



Synergy[™]

Student Information System

Synergy SIS[©]

Dashboard Guide



Edupoint Educational Systems, LLC
1955 South Val Vista Road, Ste 210
Mesa, AZ 85204
Phone (877) 899-9111
Fax (800) 338-7646

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ABOUT THIS MANUAL

Edupoint Educational Systems develops software with multiple release dates for the software and related documentation. The documentation is being released in multiple volumes to meet this commitment.

The table below lists the release date, software version, documentation volume number, and the content included in each volume of documentation to date.

Software and Document History

Date	Volume	Edition	Revision	Content
October 2009	1	1	1	Initial release of this document
March 2010	1	1	2	Updated document for November 2009 release, February & March 2010 patches
July 2011	1	1	3	Updated for June 2011 release

CONVENTIONS USED IN THIS MANUAL

Bold Text

Bold Text - Indicates a button or menu or other text on the view to click, or text to type.



Tip – Suggests advanced techniques or alternative ways of approaching the subject.



Note – Provides additional information or expands on the topic at hand.



Reference – Refers to another source of information, such as another manual or website



Caution – Warns of potential problems. Take special care when reading these sections.

BEFORE YOU BEGIN

Before installing any of the Edupoint family of software products, please be sure to review the system requirements and make sure the district's computer hardware and software meet the minimum requirements. If there are any questions about the system requirements, please contact an Edupoint representative at (877) 899-9111.



Caution: The Edupoint family of software does not support the use of pop-up blockers or third-party toolbars in the browser used to access Synergy SIS. Please disable any pop-up blockers (also known as pop-up ad blockers) and extra toolbars in the browser before logging into any Edupoint product.

At any point, if there are any technical difficulties, please contact the Edupoint technical support team at support@edupoint.com or by phone at 1-877-899-9111 option 1.

Chapter One: OVERVIEW OF DASHBOARD WIDGETS

In this chapter, the following topics are covered:

- ▶ Overview of dashboard widgets
- ▶ Types of dashboard widgets
- ▶ How end users can customize their dashboard

OVERVIEW OF DASHBOARD WIDGETS

A Dashboard Widget is a graphical reporting tool designed to track student data trends. These widgets appear on the Synergy SIS home page to give the users an overview of different trends occurring in either the school or the district. Widgets can track enrollments by day, attendance patterns, or grades. They can also link to external sources of web-based information such as images or RSS feeds.

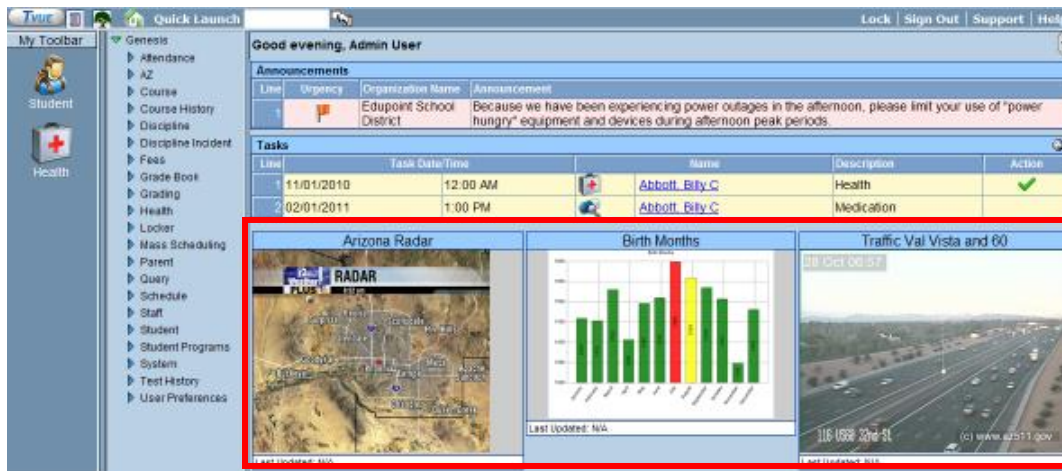


Figure 1.1 – Dashboard Widgets on Home Page

This chapter illustrates the types of widgets that can be created, and how users can add widgets to their home page. Chapter Two shows how to create a dashboard widget, and how administrators can add widgets to user home pages. Chapter Three shows examples of widgets that can be created.

TYPES OF DASHBOARD WIDGETS

There are four types of dashboard widgets: Query, External Image, RSS Feed, or SQL Query.

A **Query** widget is based on an existing Synergy SIS public query. It displays the data results from the query in a graph or chart, such as a pie chart or bar graph.

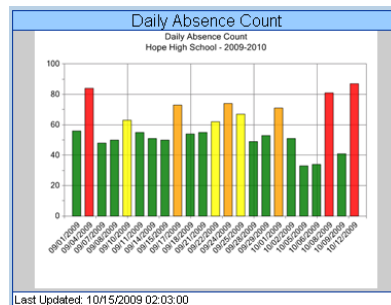


Figure 1.2 – Query Widget, Bar Chart

An **External Image** widget displays an image from an external website, such as a weather radar map or traffic update.



Figure 1.3 – External Image Widget

A **RSS Feed** widget shows the results of an RSS Feed.

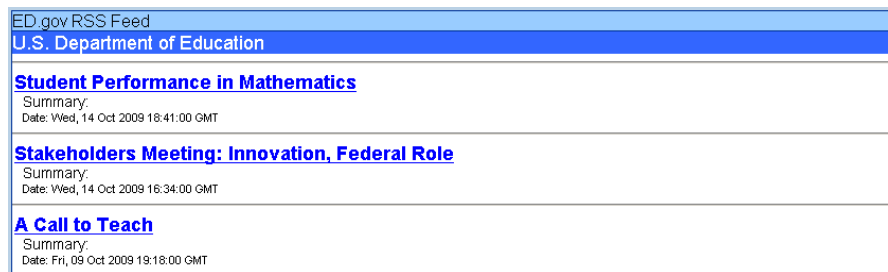


Figure 1.4 – RSS Feed Widget

A **SQL Query** widget can pull data from from any database via a SQL query, and displays the data in a graphical format such as a pie chart or bar graph.

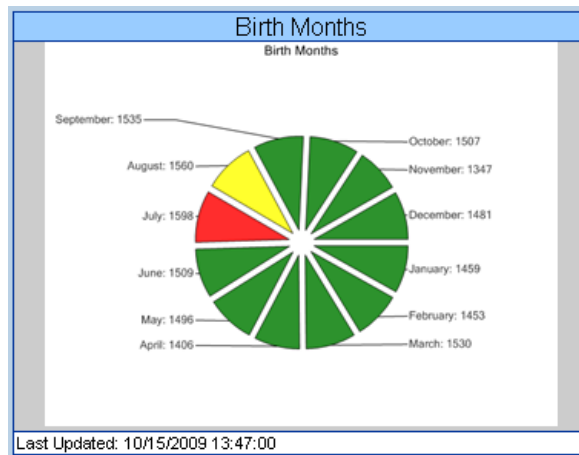


Figure 1.5 – SQL Query Widget, Pie Chart

CUSTOMIZING THE DASHBOARD

Once widgets have been created, each end user can choose which dashboard widgets are displayed on their Synergy SIS home page. To customize the dashboard:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the page.

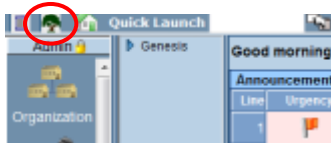


Figure 1.6 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 1.7 – Synergy SIS Folder

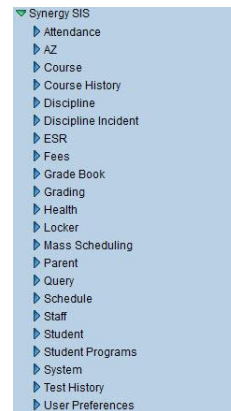
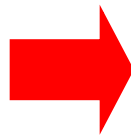


Figure 1.8 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **User Preferences** folder by clicking on the blue triangle pointing right, next to the words User Preferences. Once clicked, the triangle turns green and points downward.

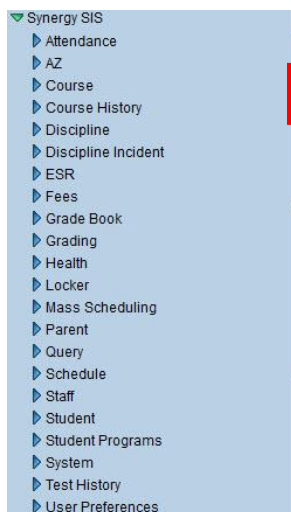


Figure 1.9 – User Preferences Folder

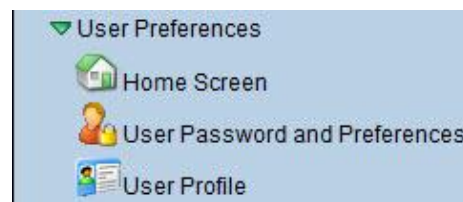
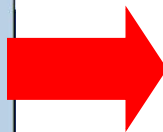


Figure 1.10 – User Preferences Folder Expanded

- Click on the **User Profile** view icon

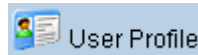


Figure 1.11 – User Profile View Icon

- The User Profile view appears in the content pane on the right-side of the view. Click on the **POV** (Point of View) tab.

Figure 1.12 – User Profile View

- On the POV tab, the user can set the number of dashboard widgets (also called dashboard controls) that appear in each row of widgets. Enter the number of widgets in the **Dashboard Controls Per Row** box.

Figure 1.13 – User Profile View, POV Tab



Note – Regardless of the number of Dashboard Controls per Row setting, a RSS Feed widget always takes the entire row.

- Dashboard widgets can be added to the home page one at a time using the Add button, or multiple widgets can be added using the Chooser button. To add a single widget, click the **Add** button.

Figure 1.14 – Dashboard Controls Grid

- The Find Dashboard Widget view pops-up. Widgets can be filtered by either the name of the widget or by the graph type. Enter all or part of the **Name** of the widget and/or select the **Graph Type** to search for a specific widget and click the **Find** button at the top of the view.

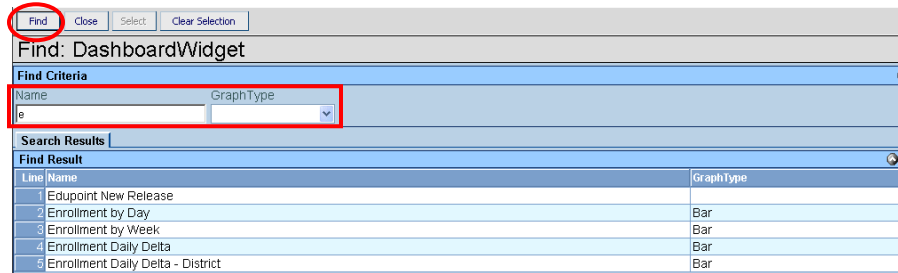


Figure 1.15 – Find Dashboard Widget View, Finding

- The list of widgets that meet the criteria entered are listed in the Find Result grid. Click on the **widget** to add, and it will be highlighted in blue. To add it to the home page, click the **Select** button at the top of the view.

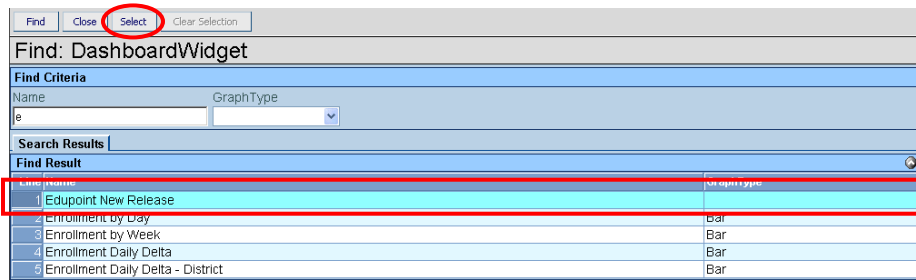


Figure 1.16 – Find Dashboard Widget View, Selecting

- The widget will be added to the Dashboard Controls grid. To add multiple widgets, click the **Chooser** button.

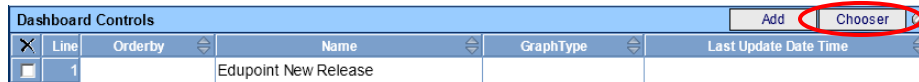


Figure 1.17 – Dashboard Controls Grid, Widget Added

11. The Chooser view pops-up. Enter all or part of the **Name** of the widget and/or select the **Graph Type** to search for a specific widget and click the **Find** button at the top of the view.

The screenshot shows the 'Chooser' interface. At the top, there are 'Find' and 'Select' buttons. Below them is the 'Find Criteria' section with input fields for 'Name' and 'GraphType'. Below the criteria are buttons for 'Add Selected Row(s) >' and 'Add All Row(s) >>'. The 'Search Results' section contains a 'Find Result' table and a 'Selected Items' table.

Line	Name	GraphType
1	Edupoint New Release	
2	Enrollment by Day	Bar
3	Enrollment by Week	Bar
4	Enrollment Daily Delta	Bar
5	Enrollment Daily Delta - District	Bar

Figure 1.18 – Chooser View, Find Result

12. The list of widgets that meet the criteria entered are listed in the Find Result grid. Click on a widget to add, and it becomes highlighted in blue. To select multiple widgets, hold down the Shift button and click on all the widgets needed. Once all of the widgets to add are highlighted in blue, click the **Add Selected Row(s)>** button to add the widgets to the Selected Items grid. To add all of the widgets listed, click the **Add All Row(s) >** button. To remove a widget from the list of Selected Items, check the box in the **X** column.

This screenshot shows the 'Chooser' interface with the 'Find Result' table highlighted. The 'Selected Items' table now contains three items.

Line	Name	GraphType
1	Edupoint New Release	
1	Enrollment by Day	Bar
2	Enrollment by Week	Bar

Figure 1.19 – Chooser View, Selected Items

13. Once all of the widgets needed have been selected from the current Find Result, another Find can be conducted by entering different criteria and clicking the Find button. This can be repeated until all the needed widgets are listed in the Selected Items grid. Once all of the widgets are listed, click the **Select** button to add them to the Dashboard Controls grid.

The screenshot shows the 'User Profile' page. It includes fields for 'User Name' (User, Admin) and 'Login Name' (Admin). There are tabs for 'Demographics', 'Navigation Menu', 'Security Access', 'Spell Check Options', and 'POV'. Below these is the 'Point of View (POV) Home Page Settings' section with a 'Dashboard Controls Per Row' field set to 3. The 'Dashboard Controls' table lists the selected widgets.

X	Line	Orderby	Name	GraphType	Last Update Date Time
<input type="checkbox"/>	1		Edupoint New Release		
<input type="checkbox"/>	2		Enrollment by Day	Bar	
<input type="checkbox"/>	3		Enrollment by Week	Bar	

Figure 1.20 – User Profile View, Widgets Added

- Once all the widgets have been added, the order in which they appear in the row on the home page can be modified by entering the order to display them in the **Order By** column.

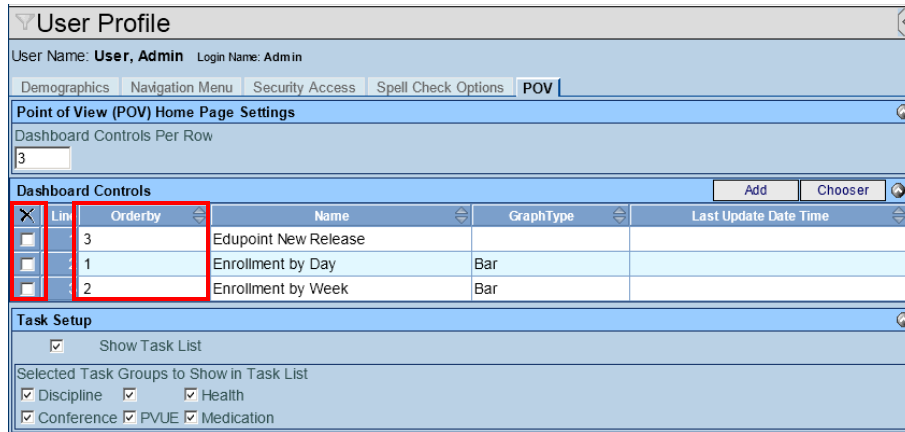


Figure 1.21 – User Profile View, Order By & Deleting

- To remove a widget from the home page, click the box in the **X** column.
- Click the **Save** button at the top of the view to save the changes, or click the **Undo** button to reverse them.

DASHBOARD WIDGET OPTIONS

Once a widget has been added to a user’s home page, they can do more than just view the widget (if the security setting for the widget allows). To enlarge the widget, click on it and a larger view of the graph or image pops-up.

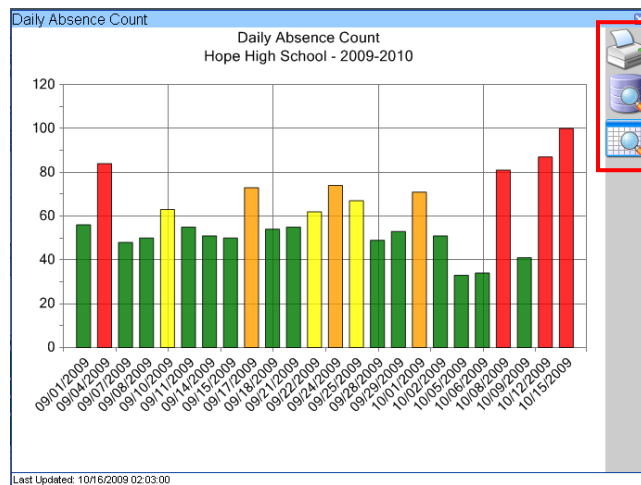


Figure 1.22 – Large View of Widget

To **print** the widget, click on the icon of the printer. To **view the underlying query**, click on the icon that looks like a canister. To **export** the results to an Excel spreadsheet click on the icon that looks like a spreadsheet.

Chapter Two: CREATING DASHBOARD WIDGETS

In this chapter, the following topics are covered:

- ▶ Creating a Query Widget
- ▶ Creating an External Image Widget
- ▶ Creating a RSS Feed Widget
- ▶ Creating a SQL Query Widget
- ▶ Viewing & Editing Dashboard Widgets
- ▶ Adding Widgets to User Home Pages

CREATING A WIDGET

To create a dashboard widget:

1. Open the **Synergy SIS Navigation Tree** by clicking on the Tree button at the top of the page.

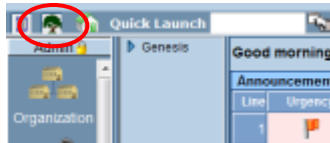


Figure 2.1 – Synergy SIS Navigation Tree

2. Expand the **Synergy SIS** folder by clicking on the blue triangle pointing right, next to the word Synergy SIS. Once clicked, the triangle turns green and points downward.



Figure 2.2 – Synergy SIS Folder

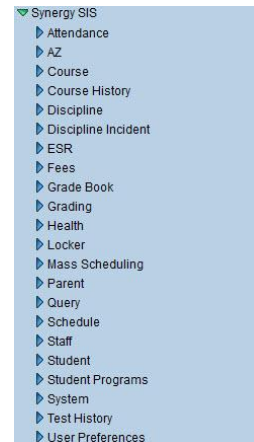
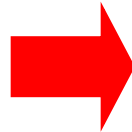


Figure 2.3 – Synergy SIS Folder Expanded

3. Under the Synergy SIS folder, open the **System** folder by clicking on the blue triangle pointing right, next to the words System. Once clicked, the triangle turns green and points downward.

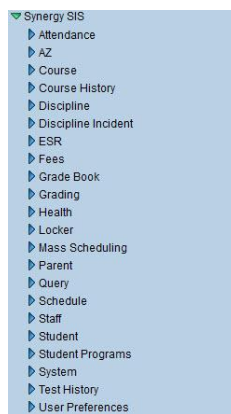


Figure 2.4 – System Folder

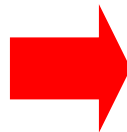


Figure 2.5 – Systems Folder Expanded

- Under the System folder, open the **Setup** folder by clicking on the blue triangle pointing right, next to the words Setup. Once clicked, the triangle turns green and points downward.



Figure 2.6 – Setup Folder

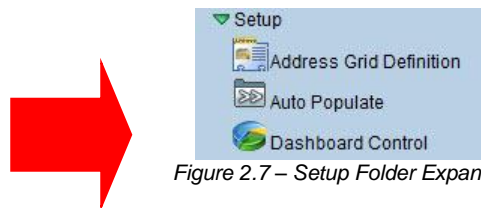


Figure 2.7 – Setup Folder Expanded

- Click on the **Dashboard Control** view icon.

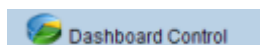


Figure 2.8 – Dashboard Control View Icon

- The Dashboard Control view appears in the content pane on the right-side of the screen. Click on the **Add** button found at the top of the view.

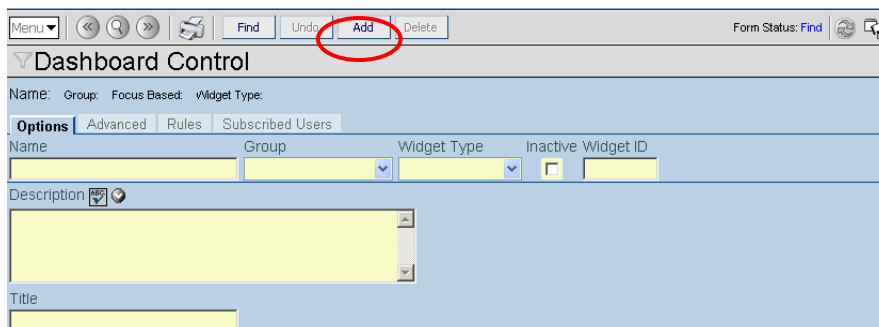


Figure 2.9 – Dashboard Control View

7. A new Dashboard Control view pops-up. Required fields are highlighted in green. Enter a name for the new widget in the **Name** field.

The screenshot shows a 'Dashboard Control' window with a 'Save' and 'Close' button at the top. Below the title bar, there are tabs for 'Options' and 'Advanced'. The 'Options' tab is active, showing a form with the following fields:

- Name:** A text input field with a green highlight.
- Group:** A dropdown menu with a green highlight.
- Widget Type:** A dropdown menu with 'Query' selected and a green highlight.
- Inactive:** A checkbox.
- Widget ID:** A text input field.
- Description:** A large text area with a 'SpellCheck' button and a circular icon.
- Title:** A text input field.
- Dimensions:** A section with instructions and input fields for 'Height (in pixels)' and 'Width (in pixels)'. Below this are 'Graph Large Height' (800) and 'Graph Large Width' (600) fields.
- Specific Focus:** A section with 'Specific Organization' and 'Specific Year' dropdown menus.

Figure 2.10 – Dashboard Control View, Adding

8. Select a **Group** to assign to the widget from the drop-down list. The groups available are customizable by each district, and they are the same groups used in the Query view. To customize the groups, modify the lookup table Revelation.QueryInfo.Group as outlined in Chapter Six of the *Synergy SIS – Query & Reporting Guide*.
9. Select the **Widget Type** from the drop-down list. The Widget Type indicates the source of the data displayed in the widget. There are 4 Widget Types:
- **Query** – the data comes from a public query in Synergy SIS
 - **External Image** – displays an image from another website
 - **RSS Feed** – shows the content of an RSS feed
 - **SQL Query** – the data comes from the Synergy SIS database via a SQL query
10. To remove a widget from everyone's home page, check the **Inactive** box. If checked, the dashboard widget is no longer available to be added as well.
11. The **Widget ID** is a serialized number assigned by the Synergy SIS system, and cannot be changed.
12. To assist users in selecting which widgets may be helpful for display enter a detailed explanation of the widget in the **Description** box. The description may be checked for spelling by clicking the SpellCheck button.

13. The **Title** is the name that appears at the top of the widget when shown on the home page.

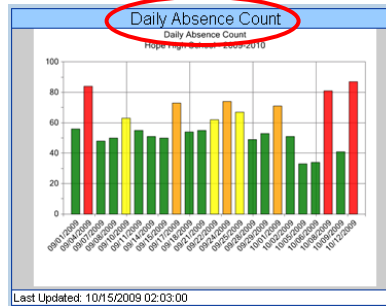



Figure 2.11 – Widget Title

14. The **Dimensions** section can reconfigure the size of the dashboard widget as displayed on the home page. The Height and Width controls the widget in the row, and the Graph Large dimensions control the size when the widget is clicked to enlarge it. To show the widget in a different size than the standard size, enter the dimensions in the boxes. Entering either the height or the width and the browser will render the other dimension proportionate to the value entered. Dimensions cannot exceed 999 in Height and Width pixels or 9999 in Graph Large Height and Graph Large Width. By default, the large graph is displayed in 800 x 600 dimensions. Dimensions cannot be set for a RSS Feed widget.
15. All the other options on the Options tab change, depending on the type of widget type selected. The options for each widget type are explained in the following sections in this chapter.
16. To specify how often the widget is updated, click on the **Advanced** tab.

Figure 2.12 – Add Dashboard Control Widget Advanced Tab

17. Select the frequency of updates from the **Schedule Task** drop-down list. Widgets may be updated **Once**, **Daily**, **Weekly**, or **Monthly**.

18. If the widget should be updated every day, or every so many days, choose **Daily**. To choose when the scheduled updates should begin and end, enter their **Start Time** and **Start Date** and **End Date**. The time should be entered in HH:MM AM/PM format. Enter the dates in MM/DD/YY format, or they may be selected by clicking the Calendar  button. To run it every day enter 1 for **Day(s)**, or enter the number of days between updates. To run it every so many hours every day, enter the number of **Hour(s)** between updates and enter the time the updates should end every day in the **Ending At** box.

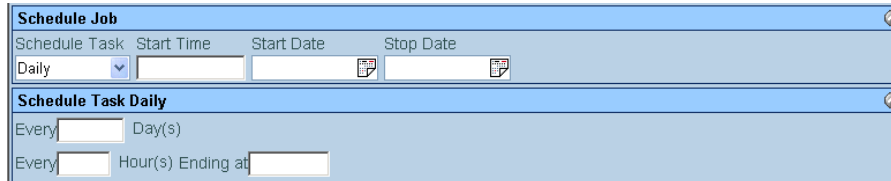



Figure 2.13 – Selecting the Daily Schedule

19. If the widget should be updated every so many weeks, choose **Weekly**. To choose when the scheduled updates should begin and end, enter their **Start Time** and **Start Date** and **End Date**. The time should be entered in HH:MM AM/PM format. Enter the dates in MM/DD/YY format, or they may be selected by clicking the Calendar  button. Enter the number of **Week(s)** between updates, and check the boxes to indicate on which **day(s) of the week** the updates should be run. Updates can also be run every so many hours every day by entering the number of **Hour(s)** between updates and enter the time the updates should end every day in the **Ending At** box.

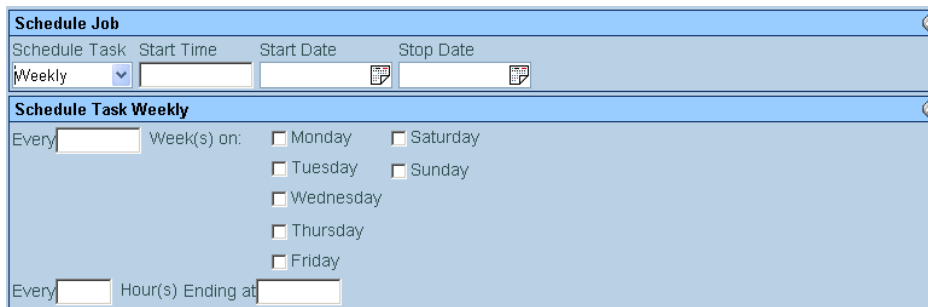



Figure 2.14 – Selecting the Weekly Schedule

20. If the widget should be updated every month, select **Monthly**. To choose when the scheduled updates should begin and end, enter their **Start Time** and **Start Date** and **End Date**. The time should be entered in HH:MM AM/PM format. Enter the dates in MM/DD/YY format, or they may be selected by clicking the Calendar  button. To run it on a specific day of the month like the 21st or the 3rd, click the **Day** radio button and select the day from the drop-down list. To run it on a specific **weekday** such as the first Monday, select which weekday from the drop-down lists. Select on which **months** the update should be run by checking the boxes next to each month.

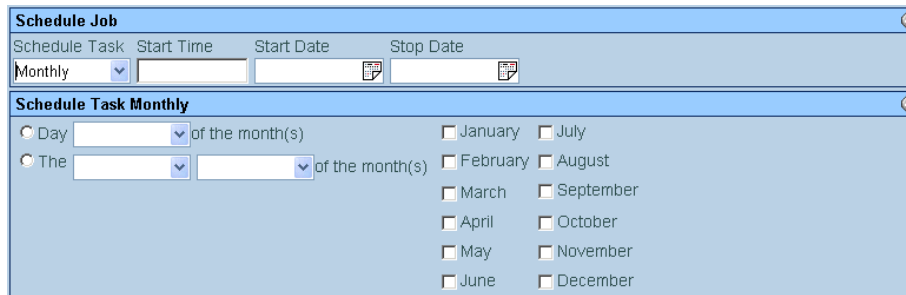


Figure 2.15 – Selecting the Monthly Schedule

21. Once all required fields (green boxes) and any other desired fields have been filled in, click on the **Save** button at the top of the view. This dashboard widget can now be added to the home page.

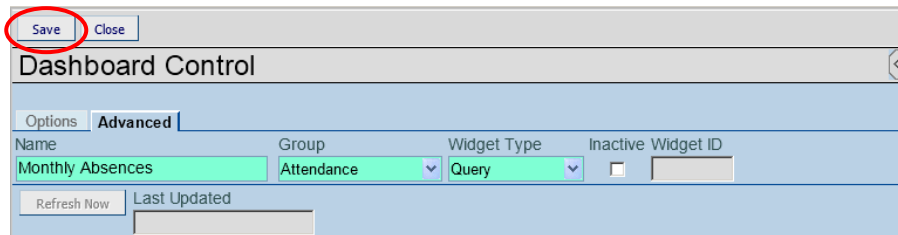


Figure 2.16 – Dashboard Control View, Saving

CREATING A QUERY WIDGET

A Query widget uses a public query to gather the data included in the widget chart. To create a Query widget:

1. **Create a query** and save it as a public query. For instructions on creating public queries, please see the *Synergy SIS – Query and Reporting Guide*.
2. Follow the instructions outlined in the previous section on creating a widget, selecting **Query as the Widget Type**.

- When Query is selected as the type of widget, the following options are available at the bottom of the Options tab on the Dashboard Control view. To specify the focus for the public query, select a Specific Organization and Specific Year. To select a organization, click the **gray arrow** next to the Specific Organization box

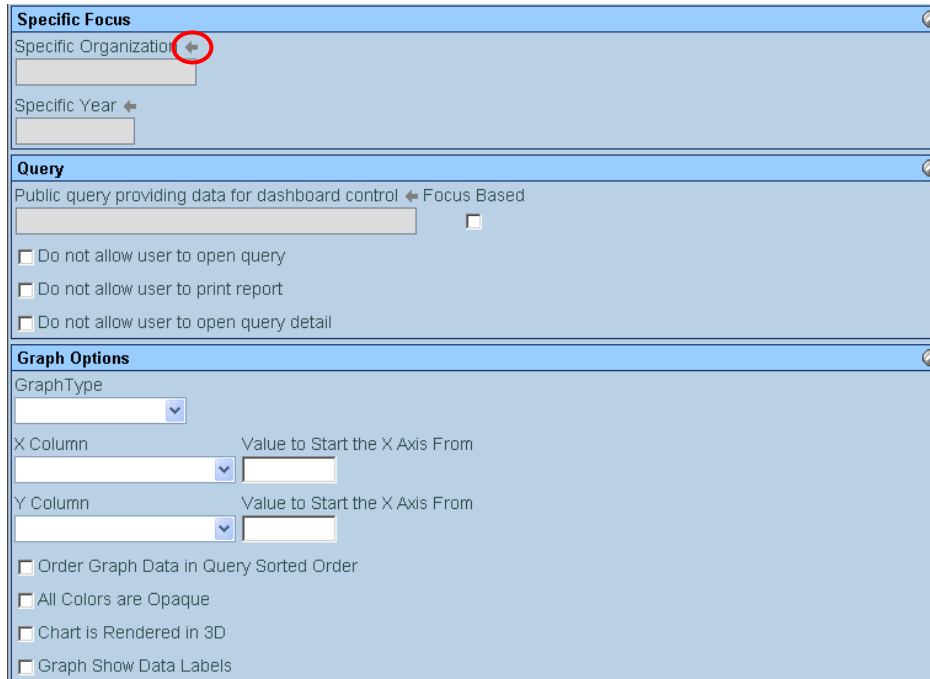


Figure 2.17 – Query Widget, Options tab

- The Find: RevOrganization view pops-up. Enter all or part of the Organization Name and click on the **Find** button to display a list of Organization Names.

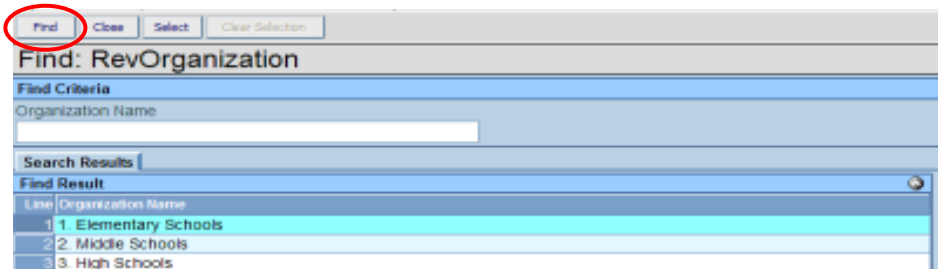


Figure 2.18 – Select RevOrganization Results

- Once the Organization Name list is displayed, click on the specific Organization Name to highlight the name and click on the **Select** Button.

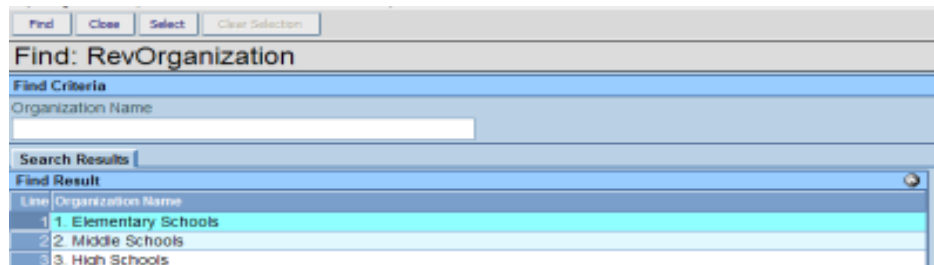


Figure 2.19 – Find RevOrganization View, Selecting

- The Find RevOrganization view will disappear and the Dashboard Control view will reappear with the Specific Organization filled in. To select a Specific Year, click on the **gray arrow** next to the Specific Year box.

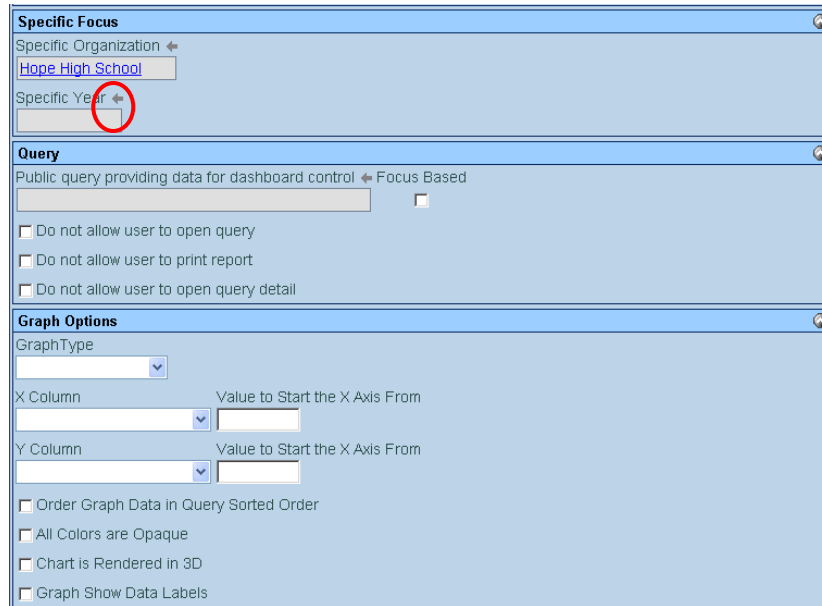


Figure 2.20 – Find Specific Year

- The Find RevYear view pops-up. Enter a school year and/or extension to search for, and click on the **Find** button at the top of the view to display a list of School Years and Extensions

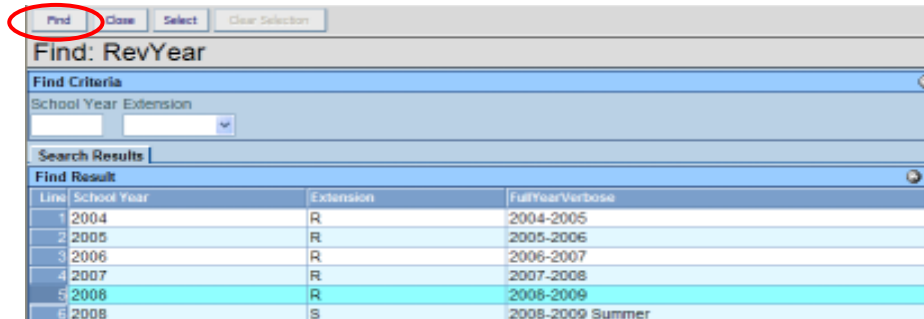


Figure 2.21 – Find RevYear View, Finding

- Once the School Year list is displayed, click on the specific School Year to highlight it and click on the **Select** Button.

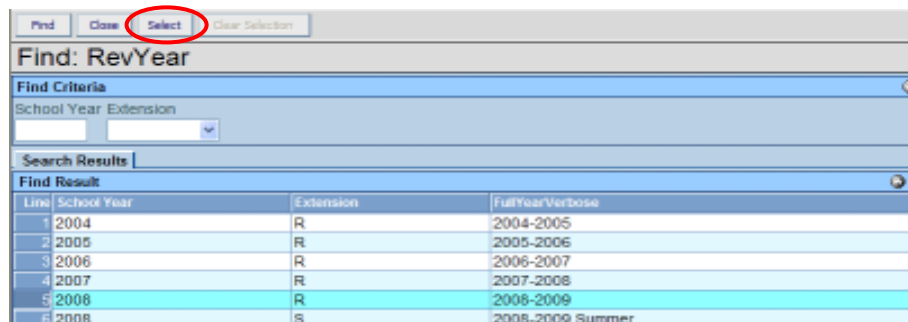
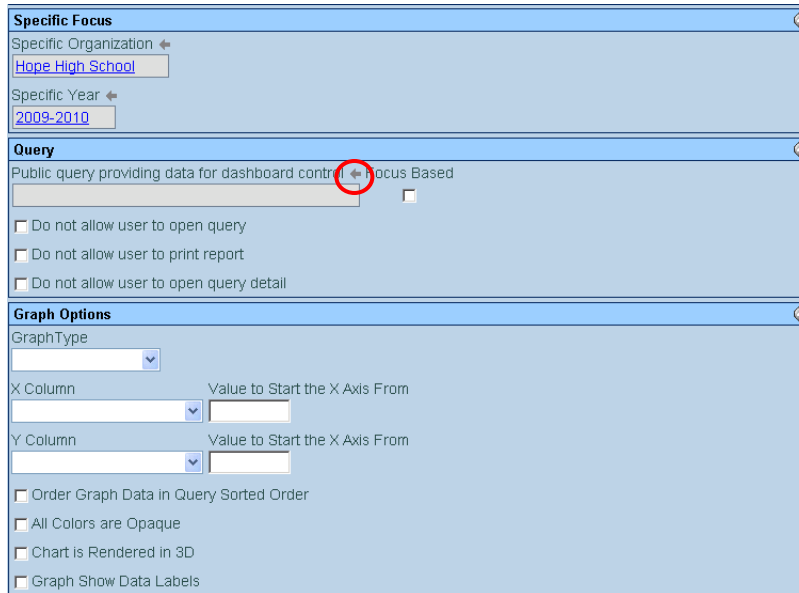


Figure 2.22 – Find RevYear Results

- The Find RevYear view will disappear and the Dashboard Control view will reappear with the Specific Year filled in. To select the query to be used for the widget, click on the **gray arrow next to the Query box**.



- The Find Query view pops-up. Select a Query Group, User Name of the user who created the query, and/or enter all or part of the Name of the query, and click the **Find** button at the top of the list to display the list of public queries.

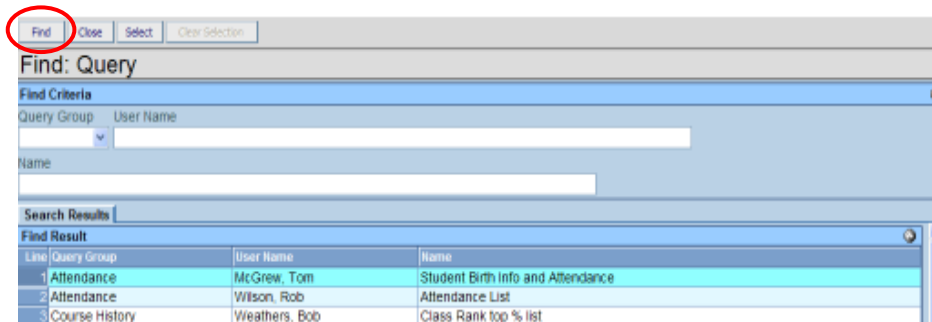


Figure 2.23 – Find Query

- Once the Query list is displayed, click on the specific Query to highlight it and click on the **Select** Button.

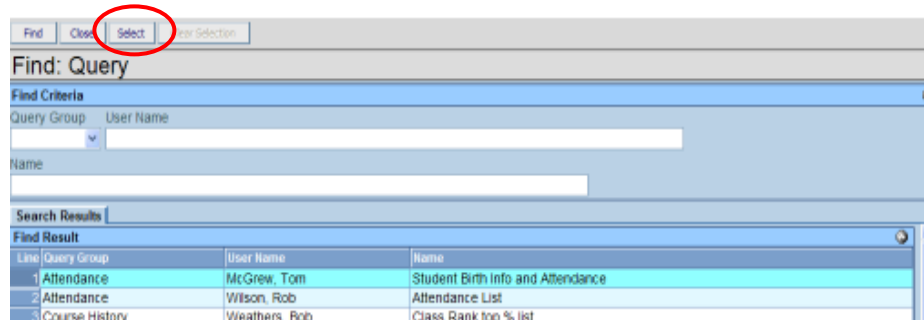


Figure 2.24 – Find Query List

12. The Find Query view will disappear and the Dashboard Control view will reappear with the public query displayed. To use the focus selected when the widget is displayed instead of a selected focus, check the **Focus Based** box.

Figure 2.25 – Dashboard Control View, Options Tab

13. To prevent the user from opening the query used for the widget from the widget itself, check the box **Do not allow user to open query**. To prevent the user from printing the widget report, check the box **Do not allow user to print report**. To prevent the user from opening the data underlying the widget in an Excel spreadsheet, check the box **Do not allow user to open query detail**.
14. To select the type of graph to be used for the widget, select the **Graph Type** from the drop-down list. There are 6 graph types:
- **Bar** graphs are used for comparing two or more values.
 - **Curve** graphs slope up or down depending upon the data.
 - **Doughnut** graphs show how proportions of data contribute to the whole. The size of the slice in a Doughnut graph ring is determined by the series value as a percentage of the total of all values.
 - **Line** graphs represent a series of data points connected together with a line and is useful to show data trends. This graph can be used to show how two items are related to each other.
 - **Pie** graphs represent an entire data category as a pie. Each data item in that category is shown as a pie wedge with each wedge being proportional to that data item's percentage of the sum of all the data being used for the graph.
 - **Surface** graphs show two independent variables on two axis, i.e. x-axis and y-axis, and a dependent variable on the z-axis. It is similar to a 3D image, where it appears as though the graph is coming out of the page.

15. Once a graph type has been chosen, select which properties from the query should be used for the X Column and the Y Column of the graph from the **X Column** and **Y Column** drop-down lists. The **Value to Start the X Axis From** is the value that appears on the horizontal line of the graph. The **Value to Start the Y Axis From** is the value that appears on the vertical line of the graph.

Figure 2.26 – Graph Options

16. To sort the data in the graph by the same sort order selected in the query, check the box **Order Graph Data in Query Sorted Order**.
17. To show the pieces of the graph in solid colors, check the box **All Colors are Opaque**.
18. To show the graph in 3D, check the box **Chart is Rendered in 3D**.
19. To show the names of the properties used on the X & Y axis, click the box **Graph Show Data Labels**.
20. Once all required fields (green boxes) and any other desired fields have been filled in, click on the **Save** button at the top of the view. This dashboard widget can now be added to the home page.
21. Once the widget has been saved, two additional tabs are available – the **Rules** tab and the **Subscribed Users** tab. The Subscribed Users tab shows all the users who have this widget on their home page, and users can be added here as well. For more information about the Subscribed Users tab, please see the section on Adding Widgets to User Home Pages later in this chapter.
22. Click on the **Rules** tab to select what colors are used for the data points in the graph.

Figure 2.27 – Dashboard Control View, Rules Tab

23. Click on the **Add** button to create a new rule.

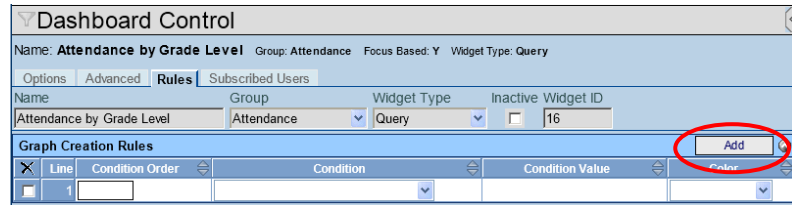


Figure 2.28 – Rules Tab, Adding

24. If multiple conditions will be used, select the order in which they are applied by entering the number of the order in the **Condition Order** columns.
25. Select the comparison to use on the data from the **Condition** drop-down list. Data can be compared by **Less Than**, **Less or Equal**, **Equal**, **Greater Than**, **Greater or Equal**, **Decrease in prior value (in %)**, **Increase from prior value (in %)**, **Decrease from prior raw value**, or **Increase from prior raw value**.
26. Enter the value to be used for the comparison in the **Condition Value** column.
27. Select the color to indicate when the condition has been met from the **Color** drop-down list. There are 10 colors to choose from.

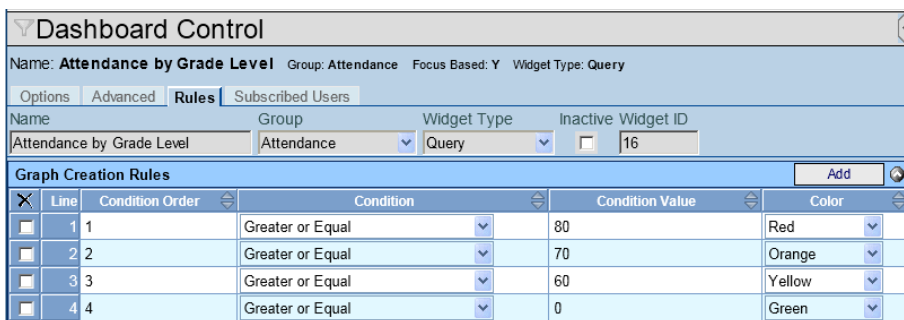


Figure 2.29 – Dashboard Control View, Rules Tab, Rules Added

28. To add another rule, click the **Add** button again. An unlimited number of rules may be added.
29. Click the **Save** button at the top of the view to save the changes.

CREATING AN EXTERNAL IMAGE WIDGET

The External Image widget allows images from an outside source to be displayed. To create an External Image widget:

1. Follow the instructions outlined in the previous section on creating a widget, selecting **External Image as the Widget Type**.
2. Enter the URL for the image in the **External URL Path** field.

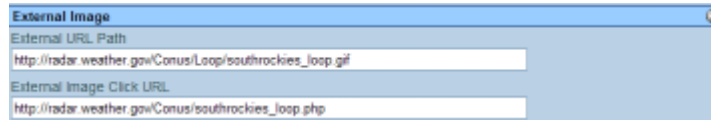


Figure 2.30 – URL Example

3. Enter the URL of the page that should be displayed when the user clicks on the widget in the **External Image Click URL** field.
4. Once all required fields (green boxes) and any other desired fields have been filled in, click on the **Save** button at the top of the view.

CREATING A RSS FEED WIDGET

The RSS Feed widget contains frequently updated content available on the web which is automatically downloaded to the widget via an RSS feed. To create a RSS Feed widget:

1. Follow the instructions outlined in the previous section on creating a widget, selecting **RSS Feed as the Widget Type**.
2. Enter the URL for the RSS Feed in the **RSS Feed URL Path** box.

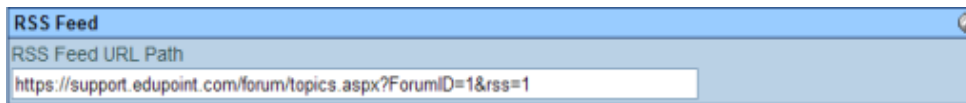


Figure 2.31 – RSS Feed URL Example

3. Once all required fields (green boxes) and any other desired fields have been filled in, click on the **Save** button at the top of the view.

CREATING A SQL QUERY WIDGET

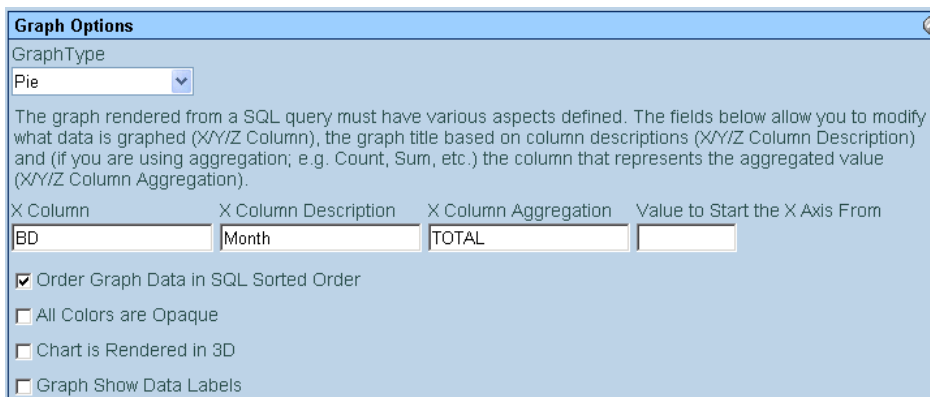
To create a SQL Query widget:

1. Follow the instructions outlined in the previous section on creating a widget, selecting **SQL Query as the Widget Type**.
2. When Query is selected as the type of widget, the following options are available at the bottom of the Options tab on the Dashboard Control view. Select the type of database to be used, either **MS SQL** or **Oracle**, from the radio buttons.

Figure 2.32 – SQL Query Options

3. Enter the name of the **Server** that hosts the database, and the name of the **Database**. Enter the **User Name** and **Password** to be used to access the database (generally rev, rev).
4. To use the current focus of the user when running the query, check the box **Focus Based**. Otherwise, the organization & year to be used will be taken from the SQL query.
5. Check the box **No Launch Detail** to suppress the system messages showing the progression of the query. While creating the widget, it may be helpful to leave this unchecked to see any error messages.

6. Enter the query into the **SQL Command** box. Below the SQL Command box, a list of standard parameters that can be used as variables in the query is shown. These additional parameters will be added when the query is run.
7. To select the type of graph to be used for the widget, select the **Graph Type** from the drop-down list. There are 6 graph types:
 - **Bar** graphs are used for comparing two or more values.
 - **Curve** graphs slope up or down depending upon the data.
 - **Doughnut** graphs show how proportions of data contribute to the whole. The size of the slice in a Doughnut graph ring is determined by the series value as a percentage of the total of all values.
 - **Line** graphs represent a series of data points connected together with a line and is useful to show data trends. This graph can be used to show how two items are related to each other.
 - **Pie** graphs represent an entire data category as a pie. Each data item in that category is shown as a pie wedge with each wedge being proportional to that data item's percentage of the sum of all the data being used for the graph.
 - **Surface** graphs show two independent variables on two axis, i.e. x-axis and y-axis, and a dependent variable on the z-axis. It is similar to a 3D image, where it appears as though the graph is coming out of the page.
8. Once a graph type has been chosen, select which fields from the query should be used for the **X Column** box. Enter the title that should be shown for the X column in the **X Column Description** box. Enter the type of aggregation to use on the data, such as TOTAL or COUNT, in the **X Column Aggregation** box. To change the number to start on the X axis from 0 to a different value, enter the number in the **Value to Start the X Axis From**.



Graph Options

GraphType
Pie

The graph rendered from a SQL query must have various aspects defined. The fields below allow you to modify what data is graphed (X/Y/Z Column), the graph title based on column descriptions (X/Y/Z Column Description) and (if you are using aggregation; e.g. Count, Sum, etc.) the column that represents the aggregated value (X/Y/Z Column Aggregation).

X Column	X Column Description	X Column Aggregation	Value to Start the X Axis From
BD	Month	TOTAL	

Order Graph Data in SQL Sorted Order

All Colors are Opaque

Chart is Rendered in 3D

Graph Show Data Labels

Figure 2.33 – Graph Options

9. To sort the data in the graph by the same sort order selected in the query, check the box **Order Graph Data in Query Sorted Order**.
10. To show the pieces of the graph in solid colors, check the box **All Colors are Opaque**.
11. To show the graph in 3D, check the box **Chart is Rendered in 3D**.

12. To show the names of the properties used on the X & Y axis, click the box **Graph Show Data Labels**.
13. Once all required fields (green boxes) and any other desired fields have been filled in, click on the **Save** button at the top of the view. This dashboard widget can now be added to the home page.
14. Once the widget has been saved, two additional tabs are available – the **Rules** tab and the **Subscribed Users** tab. The Subscribed Users tab shows all the users who have this widget on their home page, and users can be added here as well. For more information about the Subscribed Users tab, please see the section on Adding Widgets to User Home Pages later in this chapter.
15. Click on the **Rules** tab to select what colors are used for the data points in the graph.

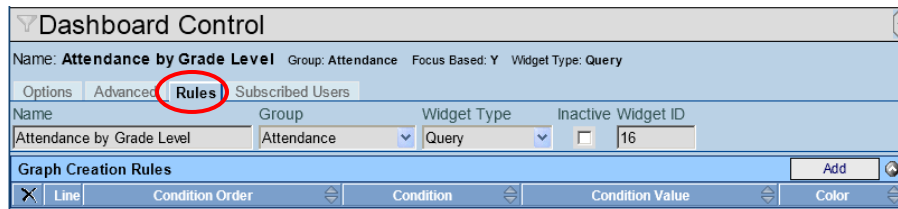


Figure 2.34 – Dashboard Control View, Rules Tab

16. Click on the **Add** button to create a new rule.

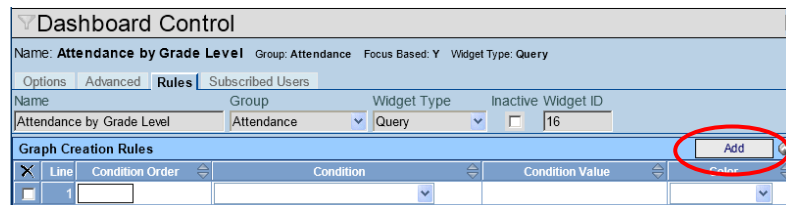


Figure 2.35 – Rules Tab, Adding

17. If multiple conditions will be used, select the order in which they are applied by entering the number of the order in the **Condition Order** columns.
18. Select the comparison to use on the data from the **Condition** drop-down list. Data can be compared by **Less Than**, **Less or Equal**, **Equal**, **Greater Than**, **Greater or Equal**, **Decrease in prior value (in %)**, **Increase from prior value (in %)**, **Decrease from prior raw value**, or **Increase from prior raw value**.
19. Enter the value to be used for the comparison in the **Condition Value** column.
20. Select the color to indicate when the condition has been met from the **Color** drop-down list. There are 10 colors to choose from.

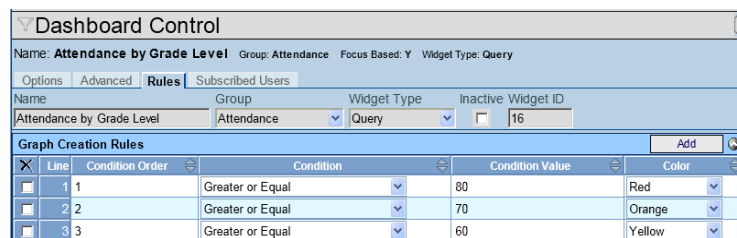


Figure 2.36 – Dashboard Control View, Rules Tab, Rules Added

21. To add another rule, click the **Add** button again. An unlimited number of rules may be added. Click the **Save** button at the top of the view to save the changes.

VIEWING & EDITING DASHBOARD WIDGETS

To find a dashboard widget there are two methods: using the **Scroll buttons** or **Find mode**. To scroll through the dashboard widget:

1. Go to the **Dashboard Control** view, found under Synergy SIS > System > Setup. Click on the **right Scroll button** at the top of the view to advance to the first dashboard widgets. Dashboard widgets are sorted alphabetically by dashboard control name.

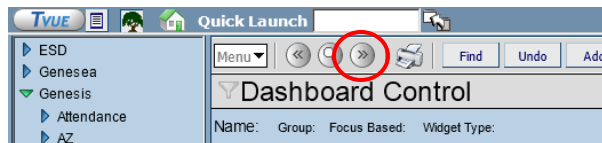


Figure 2.37 – Right Scroll Button

2. To scroll in reverse alphabetical order, click the **left Scroll button** at the top of the view.

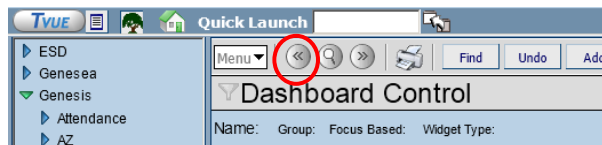


Figure 2.38 – Left Scroll Button

3. Continue clicking on the scroll buttons until the desired dashboard control appears.



Figure 2.39 – Find Mode

4. To switch to the Find mode to look for the student records: Click on **Find Mode** found between the right and left scroll buttons.

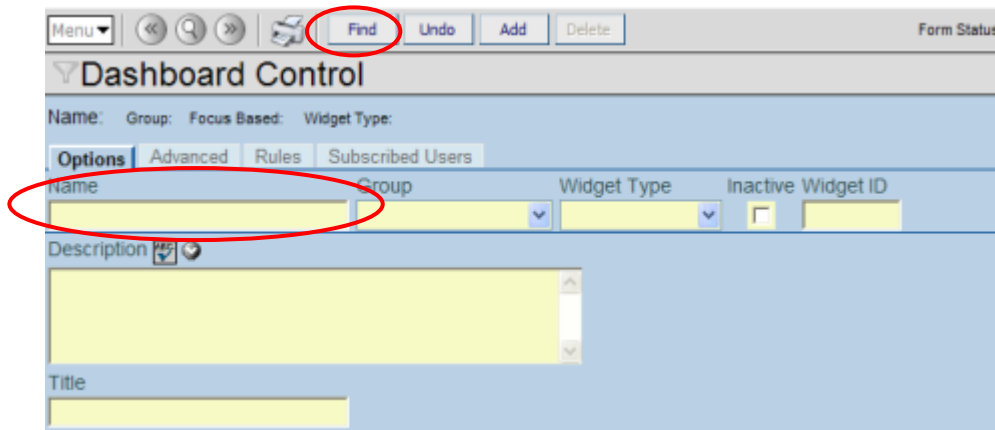


Figure 2.40 – Find by Dashboard Control Name

5. Enter either the entire dashboard widget name or the first part of the dashboard widget name in the **Name** box.
6. Click the **Find** mode or press the **Enter** key. The first dashboard control name entered into the Find view appears. Then use the scroll buttons if needed to find

the exact dashboard control widget. Once a dashboard control widget is found it will be displayed in the dashboard control view.



Note: In the Find Mode, dashboard widgets can be found by searching any of the yellow fields on the view. Entering anything in any box other than the name box brings up a pop-up window with all dashboard widgets matching the criteria entered. To select a dashboard widget, click on the name and close the pop-up window. The selected dashboard widget appears in the view.

- Click and type in any of the boxes that show in white to edit the values. To edit the top row of data (Name, Group, Widget Type, Inactive), click on the **Menu** button and select **Edit DashboardWidget Data**.

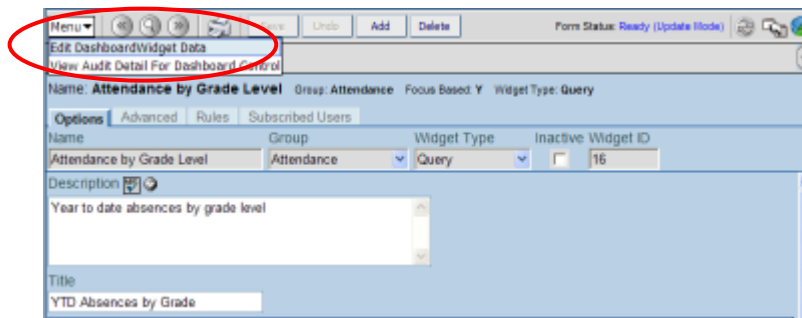


Figure 2.41 – Edit Dashboard Control Widget

- Once editing has been completed click on the **Save** button to save the changes made. Note that once a dashboard widget has been edited, the modified version will not display on the home pages until it has been refreshed.

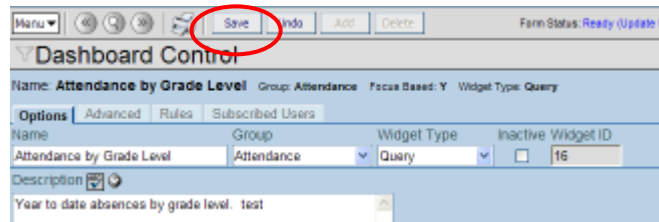


Figure 2.42 – Save Button After Editing

- To update or refresh a widget on all subscribed users' home pages, click on the **Advanced** tab of the Dashboard Control view and click the **Refresh Now** button.

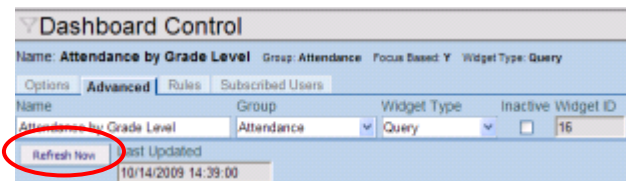


Figure 2.43 – Advanced tab, Refresh Now

- Once the Refresh Now button has been clicked, a **Job Status** box pops-up that provides updates on the status of the refresh.

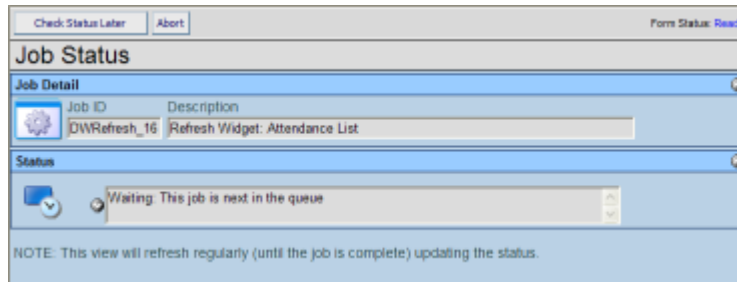


Figure 2.44 – Job Status

- When the refresh process is completed, another window pops-up that lists the results of the refresh and which users' home pages were updated.

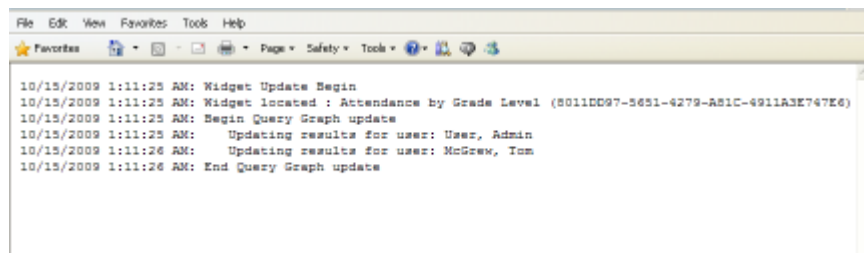


Figure 2.45 – Job Status Result

To find what changes have been made to a dashboard widget and who made the changes,

- Click on the **Menu** button and select **View Audit Detail for Dashboard Control**.

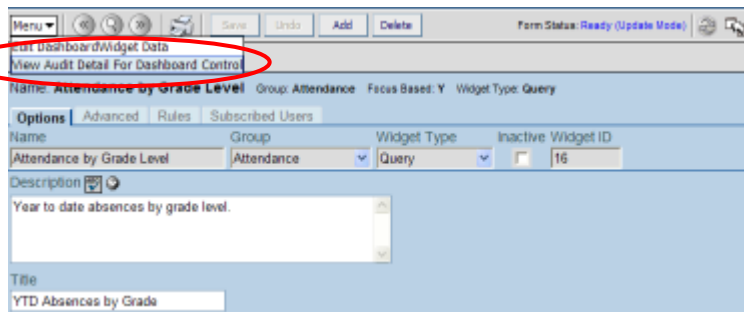


Figure 2.46 – View Audit Detail for Dashboard Control

- The Audit Trail History view lists all of the changes made to the dashboard control widget, what was changed, who changed it, and the date and time the change was made.

Audit Trail History							
Properties							
Line	Business Object	Property Name	Crud Action	New Value	Old Value	User Name	Date Time Stamp
1	DashboardWidget	RecurPattern	Update	<RECUR_Z_RecurType="1" Z_StartTime="2:01 AM" Z_StartDate="09/24/2008" Z_WeekCount="4" Z_DayCount="1"	<RECUR_Z_RecurType="1" Z_StartTime="2:01 AM" Z_StartDate="09/24/2008" Z_WeekCount="4" Z_DayCount="1"	User, Admin	10/14/2009 14:13:20
2		Name	Update	Enrollment by Day	Enrollment by Day (test)	User, Admin	10/14/2009 14:13:20
3	DashboardWidget	RecurPattern	Update	<RECUR_Z_RecurType="1" Z_StartTime="2:01 AM" Z_StartDate="09/24/2008" Z_WeekCount="4" Z_DayCount="1"	<RECUR_Z_RecurType="1" Z_StartTime="2:01 AM" Z_StartDate="09/24/2008" Z_WeekCount="4" Z_DayCount="1"	User, Admin	10/14/2009 14:10:34
4		Name	Update	Enrollment by Day (test)	Enrollment by Day	User, Admin	10/14/2009 14:10:34

Figure 2.47 – Audit Trail History

To delete a dashboard widget:

1. Find the dashboard widget to delete using either the **Scroll** buttons or **Find** mode.
2. Once the correct dashboard widget appears in the Dashboard Control view, click the **Delete** button at the top of the view.

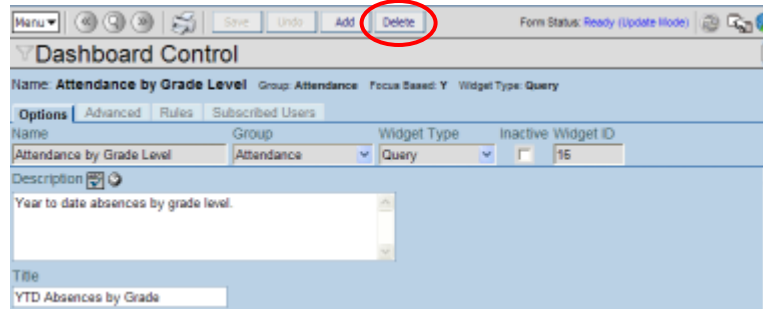


Figure 2.48 – Deleting a Dashboard Widget

3. A message box pops-up to confirm the deletion. Click the **OK** button to confirm the deletion, or click the **Cancel** button to cancel the deletion.

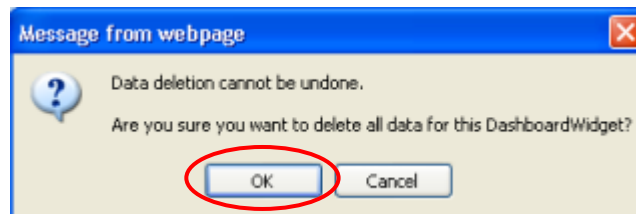


Figure 2.49 – Delete Confirmation Box

ADDING WIDGETS TO USER HOME PAGES

While users can select which widgets to add to their home pages themselves (as outlined in the section on Customizing the Dashboard in Chapter One of this guide), administrators can also add widgets to user home pages through either the POV tab of the User view or through the Dashboard Control view. The User view lists all widgets by user, and allows administrators to set the order in which they appear on the home pages. Through the Dashboard Control view, administrators can see which users are using a particular widget and add or remove users to a widget. Since the widget order cannot be set in the Dashboard Control view, widgets added here will appear at the top of the home pages. To add or remove a user from a widget:

1. In the Dashboard Control view, locate the widget using either the Scroll buttons or Find mode.
2. Click on the **Subscribed Users** tab.

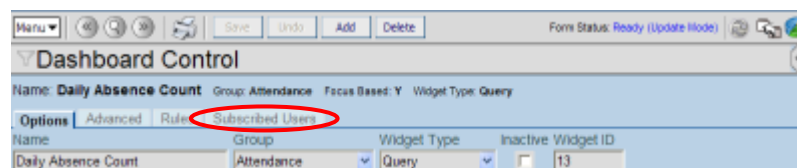


Figure 2.50 – Subscribed Users Tab

- To add a user, click on the **Chooser** button

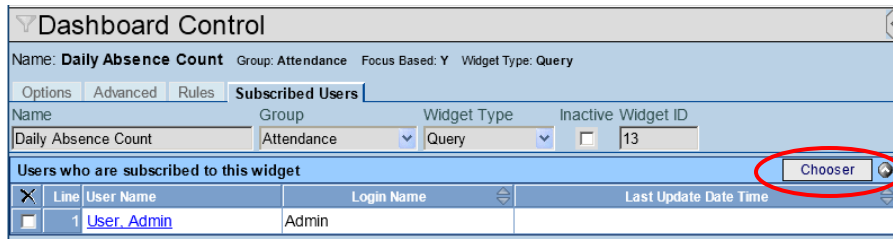


Figure 2.51 – Subscribe Users View

- The Chooser view pops-up. To find a user, enter all or part of their **Last Name**, **First Name**, and/or **Login Name** and click the **Find** button.

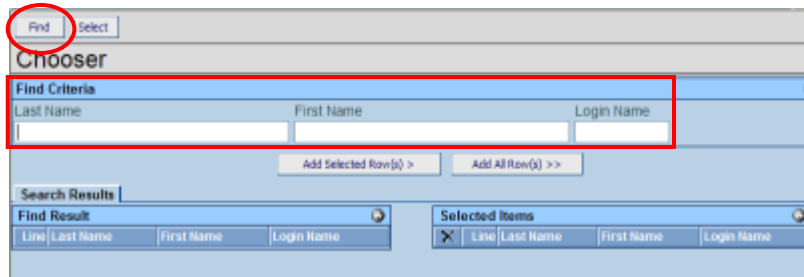


Figure 2.52 – Chooser View

- The users matching the criteria entered are listed in the Find Result section. Click on a user name and it will be highlighted in blue. To select multiple users, hold down the Shift key while selecting names. Click the **Add Selected Row(s)** to add all of the selected users to the Selected Items grid, or click the **Add All Row(s)** button to add all of the users listed in the Find Results.

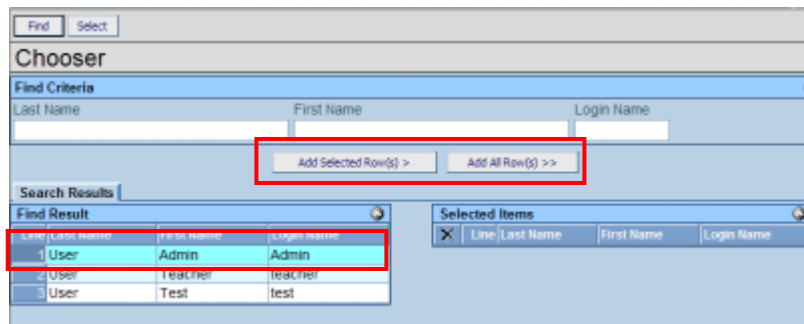


Figure 2.53 – Chooser View, Find Result

- To remove a user from the Selected Items grid, click on the box in the **X** column. Click on the **Select** button to add all of the users in the Selected Items grid to the dashboard widget. The user names are then listed as Subscribed Users

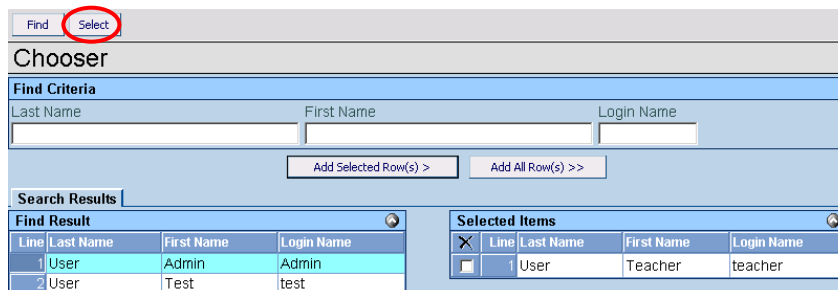


Figure 2.54 – Chooser View, Selected Items

7. To delete a user, click in the box in the **X** column next to the user's name, then click the **Save** button at the top of the view.

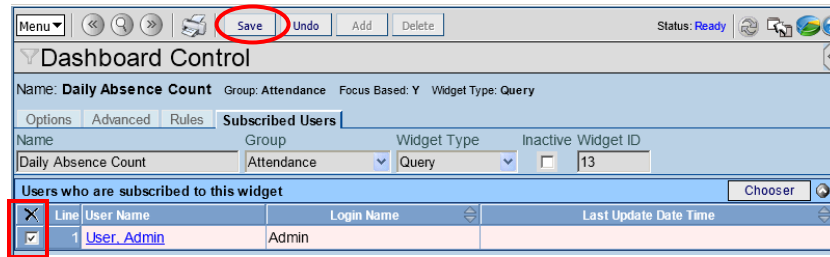


Figure 2.55 –Deleting a Subscribed User

Chapter Three: SAMPLE DASHBOARD WIDGETS

In this chapter, the following topics are covered:

- ▶ Sample dashboard widgets

ATTENDANCE BY GRADE

This is a Query widget that shows the year-to-date absences by grade level.

Name: **Attendance by Grade Level** Group: Attendance Focus Based: Y Widget Type: Query

Options | Advanced | Rules | Subscribed Users

Name: Attendance by Grade Level Group: Attendance Widget Type: Query Inactive: Widget ID: 16

Description: Year to date absences by grade level

Title: YTD Absences by Grade

Dimensions

To fix the widget dimension, enter in the height or width (entering one of the dimensions will cause the browser to render the other proportionally). Leave blank to use the original width.

Height (in pixels) Width (in pixels)

250

Use the following Large Height / Large Width fields to specify an exact large rendered height and width. The default is 800 (Height) x 600 (Width).

Graph Large Height Graph Large Width

640 480

Specific Focus

Specific Organization

Specific Year

Query

Public query providing data for dashboard control Focus Based

Attendance List

Do not allow user to open query

Do not allow user to print report

Do not allow user to open query detail

Graph Options

Graph Type

Doughnut

X Column Value to Start the X Axis From

R1.Grade

Y Column Value to Start the X Axis From

Order Graph Data in Query Sorted Order

All Colors are Opaque

Chart is Rendered in 3D

Graph Show Data Labels

Figure 3.1 – Attendance By Grade Widget

The **Attendance List** public query used for the widget:

```
K12.Student R0, K12.EnrollmentInfo.StudentSchoolYear R1,
K12.EnrollmentInfo.StudentEnrollment R2, K12.AttendanceInfo.StudentDailyAttendance R3,
K12.AttendanceInfo.Setup.SchoolAttendanceReasons R4
(CodeAbsReasSchYearGU,R3.CodeAbsReas1GU,Outer),
K12.AttendanceInfo.Setup.DistrictAttendanceReasons R5
(CodeAbsReasGU,R4.CodeAbsReasGU,Outer)
COLS R0.FormattedName, R0.Age, R0.BirthDate, R3.AbsDate, R5.Abbreviation,
R5.Description, R5.Type (,,,,,Code), R1.Grade (,,,,,Description)
If R5.Type In ('EXC', 'UNV', 'UNE') And R3.AbsDate <'$DATE' And R3.AbsDate >='$DATE-30'
Birth Month distribution
```

The query can be copied and pasted into the **Type in Query** tab of the **Query view** to create this public query.

BIRTH MONTH

This is a SQL Query widget that shows the number of students born in each month.

Menu | Save | Undo | Add | Delete

Dashboard Control

Name: **Birth Months** Group: Demographics Focus Based: N Widget Type: SQL Query

Options | Advanced | Rules | Subscribed Users

Name: Birth Months Group: Demographics Widget Type: SQL Query Inactive: Widget ID: 8

Description: SQL data gathering/count of people by birth months

Title: Birth Months

Dimensions

To fix the widget dimension, enter in the height or width (entering one of the dimensions will cause the browser to render the other proportionally). Leave blank to use the original width.

Height (in pixels): 250 Width (in pixels):

Use the following Large Height / Large Width fields to specify an exact large rendered height and width. The default is 800 (Height) x 600 (Width).

Graph Large Height: 640 Graph Large Width: 480

SQL Query

Sql Db Type: MS SQL Oracle

Server: (local) Database: DemoDB_AZ

User: rev Password: ●●●

Focus Based No Launch Detail

Graph Options

GraphType: Bar

The graph rendered from a SQL query must have various aspects defined. The fields below allow aggregation, e.g. Count, Sum, etc.) the column that represents the aggregated value (XYZ Colu

X Column	X Column Description	X Column Aggregation	Value to Start the X
BD	Month	TOTAL	

Order Graph Data in SQL Sorted Order

All Colors are Opaque

Chart is Rendered in 3D

Graph Show Data Labels

Figure 3.2 – Birth Month Widget

The SQL Query used in this widget is:

```
select BD =
  case MONTH(BIRTH_DATE)
    WHEN '1' THEN 'January'
    WHEN '2' THEN 'February'
    WHEN '3' THEN 'March'
    WHEN '4' THEN 'April'
    WHEN '5' THEN 'May'
    WHEN '6' THEN 'June'
    WHEN '7' THEN 'July'
    WHEN '8' THEN 'August'
    WHEN '9' THEN 'September'
    WHEN '10' THEN 'October'
    WHEN '11' THEN 'November'
    WHEN '12' THEN 'December'
  end, count(*) as TOTAL

from REV_PERSON
where BIRTH_DATE is not null
GROUP BY MONTH(BIRTH_DATE)
ORDER BY MONTH(BIRTH_DATE)
```

DAILY ABSENT COUNT

This is a Query widget that shows the absences by day for all grades at a given school.

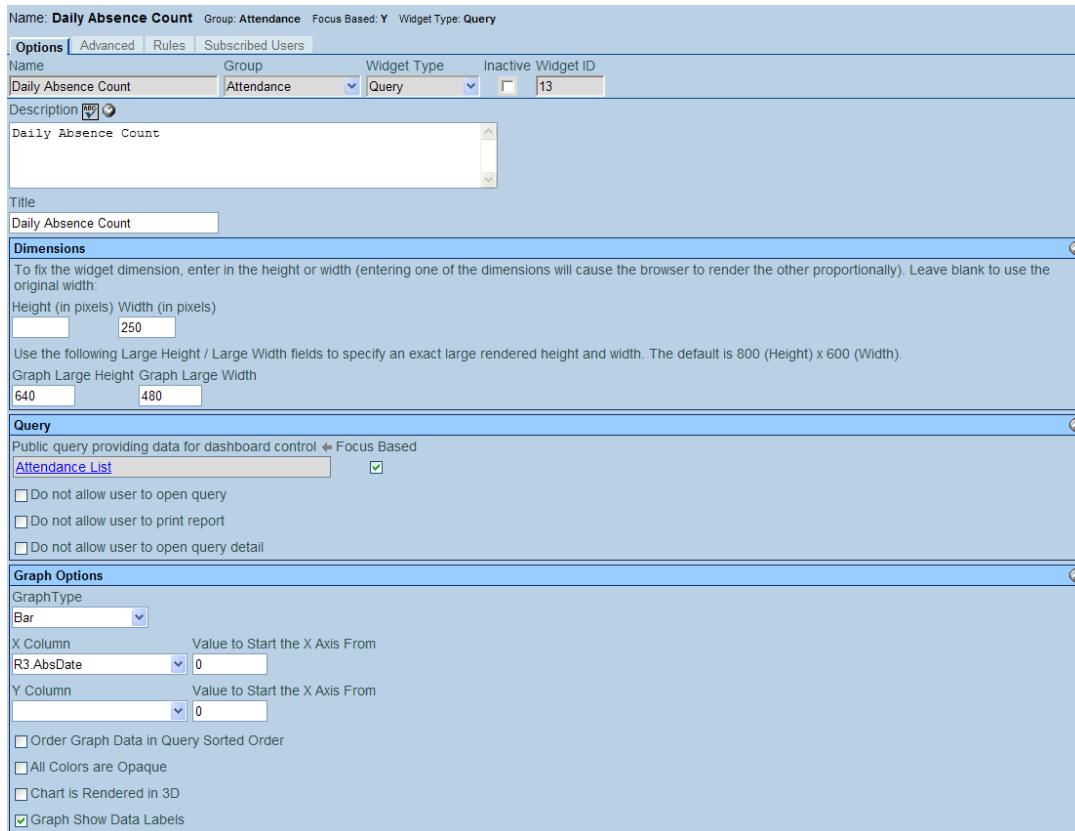


Figure 3.3 – Daily Absence Count Widget

The **Attendance List** public query used for the widget is:

K12.Student R0, K12.EnrollmentInfo.StudentSchoolYear R1,
 K12.EnrollmentInfo.StudentEnrollment R2, K12.AttendanceInfo.StudentDailyAttendance R3,
 K12.AttendanceInfo.Setup.SchoolAttendanceReasons R4
 (CodeAbsReasSchYearGU,R3.CodeAbsReas1GU,Outer),
 K12.AttendanceInfo.Setup.DistrictAttendanceReasons R5
 (CodeAbsReasGU,R4.CodeAbsReasGU,Outer)
 COLS R0.FormattedName, R0.Age, R0.BirthDate, R3.AbsDate, R5.Abbreviation,
 R5.Description, R5.Type (,,,,,,Code), R1.Grade (,,,,,,Description)
 If R5.Type In ('EXC', 'UNV', 'UNE') And R3.AbsDate < '\$DATE' And R3.AbsDate >= '\$DATE-30'

The **Rules** set for the colors of the bar graph are:

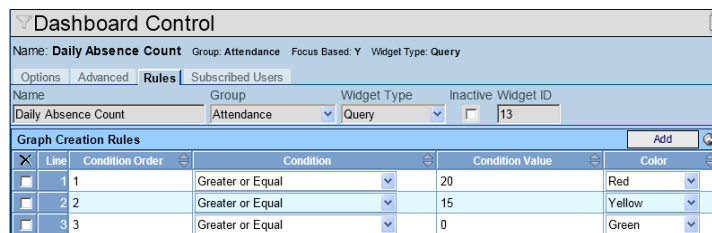


Figure 3.4 – Daily Absence Count Widget, Rules Tab

ENROLLMENT BY DAY

This is a SQL Query widget that shows the number of students enrolled each day at the school in focus.

Name: **Enrollment by Day** Group: **Attendance** Focus Based: **Y** Widget Type: **SQL Query**

Options | **Advanced** | **Rules** | **Subscribed Users**

Name: **Enrollment by Day** Group: **Attendance** Widget Type: **SQL Query** Inactive: Widget ID: **12**

Description: Enrollment counts for each day

Title: Student Enrollment Counts by Day

Dimensions

To fix the widget dimension, enter in the height or width (entering one of the dimensions will cause the browser to render the other proportionally). Leave blank to use the original width.

Height (in pixels) Width (in pixels)

Use the following Large Height / Large Width fields to specify an exact large rendered height and width. The default is 800 (Height) x 600 (Width).

Graph Large Height Graph Large Width

SQL Query

Sql Db Type
 MS SQL Oracle

Server: Database:

User: Password:

Focus Based
 No Launch Detail

SQL Command: -- Enrollment by day

```

declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = (select YEAR_GU from REV_YEAR where EXTENSION = 'R' and
SCHOOL_YEAR = @FOCUS_YEAR)
set @startDt = DateAdd (Month, -1, getDate())
set @stopDt = @DATE

```

The following will be added as parameters in the SQL execution at runtime:
@DATE = Current date (e.g. 9/15/2008)
@FOCUS_YEAR = Focus year for user (e.g. 2008)
@FOCUS_YEAR_GU = Focus year guid for user (e.g. {GUID})
@FOCUS_ORGANIZATION = Focus organization name for user (e.g. Hope HS)
@FOCUS_ORGANIZATION_GU = Focus organization guid for user (e.g. {GUID})
@FOCUS_ORG_YEAR_GU = Focus organization year guid for user (e.g. {GUID})
@USER_GU = User guid for current user (e.g. {GUID})
NOTE: Parameter names must appear exactly as listed above (capitalization included).

Graph Options

GraphType: **Bar**

The graph rendered from a SQL query must have various aspects defined. The fields below allow you to modify what data is graphed (XYZ Column), the graph title based on column descriptions (XYZ Column Description) and (if you are using aggregation, e.g. Count, Sum, etc.) the column that represents the aggregated value (XYZ Column Aggregation).

X Column	X Column Description	X Column Aggregation	Value to Start the X Axis From
<input type="text" value="TDAY"/>	<input type="text" value="Day"/>	<input type="text" value="ENRCNT"/>	<input type="text" value="0"/>

Order Graph Data in SQL Sorted Order
 All Colors are Opaque
 Chart is Rendered in 3D
 Graph Show Data Labels

Figure 3.5 – Enrollment By Day Widget

The **SQL Query** used in this widget is:

```
-- Enrollment by day

declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = (select YEAR_GU from REV_YEAR where EXTENSION = 'R' and
SCHOOL_YEAR = @FOCUS_YEAR)
set @startDt = DateAdd (Month, -1, getDate())
set @stopDt = @DATE

-- The following is the SQL string that uses the above 3 parameters
declare @curDt smalldatetime
declare @result table (TDAY smalldatetime, ENRCNT int, DOW int)
declare @curEnr int

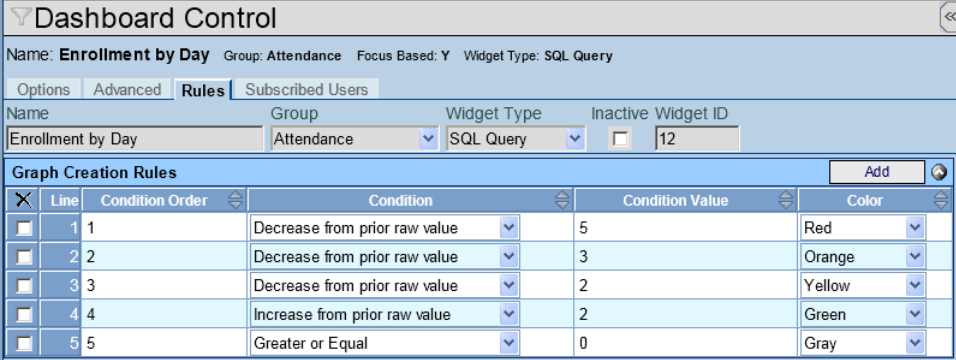
set @curDt = @startDt

while @curDt <= @stopDt
begin
    set @curEnr = (select count(*) NumStu from EPC_STU_SCH_YR ssy
        inner join REV_ORGANIZATION_YEAR oyr on (oyr.ORGANIZATION_YEAR_GU
= ssy.ORGANIZATION_YEAR_GU)
where oyr.YEAR_GU = @yearGu and ssy.ENTER_DATE <= @curDt
and ssy.ORGANIZATION_YEAR_GU = @FOCUS_ORG_YEAR_GU
and (ssy.LEAVE_DATE is null or ssy.LEAVE_DATE >= @curDt))
if (DATEPART(dw, @curDt) <> 1 and DATEPART(dw, @curDt) <> 7)
    insert into @result values(@curDt, @curEnr, DATEPART(dw, @curDt));
set @curDt = dateadd(day, 1, @curDt)

end;

select replace (str (month(TDAY)) + '/' + str (day(TDAY)) + '/' + str (year(TDAY)), ', ', '') as
'TDAY', ENRCNT from @result
```

The **Rules** set for the colors of the bar graph are:



Line	Condition Order	Condition	Condition Value	Color
1	1	Decrease from prior raw value	5	Red
2	2	Decrease from prior raw value	3	Orange
3	3	Decrease from prior raw value	2	Yellow
4	4	Increase from prior raw value	2	Green
5	5	Greater or Equal	0	Gray

Figure 3.6 – Enrollment By Day Widget, Rules Tab

ENROLLMENT BY WEEK

This is a SQL Query widget that shows the number of students enrolled each week at the school in focus.

Name: **Enrollment by Week** Group: Attendance Focus Based: Y Widget Type: SQL Query

Options | Advanced | Rules | Subscribed Users

Name: Enrollment by Week Group: Attendance Widget Type: SQL Query Inactive: Widget ID: 7

Description: People gender counts

Title: Student Enrollment Counts

Dimensions

To fix the widget dimension, enter in the height or width (entering one of the dimensions will cause the browser to render the other proportionally). Leave blank to use the original width.

Height (in pixels) Width (in pixels)

Use the following Large Height / Large Width fields to specify an exact large rendered height and width. The default is 800 (Height) x 600 (Width).

Graph Large Height Graph Large Width

SQL Query

Sql Db Type

MS SQL Oracle

Server: (local) Database: DemoDB_AZ

User: rev Password: ●●●

Focus Based

No Launch Detail

SQL Command

```
-- Enrollment by week

declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = (select YEAR_GU from REV_YEAR where EXTENSION = 'R' and SCHOOL_YEAR = @FOCUS_YEAR)
set @startDt = '09/09/2008'
set @stopDt = @DATE

The following will be added as parameters in the SQL execution at runtime:
@DATE = Current date (e.g. 9/15/2008)
@FOCUS_YEAR = Focus year for user (e.g. 2008)
@FOCUS_YEAR_GU = Focus year guid for user (e.g. {GUID})
@FOCUS_ORGANIZATION = Focus organization name for user (e.g. Hope HS)
@FOCUS_ORGANIZATION_GU = Focus organization guid for user (e.g. {GUID})
@FOCUS_ORG_YEAR_GU = Focus organization year guid for user (e.g. {GUID})
@USER_GU = User guid for current user (e.g. {GUID})
NOTE: Parameter names must appear exactly as listed above (capitalization included).
```

Graph Options

GraphType: Bar

The graph rendered from a SQL query must have various aspects defined. The fields below allow you to modify what data is graphed (X/Y/Z Column), the graph title based on column descriptions (X/Y/Z Column Description) and (if you are using aggregation, e.g. Count, Sum, etc.) the column that represents the aggregated value (X/Y/Z Column Aggregation).

X Column	X Column Description	X Column Aggregation	Value to Start the X Axis From
WEEK	Week	ENRCNT	0

Order Graph Data in SQL Sorted Order

All Colors are Opaque

Chart is Rendered in 3D

Graph Show Data Labels

Figure 3.7 – Enrollment By Week Widget

The SQL Query used in this widget is:

```
-- Enrollment by week

declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = (select YEAR_GU from REV_YEAR where EXTENSION = 'R' and
SCHOOL_YEAR = @FOCUS_YEAR)
set @startDt = '09/09/2008'
set @stopDt = @DATE

-- The following is the SQL string that uses the above 3 parameters
declare @curDt smalldatetime
declare @result table (WEEK smalldatetime, ENRCNT int)
declare @curEnr int

set @curDt = @startDt

while @curDt < @stopDt
begin
    set @curEnr = (select count(*) NumStu from EPC_STU_SCH_YR ssy
        inner join REV_ORGANIZATION_YEAR oyr on (oyr.ORGANIZATION_YEAR_GU
= ssy.ORGANIZATION_YEAR_GU)
    where oyr.YEAR_GU = @yearGu
    and ssy.ENTER_DATE <= @curDt
    and ssy.ORGANIZATION_YEAR_GU = @FOCUS_ORG_YEAR_GU
    and (ssy.LEAVE_DATE is null or ssy.LEAVE_DATE >= @curDt))
    insert into @result values(@curDt, @curEnr)
    set @curDt = dateadd(week, 1, @curDt)
end;

select replace (str (month(WEEK)) + '/' + str (day(WEEK)) + '/' + str (year(WEEK)), ' ', '') as
'WEEK', ENRCNT from @result
```

ENROLLMENT DAILY DELTA

This is a SQL Query that displays the change in the number of enrolled students from day to day for the school in focus.

Dashboard Control

Name: **Enrollment Daily Delta** Group: Attendance Focus Based: Y Widget Type: SQL Query

Options | Advanced | Rules | Subscribed Users

Name	Group	Widget Type	Inactive	Widget ID
Enrollment Daily Delta	Attendance	SQL Query	<input type="checkbox"/>	14

Description

Daily enrollment change

Title

Daily enrollment change

Dimensions

To fix the widget dimension, enter in the height or width (entering one of the dimensions will cause the browser to render the other proportionally). Leave blank to use the original width:

Height (in pixels) Width (in pixels)

Use the following Large Height / Large Width fields to specify an exact large rendered height and width. The default is 800 (Height) x 600 (Width).

Graph Large Height Graph Large Width

SQL Query

Sql Db Type

MS SQL Oracle

Server: (local) Database: DemoDB_AZ

User: rev Password: ●●●

Focus Based

No Launch Detail

SQL Command

```
-- Enrollment by day

declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = (select YEAR_GU from REV_YEAR where EXTENSION = 'R' and SCHOOL_YEAR = @FOCUS_YEAR)
set @startDt = DateAdd (Month, -1, getDate ())
set @stopDt = @DATE

The following will be added as parameters in the SQL exeuction at runtime:
@DATE = Current date (e.g. 9/15/2008)
@FOCUS_YEAR = Focus year for user (e.g. 2008)
@FOCUS_YEAR_GU = Focus year guid for user (e.g. {GUID})
@FOCUS_ORGANIZATION = Focus organization name for user (e.g. Hope HS)
@FOCUS_ORGANIZATION_GU = Focus organization guid for user (e.g. {GUID})
@FOCUS_ORG_YEAR_GU = Focus organization year guid for user (e.g. {GUID})
@USER_GU = User guid for current user (e.g. {GUID})
NOTE: Parameter names must appear exactly as listed above (capitalization included).
```

Graph Options

Graph Type

Bar

The graph rendered from a SQL query must have various aspects defined. The fields below allow you to modify what data is graphed (X/Y/Z Column), the graph title based on column descriptions (X/Y/Z Column Description) and (if you are using aggregation, e.g. Count, Sum, etc.) the column that represents the aggregated value (X/Y/Z Column Aggregation).

X Column	X Column Description	X Column Aggregation	Value to Start the X Axis From
DAY	Day	DELTA	

Order Graph Data in SQL Sorted Order

All Colors are Opaque

Chart is Rendered in 3D

Graph Show Data Labels

Figure 3.8 – Enrollment Daily Delta Widget

The SQL Query used in this widget is:

```
-- Enrollment by day

declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = (select YEAR_GU from REV_YEAR where EXTENSION = 'R' and
SCHOOL_YEAR = @FOCUS_YEAR)
set @startDt = DateAdd (Month, -1, getDate())
set @stopDt = @DATE

-- The following is the SQL string that uses the above 3 parameters
declare @curDt smalldatetime
declare @result table (EDAY smalldatetime, ENRCNT int, DOW int, DELTA int)
declare @curEnr int
declare @lastVal int
declare @delta int

set @curDt = @startDt
set @lastVal = 0

while @curDt <= @stopDt
begin
    set @curEnr = (
select count(*) NumStu from EPC_STU_SCH_YR ssy
inner join REV_ORGANIZATION_YEAR oyr on (oyr.ORGANIZATION_YEAR_GU =
ssy.ORGANIZATION_YEAR_GU)

where oyr.YEAR_GU = @yearGu and ssy.ENTER_DATE <= @curDt
and oyr.organization_year_gu = @FOCUS_ORG_YEAR_GU
and (ssy.LEAVE_DATE is null or ssy.LEAVE_DATE >= @curDt))

set @delta = @curEnr - @lastVal
if (@lastVal = 0)
    set @delta = 0
set @lastVal = @curEnr

if (DATEPART(dw, @curDt) <> 1 and DATEPART(dw, @curDt) <> 7)
    insert into @result values(@curDt, @curEnr, DATEPART(dw, @curDt), @delta);
set @curDt = dateadd(day, 1, @curDt)

end;

select replace (str (month(EDAY)) + '/' + str (day(EDAY)) + '/' + str (year(EDAY)), ',', '') as 'DAY',
ENRCNT, DELTA from @result
```

The **Rules** set for the colors of the bar graph are:

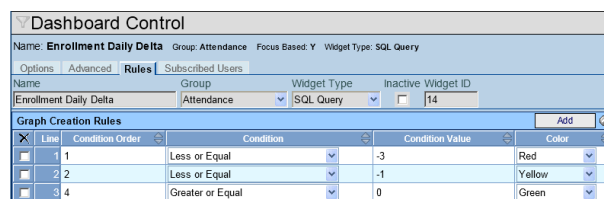


Figure 3.9 – Enrollment Daily Delta Widget, Rules Tab



ENROLLMENT DAILY DELTA – DISTRICT

This is a SQL Query that displays the change in the number of enrolled students from day to day for the district.

Name: **Enrollment Daily Delta - District** Group: Attendance Focus Based: N Widget Type: SQL Query

Options | Advanced | Rules | Subscribed Users

Name	Group	Widget Type	Inactive	Widget ID
Enrollment Daily Delta - District	Attendance	SQL Query	<input type="checkbox"/>	15

Description  

District wide enrollment delta

Title

Enrollment Daily Delta - District

Dimensions

To fix the widget dimension, enter in the height or width (entering one of the dimensions will cause the browser to render the other proportionally). Leave blank to use the original width.

Height (in pixels) Width (in pixels)

Use the following Large Height / Large Width fields to specify an exact large rendered height and width. The default is 800 (Height) x 600 (Width).

Graph Large Height Graph Large Width

SQL Query

Sql Db Type

MS SQL Oracle

Server Database



(local) DemoDB_AZ

User Password

rev ●●●

Focus Based

No Launch Detail

SQL Command  

```
-- Enrollment by day

declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = @FOCUS_YEAR_GU
set @startDt = DateAdd (Month, -1, getDate())
set @stopDt = @DATE
```

The following will be added as parameters in the SQL execution at runtime:

@DATE = Current date (e.g. 9/15/2008)
 @FOCUS_YEAR = Focus year for user (e.g. 2008)
 @FOCUS_YEAR_GU = Focus year guid for user (e.g. {GUID})
 @FOCUS_ORGANIZATION = Focus organization name for user (e.g. Hope HS)
 @FOCUS_ORGANIZATION_GU = Focus organization guid for user (e.g. {GUID})
 @FOCUS_ORG_YEAR_GU = Focus organization year guid for user (e.g. {GUID})
 @USER_GU = User guid for current user (e.g. {GUID})
 NOTE: Parameter names must appear exactly as listed above (capitalization included).

Graph Options

GraphType

Bar

The graph rendered from a SQL query must have various aspects defined. The fields below allow you to modify what data is graphed (X/Y/Z Column), the graph title based on column descriptions (X/Y/Z Column Description) and (if you are using aggregation, e.g. Count, Sum, etc.) the column that represents the aggregated value (X/Y/Z Column Aggregation).

X Column	X Column Description	X Column Aggregation	Value to Start the X Axis From
DAY	Day	DELTA	

Order Graph Data in SQL Sorted Order

All Colors are Opaque

Chart is Rendered in 3D

Graph Show Data Labels

Figure 3.10 – Enrollment Daily Delta-District Widget

The **SQL Query** used in this widget is:

```
-- Enrollment by day

declare @yearGu uniqueidentifier
declare @startDt smalldatetime, @stopDt smalldatetime
set @yearGu = @FOCUS_YEAR_GU
set @startDt = DateAdd (Month, -1, getDate())
set @stopDt = @DATE

-- The following is the SQL string that uses the above 3 parameters
declare @curDt smalldatetime
declare @result table (EDAY smalldatetime, ENRCNT int, DOW int, DELTA int)
declare @curEnr int
declare @lastVal int
declare @delta int

set @curDt = @startDt
set @lastVal = 0

while @curDt <= @stopDt
begin
    set @curEnr = (
select count(*) NumStu from EPC_STU_SCH_YR ssy
inner join REV_ORGANIZATION_YEAR oyr on (oyr.ORGANIZATION_YEAR_GU =
ssy.ORGANIZATION_YEAR_GU)

where oyr.YEAR_GU = @yearGu and ssy.ENTER_DATE <= @curDt
and (ssy.LEAVE_DATE is null or ssy.LEAVE_DATE >= @curDt))

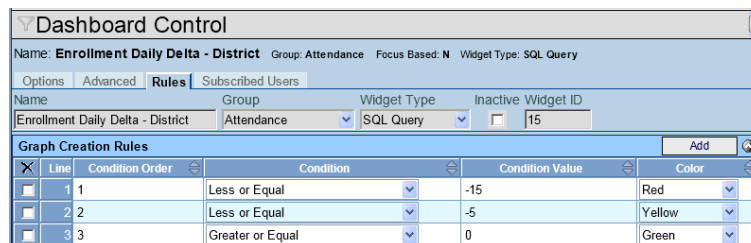
set @delta = @curEnr - @lastVal
if (@lastVal = 0)
    set @delta = 0
set @lastVal = @curEnr

if (DATEPART(dw, @curDt) <> 1 and DATEPART(dw, @curDt) <> 7)
    insert into @result values(@curDt, @curEnr, DATEPART(dw, @curDt), @delta);
set @curDt = dateadd(day, 1, @curDt)

end;

select replace (str (month(EDAY)) + '/' + str (day(EDAY)) + '/' + str (year(EDAY)), ',', '') as 'DAY',
ENRCNT, DELTA from @result
```

The **Rules** set for the colors of the bar graph are:



Line	Condition Order	Condition	Condition Value	Color
1	1	Less or Equal	-15	Red
2	2	Less or Equal	-5	Yellow
3	3	Greater or Equal	0	Green

Figure 3.11 – Enrollment Daily Delta-District Widget, Rules Tab



NASA SPACE CENTER

This is an External Image widget that displays a still image of the Kennedy Space Center that is updated taken periodically during shuttle launches.

Name: **Nasa - Kennedy Space Center C4** Group: Miscellaneous Focus Based: N Widget Type: External Image

Options | Advanced | Rules | Subscribed Users


Name	Group	Widget Type	Inactive	Widget ID
Nasa - Kennedy Space Center C4	Miscellaneous	External Image	<input type="checkbox"/>	18

Description  

Kennedy Space Center photo image feed from channel 4

Title

Kennedy Space Center - Channel 4


Dimensions 

To fix the widget dimension, enter in the height or width (entering one of the dimensions will cause the browser to render the other proportionally). Leave blank to use the original width.

Height (in pixels) Width (in pixels)

Use the following Large Height / Large Width fields to specify an exact large rendered height and width. The default is 800 (Height) x 600 (Width).

Graph Large Height Graph Large Width

External Image 

External URL Path

External Image Click URL

Figure 3.12 – NASA Space Center Widget

WEATHER IN THE PACIFIC NORTHWEST

This is an External Image widget that displays an image of the weather radar for the Pacific Northwest.

Name: Weather - Pacific Northwest Group: Miscellaneous Focus Based: N Widget Type: External Image			
Options Advanced Rules Subscribed Users			
Name	Group	Widget Type	Inactive Widget ID
Weather - Pacific Northwest	Miscellaneous	External Image	<input type="checkbox"/> 9
Description <input type="text"/>			
Title Pacific Northwest Weather			
Dimensions			
To fix the widget dimension, enter in the height or width (entering one of the dimensions will cause the browser to render the other proportionally). Leave blank to use the original width.			
Height (in pixels)	Width (in pixels)		
225			
Use the following Large Height / Large Width fields to specify an exact large rendered height and width. The default is 800 (Height) x 600 (Width).			
Graph Large Height	Graph Large Width		
640	480		
External Image			
External URL Path http://radar.weather.gov/Conus/Loop/pacnorthwest_loop.gif			
External Image Click URL http://radar.weather.gov/Conus/pacnorthwest_loop.php			

Figure 3.13 – Weather-Pacific Northwest Widget

Chapter Four: SECURITY

In this chapter, the following topics are covered:

- ▶ Where security for dashboard-related views may be defined

Security for each of the views discussed throughout this manual is defined by two options: the **PAD Security** view and the **Security Definition** view. Both of these views are found under Synergy SIS > System > Security. How each of these views work and how security is defined is covered in detail in the **Synergy SIS - Security Administrator Guide**. This chapter outlines where the security for each part of each dashboard-related view may be defined in the Security Definition view.

DASHBOARD CONTROL SECURITY

The **Options** and **Advanced tabs** of the Dashboard Control view are controlled by the security node:

Revelation.Query.DashboardWidget

The screenshot shows the 'Dashboard Control' window with the 'Options' tab selected. The 'Advanced' sub-tab is also visible. The 'Options' section includes fields for Name, Group, Widget Type (set to 'Query'), and Inactive Widget ID. The 'Advanced' section includes a Description field, a Title field, a Dimensions section with Height (800) and Width (600) fields, and a Specific Focus section with Specific Organization and Specific Year fields.

Figure 4.1 – Dashboard Control View

The **Rules** tab of the Dashboard Control view is controlled by the security node:

Revelation.Query.DashboardWidgetRule

The screenshot shows the 'Dashboard Control' window with the 'Rules' tab selected. The 'Rules' section displays a table of 'Graph Creation Rules' with the following data:

Line	Condition Order	Condition	Condition Value	Color
1		Less or Equal	-15	Red
2		Less or Equal	-5	Yellow
3		Greater or Equal	0	Green

Figure 4.2 – Rules Tab, Dashboard Control View

The **Subscribed Users tab** of the Dashboard Control view is not controlled by a security node.

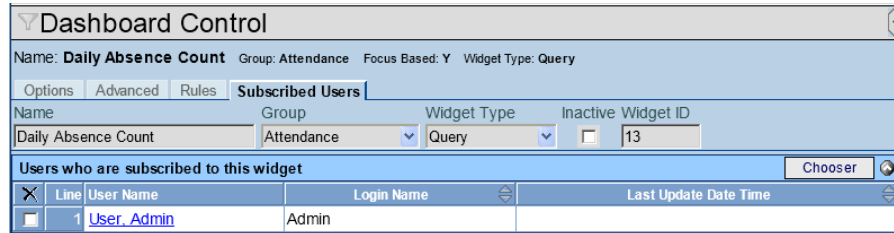


Figure 4.3 – Subscribed Users Tab, Dashboard Control View

The following security nodes do not provide a visible change in security on the views:

- Revelation.Query.DashboardUI

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