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# Synergy 101 Manual

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Cascade Technology Alliance

Columbia Gorge ESD | Multnomah ESD | Northwest Regional ESD | Willamette ESD

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## Disclaimer

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## Exclusion

This training manual has been prepared exclusively for Cascade Technology Alliance Synergy users. Information contained within this document may be used by constituent school districts for the sole purpose of personnel training and reference. All other uses are prohibited without prior written consent.

## Definitions

The last revised date reflects the most recent date a change was made to the manual. The version number matches the version of Synergy the manual has been updated for.

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## Login Screen

Navigate to your district's Synergy login screen. Enter your **Login Name** and **Password** in the appropriate fields as supplied by your district. Click the blue **Login** button.

Please enter your login name and password below to access the application.

**Login Name**

**Password**

Make sure your browser has pop-ups allowed. Your browser will display the following message if a pop-up blocker is detected:

**A pop up blocker has been detected. Please check your browser and any additional toolbars (like Google or Yahoo) and allow pop ups for this URL.**

## Focus

You will see your name in the top right corner of your Synergy window. This is the focus area. Your focus determines which building within your district you are looking at, the school year you are viewing, and whether you are looking at active students only, inactive students only or both active and inactive students.

To change your focus, click within the focus area.

Ovid Boyd (Show Active and Inactive)  
2017-2018 Training School District

### Change Focus

Year: 2017-2018

Organization: Technology Elementary School

- [-] Training School District
  - [-] 1. Elementary Schools
    - Cascade Elementary School
    - Technology Elementary School
  - [+] 2. Middle Schools
  - [+] 3. High Schools
  - [+] 4. Special Schools
  - Other Oregon Schools

Show Students:  Show Active Only  
 Show Inactive Only  
 Show Active and Inactive

Save Cancel

Use the **Year** menu to move into a different school year. Synergy will change the background color of your screen to **green** when focused to a previous school year. Future school years will be shaded **brown**. The current year is **white**.

Use the **Organization** drop down to change your focus to a different building within your district. Or, you can use the tree to navigate to that organization. Your focus can also be a group of organizations like *1. Elementary Schools* in the screenshot. You would see data from all elementary schools with that focus. Your district determines which organizations you can access.

Use the radio buttons to set whether you are looking at only active students, only inactive students or both active and inactive students.

Click **Save** when you are done making your selections.

## Title Bar

### TeacherVUE

Use this link to open to open **TeacherVUE**, which includes **Grade Book**.

### Home Icon

To return to the home page at any time from any screen, click the **Home** icon.

### Streams

Maintain a running dialog with by using the **Streams** communication tool.

### Announcements

To view the district and school announcements screen that was viewed when you initially logged in, click the **Announcements** link. A number resting in the corner of the icon indicates the number of new announcements.

### Tasks

To view the tasks assigned to you, click the **Tasks** link. These are the same tasks viewed on the **Home** screen. A number resting in the corner of the icon reflects the number of tasks waiting to be addressed.

### Job Queue

Once a report or process is submitted, the status is listed in the job queue. See a snapshot of jobs by hovering over this link. A number resting in the corner of the icon represents the number of new jobs in the queue. **Green** with spinning gears means jobs in progress, **white** means jobs completed and **red** means jobs failed.



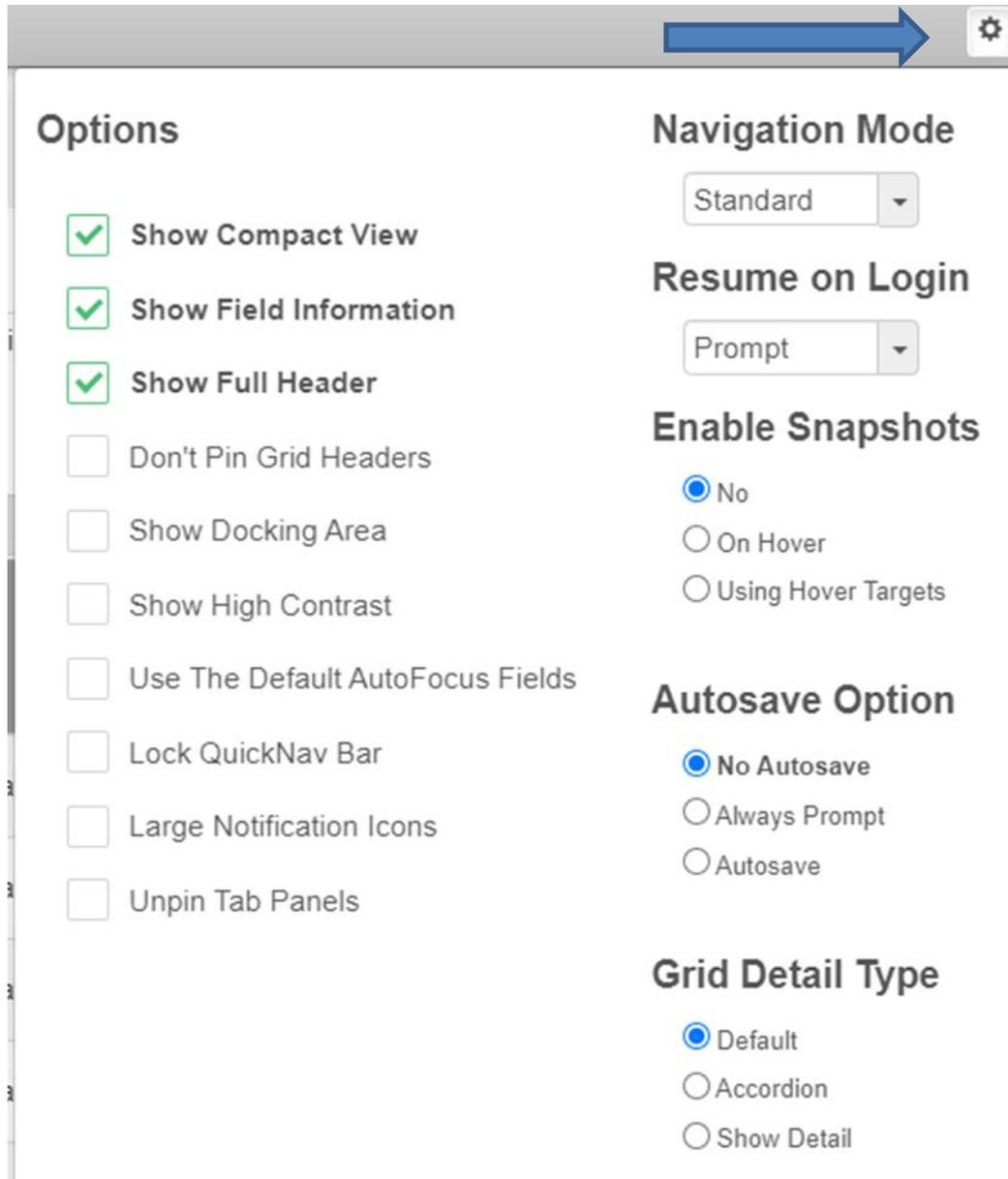
If the job is complete, click **View** to open the report.

To dismiss the job, click **Dismiss**. The details of the job may still be viewed from the **Job Queue** screen.

To see details of all jobs, click **Open JobQueue Viewer**.

## Screen Options

**Screen Options** provides a quick way to customize the viewing experience. Hover over the icon to view the options. Click the option to select or deselect it.



**Show Compact View:** Eliminates some of the empty space on the screen. Users working on laptops may find this view beneficial.

**Show Field Information:** Hovering over a field identifies the corresponding business object information. This is helpful when creating queries. Most users do not need this enabled.

**Show Full Header:** Allows you to remove the district logo from the top of the screen.

**Don't Pin Grid Headers:** Keeps the field names visible on grids while you scroll down.

✕	Line	Course		Calendar	
		Title	ID	Year	Month
		headings stay visible	0686	2011	10
			0610	2011	10

**Show Docking Area:** Adds a bar at the bottom of the screen you can customize with specific fields.

**Show High Contrast:** Allows you to pick out your own color scheme. You can choose both the **Background Color** and **Header Background**.

Mark	Conduct
A+	
C-	
P	
D	

**Show High Contrast**

Custom

Background Color: #6d6d6d    Header Background: #a01818

Show Snapshot Views

Use The Default AutoFocus Fields

Lock QuickNav Bar

**Lock Quick Nav Bar:** a lock sign displays when attempting to remove icons from the [Quick Nav Bar](#).

**Unpin Tab Panels:** You can unpin tab panels using the **Unpin Tab Panel** option or by clicking the  icon on an individual tab panel. Both options allow you to set preferences for all tab panels.

Selecting **Unpin Tab Panels** allows the panels to move up and down with the page when you scroll.

Deselecting **Unpin Tab Panels** keeps the panels stationary while the rest of the page scrolls up and down.

**Navigation Modes:** There are two navigation modes.

#### **Standard or Accessible**

**Accessible** is designed to work with screen readers for vision impaired users. See <https://sistrain.cascadetech.org/DemoCTA/accessibility.html> for more information.

**Resume on Login:** There are three options.

**Never** you will see no changes in navigation. **Prompt** will ask you to choose yes or no if you want to go back to the last screen you were on when you last logged in. **Always** will always take you back to your last screen on your previous login session.

**Enable Snapshots:** There are three options.

**No. On hover** and **Using Hover Targets**. If you hover over a Student or Parent name hover allows you to see **Snapshot Views** that give quick information.

**Autosave Option:** No Autosave is the option we recommend. It will protect your data from accidental changes. We have disabled that from the end users.

**Grid Detail Type:** This feature allows a user to set their personal preference for grid detail.

**Default:** Uses the option selected on the **Options** tab of the System Configuration screen.

**Accordion:** Displays  next to the **Line** number for each line in the grid. Click  to toggle the line details open or close.

**Show Detail:** Displays the **Show Detail** button.

## **Lock**

This locks the screen until your re-enter your password. This is helpful when you need to leave their desk momentarily and do not want to lose your work.

## **Sign Out**

Click this link to log out.

## **Support**

This links to a page with information about how to receive support for the Synergy SIS system. This page can be customized by your district.

## **Help**

This links to the online help system.

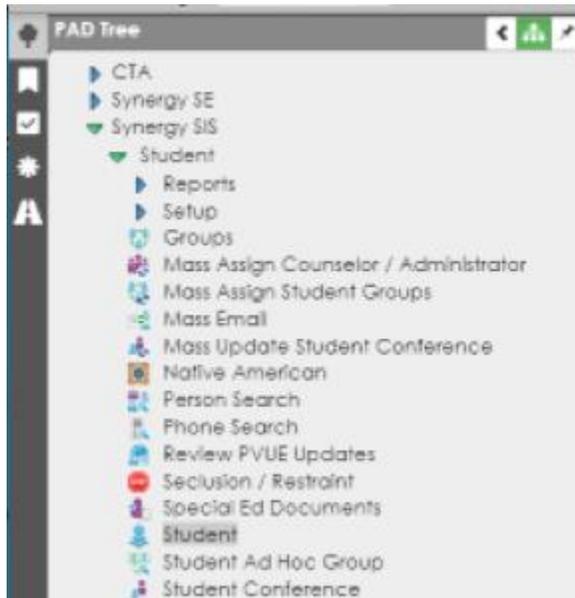
## Navigating in Synergy

Synergy provides users with multiple ways of moving around the system. The four main methods are:

- **Navigation Tree**
- **Navigation Panels**
- **Quick Launch**
- **Quick Nav**

### Navigation Tree

The **Navigation Tree** lists all screens or reports the user has access to. To use the tree:



1. Click on the name of the module or the blue triangle next to it to expand the folder and view its contents. When a triangle has been clicked, it turns green and points downward.
2. Continue clicking on the names/triangles until the desired screen or report is displayed.
3. Click on the screen name or icon to show it in the Content Area.

Right clicking on a report or screen provides more options:

**Open in Current Window** – Opens the screen in the Content Area.

**Open in New Window** – Opens the screen in a new 'detached' window.

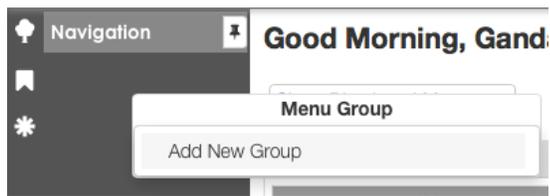
**Add to Group** – Places an icon link in the selected Navigation toolbar.

**Add to QuickNav** – An icon link is placed above in the QuickNav bar.

## Navigation Panel

The **Navigation** pane can be used to store frequently used screens and reports. Multiple groups can be created to organize the screens and reports. To create a group:

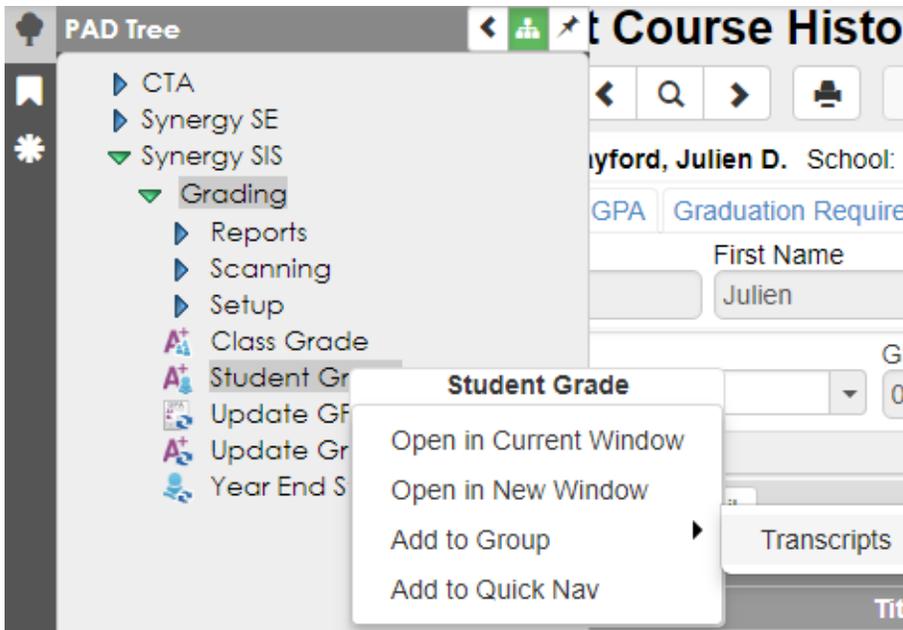
1. Hover over the **Navigation Panel** icon.
2. Right click on the word **Navigation**.
3. Click **Add New Group**.



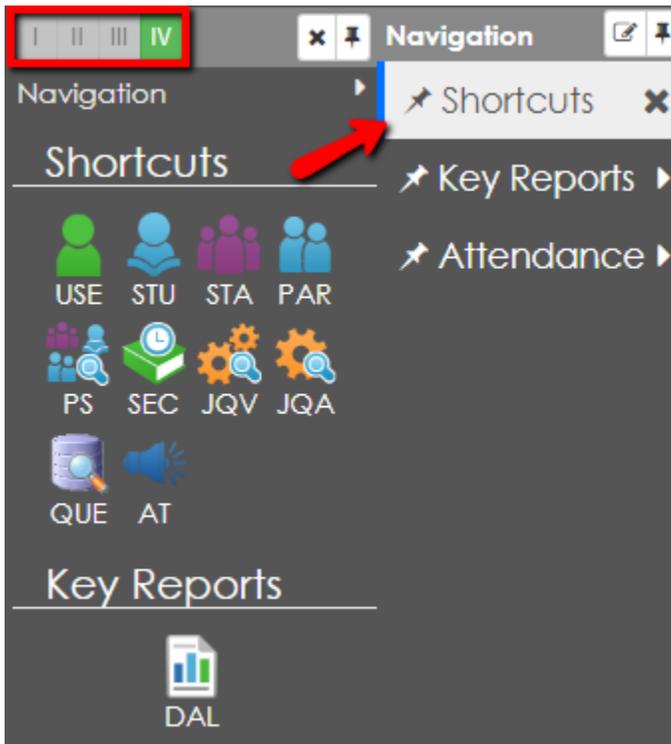
4. Enter a name for the new group and hit 'Enter' on your keyboard.

You can now add multiple screens and reports to the group. Items can be added to the group by:

1. Locate the screen or report interface to add in the **Navigation Tree**.
2. Right click on the screen or report interface.
3. Hover over the **Add to Group** option. A box pops out with a list of groups that have been created. Click the desired group.



You can pin the groups so they always list all icons, instead of needing to hover over them. To do so, click the pin icon next to the group name.



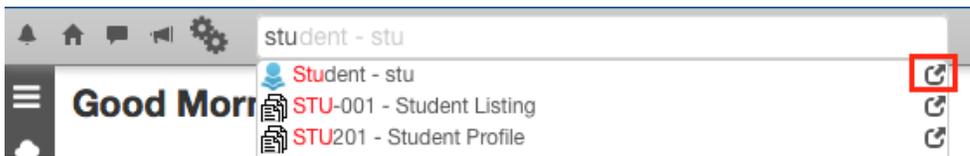
You can change the size of the icons by clicking the Roman numeral icons.

## Quick Launch

The **Quick Launch** bar provides a quick way to launch a screen or report by simply typing the name of the screen or ID of the report in the box.

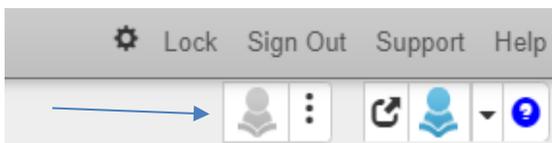


Entering just a few letters displays the screens available that match. Users can hit Enter or click the desired screen from the list to quickly move to the selected screen. The **Quick Launch** can also be used to open a screen in a detached window. Click the detach icon to the right of the screen title to do so.

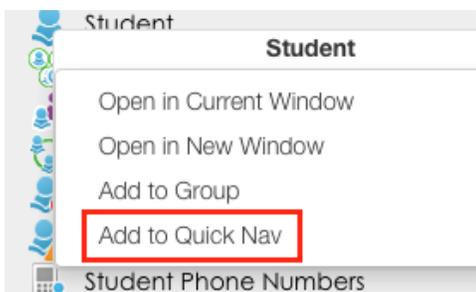


## Quick Nav Bar

Similar to the **Navigation Panel**, the **Quick Nav Bar** is a place for screens that are used frequently. One of the advantages of using the Quick Nav is that screens are automatically detached and open in a new window. The icons in the **Quick Nav** are displayed in this area.

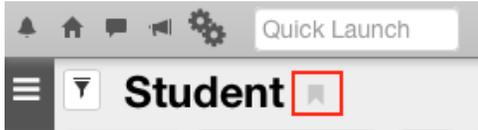


1. To add a link to **Quick Nav Bar**, from the **Navigation Tree** or **Navigation Panel** right-click on the screen name or icon.
2. Select **Add to Quick Nav**.

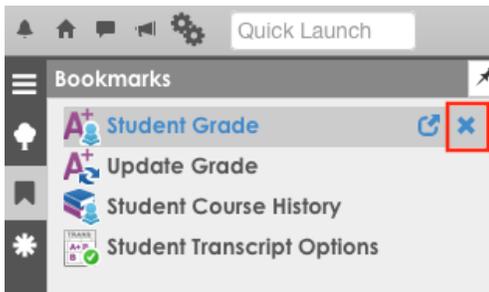


## Bookmarks Panel

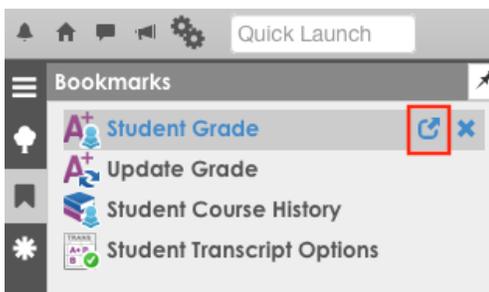
Bookmark any frequently used screen, report, or process by clicking the bookmark to the right of the screen title. Once a screen is bookmarked, the bookmark icon turns blue.



To remove a bookmark, hover over the title and select the blue X.

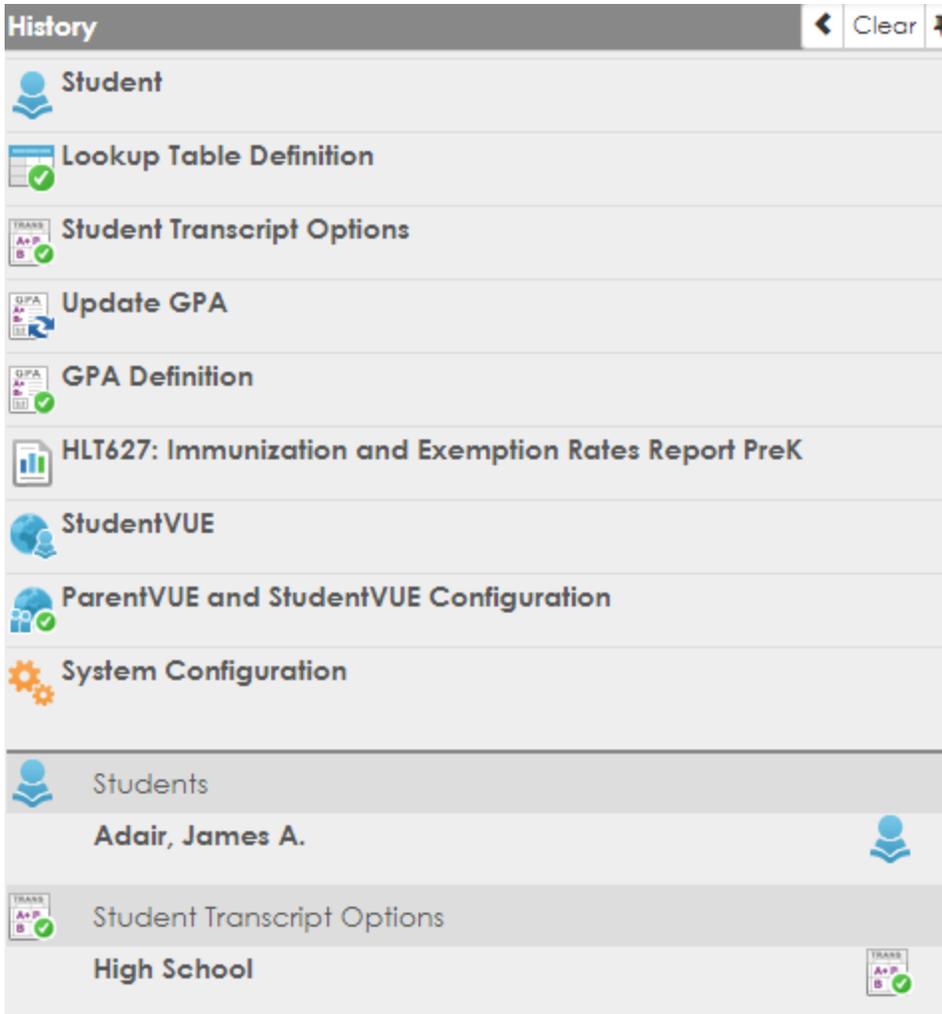


To open the screen in a separate window, hover over the title and select the detach screen icon.



## History Panel

Return to any screen, report, process or particular record visited session by selecting it from the **History Panel**.



The screenshot displays the 'History' panel with a 'Clear' button and a star icon in the top right corner. The panel is divided into two sections. The top section lists various system actions, each with an icon and a green checkmark: 'Student' (person icon), 'Lookup Table Definition' (table icon), 'Student Transcript Options' (TRANSP A+P B icon), 'Update GPA' (GPA icon with refresh arrow), 'GPA Definition' (GPA icon), 'HLT627: Immunization and Exemption Rates Report PreK' (report icon), 'StudentVUE' (person icon), 'ParentVUE and StudentVUE Configuration' (person icon with checkmark), and 'System Configuration' (gears icon). The bottom section is titled 'Students' and shows a record for 'Adair, James A.' with a person icon. Below this, it shows 'Student Transcript Options' with a TRANSP A+P B icon and 'High School' with a TRANSP A+P B icon and a green checkmark.

## Basic Screen Functions

Using the **Navigation Tree**, go to **Synergy SIS > Student > Student**.

This screenshot shows the top portion of the Synergy SIS Student record page. The header includes the title 'Student' and a navigation bar with buttons for Menu, navigation arrows, a magnifying glass, Save, Undo, Add, and Delete. Below the header, the student's name 'Mayford, Julien' and other details like school and grade are visible. Callouts with red arrows point to specific UI elements:

- the Actions button runs a report or process for this student**: Points to the magnifying glass icon in the navigation bar.
- Arrows navigate between records. The magnifying glass searches records.**: Points to the left and right navigation arrows.
- Refreshes the data**: Points to the circular refresh icon in the top right corner.
- Opens the screen in a new window**: Points to the external link icon in the top right corner.

This screenshot shows the same Synergy SIS Student record page, but with different callouts. The student's name 'Mayford, Julien' and other details are visible. Callouts with red arrows point to specific UI elements:

- Hover over the Menu to see a list of options. They vary from screen to screen.**: Points to the 'Menu' button in the navigation bar.
- Click tabs to see more data about this record**: Points to the 'Other Info' tab in the secondary navigation bar.
- Notification icons may be added to a student's record that include medical, special ed or other info.**: Points to the notification icon (a yellow triangle with an exclamation mark) in the top right corner.

## Snapshot Views

If you hover over the title area of many screens, you will get a snapshot view with more details.

**Period Attendance**

Student Name: **Fir, Douglas** School: **G High School** Status: **Active** Homeroom: **219** Age: **18**

Calendar Days of Activity Totals History Attendance Letters Concurrent Attendance Summary Interventions

**Fir, Douglas**

No Photo  
Edupoint  
On file

Student ID: 291916 SSID: 128509  
Grade: 12 EdFi ID:  
Student Email: test@cascadtech Home Address: 1234 SW Sticky St  
Birth Date: 01/01/1999 Portland, OR 97220  
Age: 18

Map it!

Current Class:  
**For the current day, no Schedule Information was found for this student**

Override All Re

## Editing Data

Once you have located a particular record on any screen, click in any available field to make edits.

After making an edit, **Save**, **Undo**, and **Field Based Undo** buttons will appear. Click the **Field Based Undo** backwards arrow to undo only the change to that particular field. Click **Save** or **Undo** to save all changes or undo all changes on the screen. You must **Save** or **Undo** your changes before you can leave the tab.

**Student**

Menu < > Save Undo + Add x Delete

Student Name: **(Gibson, Bailee)** School: **G High School** Homeroom: Teacher: Enrollments: Age: **18 yrs 6 mths**

Demographics Parent/Guardian Other Info Emergency Enrollment Enrollment History Classes Documents Student Contact I

Last Name (Legal) First Name (Legal) Middle Name Suffix Student ID Grade Gender  
Gibson Bailee 223053 12 Female

**Student Information**

No Photo  
Edupoint  
On file

Language First Learn Home Language Language To Home Language By Home Int  
Dutch English English

AKA Last Name **AKA First Name** AKA Middle Name AKA Suffix  
Bee

SSID Birth Date Birth Place (City) Birth Verification  
070265 01/01/1999 Birth Certificate

Birth State Birth Country Student Email  
Oregon United States of America test@cascadtech

Deceased

When entering data into a date field, click the calendar icon to select a date. You can also enter the date directly into the field. Synergy will format the date correctly as long as it is entered using mmddyy format. Time data works similarly.

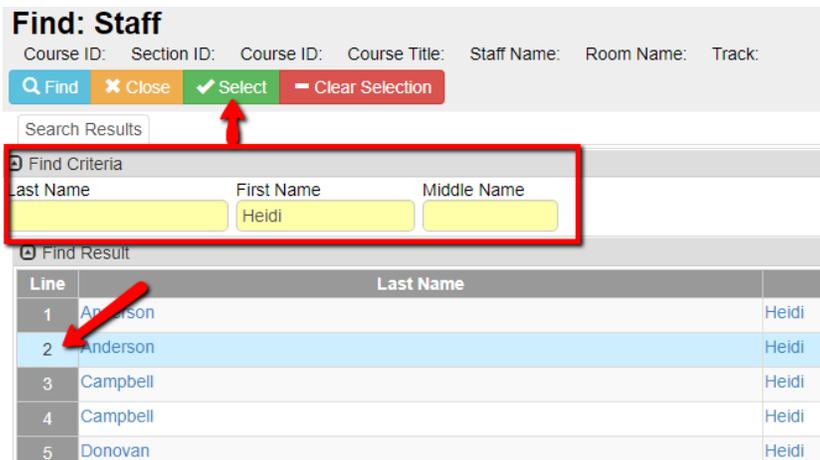


If fields are greyed out, they may be calculated values that can't be directly edited, like **Resolved Race/Ethnicity**. Or, they may be editable, but you may not have the needed user permissions to edit them. Or, they may require a special step to edit them. For instance, a student's name can only be edited after you choose **Edit Student Data** from the **Menu**.

Some types of data (foreign keys) are pulled from a list of possible choices represented by a chain symbol . When you enter data here, it will present you with a list of possible choices.



Choose the appropriate option. If you cannot find the choice you need, you can click **Advanced** to bring up a more detailed search dialog.



For the advanced foreign key popup, use the **Find Criteria** area to locate the data you need. Highlight your choice by clicking the **Line #**. Then click **Select** to choose it and return to your prior window.

## Searching in Synergy

### Searching Basics

Click the magnifying glass to enter 'find mode'. Text and drop down fields will turn yellow. Any yellow field can be incorporated into a search. Fields and drop downs from multiple tabs can also be combined to search for specific records.

The screenshot shows the Synergy search interface with several tabs: Demographics, Parent/Guardian, Other Info, Emergency, Enrollment, Enrollment History, and Classes. Below the tabs are search fields for Last Name (Legal), First Name (Legal), Middle Name, Suffix, Student ID, Grade, and Gender. The 'Grade' dropdown is open, showing options from 7H to GR, with 10 and 11 selected. The 'Home Language' dropdown is also open, showing 'Spanish' selected. The 'Check/Uncheck All' button is visible at the top of the dropdown menu.

The above search will return all records for 10<sup>th</sup> and 11<sup>th</sup> graders with a **Home Language** of *Spanish*. Use the checkboxes in a drop down to select specific values or click the **Check/Uncheck All** button to select/deselect all rows. Click the **Find** button or hit 'Enter' to run the search. Search results are returned in a new window.

**Find Result**

Query: [Open In Query](#) [Print](#) Output Type: PDF

Filter: [Save As Filter](#) Filter Name:   Make Active

Line	Last Name (Legal)	First Name (Legal)	Middle Name	Student ID	Grade	Home Language
1	Anderson	Ana		709215	10	Spanish
2	Anderson	Charles		337298	10	Spanish
3	Anderson	Dakota		338339	10	Spanish

The results window can be used to quickly jump to a specific student record. Click the line number to open the record in your main Synergy window while keeping the results window open. Double-clicking a line number will open the record in your main Synergy window and close the results window.

Search results can be exported directly from Synergy into many useful file types including PDF, Excel and CSV files. Click the **Output Type** drop down to select the desired file type. The default is PDF. Click **Print**. The file will be downloaded.

**Find Result**

Query:   Output Type: PDF

Filter:  Filter Name:   Make Active

Line	Last Name (Legal)	Legal)	Middle Name	Student ID	Grade	Home Language
1	Anderson			709215	10	Spanish
2	Anderson			337298	10	Spanish
3	Anderson			338339	10	Spanish
4	Anderson			264639	11	Spanish

### Using the \* (wildcard) in searches

The \* (wildcard) can be used to further refine searches. We can add on to our previous search by putting the \* in the last name field.

Demographics Parent/Guardian Other Info Emergency Enrollment Enrollment History Classes

Notes Additional Alerts

Last Name (Legal) First Name (Legal) Middle Name Suffix Student ID Grade Gender

joh\* Spanish 10 11

Student Information

No Photo Language First Learned Home Language Language To Home

Edupoint Last Name Goes By

On file AKA Last Name AKA First Name AKA Middle Name

The search will return all records for 10<sup>th</sup> and 11<sup>th</sup> graders whose **Home Language** is *Spanish* and whose **Last Name** begins with 'Joh'.

The \* can also be used to pull specific fields of data into a search. The following search will return a list of every student and include their **Grade, Gender, Home Language** and **SSID**.

Demographics Parent/Guardian Other Info Emergency Enrollment Enrollment History Cla  
 Notes Additional Alerts

Last Name (Legal) First Name (Legal) Middle Name Suffix Student ID Grade Gender

Student Information

No Photo  
 Edupoint  
 On file

Language First Learned Home Language Language To Home Language By Home

Last Name Goes By

AKA Last Name AKA First Name AKA Middle Name AKA Suffix

SSID Birth Date Birth Place (City) Birth Verification

Here is an example of the results returned.

Line	Last Name (Legal)	First Name (Legal)	Middle Name	Student ID	Grade	Gender	Home Language	SSID
1	Anderson	Abigail		360137	10	Male	English	664559
2	Anderson	Ada		397657	10	Male	English	544749
3	Anderson	Adam		795294	09	Female	English	975961
4	Anderson	Addison		571430	09	Female	English	302101
5	Anderson	Alejandro		745845	10	Female	English	184369
6	Anderson	Alexandria		344869	10	Male	English	545001
7	Anderson	Alijah		794693	12	Female	English	629139
8	Anderson	Alyssa		216272	12	Male	Vietnamese	578077

### Using special characters to search

Some fields allow for additional special searches.

- = Pulls records where no data has been entered in the field
- % Pulls records where a value has been entered in the field
- <, >, >=, <= Boolean values locate less than/greater than values. May work with both text (alphabetically), numbers and dates.

Special character searches can also be combined into groups with AND or OR logic. To do so, add criteria, then click the + icon to add another one. You can switch from AND logic to OR logic by clicking the word AND. In the following example, all students in the alphabet from B-E will be return in the results.

Student Name: School: Homeroom: Teacher: Enrollments: Age:

Demographics Parent/Guardian Other Info **Add Condition (ctrl + enter)**

Last Name First Name Middle Name Suffix

Student Information

No Photo Language First Learn Home To Hom

Edupoint AKA Last Name AKA First Name AKA Middle

AND > < >B <E

### Using checkboxes in searches

Checkboxes can also be used in searches. While in find mode, a checkbox can be used to pull four different 'states' of data. Continue clicking the checkbox to cycle through all four.

**Unchecked** – not included in search results

**1-click** – Only include checked

**2-click** – Include both checked and unchecked

**3-click** – Only include unchecked

The following search returns a list of students who need an interpreter as well as the student's **Home Language**.

Student Information

No Photo Language First Learned Home Language Language To Home Language By Home Interpreter Needed

\*

### Creating Filters

The results of any search can be used to create a filter. When a filter is applied to a screen, only the records that match the filter can be seen in the screen. This can make scrolling through records much easier.

1. Select your search criteria. Click **Find** or hit enter. The following search will pull a list of all 10<sup>th</sup> graders.

Demographics Parent/Guardian Other Info Emergency Enrollment Enrollment History  
 Notes Additional Alerts

Last Name (Legal) First Name (Legal) Middle Name Suffix Student ID Grade Gender

10

2. Enter a name for the filter in the **Filter Name** field. To create the filter without immediately turning it on, uncheck the Make Active box.

**Find Result**

Query Filter

Open In Query Print Output Type PDF  Filter Name   Make Active

Students

Line	Last Name (Legal)	First Name (Legal)	Middle Name	Student ID	Grade
1	Anderson	Abigail		360137	10
2	Anderson	Ada		397657	10

3. Click **Save As Filter** to save the new filter.

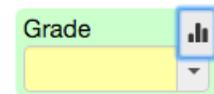
Once a filter has been created and is active, the filter icon turns yellow.



- Hover your mouse over the filter icon to deselect it or to select another filter and click **Save**.
- To turn a filter off, hover your mouse over the filter icon, uncheck the box next to the filter and click **Save**.
- To delete a filter, hover your mouse over the filter icon, and click **X** next to the filter. Click **Save**.

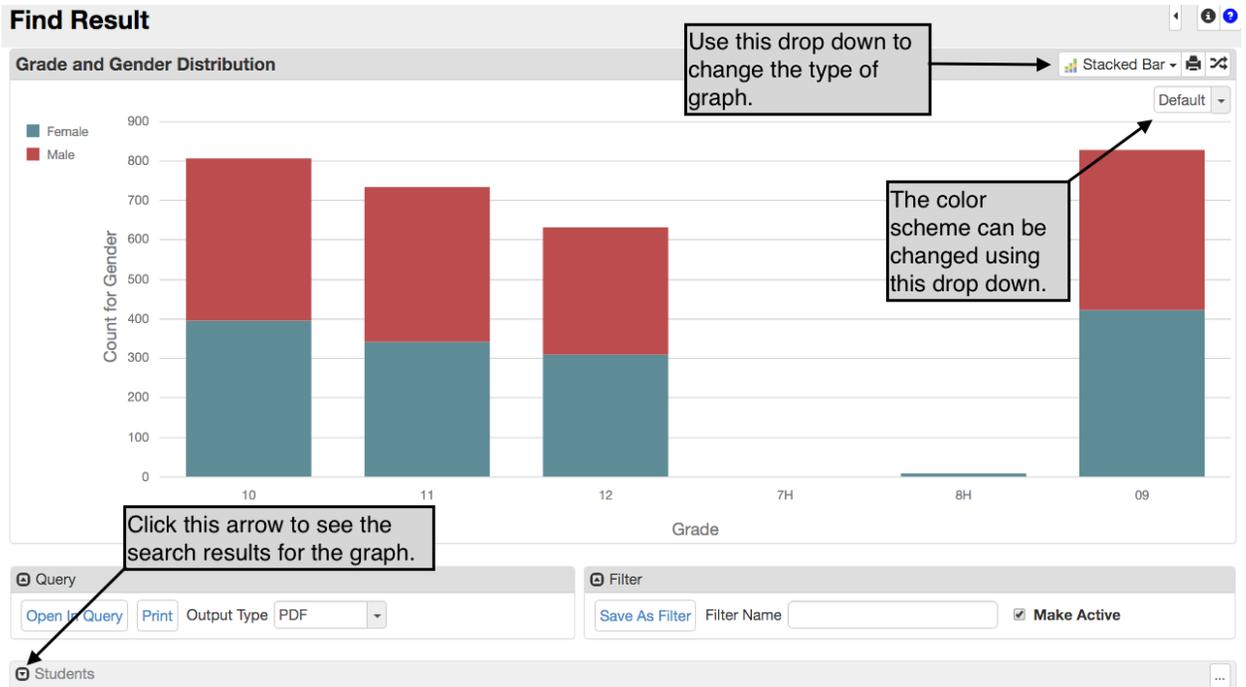
## Graphing Search Results

Graphs can be produced directly from Synergy based on search results. Hover over any text or drop down field to show the graph icon. Clicking it will highlight the field green.



Fields may be toggled on without choosing any value. Synergy will treat this as if you put \* into the field. You can also select values as you would for a normal search.

Once a field has been toggled into graph mode, the **Find** button changes to **Graph**. Click **Graph** or hit enter to display the graph along with the search result.



You can graph up to two types of data together. For instance, you could graph **Home Language** by **Grade**. You can add additional search criteria to a graph. For instance, you could graph **Home Language** by **Grade**, but only for students not born in the US (by adding that part as a search option).

Student Name: School: Homeroom: Teacher: Enrollments: Age:

Demographics | Parent/Guardian | Other Info | Emergency | Enrollment | Enrollment History | Classes | Documents

Last Name (Legal) | First Name (Legal) | Middle Name | Suffix | Student ID | Grade

**Student Information**

No Photo

Language First Learned | Home Language | Language To Home | Language By Home

AKA Last Name | AKA First Name | AKA Middle Name

Birth Date | Birth Place (City) | Birth State | Birth Country | Student Email

Deceased

Everything except United States is checked

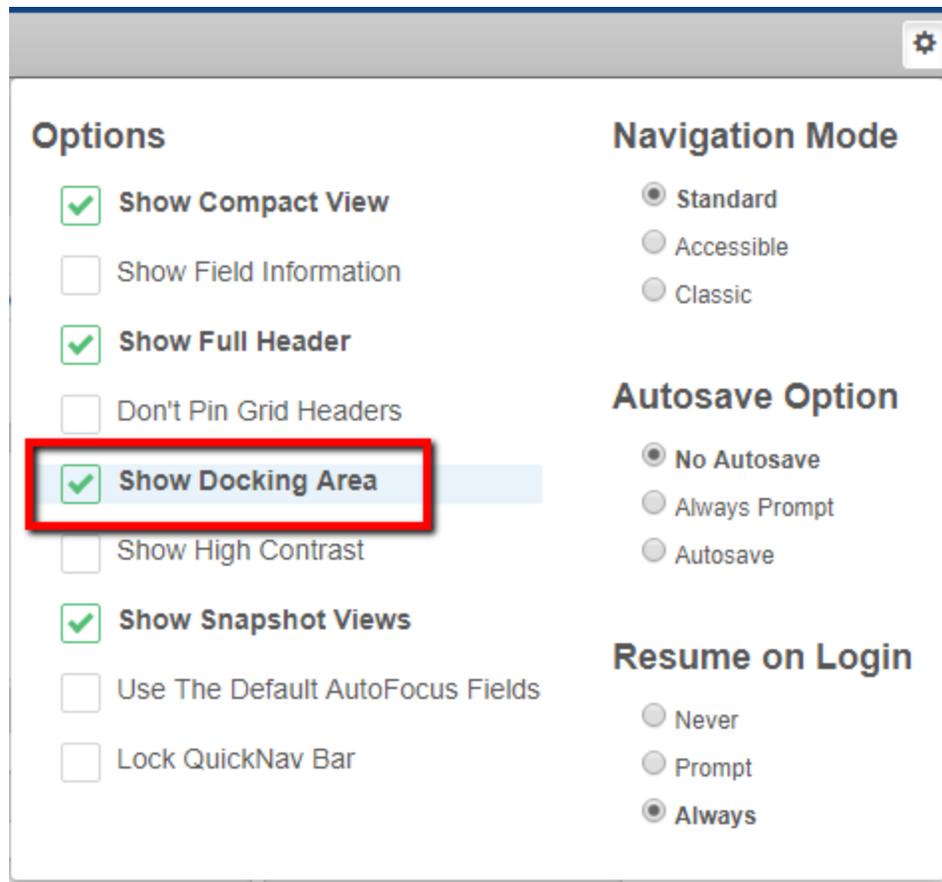
Graphing Home Language by Grade

## Docking Area

The **Docking Area** allows you to keep certain fields always visible. These fields can be combined from multiple screens, so you can have data together that is normally shown separately. For instance, in the following example the **Attendance Base Rate** comes from the **Period Attendance** screen while the **Primary Phone** field comes from the **Student** screen.

Attendance Base Rate:	Primary Phone:
<b>0.9766</b>	<b>541-791-6843</b>

1. First, make sure the **Docking Area** is enabled in your **Screen Options**. The **Docking Area** will be visible at the bottom of the screen.



2. To add a field to the **Docking Area**, hold control on your keyboard and click and drag the field to it. The field will turn orange while you drag it.

Days Present	Days Enrolled	Attendance Base Rate
167.0000	171	0.9766
<span>Attendance Intervention Log</span> <span>+ Add</span>		
<b>X</b>	<b>Line</b>	<b>Intervention Start Date</b>
		<b>Attendance Base Rate</b>
		0.9766

---

Attendance Base Rate: Primary Phone:

**0.9766**      **541-791-6843**

- To remove a field, hover over it and click the X

Attendance Base Rate: Primary Phone:

**0.9766** ➔ X **541-791-6843**

- Additional options that change the look of the dock can be accessed with the gear icon

Attendance Base Rate: Primary Phone:

**0.9766**      **X 541-791-6843**

Each type of record has its own docking area. So, you would see this student-related docking area on every student-related screen such as the **Student** screen or the **Health** screen, but you would not see it on a section-related screen like the **Section** screen. You could have a section-related docking area for those screens though.

## Changing Password

Go to **Synergy SIS > User Preferences > User Password and Preferences > Password** tab.

(This only works for non-LDAP districts. LDAP districts should contact District IT for directions on how to change their Active Directory password.)

## Synergy Reports

Reports in Synergy use a common **Report Interface**. The **Report Interface** uses five tabs: **Options**, **Sort/Output**, **Conditions**, **Selection** and **Advanced**.

### Options Tab

The options listed will vary from report to report. They allow you to customize the results, or to select certain records to include.

### Sort/Output Tab

Use this tab to change the **File Type** of the report. Reports can be exported as Excel, CSV or RTF files among others. You can also use this tab to change the sort order of the generated data.

### Conditions Tab

This tab can be used to run a report for students that meet set criteria. Click **+Add** to add a line to the grid. All conditions must have a **Condition**, **Operator** and **Value**. Multiple lines can be added. Please note that multiple lines act as AND conditions.

The following condition will run the report for student's whose last name begins with M – R.

Name: **Student Profile** Number: **STU201** Page Orientation: **Portrait**

Options   Sort / Output   **Conditions**   Selection   Advanced

Student + Add ...

X	Line	Condition	Not	Operator	Value
■	1	Last Name (Legal) (Student.LastName) ▾	▾	Greater or Equal ▾	M
■	2	Last Name (Legal) (Student.LastName) ▾	▾	Less Than or Equal ▾	R

### Selection Tab

This tab can be used to select specific students or groups of students to run a report for.

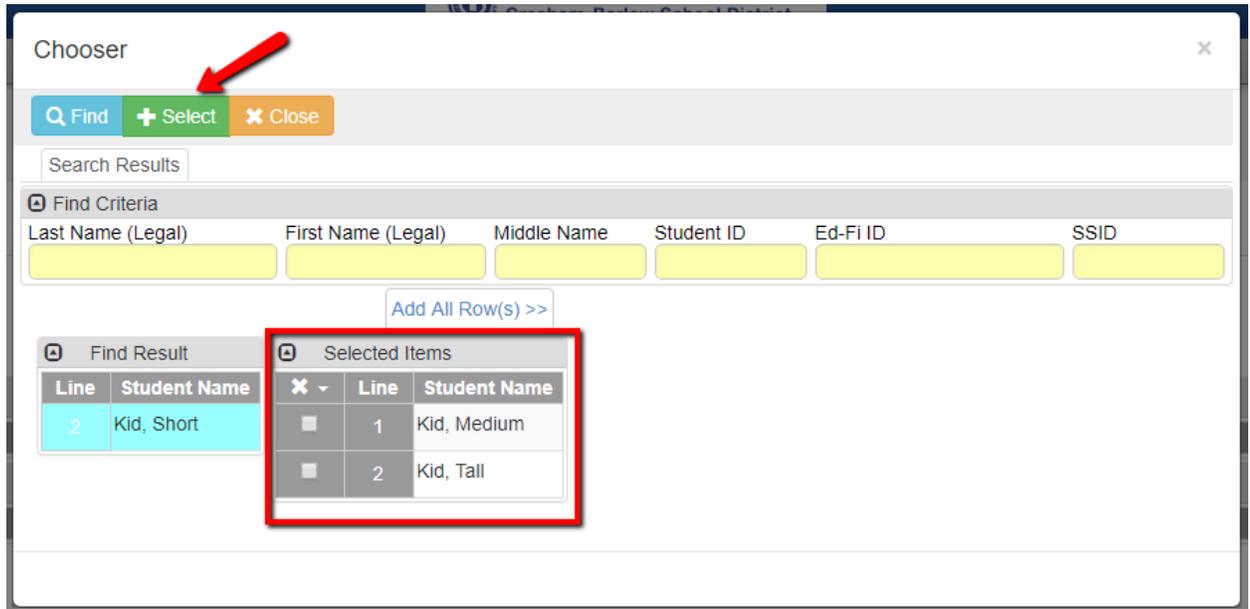
#### Object Type

For most reports, **Object Type** allows you to select particular students. (A few allow for other types of objects.)

1. Select **Student** from the **Object Type** drop down. Click **Select**. A chooser window opens.

Object Type  
 Student Select  
Clear

2. Use search criteria to find specific students. Click the appropriate line number to add them to your list of students to run the report for.

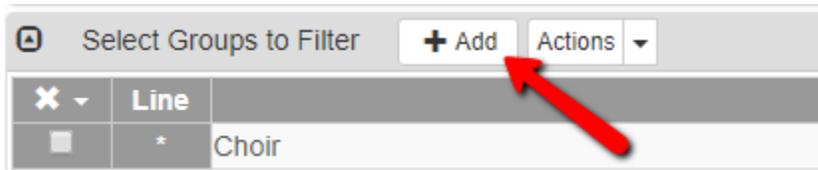


3. Click the green **Select** button once all students are added to the list.

### Student Groups

You can run the report for particular **Student Groups**.

1. Click the **+Add** button in the **Student Groups to Filter** grid. A line is added.



2. Select the appropriate **Student Group** from the drop down.  
 Multiple groups can be selected.

### *Counselor/Administrator Filters*

You can use these to run reports for students who have particular counselors or administrators. This is on the Selection tab.

Select Counselor Filter

Select Administrator Filter

### **Advanced Tab**

This tab can be used to schedule a report to run on a recurring interval.

#### *To schedule a report:*

1. Set the **Schedule Task** drop down to **Weekly**. (Other options are also possible).
2. The **Start Time** and **Start Date** will default to the current date and time.
3. You should also enter a **Stop Date** (or else the report will continue recurring forever).
4. Change the job to run every 1 week instead of every 4 weeks.
5. Use the checkboxes to set which days of the week the report should run.
6. The results of a report can be emailed to multiple users. Otherwise, you must log in to get the results. Click the arrow in the **Notification** area to set up email.
7. Enter the email address to send a notification of the report to. Multiple addresses may be if entered separated by a comma.
8. Check the **Include the result report as an attachment** to attach a copy of the results to the email.
9. On the Advanced tab, you have two options **Print/Schedule** and **Schedule**. If you want a report at the time you are setting this up, choose **Print/Schedule**, if you just want to setup the job, choose **Schedule**.

### Report **STU201: Student Profile**

Name: **Student Profile** Number: **STU201** Page Orientation: **Portrait**

Weekly  1:00 AM  08/07/2020  06/30/2021

This report will print next on **Monday, August 10th at 1:00 AM**

Schedule Task Weekly

Every  Week(s) on:

Monday  Saturday  
 Tuesday  Sunday  
 Wednesday  
 Thursday  
 Friday

Notification

Email the following address(es) upon completion  
 e.g. user@server.net, user2@server2.com

Include the result report as an attachment

External Interface

## Report Defaults

Options selected can be saved as the default for that report. These defaults are user specific.

Once you have made your desired report selections, click the **Save Default** button.

This can be undone at any time by clicking the **Reset Saved Default** button. Note that the **Reset Saved Default** button will be highlighted yellow once a user has saved a custom report default.

## Retrieving reports results

Recent reports run by a user can be retrieved from the Job Queue.

1. Go to **Synergy SIS > System > Job Queue > Job Queue Viewer**
2. Click the **Result** icon to get the report

Jobs in Queue							Show Detail	...
X	Line	Date Submitted	Completed	State	Job ID	Description	Result	
	1	03/28/2016 14:20:13	03/28/2016 14:22:29		STU201			
	2	03/25/2016 14:53:05	03/25/2016 14:53:11		QRY801			

Click the icon to open the results of the report.

## Running reports or processes on search results

You can run many reports or processes on a search result.

1. Perform a search so that you are on the **Find Result** screen
2. Click the **Actions** button

**Find Result**

Actions Open In Query

Query Filter

Print Output Type PDF Save As Filter

Filter Name

Make Active

Line	Last Name (Legal)	First Name (Legal)	Middle Name	Student ID	Ed-Fi ID	SSID
1	Kid	Medium		626638		12318205
2	Kid	Short		548470		11770147
3	Kid	Tall		756666		18913156

3. Choose the report or process you want to run for the students in your search results

Actions Open In Query

Reports Processes

ATD202: Daily Attendance Minutes Profile  
 ATD403: Daily Absent List  
 ATD404: Daily Tardy List  
 CNF201: Student Conference Profile  
 FDP201: Student Fee Profile  
 FDP402: Student Fee Collection List  
 FDP403: Student Fee Refund Needed List  
 FDP405: Fee Code Detail by Payment Method  
 FDP412: Fees Collected Detail  
 FDP418: Student Fee Refund Paid List  
 FDP601: Fees Collected Summary  
 FDP602: Fee Code by Payment Method Summary

Locker Mass Assignment  
 Mass Assign Counselor / Administrator  
 Mass Assign Course Requests  
 Mass Assign Fees  
 Mass Assign House And Team  
 Mass Assign Sections  
 Mass Assign Student Groups  
 Mass Assign Track  
 Mass Change Attendance Definition  
 Mass Email  
 Mass Update Student Conference

4. A report interface window will pop up with an icon showing you are running the report for your find results

**Report STU201: Student Profile**

Print Save Default Reset Saved Default Email Me

Name: **Student Profile** Number: **STU201** Page Orientation: **Portrait**

Options Sort / Output Conditions Selection **Advanced**

Query Results

Line	Last Name (Legal)	First Name (Legal)	Middle Name	Student ID	Ed-Fi ID	SSID
1	Kid	Medium		626638		12318205
2	Kid	Short		548470		11770147
3	Kid	Tall		756666		18913156

Select Groups to Filter + Add Actions

Select Counselor Filter

Select Administrator Filter

5. Choose any settings you want, and then click **Print** to run the report

Some screens have the action option so you can run it directly from the main screen, in this case for a particular Student

**Student**

Menu Print Search Save Undo + Add X Delete

Student Name

Demog Last Name

**Reports**

- ATD201: Daily Attendance Profile
- ATD202: Daily Attendance Minutes Profile
- ATD203: Daily Attendance By Week
- ATD204: Daily Attendance Totals
- ATD402: Daily Attendance List
- ATD403: Daily Absent List
- ATD404: Daily Tardy List
- ATD405: Daily Perfect Attendance List
- ATD407: End Of Year Attendance List

**Processes**

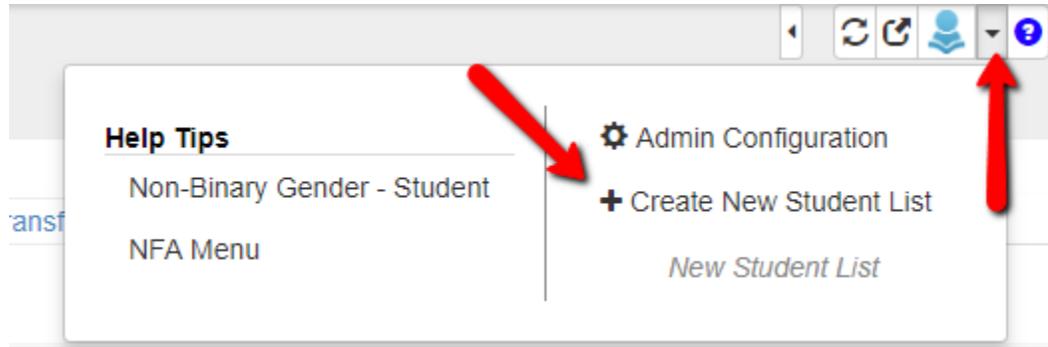
- Locker Mass Assignment
- Mass Assign Counselor / Administrator
- Mass Assign Course Requests
- Mass Assign Fees
- Mass Assign House And Team
- Mass Assign Sections
- Mass Assign Student Groups
- Mass Assign Track
- Mass Change Attendance Definition

### Running reports or processes on a saved list

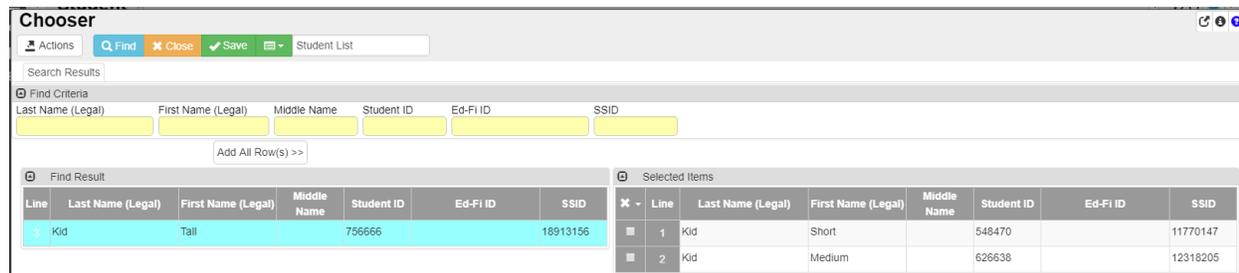
You can create a saved list of students, and then run reports or processes on them.

### Create the list

1. To create a list, navigate to the **Student** screen and click the down arrow icon in the upper right-hand corner



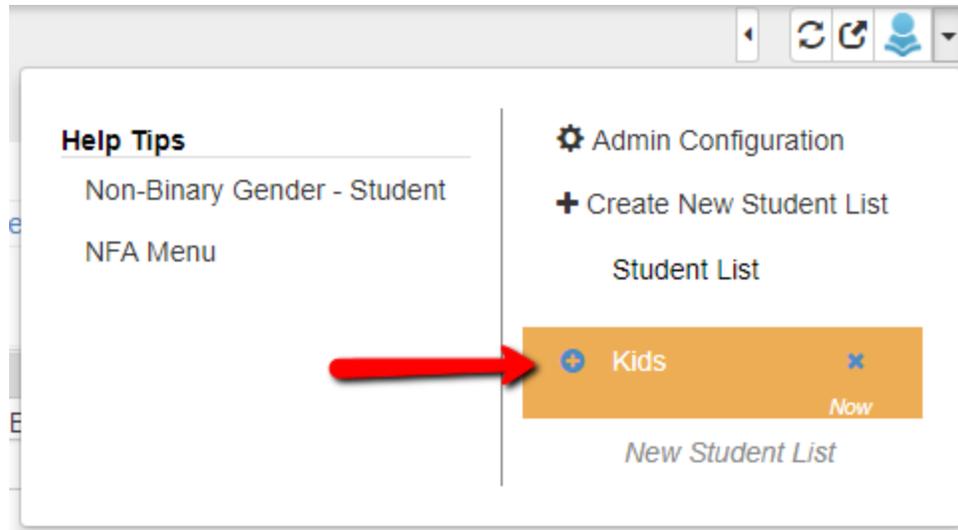
2. Click the **+Create New Student List** button
3. Use the **Find Criteria** area to locate students and move them to the **Selected Items** area to include them in your list



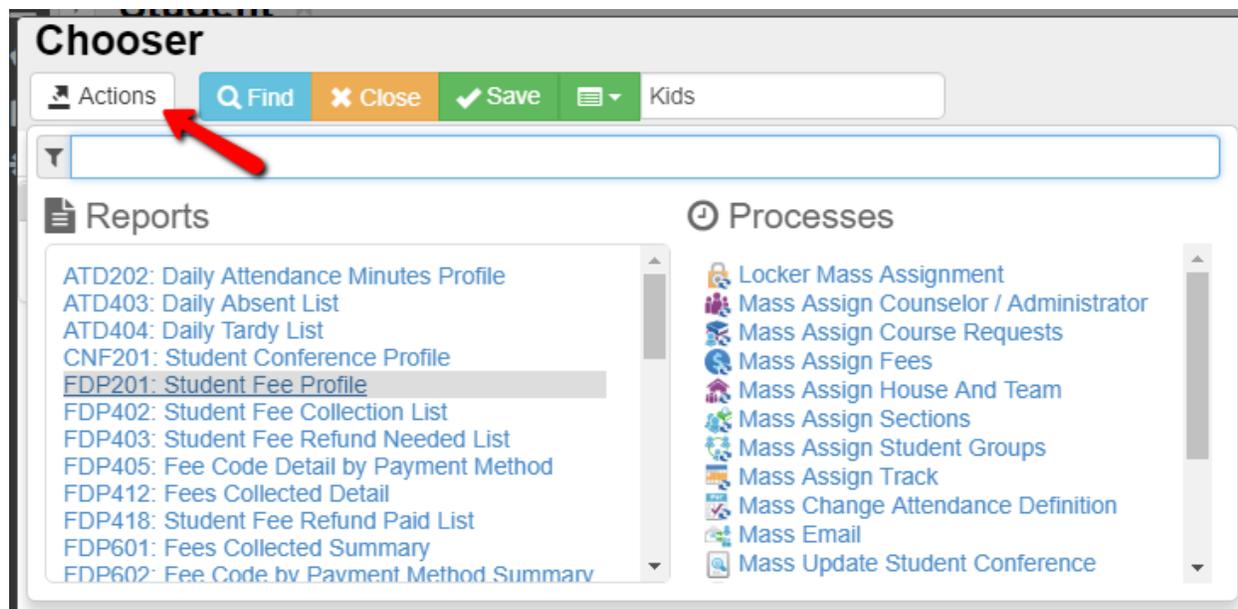
4. Give your list a name in the **Student List** textbox
5. Click **Save**

### Run reports or processes on the list

1. First open the list by selecting it  
(if you just created the list and it is not visible, leave the **Student** screen and return to it and it will appear)



2. In the Actions menu, choose the report or process you want to run for this list



3. A report interface window will pop-up with an icon showing you are running the report for your list.

**Report STU201: Student Profile**

Print Save Default Reset Saved Default Email Me

Name: **Student Profile** Number: **STU201** Page Orientation: **Portrait**

Options Sort / Output Conditions Selection **Advanced**

Query Results

Line	Last Name (Legal)	First Name (Legal)	Middle Name	Student ID	Ed-Fi ID	SSID
1	Kid	Medium		626638		12318205
2	Kid	Short		548470		11770147
3	Kid	Tall		756666		18913156

Select Groups to Filter + Add Actions

X Line Student Group

Select Counselor Filter

Select Administrator Filter

4. Choose any settings you want, and then click **Print** to run the report

Choosing a process works largely the same way.