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CONVENTIONS USED IN THIS GUIDE

**Bold Text** - Indicates a button or menu or other text on the screen 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. Please disable any pop-up blockers (also known as pop-up ad blockers) on the system before logging into any Edupoint product.
The Navigation Tree (also called PAD Tree) lists all screens or reports to which the user has access. It is located on the left side of the Content Area. Synergy SIS may be navigated directly from the Navigation Tree.

The statement “Navigate to Student > Setup > District Groups” means:

1. Click if the Navigation Tree is not visible.
2. Click Synergy SIS.
3. Click Student.
4. Click Setup.
5. Click District Groups.
Chapter One: OVERVIEW

This chapter covers the following topics:
  ► Overview of Query and Reporting
OVERVIEW OF QUERY AND REPORTING

Synergy SIS offers numerous **pre-defined reports** that can be printed. Each report can also be customized at the time it is printed. Almost every report has a set of options that are specific to that report. Each of these report-specific options is outlined in the Synergy SIS guide relating to the report. This guide explains how to use the options that are common to all reports in Synergy SIS.

Once jobs have been submitted, such as reports or processes like the New Year Rollover, their status is listed in the Job Queue Viewer and the Job Q Adm Viewer. The Job Queue Viewer lists all of the jobs that have been submitted by the user currently logged in to Synergy SIS, where the Admin Viewer lists all jobs regardless of user. Both of these screens are covered in later in this guide.
Beside the included reports, Synergy SIS offers several ways to create custom reports. This guide shows how the Find Mode function on each screen can act as a quick report writer. It also covers the Query screen and the various types of reports it can create.

![Query Screen](image1.png)

**Figure 1-3 Query Screen**

When users create queries that might be useful for all Synergy SIS users, they can nominate them to be shared with everyone as public queries. The public queries can be managed and reviewed using the Query Admin screen.

![Query Admin Screen](image2.png)

**Figure 1-4 Query Admin Screen**
Synergy provides the ability to run select SQL queries on the Synergy database or another database and to view the query results within Synergy. This is done using the SQL Query screen.

Now that users can create reports and folders in the Navigation Tree (or PAD Tree) by saving queries as reports as outlined in this guide, the folder structure and report names in the User-Defined folders (UD PAD tree or User PAD Tree) can quickly become disorganized and chaotic. These folder and reports can be managed through the UD PAD Definition screen as outlined later in this guide.

SQL Server Reporting Services (SSRS) may be run in Synergy, as well, using the Add New SSRS Report screen, which is accessed from the Report Interface Change screen. These reports can be saved to the PAD tree like any other user-defined report. You can pass parameters to the SSRS query by adding fields to the SSRS report interface in Synergy.
In addition this guide provides examples of the reports available for Job Queue and outlines the security options available for the Job Queue Viewer, Job Q Adm Viewer, Query, Query Admin, SQL Query, and SQL Server Reporting Services screens.

**NOTE:** A user’s ability to create and save a report is subject to the security restrictions set up by their district.
Chapter Two: REPORTS

This chapter covers the following topics:

► Sort/Output Options
► Filter Report
► Filter by Student
► Schedule Reports
► District Report Options
► Report Groups
Synergy SIS offers numerous pre-defined reports that can be printed. Each report can also be customized at the time it is printed.

Almost every report has a set of options that are specific to that report. The report-specific options are listed on the **Options tab** of the Report Interface. Each of these report-specific options is outlined in the Synergy SIS guide relating to the report.

The options selected can be saved as the default options for that report by clicking **Save Default**. This only saves the selections on the Options tab, and these options are specific to each school and to the user. To remove the saved default settings, click **Reset Default**.

When **Print** is clicked, the report is not actually sent to a printer. When a report is printed, it is displayed on the screen as a PDF file. This PDF can then be sent to a printer or saved. Once Print is clicked, the **Job Status** screen pops-up.

From the Job Status screen, the report can be cancelled by clicking **Abort**. Clicking **Check Status Later** closes the Job Status screen, but the report and its results can still be screened from the Job Queue Viewer screen. When the report is finished, the Job Status screen closes and the report pops-up in a PDF Viewer.
SORT/OUTPUT OPTIONS

The options available on the Sort/Output tab of each report can change the order in which the data is sorted, and they can change the format of the printed report. Additional reports and mail merge documents may also be attached to the report to assist with mailings.

![Figure 2-3 Report Interface Screen, Sort/Output Tab](image)

To customize the sort/output options:

- The default file type for most reports is PDF, but reports can also be generated in the following formats by selecting them from the File Type drop-down list:

  **TIFF Image** – a graphics file
  **CSV** – a comma-separate values file
  **Excel** – a Microsoft Excel version 1997-2003 format file
  **HTML** – a web page in the standard Synergy SIS format
  **Rich Text** – a document file (basically Microsoft Word format)
  **Text File** – a plain text file with no formatting, in tab-delimited format
  **XML** – an extensible markup language file
• If **Prompt For Download** is checked, a prompt appears when the report is generated to either save or open the report.

![Figure 2-4 Report Download Prompt](image1)

• To display the word Confidential on the report, select where the Confidential label should appear on the report from the **Label Options** drop-down list. It can appear in the **Footer**, **Header**, or **Header & Footer**.

![Figure 2-5 Report Header, Confidential Label](image2)

![Figure 2-6 Report Footer, Confidential Label](image3)

If the report has been setup with a mandatory primary sort, this sort is displayed **Student Mandatory Sort Properties** box and cannot be changed.

The default **Sort** order is shown in the middle of the screen. The properties, or fields, listed are different for each report. The report is sorted by the order in which the properties are listed. For example, the report below is sorted first by the student’s last name, then by their first name.

![Figure 2-7 Default Sort Order](image4)

• To remove a sort property, check in the box in the X column and the property is immediately removed.

• To change an existing property, select the new property from the drop-down list in the **Sort By** column. The list of properties available for sorting is different for each report. The direction of the sort may also be changed by selecting it from the drop-down list in the **Sort Order** column. **Ascending** sorts from smallest to largest value or from A to Z. **Descending** sorts from largest to smallest, or from Z to A.

• To add a new property to be used to sort, click **Add**. Select the property to use from the **Sort By** column, and select the direction of the sort from the **Sort Order** column.
- For some reports, there is an option to select an **Additional Report To Run** from the drop-down list. This report will run in conjunction with the primary report. The three additional reports available currently are STU424 – Student Oldest or Youngest, STU802 – Student Mailing Labels and STU803 – Student Household Labels. The Student Oldest or Youngest report prints one mailing label per household with the information from either the oldest or youngest sibling. The Student Mailing Labels use the student’s mailing address, and the Student Household Labels use the parent’s mailing address. By running the labels in conjunction with the report, the labels are printed in exactly the same order as the report with exactly the same students. This makes it much easier to generate all the reports needed to complete a mailing.

![Figure 2-8 Additional Report To Run/Mail Merge Options](image)

1. A mail merge letter may be generated in conjunction with the report. As with the labels, this makes a mailing much easier to coordinate. To create a mail merge letter to be used, please refer to the instructions on creating mail merge letters in the Synergy SIS – *System Administrator Guide*. Once a letter has been created, select the letter from the **Merge Document** drop-down list.

2. Select the type of document to print from the **Merge Output Type** drop-down list. The merged document can be printed as either a **Word Doc** or **PDF**.

3. Select the language in which the document should be printed from the **Merge Language Property** drop-down. The language currently defaults to the **Home Language** of the student (as entered into the Student screen). When the merge document is printed, it looks up the language of the student and then looks to see if there is a mail merge letter saved in that language. If a mail merge letter is not available in the student’s language, the default language (generally English) is used.
FILTER A REPORT

Filtering a report limits the information included on the report to the records that match the filter, or condition. Most of the common criteria used to filter a report are listed on the Options tab of the report. To filter a report separately from the options available on the Options tab:

1. Click the **Conditions tab**.

2. Click **Add** to add a filter, and a new line is added to create a new Condition. A condition is like a mathematical formula. It looks at each record to be included in the report, and compares it to the condition. If it matches the condition, it is included in the report. A condition has three main parts: which property in the report to examine, the mathematical operation to use like Equal or Not Equal, and the value to use as the criteria. Written out, it would look like this:

   \[
   \text{Property} = \text{Value} \text{ or } \text{Property} \neq \text{Value}
   \]

3. Select the property to be used for the filter from the **Condition** drop-down list. The list of properties available is different for each report. The properties are generally items from the primary table of the report. For example, a report about students would list student properties such as the student’s language, birth date, city, etc. A report about sections would list section properties such as the section ID, course title, room number, etc.

   The name of the table from which the property is taken is listed in parenthesis after the name of the property. This is helpful when selecting properties that have the same name in more than one table. For example, Phone is used both in the physician records and in the student records.

   \[
   \text{Phone (Physician.Phone)} \quad \text{Phone (Student.PrimaryPhone)} \quad \text{Phone (StudentSchoolYear DropOffRespPhone)}
   \]

   \[\text{Figure 2-11 Property List}\]
4. Set the mathematical operation by using the Not and Operator columns together.
   Selecting Not from the drop-down list just adds a Not before the operator. For example,
   if the Operator is set to Equal To and Not is selected, the operation would be set to Not
   Equal To. The Operator can be set to one of the following:

   - **Contains** – the property selected must contain the value entered. For example, if
     Email was selected as the property and the value entered was yahoo, the report
     would list all students with an e-mail address that contained the letters yahoo
     anywhere (billy@yahoo.com, melissa@yahoo.com, etc.) If Not was added, it would
     list all e-mail address that did not have yahoo in it (george@gmail.com,
     sandra@hotmail.com, etc.)

   - **Equal To** – the property selected must be exactly the same as the value entered.
     For example, if Home Language was selected as the property and the value entered
     was English, the report would list all students whose Home Language was English. If
     Not was added, it would list all students whose Home Language was not English.

   - **Ends With** – the property selected must end with the value entered. For example, if
     the section ID were created with the Course and Period option and 01 was entered
     as the value for the section ID property in a report, the report would list all sections
     for period 01. If Not was added, the report would list all sections not in period 01.

   - **Greater or Equal** – the property selected must be greater than or equal to the value
     entered. For example, if Expected Graduation Year was selected as the property
     and the value entered was 2009, the report would list all students with an expected
     graduation year of 2009 or greater (2009, 2010, etc.). If Not was added, the report
     would list only students with an expected graduation year of 2008 or lower.

   - **Greater Than** – the property selected must be greater than the value entered. For
     example, if Expected Graduation Year was selected as the property and the value
     entered was 2009, the report would list all students with an expected graduation
     year of 2010 or greater (2010, 2011, etc.). If Not was added, the report would list
     only students with an expected graduation year of 2009 or earlier.

   - **In List** – the property selected must include one of the values entered in the Value
     field. List values are entered in the Value box separated by a comma. For example,
     if Grade was selected as the property and the values entered were 1, 2, 3, the report
     would list all students in grades 1, 2, or 3. If Not was added, the report would list
     students were not in grades 1, 2, or 3.

   - **Less Than or Equal** – the property selected must be less than or equal to the value
     entered. For example, if Age was selected as the property and the value entered
     was 15, the report would list all students 15 or younger (15, 14, etc.). If Not was
     added, the report would list only students older than 15 (16, 17, etc.)

   - **Less Than** – the property selected must be less than the value entered. For
     example, if Age was selected as the property and the value entered was 15, the
     report would list all students younger than 15 (14, 13, etc.). If Not was added, the
     report would list only students younger than 15 (14, 13, etc.)

   - **Starts With** – the property selected must start with the value entered. For example,
     if Enter Code was selected as the property and the value entered was R, the report
     would list all students whose enter code started with R (R1, R2, R3, etc.). If Not was
     added, it would list all students with enter codes that did not’ start with R (E1, E2,
     etc.)
Chapter Two

TIP: When using dates in a condition, a full date must be entered as a value such as 9/1/2009. To filter a date, the most useful operators are Equal To, Greater Than, Greater Than, or Equal, Less Than, or Less Than or Equal. For example, to list all students who have the same enter date, Equal To would be used. To list all students who entered on or before a date, Less Than or Equal would be used. To list all students who started after a specific date, use Greater Than.

5. Enter the Value to be used for the condition. The value can be numbers or letters, and it is not case-sensitive. To use a date, enter it in MM/DD/YY or MM/DD/YYYY format. When using a value from a drop-down list, enter either the Code or its Description. For example, for Gender enter either M or Male. When entering a value for a property with a checkbox, use Y for checked or N for not checked.

6. **Multiple conditions** may be added. For a record to be printed, it must match all of the conditions entered.

7. To remove a condition, check the box in the X column in front of the condition.

![Figure 2-12 Report Interface Screen Conditions Tab](image_url)
FILTER BY STUDENT OR STUDENT GROUP

If the report is a student-based report, the specific students, or student groups to be included on the report may be selected using the Selection tab. If the report is not a student-based report, this option is not available. To select which students should be included on the report:

1. Click the Selection tab.

2. Select Student from the Object Type drop-down list.

3. Click Select to add students to the list of students included in the report. The Chooser screen displays.

4. Enter the information known about the students to be assigned in the Find Criteria section, and click Find at the top of the screen. The students may be found using any part of the criteria, including last name, first name, middle name, and perm ID. Partial information may be used as well, such as the first letters of a last name or first name.

5. Once Find is clicked, a list of students that match the criteria appears in the Search Results section. Click the name or names of the student(s) to add the student(s) to the Selected Items section. Multiple searches may be made until all students have been found and added to the Selected Items section. Multiple rows may be selected by holding down the Ctrl key and clicking on all the students needed. To remove a student from the Selected Items section, click the box under X column. To add all of the students found in the Search Results list to the Selected Items section, click Add All Row(s).

Figure 2-13 Report Interface Screen Selection Tab
6. Once all of the students to be assigned have been selected, click **Select** at the top of the screen to add the students to the report. The Chooser screen closes and the selected names display.

7. To remove specific students from the report, check the box in the X column next to the student’s name. To remove the entire list of students as criteria for the report, click **Clear**.
To filter by a student group,

1. Click **Add** on the Select Groups to filter grid. A blank line displays.
2. Select the **Student Group** from the drop-down.

Student Groups may be selected in addition to individual students or alone.
To filter by counselor,

1. Click **Select Counselor Filter** drop-down and select.

A counselor may be selected in combination with individual students, student groups or alone.
SCHEDULE REPORTS

By default, when a report is printed it runs once and the options selected on all of the tabs of the interface are not saved. Reports can be created to run on a scheduled basis on the Advanced tab. When reports are scheduled, they run every time with the options selected on all of the tabs of the report interface at the time the report was first run. They also run based on the year and school in focus at that point.

When a report is scheduled, a job is created in the Job Queue to run the report on the first scheduled time & date. When the report is run at the first schedule time & date, it creates a new job to run at the next scheduled time & date. That job then schedules the next run, and so on. To stop a scheduled report, it must be deleted from the Job Queue. This stops the report from running ever again.

To schedule a report:

1. Select all of the options to be used in the report on the various tabs of the Report Interface.
2. Click the Advanced tab.
3. Select the frequency with which the report should be run from the Schedule Task drop-down list. Reports can be set to run Once, Daily, Weekly, or Monthly.
4. For each type of schedule, enter the time the report should run in Start Time. Just enter the time numerals. The system formats the field once entered, i.e., 900 formats as 9:00 AM. The default is the time the report was created.
5. Enter the Start Date (MMDDYY) or click  and select date. If needed, enter the Stop Date (for example, the date of the end of the school year). The Start Date defaults to the date on which the report was created.
• For **Daily** reports, enter the number of days in between each report run. For example, to run a report every day, enter the number 1. If 7 is entered, the report basically runs once a week.

![Figure 2-18 Scheduling a Daily Report](image)

• For **Weekly** reports, enter the number of weeks in between each report run. To run the report every week, enter 1. If 4 is entered, the report basically runs once a month. Also, check the boxes next to the days of the week on which the report should run. For example, a report could be scheduled run every week on Monday and Wednesday and Friday.

![Figure 2-19 Scheduling a Weekly Report](image)

• For **Monthly** reports, choose whether to run the report based on the **Day of the Month** such as the 1st or the 20th, or to run it based on a weekday, such as the second Tuesday of the month. Also, check the boxes next to the months on which the report should be run.

![Figure 2-20 Scheduling a Monthly Report](image)
6. Once the schedule has been set, click **Print** at the top of the screen to save and schedule the report.

The **Job Status** window displays. The job will not go to the top of the queue and print until the scheduled date and time, so close the Job Status screen.

![Figure 2-21 Job Status Screen](image)

**CAUTION:** When reports are scheduled, they run every time with the options selected on all of the tabs of the report interface and the year and school in focus at the time the report was first run. These values cannot be edited after the report is first run. Be sure to setup the report exactly as it should be run each time before clicking Print. To change a previously scheduled report, the report must be deleted from the Job Queue and recreated.
After the report is run at its scheduled time, the results of the report can be opened and printed from the Job Queue. However, the users would need to remember to open up the Job Queue and get the report at each scheduled instance. To remind the report users that the report has been run, notifications can be sent via e-mail.

**REFERENCE:** Before sending notifications by e-mail, Synergy SIS must be configured to send e-mail via the local e-mail server. For instructions on how to configure e-mail, please refer to the section on System Configuration in the *Synergy SIS – System Administrator Guide*.

To notify users via e-mail when a scheduled report is run:

1. On the Advanced tab, click **Maximize** to expand the Notification section of the tab.

![Figure 2-22 Advanced Tab, Report Interface](image)

2. In the box provided, enter the **email addresses** of the users separated by commas. The email address must be the full formatted e-mail address, such as `user@domain.com`.

![Figure 2-23 Setting Up Notifications](image)

3. To include the report in the e-mail so users do not have to go to the Job Queue to print it, check the box labeled Include the **Result Report as an Attachment**.

4. Click **Print** at the top of the screen to schedule the report & notifications.

Reports can be saved as a file to a location on a server. This function can be used to export data from Synergy SIS that can then be imported or used in another program. To set the report to save to a file:

1. On the Advanced tab, click **Maximize** to expand the External Interface section of the tab.
2. In the box at the top of the section, enter the full UNC path and file name such as `\SERVER\Folder\FileName.txt`. To include the date and/or time in the file name to create a unique file name, include `{Date}`, `{Time}` or `{DateTime}` in the name of the file. For example, `File{Date}.txt` will be saved as `File20090703.txt`.

3. If another program should be started each time the report is saved to this file, enter the full UNC path and filename of the program in the box at the bottom of the section such as `\SERVER\Folder\BatchFile.bat`. Information about the saved file can be passed to the program by using `{File}`, `{Path}` or `{PathFile}` after the name and location of the program separated by a space or other commands, as `\SERVER\Folder\BatchFile.bat {Path}`.

4. Click **Print** at the top of the screen to save the file. It can be set to a schedule just as any other report.
DISTRICT REPORT OPTIONS

At the bottom of each report, a footer displays with the date, time, and name of the person who printed the report. In addition, the name of the district and the page number out of total page numbers display.

Districts can create a custom message that displays just above the standard footer, decide to show or not show the name of the person who printed the report, and determine how unlisted phone numbers display on reports.

NOTE: The custom message functionality is not available on the following reports: STU210, IDS210, and STU602.

To apply any of these options to a report,

1. Navigate to Synergy SIS>System>Setup>District Setup screen and select the Reports tab.
2. Select the reports that will display any of these options using Chooser.

To setup a custom footer that displays above the standard footer,

1. Enter the custom message in the Footer Boiler Plate box.
2. Check Show Footer Boiler Plate for each report to display the message.
3. Click **Save** at the top of the screen.

To mask unlisted phone numbers,

3. Select the option from the drop-down.

4. Click **Save** at the top of the screen.

To select to display or not display the person who printed the report,

3. Select the option from the drop-down.

---

**CAUTION:** Users may override this setting for their printed reports on the User Password and Preferences screen. Report Preferences tab.
REPORT GROUPS

Occasionally, there may be a need to print several reports for a student or group of students. For example, when a student withdraws there may be several reports that the district would like to print out. Rather than printing each report individually, a report group can be created and saved to streamline this process. To create a report group:


3. Enter the Name of the report group, and a Number. The number will be prefaced by UD- automatically when saved, as the report group is saved with the other user-defined reports in the PAD tree.

4. Use Chooser to select the reports to be included in the group.
5. Choose the report interface used for the group from the **Select the Primary Report Associated with This Report Group** drop-down list.

6. Select the **Output Type** from the drop-down. A **Combined** group prints one PDF with all of the reports, where a **Separate Files** group generates one PDF for each report in the group.

7. Enter the folder in the district PAD tree where the report group should be saved in the **Location of the Report Group in the PAD Tree** box.

8. Click **Save** at the top of the screen. Saved groups appear in the district PAD Tree as shown below.
When printing the report group, the group will use the Report Interface of the selected primary report. Be sure this report has the options needed for all other reports in the group.

To edit or delete a report group:

2. Use Find or Scroll to find the group.

![Completed Report Group](image)

- To change the Options, click in any of the boxes and make a new selection.
- To remove a report from the group, check the box in the X column, click Save.
- To delete the entire group, remove all reports in the group first. Then click Delete at the top of the screen.
- To change the name and/or number of the group, click Menu and select the Edit ReportDef Data option.

![Report Group Menu Options](image)

- The Name and Number boxes turn white and the text can be edited. Make the changes, and then click Save at the top of the screen.
Chapter Three: 
**QUERY USING FIND**

This chapter covers the following topics:

- Query Using Find
- Charts
- Print as Report
- Create a Query
- Create a Filter
QUERY USING FIND

In addition to locating the exact record to view on screen, the Find Mode function can also act as a quick report writer. Find Mode works in any screen in Synergy SIS. To use Find Mode to produce a quick report:

1. Adjust the **focus** to select the school and year to be included on the report. Also, select whether to include active or inactive students. The focus is indicated in the top right-hand corner of the screen.

![Figure 3-1 Checking Current Focus](image1)

2. Go to the **screen** with the information for the report.

3. If the screen is not in Find Mode already, click **Find Mode**. When a screen is in Find Mode, all of the fields are yellow.

4. To include a field in the report, enter an asterisk * in the field. (First, Middle and Last Names and Perm ID are included in all queries by default when launched in this manner, and do not require an asterisk *.)

In addition, fields can also be selected on multiple tabs before clicking Find to create reports that are more complex.

![Figure 3-2 Student Screen Demographics Tab](image2)

![Figure 3-3 Student Screen Other Info Tab](image3)
5. To filter the report, enter the **criteria** by which to filter in the appropriate field. For example, to show only students with a Home Language of Spanish select Spanish from the Home Language drop-down list.

6. In addition to selecting values from drop-down fields to use as criteria, any field may be filtered by entering **text or numbers** into the field. To exactly match the text entered, just enter the text or numbers.

7. To match by the starting portion of the field, enter the first part of the text to match followed by the asterisk (also known as a **Starts With** criteria). For example, entering d* in the Counselor field lists all of the students who have a counselor whose last name starts with d.

8. To match the last part of the field, enter the asterisk followed by the text (*di, for example). This is also known as an **Ends With** criterion.

9. To find the text in any part of the field, enter an asterisk followed by the text followed by another asterisk (*dia*, for example). This is called a **Contains** criterion.

10. **Operators** may also be used to filter the information included in the Find results. Operators include =, <, >, or <> (for not equal). This is particularly useful for date fields. For example, entering >=9/1/09 in the Enter Date field would return all students whose enter date is greater than or equal to 9/1/2009. Operators can be used with numbers, dates, or text.

11. When all of the criteria and fields have been selected, click **Find** to view the results. The Find results pop-up in a new windows. The results can then be printed as a report, saved as a filter, or opened in a query as explained later in this chapter.
CHARTS

Find Mode can also produce some basic charts based on the fields on the screen.

1. Hover your mouse near the right corner of a field to reveal the graph icon.

2. Click the icon. The field is surrounded in green.

3. Select another field, if desired, in the same fashion. A field may be selected from any two tabs of the same screen but only two fields may be selected at one time.

4. Click Graph at the top of the screen. The graphs open in the Find Result screen.

Once open, graphs may be customized by type, color, and results using the buttons in the right corner. If desired, the graph may be printed, as well.

![Figure 3-6 Find Result Screen](image-url)
NOTE: The charts described below may only be created when v9.0 is selected from the System>User>User>Security Settings tab, Other grid, Navigation drop-down,

Or similarly, for a particular user group on the Mass Change User Group Members screen located at System>User>User Groups, Menu selection.

Four types of charts are available – a pie chart, a bar chart, a wave chart, or a circle chart.

To print a pie chart:

1. Adjust the focus to select the school and year to be included on the report. Also, select whether to include active or inactive students. The focus is indicated in the top right-hand corner of the screen.

2. Go to the screen with the information for the report.

3. If the screen is not in Find Mode already, click Find Mode. When a screen is in Find Mode, all of the fields are yellow.

4. Enter a ^ (caret character) in the field to chart.
5. Click **Find** and the chart pops-up in a new window.

![Figure 3-9 3D Pie Chart](image)

To print a **bar chart**:

1. Adjust the **focus** to select the school and year to be included on the report. Also, select whether to include active or inactive students. The focus is indicated in the top right-hand corner of the screen.

2. Go to the **screen** with the information for the report.

![Figure 3-10 Student Screen](image)

3. If the screen is not in Find Mode already, click **Find Mode**. When a screen is in Find Mode, all of the fields are yellow.

4. Enter a | (bar character) in the field to chart.

5. Click **Find** and the chart pops-up in a new window.

![Figure 3-11 Bar Chart](image)
To print a **wave chart**:  

6. Adjust the **focus** to select the school and year to be included on the report. Also, select whether to include active or inactive students. The focus is indicated in the top right-hand corner of the screen.  
   - Go to the **screen** with the information for the report.

   ![Figure 3-12 Student Screen](image)

   - If the screen is not in Find Mode already, click **Find Mode**. When a screen is in Find Mode, all of the fields are yellow.
   - Enter a ~ (tilde character) in the field to chart.
   - Click **Find** and the chart pops-up in a new window.

![Figure 3-13 Wave Chart](image)

To print a **circle chart**:  

7. Adjust the **focus** to select the school and year to be included on the report. Also, select whether to include active or inactive students. The focus is indicated in the top right-hand corner of the screen.  
   - Go to the **screen** with the information for the report.
If the screen is not in Find Mode already, click **Find Mode**. When a screen is in Find Mode, all of the fields are yellow.

- Enter a $ (dollar sign character) in the field to chart.
- Click **Find** and the chart pops-up in a new window.
**PRINT AS REPORT**

Once the results of the Find are listing the desired records, the results can be printed as a report by clicking **Print**.

![Figure 3-16 Find Results](image)

By default, the results print as PDF file to the screen. The resulting file can then be sent to the printer or saved. To change the results to a different format, select the type of file from the **Output Type** drop-down list. The possible file types are:

- **TIFF Image** – a graphics file
- **CSV** – a comma-separate values file
- **Excel** – a Microsoft Excel version 1997-2003 format file
- **HTML** – a web page in the standard Synergy SIS format
- **PDF** – a Portable Document Format for Adobe Reader
- **Rich Text** – a document file (basically Microsoft Word format)
- **Text File** – a plain text file with no formatting, in tab-delimited format
- **XML** – an extensible markup language file
CREATE A QUERY

The results of the Find can be filtered further using the Query screen for additional customization. To open the results in a query, click **Open in Query** at the top of the Find results.

![Find Result](image)

**Figure 3-17 Find Results**

The results open in the Query screen. For more information about how the query can be customized, please see Chapter Four of this guide.
CREATE A FILTER

Find Mode can also be used to create a filter to be applied to a screen. 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. To save the Find results as a filter:

1. Enter a name for the filter in the Filter Name.

2. To turn the filter on immediately, check the Make Active box.

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.
This chapter covers the following topics:

- Parts of a Query
- Columns
- Conditions
- Sort
- Labels
- Save a Query
- Save a Query as a Report
- Open a Query
- Delete a Query
A query is a way to define a custom report in Synergy SIS. A query can pull together any information in Synergy SIS, and queries can be saved so that they can be run over and over again. They can also be saved as reports so they can be scheduled.

Navigate to **Synergy SIS>Query>Query**.

**PARTS OF A QUERY**

There are three main parts to a query: **Columns**, **Conditions**, & **Sort**. Each of these parts is represented by a tab on the Query screen. The fourth tab, **Type in Query**, is where a query can be entered by typing instead of using the first three tabs to guide the query construction. Typing a query is only for advanced users who are familiar with the conventions of the query language in Synergy SIS.

- **Columns** tab is where the pieces of information that will be included in the query are selected. It can also customize how the information is displayed. It is called Columns, as the information selected will appear in the output report in columnar format.

- **Conditions** tab filters the information to be included in a query. If, for example, student information is selected on the Columns tab, the Conditions tab can define which students’ information is included.

- **Sort** tab defines the order in which the information is presented.
COLUMNS

The first part of creating a query is to choose what information should appear in the final report. Any of the information contained in Synergy SIS can be included in a query. Selecting the information for the query is done on the Columns tab. To select what information should be included in the query:

1. In the Business Object grid, select Add Root Business Object.

Select a Business Object window opens.

2. There is a frequently used list of business objects, or tables, such as Student, Course etc. Below that is the list of Primary business objects. Select the business object to be used in the query by clicking on the name of the object.
The selected object displays on the left, and the Properties associated with the selected business object display on the right. Properties are pieces of information about the business object selected, such as Birth Date or Last Name for the Student object.

3. To select a property to be included in the query, click the name of the Property. The list of properties can be scrolled through on the right. Once a property is selected the name turns blue and the property displays below on the Property Overrides grid.

4. Click to select the business object, or click the name to select the property, too.

5. Click another property for the object to add it to the query. Continue adding properties until all the needed information is shown in the Property Overrides grid.
6. At this point, a basic query has been created. Click **Execute**, at the top of the screen, to see what the query will look like.

7. The query displays in the format selected (the default is HTML). If the information is correct, the query can be saved or further customizations can be made.

**Execute** can be run as many times as needed to test the query. To clear the query and start over, click **Clear All** at the top of the screen.

**REFERENCE:** For instructions on how to use Show All Business Objects, Show All Properties, and the Add Literal button, please see the Chapter Five: Advanced Queries in this guide.

Some simple customizations can be made to the display of the query in the **Property Overrides** grid.

- To **delete** a property from the report, click in the box in the **X** column next to the property. The property is instantly removed from the list.

- To change the heading of the column in the report, enter the new heading in the **Label Override** column. The default heading is the name of the property, such as Perm ID or Gender.

- To change the order of the columns, enter the new order in the **Order** column by numbers. If two properties have the same number, order will default to alpha by Name.
• To change the width of each column, enter the new width in inches in the **Width** column.

• To hide a property so that it used in the query calculation but it is not displayed on the report, check the **Hide** box. Generally, this is used for queries that are more complicated in order to hide the link fields, as outlined in Chapter Five. However, it can be used so that a property used for sorting or filtering does not appear on the report.

• Each of the properties listed can be used to group the records with same value in the property together. To group on a property, select the Group # from the **Group** drop-down list. Since multiple groups may be created, Group 1 is the first property to group, Group 2 is the second, etc. When a property is grouped, it is removed from the columns and placed at the top of each page on which the records of the group is listed.

<table>
<thead>
<tr>
<th>Gender</th>
<th>Last Name</th>
<th>First Name</th>
<th>Perm ID</th>
<th>Phone</th>
<th>Birth Country</th>
</tr>
</thead>
<tbody>
<tr>
<td>Male</td>
<td>Abigail</td>
<td>Billy</td>
<td>905433</td>
<td>480-555-1214</td>
<td>United States of America</td>
</tr>
</tbody>
</table>

**Figure 4-7 Grouped By Gender**

**NOTE:** For groups to work correctly, the query must be sorted in the same order as the groups. For more information about sorting, please see the section **Sort** later in this chapter.

• If grouping the records, a break should be inserted into the report to allow the group information to display. While the group information does appear at the top of the page, it will be rare that the groups split exactly at the end of the page. Without the break, the records would still be grouped, but the group would not appear on the report. The **break** can be by Group or by Page.

  o The **Group break** inserts information about the group and repeats the header information, but does not start a new page at the start of each group.

<table>
<thead>
<tr>
<th>Australia, Commonwealth of</th>
<th>Last Name</th>
<th>First Name</th>
<th>Gender</th>
<th>Perm ID</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laurence</td>
<td>Jonathan</td>
<td>Male</td>
<td>167792</td>
<td>480-555-9641</td>
<td></td>
</tr>
<tr>
<td>Belgium, Kingdom of</td>
<td>Amanda</td>
<td>Female</td>
<td>950761</td>
<td>480-555-9668</td>
<td></td>
</tr>
</tbody>
</table>

**Figure 4-8 Group Break**

  o The **Page break** starts a new page at the start of each new group in addition to repeating the group and header information.

<table>
<thead>
<tr>
<th>Hope High School</th>
<th>Year: 2009-2010</th>
<th>Report: QRY801</th>
</tr>
</thead>
<tbody>
<tr>
<td>Query Result Portrait</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Birth Country</th>
<th>Last Name</th>
<th>First Name</th>
<th>Gender</th>
<th>Perm ID</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia, Commonwealth of</td>
<td>Laurence</td>
<td>Jonathan</td>
<td>Male</td>
<td>167792</td>
<td>480-555-9641</td>
</tr>
</tbody>
</table>

**Figure 4-9 Page Break**

• For properties that are drop-down lists, the property has a Code and a Description. For example, the code for gender is M but the description is Male. In the query, select from the **Display** drop-down list to display the **Code**, the **Description**, or **Both**. Selecting the **Default** option lets Synergy SIS select the best fit for the property. Usually the default is the description, but in cases where the description is very long the code is usually used
(such as with Enter Codes). When Both is selected, the Code is displayed first then the Description, separated by a hyphen.

<table>
<thead>
<tr>
<th>Last Name</th>
<th>First Name</th>
<th>Gender</th>
<th>Perm ID</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ahlstrom</td>
<td>Linda</td>
<td>F - Female</td>
<td>120451</td>
<td>480-555-0641</td>
</tr>
<tr>
<td>Waters</td>
<td>Victor</td>
<td>M - Male</td>
<td>153227</td>
<td>480-555-0325</td>
</tr>
<tr>
<td>Louden</td>
<td>Karen</td>
<td>F - Female</td>
<td>901958</td>
<td>480-555-2962</td>
</tr>
</tbody>
</table>

*Figure 4-10 Display Both Option*
CONDITIONS

Setting conditions for a query limits the information included on the query to the records that match the condition or conditions. To select Conditions for the query:

1. Click the Conditions tab.

![Figure 4-11 Query Screen, Conditions Tab](image)

2. Click Add Condition. The Create a Condition window opens.

![Figure 4-12 Query Screen, Conditions Tab](image)

A condition is like a mathematical formula. It looks at each record to be included in the query, and compares it to the condition. If it matches the condition, it is included in the query. A condition has three main parts: which property in the query to examine, the mathematical operation to use like Equal or Not Equal, and the value to use as the criteria. Written out, it would look like this:

\[ \text{Property} = \text{Value} \text{ or } \text{Property} \neq \text{Value} \]

3. Select the Object that has the property to be used, and then select the Property. The only objects available are those objects that have been added to the query. However, any of the properties of the object may be used for the condition and not just the properties that have already been added to the query.
4. Set the Condition by using the Not and Operator together. Selecting Not just adds a Not before the operator. For example, if the Operator is set to Equal To and Not is selected, the operation would be set to Not Equal To. The Operator can be set to one of the following:

- **Contains** – the property selected must contain the value entered. For example, if Email was selected as the property and the value entered was yahoo, the report would list all students with an e-mail address that contained the letters yahoo anywhere (billy@yahoo.com, melissa@yahoo.com, etc.) If Not was added, it would list all e-mail address that did not have yahoo in it (george@gmail.com, sandra@hotmail.com, etc.)

- **Equal To** – the property selected must be exactly the same as the value entered. For example, if Home Language was selected as the property and the value entered was English, the report would list all students whose Home Language was English. If Not was added, it would list all students whose Home Language was not English.

- **Ends With** – the property selected must end with the value entered. For example, if the section ID were created with the Course and Period option and 01 was entered as the value for the section ID property in a report, the report would list all sections for period 01. If Not was added, the report would list all sections not in period 01.

- **Greater or Equal To** – the property selected must be greater than or equal to the value entered. For example, if Expected Graduation Year was selected as the property and the value entered was 2009, the report would list all students with an expected graduation year of 2009 or greater (2009, 2010, etc.). If Not was added, the report would list only students with an expected graduation year of 2008 or lower.

- **Greater Than** – the property selected must be greater than the value entered. For example, if Expected Graduation Year was selected as the property and the value entered was 2009, the report would list all students with an expected graduation year of 2010 or greater (2010, 2011, etc.). If Not was added, the report would list only students with an expected graduation year of 2009 or earlier.

- **In List** – the property selected must include one of the values entered in the Value field. List values are entered in the Value box separated by a comma. For example, if Grade was selected as the property and the values entered were 1, 2, 3, the report would list all students in grades 1, 2, or 3. If Not was added, the report would list students were not in grades 1, 2, or 3.

- **Less Than or Equal To** – the property selected must be less than or equal to the value entered. For example, if Age was selected as the property and the value entered was 15, the report would list all students 15 or younger (15, 14, etc.). If Not was added, the report would list only students older than 15 (16, 17, etc.)

- **Less Than** – the property selected must be less than the value entered. For example, if Age was selected as the property and the value entered was 15, the report would list all students younger than 15 (14, 13, etc.). If Not was added, the report would list only students 15 or older (15, 16, 17, etc.)

- **Starts With** – the property selected must start with the value entered. For example, if Enter Code was selected as the property and the value entered was R, the report would list all students whose enter code started with R (R1, R2, R3, etc.). If Not was added, it would list all students with enter codes that did not’ start with R (E1, E2, etc.).

**TIP:** When using dates in a condition, a full date must be entered as a value such as 9/1/2009. To filter a date, the most useful operators are Equal To, Greater Than,
Greater Than, or Equal, Less Than, or Less Than or Equal. For example, to list all students who have the same enter date, Equal To would be used. To list all students who entered on or before a date, Less Than or Equal would be used. To list all students who started after a specific date, use Greater Than.

5. Enter either a Value to be compared (the most common option) or select a Property.

A Value is the actual contents of the property such as numbers or letters. Enter the Value to be used for the condition. The value can be numbers or letters, and it is not case-sensitive. To use a date, enter it in MM/DD/YY or MM/DD/YYYY format. When using a value from a drop-down list, enter either the Code or its Description. For example, for Gender enter either M or Male. When entering a value for a property with a checkbox, use Y for checked or N for not checked.

6. Click Add to save the Condition to the Query.

Add Conditions

- By default, conditions are added as an AND condition type. Once the And condition type has been added, it can be switched to an OR condition type by right clicking on the word And.
• To insert a condition group, click +And or +Or.

• To insert a condition, click the plus sign in the And/Or box.

• Groups can be nested, and an unlimited number of groups and conditions can be added to create very complicated conditions.

Figure 4-16 Query Screen, Conditions Tab

• Conditions can be rearranged by dragging them with your mouse or removed by selecting the blue X.

Figure 4-17 Query Screen, Conditions Tab
SORT

Setting the sort order sets the order in which the records included in the query display. If no sort order is selected, the records are sorted by the default sort order of the primary object. For example, the Student object is always sorted by Last Name unless otherwise chosen. To add a new sort order to the query:

1. Click the **Sort** tab.

2. Select the **Property** from the drop-down. Only the properties that have already been selected for use in the query on the Columns tab are available.

3. The direction of the sort may also be changed by selecting it from the **Sort Order** column. **Ascending** sorts from smallest to largest value or from A to Z. **Descending** sorts from largest to smallest, or from Z to A.

4. Add additional properties in the same way. The sort occurs in the order in which the properties display on the Sort tab. For example, in the sort shown above the properties sort by Last Name and then First Name.

5. To delete a property from the sort, select the red x and it immediately disappears.
LABELS

Labels are a special category of queries that allow queries to be printed on standard label formats. To create a label query:

1. Select the columns, conditions, and sort as needed to create the query.
2. From the Orientation drop-down list, select Label.

3. A new tab is added to the Query screen titled Label Dimensions. Click the Label Dimensions tab to select and format the label.

4. Select the type of labels to be used from the Label Type list.

REFERENCE: Labels are defined in the Label Detail screen, found under Synergy SIS>System>Setup. For more information about defining labels, please refer to the Synergy SIS – System Administrator Guide.

- Top Margin, Label Height, Side Margin, Label Width, Vertical Pitch, Number Across, Horizontal Pitch, Number Down, Page Size, and Page Orientation should only be adjusted if printing custom labels or if after testing the commercial labels need a slight adjustment.
To specify how much space each of the fields in a row should take on a label, enter the value in the **Row Height** box. **Row Space** specifies how much white space is placed between each row. If these values are blank, the system calculates the height automatically.

To have the fields in the label shrink or expand to fit the selected label size, check the box **Scale Fields**. A minimum **Font Size** can also be specified.

When printing the PDF File that is created by the query, be sure to change the Page Handling settings before printing the labels. Change the **Page Scaling** to **None**, and uncheck the **Auto-Rotate and Center** box.
Figure 4-23 PDF Print Options
SAVE A QUERY

While the information selected on the Columns, Conditions & Sort tabs is different for every query, the basic information recorded at the top of the Query screen needs to be saved for every query. To save a query:

1. Enter a short name for the query in the Name box.

2. A longer explanation of the query can be entered in the Description field. To check the spelling of the description, or if more room is needed, hover your mouse over the right corner and select.

3. Select the Group to be assigned to the query from the drop-down list. The Group is used to categorize queries to make them easier to find in a long list. The groups are customized for each district as outlined in the Customizing Query groups section in Chapter Six of this guide.

4. The default Type of query is Select, which indicates this query will show information from the Synergy SIS database. It can be changed, but this is NOT recommended. Update, Delete or Insert will make a direct change to the database. This should only be attempted by experienced users.

5. The Output Type shows the default output format for the query, and it can be changed to any of the following by clicking on the drop-down list:
   - TIFF Image – a graphics file
   - CSV – a comma-separate values file
   - Excel – a Microsoft Excel version 1997-2003 format file
   - HTML – a web page in the standard Synergy SIS format
   - PDF – a Portable Document Format for Adobe Reader
   - Rich Text – a document file (basically Microsoft Word format)
   - Text File – a plain text file with no formatting, in tab-delimited format
   - XML – an extensible markup language file

6. Select the Orientation to be used in the printed output, either Landscape or Portrait. The Labels orientation is covered in the section on Labels.
7. Click **Save** at the top of the query.

8. The Save Query screen displays. To save the query to the list of queries for the logged-in user, click **Save**. To nominate it to be a public query available to all Synergy SIS users, check the box **Nominate for Public** before saving. Public queries must be reviewed and approved by administrators before the query is listed as a public query. For more information about public queries, see [Manage Public Queries](#).

![Figure 4-25 Save Query Screen](image)

**Caution:** After saving a query, any changes made result in a new query saving on the My Queries tab in the Open button.
**SAVE A QUERY AS A REPORT**

Queries can also be saved as reports. This has many advantages. The report can be run by anyone with access to the report, and the Report Interface is easier to use than the Query Interface. Reports can also be scheduled to be run at regular intervals. For more about working with reports, please see Chapter Two of this guide. To save a query as a report:

1. Click **Menu > Save As Report**.

   ![Figure 4-26 Query Screen, Save As Report Button](image)

2. The Save User Report screen displays. Enter the name of the report, as it should appear in the User PAD Tree, in **Report Name**. Enter an ID for the report in the **Report ID** field.

   ![Figure 4-27 Save User Report Screen](image)

3. If a report exists with the same Report ID, select whether or not to **Overwrite the Existing Report Layout** and to **Overwrite the Existing Query Data** by checking or unchecking the boxes. The report layout is the information defined by the output type and the customization of the properties in the Step 3 grid. The query data is the actual properties selected.

4. Select where to save the report in the User PAD tree by entering the folder structure in the **Location of Report in PAD** box. To indicate subfolders, separate folder names with a \\. For more information about the User PAD Tree, see the section on Managing User-Defined Reports in Chapter Six of this guide.

5. Click **Save** to save the report.
SHARING

The Share option provides users with a quick way to nominate a query for public use. Users select this option in the Menu on the Query screen.

Select Nominate for Public to select the query for public use. The query displays on the Query Admin > Nominated Queries tab for use by all users.
OPEN A QUERY

Two types of queries are available when opening a query. A user can open any query they have personally saved in their list of queries, or a public query can be opened. To open a query:

1. Click **Open** at the top of the Query Screen.

   ![Figure 4-30 Query Screen, Open](image)

2. The Query Open screen displays. The first tab is **My Queries**, which lists all of the queries the current user has saved. To filter the list of queries, select the **Group** and/or **Type** of query from the drop-down lists and click **Filter**.

   ![Figure 4-31 Query Open Screen, My Queries Tab](image)

3. To open a query from the current user, click anywhere on the line of the query and click **Open**.

   1. To select a query that has been saved for everyone to use in Synergy SIS, click the **Public Queries** tab.

   ![Figure 4-32 Query Open Screen, Public Queries Tab](image)

2. To filter the list of public queries, select the **Group**, **Type**, and/or **Include in Product Owned** from the drop-down lists and click **Filter**.
3. To open a public query, click anywhere on the line of the query and click **Open**.
DELETE A QUERY

To delete a query from the list of saved queries for the current user:

1. Click Open at the top of the Query Screen.

2. The Query Open screen pops-up. Select the query to be deleted from the list of Saved Queries, and click Open.

3. Once the query has opened in the Query screen, click Delete at the top of the screen to delete the query.
Chapter Five: ADVANCED QUERIES

This chapter covers the following topics:

► Create a Query Using a Link Field
► Create a Query Using Multiple Business Objects
► The Literal Property
► Edit the Query Manually
CREATE A QUERY USING A LINK FIELD

Queries can be created from multiple business objects by linking the business objects via a common property. The common property is referred to as a Link Field. To create a query from multiple business objects using a link field:

1. When selecting the Business Objects to be used in the query, a limited number of business objects are shown by default. It may be helpful to view all business objects by selecting All business objects.

   ![Figure 5-1 Select A Business Object Screen](image)

   Figure 5-1 Select A Business Object Screen

2. The selected business object displays on the Business Objects grid and the properties associated with it display to the right.

   ![Figure 5-2 Select the Properties](image)

   Figure 5-2 Select the Properties

Note that certain properties display with a ☑ next to them. These are Link Fields that link to another business object. In the example shown above, the property links to RevAddress.
3. When selecting, the option is provided to add the business object with or without the property. Click the link to add the business object or click the name of the property to add both.

To remove a business object from a query, hover your mouse over the business object in the Business Objects grid and select the blue x.

![Deleting a Business Object](image)

Figure 5-3 Deleting a Business Object

4. When a link field is added to a query, it is strongly recommended that it be set to **Hide** from the Query Results. While the field is essential to the query to tie the business objects together, the data contains in the link field is generally a several-digit hexadecimal number that does not add meaning to the final results.

![Link Field Results](image)

Figure 5-4 Link Field Results

5. To hide the link field, check **Hide** in the Property Overrides grid.

![Property Overrides Grid](image)

Figure 5-5 Step 3 Provide Any Desired Property Overrides Grid

**TIP:** When working with multiple business objects, selecting the initial business object is critical. Not all business objects are linked, so a desired business object may not be available for linking if the incorrect business object was selected first. For example, to create a query with information about a section and the students enrolled in the section, the ClassStudent object or StudentClass object should be selected first and not the Student object.
THE LITERAL PROPERTY

A special type of property can be added to queries called the Literal property. The Literal property adds a fixed text value as a column to any query. To add a literal property:

1. Click Add Literal. A new line is added to the grid.

![Figure 5-6 The Add Literal Button](image)

2. The text entered in the Name field will display in the query results. Enter the value that should be displayed, and modify the rest of the property values as usual.

![Figure 5-7 Editing the Literal Property](image)
EDIT THE QUERY MANUALLY

Occasionally it may be advantageous to edit a query manually. For example, with a query that has a condition with a date, the date may need to be changed each time the query is run. To edit a query manually:

1. Click the **Type in Query** tab.

   ![Type in Query Tab](image)

   Figure 5-8 Type in Query Tab

2. Click in the **Query** box, and change the text as necessary. In the example above, the query runs for a specific Course ID. To run the query for a different course, it would be necessary to change the Course ID.

3. After making any changes to the text in the Query box, be sure to click **Validate** to check the query to see if it is correct.

In text format, each query has four sections – one defining the business objects, one listing the properties, one for the conditions, and one for the sort. The conditions and the sort sections are optional, but every query must have the business objects and properties sections.

The **Business Object Section**

The format for the business object section is

**BusinessObject R#, BusinessObject R# (LinkField,R#LinkField,)**

Each business object is assigned a sequential number following the letter R. When the business object is referred to in the rest of the query, it is referred to by the R#.

When a business object is linked to another business object using a Link Field, the business object is followed by the names of the link fields, which tie the objects together. The first link field is the field in the current business object, and the second link field is the link field from the other business object preceded by its R#.

An example of a business object section is:

The Properties Section

The format for the properties section is:

    COLS R#.PropertyName, R#PropertyName (Width,LabelOverride,Hide,GroupBreak,Group#)

The properties section must be preceded by the word COLS. R# indicates the business object from where the property comes.

If any property overrides have been defined for the property, they are listed in the order indicated above in parenthesis following the property name. If a property override is not used, a space is used instead. The Hide override is either blank or the word Hide to turn on the Hide function. The break is GroupBreak, PageBreak, or blank. The Group value is the word Group followed by the number of the group. The Label Override value is surrounded by single quotes.

An example of a properties section is:

    COLS R0.FormattedName, R0.BirthVerification (,,Hide), R1.EnterDate, R1.EnterCode, R1.HomeroomSectionGU (,,Hide), R2.RoomGU (,,Hide), R3.RoomName (.1,'GU',Hide,GroupBreak,Group1)

The Conditions section

The format for the properties section is:

    IF R#.PropertyName Operator Value AND R#.PropertyName Operator Value

Operators can be In, Start/StartsWith, Contain/Contains, End/EndsWith, =, <, <=, =>, !, <>, or NOT. The condition groups are indicated with AND/OR. Values are surrounded with single quotes. Parentheses are used to group nested conditions.

An example of a conditions section is:

    If R4.CourseID ="IT01"

The Sort section

The format for the properties section is:

    Sort R#.PropertyName, R#.PropertyName Desc

The section always starts with Sort. The properties are listed in the order in which they are sorted, separated by commas. The sort is ascending unless followed by Desc.

An example of a sort section is:

    Sort R0.FormattedName
A quick refresher guide on the format for queries is also available at the bottom of the Type in Query tab.

Figure 5-9 Query Guide
Chapter Six:
SQL QUERY AND SSRS IN SYNERGY

This chapter covers the following topics:

► Run a SQL Query
► Run SQL Queries from Other Databases
Synergy provides the ability to run a SQL query on the Synergy database or another database. Results may be viewed within Synergy.

**RUN A SQL QUERY**

1. Navigate to **Synergy SIS >Query>SQL Query**.

2. Enter a query in the SQL Statement field.

3. Click **Execute** to run the query. Only select queries are processed. The query results display in a new window.
RUN SQL QUERIES FROM OTHER DATABASES

Queries can also be executed on databases other than the Synergy database.

1. Enter a query in the SQL Statement field.
2. Select the Override Connection checkbox. The Connection Override group box displays.
3. Enter the connection information for a different database.

![Figure 6-2 Connection Override Parameters](image)

- **Database Type** – the kind of database server that will be used in the connection. The options are MS SQL or Oracle.
- **Server** – the IP address or machine name of the database server.
- **Database** (MS SQL) – the database connection.
- **User ID** – the User ID to access this database.
- **Password** – the password to access this database.
- **Extra Params** – any extra parameters that should be added to the connection string.

**CAUTION**: Queries executed from this screen pass directly to the database bypassing all business logic and security. Users who have access to this screen will be able to see any data stored in the database.

4. Click **Execute** to run the query.
SQL Server Reporting Services (SSRS) in Synergy

Synergy is able to run SQL Server Reporting Services (SSRS) reports. SSRS is a server-based report generation software system from Microsoft, which enables users to quickly and easily generate reports from Microsoft SQL Server databases. You can save these reports to the PAD tree like any other user-defined report. You can pass parameters to the SSRS query by adding fields to the SSRS report interface in Synergy.

2. Click Add.
3. Enter the Name of the report, as you want it to appear in the PAD tree.
4. Enter the Number of the report, as you want it to appear in the PAD tree.
5. Enter the URL to the SSRS server in the SSRS URL field and the full path to the SSRS report to run in the SSRS Report Name field.
6. If you wish to specify a data source other than the default, enter the SSRS data source information in the Data Source Name, Data Source User Name, and Data Source Password fields.
7. Enter the account information to run the SSRS report in the Web Service Domain Name, Web Service User Name, and Web Service Password fields. These credentials must have the appropriate rights on the SSRS server to execute the report.
8. Enter a Report Description, as you want it to appear on the new report interface.

9. If you wish to open the SSRS report from the SSRS server and use any of the data manipulation features of the SSRS report, select the Open With URL option. If you unselect this option, Synergy returns a pdf version of the SSRS report.

10. In the PAD Location field, enter the location in the PAD tree where you wish to save the report. Separate folders with a ‘\’.

11. Click Save.

![Figure 6-4 Synergy SIS PAD Tree Example](image)

Pass a Parameter to an SSRS Report
By default, Synergy will pass the following parameters to any SSRS report being launched from Synergy.

- `@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 High School)
- `@FOCUS_ORGANIZATION_GU` = Focus organization guid for user (e.g. {GUID})
- `@FOCUS_ORG_YEAR_GU` = Focus organization year guid for user (e.g. {GUID})
- `@FOCUS_ORG_YEAR_GU_LIST` = Focus organization year guid list for user (e.g. {GUID}, {GUID}, …)
- `@USER_GU` = User guid for current user (e.g. {GUID})

(1)

In addition to this list, you can use the Report Interface Change screen to add fields that will be passed as parameters to the SSRS reporting engine.

2. Scroll to the SSRS report to which you would like to pass a variable.
3. On the Modifications tab, click the Tab – Options folder in the Report Interface Modifications tree and select Add Field to Tab – Options.
4. Select the desired Business Object and Property to add.
**NOTE:** The **Business Object** field filters automatically to a specific group of Synergy business objects as well as all user-defined business objects. Edupoint recommends that you create a user-defined business object and property to use for SSRS parameters to avoid potential conflicts with future Synergy updates.

![Report Interface Change Add Field](image.png)

*Figure 6-5 Report Interface Change Add Field*
Chapter Seven:
QUERY & JOB QUEUE ADMINISTRATION

This chapter covers the following topics:

► Job Queue
► Job Queue Admin
► Configure Query Groups
► Manage Public Queries
► Manage User-Defined Reports
JOB QUEUE

Once jobs have been submitted, such as reports or processes like the New Year Rollover, their status is listed in the Job Queue Viewer and the Job Q Adm Viewer. The Job Queue Viewer lists all of the jobs that have been submitted by the user currently logged in to Synergy SIS, where the Admin Viewer lists all jobs regardless of user. Both allow the jobs to be deleted, the results of the job to be printed, and the details of the job to be screened.

Navigate to Synergy SIS>System>Job Queue>Job Queue Viewer

In the Job Queue Viewer, each job is listed with the date and time the job was submitted and completed. The state of the job is also indicated by an icon, as shown below:

- Waiting
- In Progress
- Completed
- Error

![Job Queue Viewer](image)

The Job ID and Description are listed. For reports, this is the report ID and the name of the report.
To view the result of the job, click icon in the Result column. The results pop-up in a new window, generally in PDF format.

For jobs still in progress, clicking on the Result brings up the Job Status screen.

From the Job Status screen, the job can be cancelled by clicking the Abort. Clicking Check Status Later closes the Job Status screen, but the job and its results can still be screened from the Job Queue Viewer screen.

To delete a job from the queue, check the box in the X column and click Save at the top of the screen. To delete all the jobs at a particular state, select the state from the State Selection drop-down list and click Delete Jobs.

To filter the list of jobs displayed, enter the criteria to filter and click Filter. Jobs can be filtered by Job ID, entering all or part of the ID, or by a range of dates entering the Begin Date and End Date (MMDDYY or select date using ).
• Jobs can also be filtered by selecting a **State** from the drop-down list, or entering the name of the process server used to process the job in **Server Name**. To show reoccurring jobs in the list, check **Show Recurring**.

![Figure 7-4 Job Queue Viewer, Filtering](image1)

• Additional information is available about each job by clicking **Show Detail**. The detailed information about each job appears to the right. The job in display is highlighted in blue to the left. To switch to another job, click the job on the left.

• The first tab to be displayed is the **Details** tab. In addition to the information shown in the main screen, this tab shows the Result Type, the Job Type, the Date Processed, the Total Execution Time, and the Focus from which the job was run.

![Figure 7-5 Job Queue Viewer, Detailed Screen, Details Tab](image2)
• The **Recurring Pattern** tab shows the details of the schedule of any reoccurring jobs.

![Figure 7-6 Job Queue Viewer, Detailed Screen, Recurring Pattern Tab](image)

• On the **Results** tab, the results of the job can be brought up by clicking the icon just as can be done from the main screen.

To have the results bring up a prompt to save or open the results file, check the box labeled **Force Download Prompt**.

![Figure 7-7 Job Queue Viewer, Detailed Screen, Results Tab](image)
The **System Info** tab shows the name of the process server used to process the job, and if the job is still in progress it shows how much has been processed in the **Progress** field. If the job errored out, the top part of the error message is displayed in the **Progress Message** field. The **Process Queue GU** and **Job Primary BO** are for developers, and show the ID of the job in the process queue and the primary business object for the job.

Additional information can be seen by clicking the **Maximize** buttons for the **Process State XML** and **Error Info** sections.

The **Process State XML** is also more information for developers. The **Error Info** section shows the full text of the error message.

- To close the detailed screen, click **Hide Detail**.
JOB QUEUE ADMIN

The Job Queue is administered from the Job Q Adm Viewer screen. This screen has all of the same functionality and features of the Job Queue Viewer screen. However, all the jobs from all users are listed in the Admin Viewer rather than just the jobs of the logged-in user. In addition, the Admin Viewer allows the priority of each job to be adjusted.

The main purpose of the Admin Viewer is to diagnose problems with the queue and to adjust the status of jobs waiting in the queue. When users start reporting that the job is listed 2nd, 3rd, 4th, etc. in the queue as shown in the Job Status screen, there may be a problem with the job queue and it should be checked from the Admin Viewer.

In the Admin Viewer, three additional columns of information about jobs are listed: the Priority, the Process Server Machine Name, and the User Name.

When a job is submitted by a user, it has the priority of Normal. If a job is still waiting that may delay the queue, the priority of the job can be switched to Low to allow later jobs with a priority...
of Normal to finish first. Conversely, if there is an urgent job to be run that is waiting, its priority can be switched to **High** to set that job to process next.

The Admin Viewer can also filter jobs by **User Name** by clicking on the gray arrow next to the User Name field and selecting the user. All other functions are the same as the Job Queue Viewer.
CONFIGURE QUERY GROUPS

On the Query screen, there is a drop-down list titled Group, where pre-populated values may be selected from this list. The values in this drop-down list are stored in a lookup table. This lookup tables may be modified by using the Lookup Table Definition screen, found under Synergy SIS>>System>>Setup. Before creating queries in the Query screen, these values should be entered. These groups are also used by the Dashboard Control screen to categorize widgets. To modify the lookup table’s values:

1. Go to the Lookup Table Definition screen, found under Synergy SIS>System>Setup.

2. Clicking on the triangle next to the Revelation node, then click the node Query Info. Finally, click the Group table.

3. In the Group table, click Add to add a new code.

4. The order in which the values are displayed can be set by entering the order number in the ListOrder column. If the numbers in the ListOrder field are the same or are all blank, the Code is used to sort the list and then the Description.

5. Enter a code for the item in the Code column. This value must be unique since it is used internally to link the tables in the database and it is displayed in the drop-down list.

6. Enter the description of the code in the Description column.

7. The Other SIS column is used to import data during the conversion process from another student records system. Enter the code used in the old system in this column.

8. If appropriate, a start date and end date may be entered for the code in the Status column to activate or deactivate the code for a particular year. If a code is inactive, it shows in data already entered but it is no longer available for selection for new records. For example, if a code is no longer valid for records beginning FY2008, select 2008 for the end year.

9. The State Code, Alt Code 3, and Alt Code SIF are not needed since this information is not uploaded to the state. The checkbox at the top of the table Use Code as the State Code is not used as well.

10. Click Save at the top of the screen to save the changes.
MANAGE PUBLIC QUERIES

When users create queries that might be useful for all Synergy SIS users, they can nominate them to be shared with everyone as public queries. To manage the public queries and review the nominated queries, use the Query Admin screen.

Navigate to Synergy SIS>Query>Query Admin.

The Public Queries tab of the Query Admin screen lists all of the queries that have been approved for the public queries list. For each query, the following information is listed and can be edited by clicking in the appropriate field and making the changes:

1. To review the query, click Open and the query opens in the Query screen.
2. The Name of the query & Description of the query can be edited by typing in the boxes. The Description can be checked for spelling by clicking SpellCheck. The description could also include any special instructions on how to customize the report before running it.
3. The Type of query could be changed by selecting it from the drop-down list, but this is NOT recommended. A Select type shows the data from the database for reports, but Update, Delete, or Insert makes direct changes to the database and should only be attempted by experienced users.
4. The Output Type shows the default format for the query, and it can be changed to any of the following by clicking on the drop-down list:
   - TIFF Image – a graphics file
   - CSV – a comma-separate values file
   - Excel – a Microsoft Excel version 1997-2003 format file

Figure 7-12 Query Admin Screen, Public Queries Tab
• **HTML** – a web page in the standard Synergy SIS format

• **Rich Text** – a document file (basically Microsoft Word format)

• **Text File** – a plain text file with no formatting, in tab-delimited format

• **XML** – an extensible markup language file

• **PDF** – a Portable Document Format for Adobe Reader

5. The **User Name** indicates who created the query, and cannot be changed.

6. If the query came with Synergy SIS and cannot be changed, the **Product Owned** column shows **Yes**. User-created queries are **No**. This cannot be changed.

7. The **Group** is used to categorize queries to make them easier to find in a long list. The groups are customized for each district as outlined in the Customizing Query groups section in this chapter.

8. Once any changes have been made, be sure to click **Save** at the top of the screen to save the changes, or click **Undo** to remove the changes.

The list of queries can be filtered to show just queries matching a specified **Group** and/or **Type**. The list can also be filtered by whether or not the query is **Product Owned**. To apply a filter, select the filter to apply from the Group, Type, and/or Include Product Owned drop-down lists and click **Filter**.

![Figure 7-13 Query Admin Screen, Filter Properties](image)

To delete a public query, click the box in the **X** column next to the query and click **Save** at the top of the screen.

To approve or reject queries nominated for public:

1. Click the Nominated Queries tab.

2. To filter the list of queries shown, select the Group and/or Type from the drop-down lists and click **Filter**.

![Figure 7-14 Query Admin Screen, Nominated Queries Tab](image)
3. To review the query, click **Open** and the query opens in the Query screen.

4. Before approving or rejecting the nominated query, the group to which the query is assigned can be changed by clicking on the **Query Group** drop-down list.

5. A note can also be added regarding the nomination by typing in the **Nomination Note** field. This note can be checked for spelling by clicking the SpellCheck button. The note could indicate that the query needs more work before acceptance, or the reason why the query was rejected.

6. To approve or reject the query for the public queries, select either **Approved** or **Rejected** from the **Nomination State** column. Once approved or rejected, the query is removed from the list of nominated queries. The note and group can be changed and saved without changing the nomination state.

7. Click **Save** to save the changes. The Nomination Note and current Nomination State of the query appears in the user’s **Query Open** screen.

If the query was approved, it appears in the list of public queries. If it was rejected, it still appears in the user’s list of queries but it does not appear in the Query Admin screen.
MANAGE USER-DEFINED REPORTS

Now that users can create reports and folders in the Navigation Tree (or PAD Tree) by saving queries as reports (as outlined in Chapter Four of this guide), the folder structure and report names in the User-Defined folders (also known as the UD PAD tree or User PAD Tree) can quickly become disorganized and chaotic. The UD PAD tree is located above the Synergy SIS & Synergy SE folders in the Navigation Tree. The name of the top-level folder is the abbreviation of the district name (in the example below, ESD for Edupoint School District), and cannot be changed. This abbreviation is taken from the Locale as defined in the license key (USA.AZ.District Abbreviation). The folders and reports underneath this folder are created when a user saves a query as a report.

1. To edit and manage these folders and reports, navigate to Synergy SIS>System>Setup>UD PAD Definition.

2. The folders and reports from the UD PAD Tree are shown in the User PAD Tree section. To view additional folders, click the green triangles to expand the tree.
Modify Folder

1. To modify a folder, click the folder name. On the right side of the screen, the name of the folder can be modified by editing the text in the Name box.

2. To move the folder up or down the tree, click Move Up or Move Down. To add another folder underneath the folder, click Action…drop-down list and choose Add Group to FOLDERNAME.

3. The Add Module to UD Navigation Tree screen pops-up. Enter the name of the new folder in the Name box, and click Save.

4. To add another report to the folder, click Action…drop-down list and choose Add Report to FOLDERNAME.
5. The Add Report to UD Navigation Tree pops-up. Select the report to add from the UD Reports drop-down. Previously saved user-defined reports are listed, only. Click Save to add the report to the tree.

![Image](Add_Report_to_UD_Navigation_Tree.png)

*Figure 7-20 Add Report to UD Navigation Tree Screen*

6. To delete the folder, click **Action…** drop-down list and choose **Delete FOLDERNAME**.

![Image](UD_PAD_DEFINITION_SCREEN_Action_Drop-Down_List.png)

*Figure 7-21 UD PAD Definition Screen, Action… Drop-Down List*

7. A box pops-up to confirm the deletion. Deleting the folder deletes all folders and reports stored in that folder. To delete the folder, click **OK. Refresh the screen when done to see the new folder structure.**

![Image](Confirm.png)

*Figure 7-22 Confirming Folder Deletion*
Modify Report

1. To modify a report, click the report to modify. On the right side of the screen, the name of the report can be modified by editing the text in the Name box. The Report ID can also be edited.

![Figure 7-23 UD PAD Definition, Modifying a Report](image)

2. To move the report up or down the tree, click Move Up or Move Down.

3. To delete the report, click Action…drop-down list and choose Delete REPORTNAME.

4. A box pops-up to confirm the deletion. To delete the report, click OK. Refresh the screen when done to see the new folder structure.

![Figure 7-24 Confirming Report Deletion](image)

5. Click Save at the top of the screen to save the changes.
Chapter Eight:
JOB QUEUE REPORTS

This chapter covers the following topics:
► JQE601 - Job Queue Execution Times
► JQE602 - Jobs by Hour
► JQE603 - Jobs by Type
AVAILABLE REPORTS

The available reports for the Job Queue are found under the Synergy SIS Job Queue folder. There are four types of reports available – Extracts, Individual, List, and Summary. Extracts pull information from Synergy SIS in a text file that can then be imported into another program. Individual Reports print information about a single student per page, but can be printed for multiple students at one time. List Reports generate summaries for multiple students. Summary Reports present numerical report summaries.

1. Navigate to Synergy SIS>System>Job Queue>Reports>Summary.

2. Click the name of a report to open its interface and select the options to be used in printing the report.

3. Once the report options have been set, click Print. The report is printed as a PDF to the screen, which can then be sent to the printer.

REFERENCE: This chapter covers only the customizations specific to each of the reports used in Job Queue, and the additional options available on the other tabs are explained in Chapter Two of this guide.
JQE601 - JOB QUEUE EXECUTION TIMES

The Job Queue Execution Times report lists the amount of time it took to process each of the jobs listed in the queue. For each amount of time, it shows the number of jobs that took that long to process in the Count column and the percentage of jobs that represents in the Overall column. For example, in the first line of the report below, 87 jobs took less than 1 second to process (00:00:00), which represents 7.08% of all jobs. The threshold represents what percentage of jobs processed in that amount of time or less. For example, in the report below, 80% of the jobs processed in 15 seconds or less.

The report can be customized using the following options:

- Select the type of job to be included from the Job Type drop-down list. The types of jobs that can be selected are Reports, Scheduling, or Other Processes.

- Set the Maximum Time Duration of the jobs to be included by entering the minutes and seconds of the longest job to be included.

Figure 8-1 Job Queue Execution Times Report, Report Interface
Figure 8-2 Job Queue Execution Times Report

<table>
<thead>
<tr>
<th>Total Time</th>
<th>Count</th>
<th>Overall</th>
<th>Threshold</th>
</tr>
</thead>
<tbody>
<tr>
<td>00:00:00</td>
<td>52</td>
<td>0.51%</td>
<td>0.51%</td>
</tr>
<tr>
<td>00:00:09</td>
<td>275</td>
<td>2.71%</td>
<td>79.00%</td>
</tr>
<tr>
<td>00:00:10</td>
<td>210</td>
<td>2.12%</td>
<td>81.25%</td>
</tr>
<tr>
<td>00:00:11</td>
<td>152</td>
<td>1.50%</td>
<td>82.60%</td>
</tr>
<tr>
<td>00:00:12</td>
<td>181</td>
<td>1.77%</td>
<td>84.70%</td>
</tr>
<tr>
<td>00:00:13</td>
<td>127</td>
<td>1.26%</td>
<td>85.01%</td>
</tr>
<tr>
<td>00:00:14</td>
<td>120</td>
<td>1.18%</td>
<td>87.10%</td>
</tr>
<tr>
<td>00:00:15</td>
<td>58</td>
<td>0.55%</td>
<td>85.05%</td>
</tr>
<tr>
<td>00:00:16</td>
<td>79</td>
<td>0.77%</td>
<td>89.82%</td>
</tr>
<tr>
<td>00:00:17</td>
<td>99</td>
<td>0.99%</td>
<td>90.52%</td>
</tr>
<tr>
<td>00:00:18</td>
<td>58</td>
<td>0.57%</td>
<td>80.67%</td>
</tr>
<tr>
<td>00:00:19</td>
<td>84</td>
<td>0.83%</td>
<td>90.60%</td>
</tr>
<tr>
<td>00:00:20</td>
<td>46</td>
<td>0.47%</td>
<td>91.19%</td>
</tr>
<tr>
<td>00:00:21</td>
<td>26</td>
<td>0.25%</td>
<td>91.42%</td>
</tr>
<tr>
<td>00:00:22</td>
<td>42</td>
<td>0.41%</td>
<td>91.93%</td>
</tr>
<tr>
<td>00:00:23</td>
<td>28</td>
<td>0.27%</td>
<td>92.11%</td>
</tr>
<tr>
<td>00:00:24</td>
<td>31</td>
<td>0.30%</td>
<td>92.41%</td>
</tr>
<tr>
<td>00:00:25</td>
<td>36</td>
<td>0.35%</td>
<td>92.67%</td>
</tr>
<tr>
<td>00:00:26</td>
<td>28</td>
<td>0.27%</td>
<td>92.94%</td>
</tr>
<tr>
<td>00:00:27</td>
<td>14</td>
<td>0.14%</td>
<td>93.00%</td>
</tr>
<tr>
<td>00:00:28</td>
<td>26</td>
<td>0.26%</td>
<td>93.37%</td>
</tr>
<tr>
<td>00:00:29</td>
<td>28</td>
<td>0.26%</td>
<td>93.63%</td>
</tr>
<tr>
<td>00:00:30</td>
<td>18</td>
<td>0.18%</td>
<td>93.72%</td>
</tr>
<tr>
<td>00:00:31</td>
<td>15</td>
<td>0.15%</td>
<td>93.88%</td>
</tr>
<tr>
<td>00:00:32</td>
<td>15</td>
<td>0.15%</td>
<td>94.04%</td>
</tr>
<tr>
<td>00:00:33</td>
<td>26</td>
<td>0.26%</td>
<td>94.23%</td>
</tr>
<tr>
<td>00:00:34</td>
<td>18</td>
<td>0.18%</td>
<td>94.41%</td>
</tr>
<tr>
<td>00:00:35</td>
<td>11</td>
<td>0.11%</td>
<td>94.62%</td>
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<tr>
<td>00:00:36</td>
<td>6</td>
<td>0.06%</td>
<td>94.86%</td>
</tr>
<tr>
<td>00:00:37</td>
<td>8</td>
<td>0.09%</td>
<td>94.97%</td>
</tr>
<tr>
<td>00:00:38</td>
<td>18</td>
<td>0.18%</td>
<td>94.84%</td>
</tr>
<tr>
<td>00:00:39</td>
<td>11</td>
<td>0.11%</td>
<td>94.95%</td>
</tr>
<tr>
<td>00:00:40</td>
<td>3</td>
<td>0.03%</td>
<td>95.84%</td>
</tr>
<tr>
<td>00:00:41</td>
<td>12</td>
<td>0.12%</td>
<td>95.10%</td>
</tr>
<tr>
<td>00:00:42</td>
<td>7</td>
<td>0.07%</td>
<td>95.22%</td>
</tr>
<tr>
<td>00:00:43</td>
<td>13</td>
<td>0.13%</td>
<td>95.35%</td>
</tr>
</tbody>
</table>
**JQE602 - JOBS BY HOUR**

The Jobs By Hour report lists each hour of the day with the status of the jobs for that hour and how many jobs were processed at the time.

The report can be customized using the following options:

- Select the type of job to be included from the **Job Type** drop-down list. The types of jobs that can be selected are **Reports**, **Scheduling**, or **Other Processes**.

- Select the State of the jobs that are included in the report. The state of the jobs can be **Hold**, **Waiting**, **In Progress**, **Error**, or **Complete**.

- To include jobs that were not completed because of errors in the totals for the report, check the box **Show Errors**.

*Figure 8-3 Jobs By Hour Report, Report Interface*
### Jobs by Hour Report

#### Table: Hope High School Jobs by Hour

<table>
<thead>
<tr>
<th>Hour</th>
<th>State</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>12 AM</td>
<td>6</td>
<td>8</td>
</tr>
<tr>
<td>1 AM</td>
<td>6</td>
<td>97</td>
</tr>
<tr>
<td>2 AM</td>
<td>2</td>
<td>2</td>
</tr>
<tr>
<td>3 AM</td>
<td>8</td>
<td>21</td>
</tr>
<tr>
<td>4 AM</td>
<td>Complete</td>
<td>1</td>
</tr>
<tr>
<td>5 AM</td>
<td>Complete</td>
<td>13</td>
</tr>
<tr>
<td>6 AM</td>
<td>Error</td>
<td>3</td>
</tr>
<tr>
<td>7 AM</td>
<td>Complete</td>
<td>4</td>
</tr>
<tr>
<td>8 AM</td>
<td>6</td>
<td>107</td>
</tr>
<tr>
<td>9 AM</td>
<td>281</td>
<td></td>
</tr>
<tr>
<td>10 AM</td>
<td>Error</td>
<td>11</td>
</tr>
<tr>
<td>11 AM</td>
<td>Complete</td>
<td>30</td>
</tr>
<tr>
<td>12 PM</td>
<td>Error</td>
<td>732</td>
</tr>
<tr>
<td>1 AM</td>
<td>Complete</td>
<td>44</td>
</tr>
<tr>
<td>2 AM</td>
<td>7</td>
<td>7</td>
</tr>
<tr>
<td>3 AM</td>
<td>Complete</td>
<td>694</td>
</tr>
<tr>
<td>4 AM</td>
<td>Complete</td>
<td>133</td>
</tr>
<tr>
<td>5 AM</td>
<td>Error</td>
<td>31</td>
</tr>
<tr>
<td>6 AM</td>
<td>40</td>
<td></td>
</tr>
<tr>
<td>7 AM</td>
<td>Complete</td>
<td>2</td>
</tr>
<tr>
<td>8 AM</td>
<td>1163</td>
<td></td>
</tr>
<tr>
<td>9 AM</td>
<td>1082</td>
<td></td>
</tr>
<tr>
<td>10 AM</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>11 AM</td>
<td>Error</td>
<td>50</td>
</tr>
<tr>
<td>12 PM</td>
<td>Complete</td>
<td>287</td>
</tr>
<tr>
<td>1 AM</td>
<td>687</td>
<td></td>
</tr>
<tr>
<td>2 AM</td>
<td>8</td>
<td></td>
</tr>
<tr>
<td>3 AM</td>
<td>Complete</td>
<td>562</td>
</tr>
<tr>
<td>4 AM</td>
<td>Error</td>
<td>84</td>
</tr>
<tr>
<td>5 AM</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>6 AM</td>
<td>Complete</td>
<td>117</td>
</tr>
<tr>
<td>7 AM</td>
<td>1037</td>
<td></td>
</tr>
<tr>
<td>8 AM</td>
<td>Error</td>
<td>21</td>
</tr>
<tr>
<td>9 AM</td>
<td>Error</td>
<td>27</td>
</tr>
<tr>
<td>10 AM</td>
<td>935</td>
<td></td>
</tr>
<tr>
<td>11 AM</td>
<td>Complete</td>
<td>180</td>
</tr>
<tr>
<td>12 PM</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>1 AM</td>
<td>Complete</td>
<td>1</td>
</tr>
<tr>
<td>2 AM</td>
<td>Error</td>
<td>29</td>
</tr>
</tbody>
</table>

*Figure 8-4 Jobs By Hour Report*
JQE603 - JOBS BY TYPE

The Jobs by Type report lists all the types of jobs, including each report, and a count of how many of each type of job has been processed.

The report can be customized using the following options:

- Select the type of job to be included from the Job Type drop-down list. The types of jobs that can be selected are Reports, Scheduling, or Other Processes.
- To include jobs that were not completed because of errors in the totals for the report, check the box Show Errors.

Figure 8-5 Jobs by Type Report, Report Interface
<table>
<thead>
<tr>
<th>JobID</th>
<th>Description</th>
<th>Count</th>
<th>Errors</th>
</tr>
</thead>
<tbody>
<tr>
<td>ADV01</td>
<td>Classroom Accommodations by Section</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>ADV02</td>
<td>Classroom Accommodations by Student</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>ADV03</td>
<td>Classroom Accommodations by Accommodation</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>AUM4170</td>
<td>Average Daily Membership</td>
<td>70</td>
<td></td>
</tr>
<tr>
<td>AUM4175</td>
<td>Average Daily Membership Summary</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>AUM6021</td>
<td>Student Discipline Profile</td>
<td>15</td>
<td></td>
</tr>
<tr>
<td>AUM6120</td>
<td>Student Discipline Listing</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>AUM6121</td>
<td>Student Discipline List</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>AUM6130</td>
<td>Daily Attendance Reflection</td>
<td>45</td>
<td></td>
</tr>
<tr>
<td>AUM6140</td>
<td>Daily Attendance Minutes Profile</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>AUM6141</td>
<td>Daily Student Attendance Totals</td>
<td>94</td>
<td>1</td>
</tr>
<tr>
<td>AUM6142</td>
<td>Daily Attendance List</td>
<td>50</td>
<td></td>
</tr>
<tr>
<td>AUM6143</td>
<td>Daily Absent List</td>
<td>65</td>
<td></td>
</tr>
<tr>
<td>AUM6144</td>
<td>Daily Tally List</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>AUM6145</td>
<td>Daily Perfect Attendance List</td>
<td>42</td>
<td></td>
</tr>
<tr>
<td>AUM6146</td>
<td>Daily Student List by Attendance</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>AUM6147</td>
<td>End Of Year Attendance List</td>
<td>59</td>
<td></td>
</tr>
<tr>
<td>AUM6148</td>
<td>End Of Year Totals</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>AUM6149</td>
<td>Class Reduction Summary</td>
<td>27</td>
<td></td>
</tr>
<tr>
<td>AUM6150</td>
<td>Class Days Enrolled</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>AUM6151</td>
<td>Attendance Audit List</td>
<td>20</td>
<td></td>
</tr>
<tr>
<td>AUM6152</td>
<td>Daily Attendance Summary</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>AUM6153</td>
<td>Monthly Acq Detail</td>
<td>11</td>
<td></td>
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<tr>
<td>AUM6154</td>
<td>Monthly Acq Summary</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>AUM6155</td>
<td>Cumulative Enrollment Totals</td>
<td>23</td>
<td></td>
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<tr>
<td>AUM6156</td>
<td>Monthly Acq Summary</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>AUM6157</td>
<td>Student Attendance Summary</td>
<td>44</td>
<td></td>
</tr>
<tr>
<td>AUM6158</td>
<td>200 Day Accountability Report</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>AUM6159</td>
<td>Director's Membership and Attendance Report</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>AUM6160</td>
<td>Director's Vocational Class FTEADA Report</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>AUM6161</td>
<td>Director's Vocational Class FTEADA Report</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>AUM6162</td>
<td>Attendance Sheet</td>
<td>43</td>
<td>2</td>
</tr>
<tr>
<td>AUM6163</td>
<td>Attendance Sheet</td>
<td>13</td>
<td>12</td>
</tr>
<tr>
<td>AUM6164</td>
<td>Attendance Letters</td>
<td>32</td>
<td>5</td>
</tr>
<tr>
<td>AUM6165</td>
<td>Class Attendance Reminder</td>
<td>65</td>
<td>10</td>
</tr>
<tr>
<td>AUM6166</td>
<td>Period Student Attendance Profile</td>
<td>57</td>
<td></td>
</tr>
<tr>
<td>AUM6167</td>
<td>Period Attendance List</td>
<td>87</td>
<td></td>
</tr>
<tr>
<td>AUM6168</td>
<td>Period Student Absence Totals</td>
<td>78</td>
<td>4</td>
</tr>
<tr>
<td>AUM6169</td>
<td>Period Perfect Attendance List</td>
<td>12</td>
<td></td>
</tr>
</tbody>
</table>

Figure 8-6 Jobs By Type Report
Chapter Nine: SECURITY

This chapter covers the following topics:

► Job Queue Viewer Security
► Job Q Adm Viewer Security
► Query Security
► Query Admin Security
► SQL Query Security
► SSRS Report Security
► Job Queue Reports Security
Security for each of the screens discussed throughout this manual is defined by two options: the PAD Security screen and the Security Definition screen. Both of these screens are found under Synergy SIS>>System>>Security. How each of these screens 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 student information-related screen may be defined in the Security Definition screen.

**JOB QUEUE VIEWER SECURITY**

The Job Queue Viewer screen, found under Synergy SIS>>System>>Job Queue, is controlled by the node below. This node also controls the Job Q Adm Viewer screen.

![Job Queue Viewer](image)

*Figure 9-1 Job Queue Viewer*

The Results tab of the detailed screen is controlled by the node below. This node also controls the Results tab of the Job Q Adm Viewer screen.

```
Revelation.JobQueueInfo.JobQueueResultGrid
```
The following security nodes do not provide a visible change in security on the screens:

- Revelation.JobQueueInfo.JobQueueUI
- Revelation.JobQueueInfo.JobQueueResult
- Revelation.JobQueueInfo.JobQueueRecur
JOB Q ADM VIEWER SECURITY

The Job Q Adm Viewer screen, found under Synergy SIS>>System>>Job Queue, is controlled by the node below. This node also controls the Job Queue Viewer screen.

Revelation.JobQueueInfo.JobQueue

Figure 9-3 Job Q Adm Viewer

The Results tab of the detailed screen is controlled by the node below. This node also controls the Results tab of the Job Queue Viewer screen.

Revelation.JobQueueInfo.JobQueueResultGrid

Figure 9-4 Job Q Adm Viewer, Detailed Screen, Results Tab

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

- Revelation.JobQueueInfo.JobQueueUI
- Revelation.JobQueueInfo.JobQueueResult
- Revelation.JobQueueInfo.JobQueueRecur
QUERY SECURITY

- **Revelation.Query.RevQuery** controls the main Query information such as Name, Group, Type, etc. This node also controls the Type in Query tab.

The **Columns tab** of the **Query** screen, found under Synergy SIS>>Query, is controlled by the security nodes:

- **Revelation.Query.AllPropertyGrid** controls the Property Overrides grid.

![Query Screen, Columns Tab](image-url)
The **Conditions tab** of the **Query** screen, found under Synergy SIS>>Query, is controlled by the security node:

**Revelation.Query.ConditionTree**

*Figure 9-6 Query Screen, Conditions Tab*
The **Create A Condition** screen, which pops-up when adding a condition to the Conditions tab, is controlled by the security node:

```
Revelation.Query.RevQueryCondition
```

![Figure 9-7 Add Condition Screen](image)

The **Sort tab** of the **Query** screen, found under Synergy SIS>>Query, is controlled by the security node:

```
Revelation.Query.RevQuerySort
```

![Figure 9-8 Query Screen, Sort Tab](image)
The **Type in Query** tab of the **Query** screen, found under Synergy SIS>>Query, is controlled by the security node below. This node also controls the main Query definition fields such as Name, Group, Type, etc.

![Query Screen, Type In Query Tab](image)

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

- Revelation.Query.QueryRI
- Revelation.Query.ConditionGrid
- Revelation.Query.QueryExecute
- Revelation.Query.QueryUser
QUERY ADMIN SECURITY

The Public Queries tab of the Query Admin screen, found under Synergy SIS>>Query, is controlled by the node:

Revelation.Query.QueryPublicGrid

![Figure 9-10 Query Screen, Public Queries Tab](image)

The Nominated Queries tab of the Query Admin screen, found under Synergy SIS>>Query, is controlled by the node:

Revelation.Query.QueryEvalGrid

![Figure 9-11 Query Admin, Nominated Queries Tab](image)

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

- Revelation.Query.QueryOpenPublicGrid
- Revelation.Query.QueryPublic
SQL QUERY SECURITY

The SQL Query screen, found under Synergy SIS>>Query, is controlled by the node:

Revelation.Query.QuerySQLUI

Figure 9-12 SQL Query Screen
SSRS Report Security

The Add New SSRS Report screen, found under Synergy SIS>System>Data and Views>Report Interface Change, (click Add at the top of the screen) is controlled by these security nodes.

The Name, Number, and Pad Location are controlled by this security node:

Revelation.ReportDef

The rest of the screen is controlled by this security node:

Revelation.SSRSCfg
JOB QUEUE REPORTS SECURITY

While report security options are available under the Security Definition screen, it is recommended to use the PAD tree security to control access to reports, only.