Query and Reporting Guide

Release 2019

June 2018
The Edupoint software and any form of supporting documentation are proprietary and confidential. Unauthorized reproduction or distribution of the software and any form of supporting documentation is strictly prohibited and may result in severe civil and criminal penalties.

Information in this document is provided in connection with Edupoint Educational Systems, LLC. products. No license to any intellectual property rights is granted by this document.

The screens, procedural steps, and sample reports in this manual may be slightly different from the actual software due to modifications in the software based on state requirements and/or school district customization.

The data in this document may include the names of individuals, schools, school districts, companies, brands, and products. Any similarities to actual names and data are entirely coincidental.

Copyright ©2016-2018 Edupoint Educational Systems, LLC.

Edupoint, Synergy Student Information System, Synergy Special Education, Synergy Assessment, TeacherVUE, LessonVUE, StudentVUE, and ParentVUE are registered trademarks of Edupoint Educational Systems. Inspect is a registered trademark of Key Data Systems. Google and the Google logo are registered trademarks of Google Inc. Apple and iPad Pro are trademarks of Apple Inc. Microsoft and OneDrive are trademarks of the Microsoft group of companies.

Other names and brands may be claimed as the property of others.
About This Manual

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

This document serves as a reference for Edupoint’s recommendations and Best Practices for Synergy processes. Due to the complex nature and myriad configurations possible within the Synergy software, it is not feasible to include every possible scenario within this guide.

Conventions Used in This Manual

- **Bold** indicates user interactions such as a button or field on the screen.
- **Italics** indicate the option to select or text to enter.
- Notes, Tips, References, and Cautions appear in the margin to provide additional information.

### Before You Begin

Before installing any of the Edupoint family of software products, be sure to review the system requirements and make sure the district’s computer hardware and software meet the minimum requirements.

### Software and Document History

<table>
<thead>
<tr>
<th>Document Version</th>
<th>Release Date</th>
<th>Software Release</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.0</td>
<td>Sep 2015</td>
<td>10</td>
<td>Initial release of this document</td>
</tr>
<tr>
<td>-</td>
<td>Oct 2015</td>
<td>10.01</td>
<td>No changes required</td>
</tr>
<tr>
<td>-</td>
<td>Nov 2015</td>
<td>10.02</td>
<td>No changes required</td>
</tr>
<tr>
<td>2.0</td>
<td>Apr 2016</td>
<td>10.03</td>
<td>Updated</td>
</tr>
<tr>
<td>3.0</td>
<td>Jul 2016</td>
<td>10.04</td>
<td>Updated</td>
</tr>
<tr>
<td>-</td>
<td>Dec 2016</td>
<td>10.05</td>
<td>No changes required</td>
</tr>
<tr>
<td>4.0</td>
<td>May 2017</td>
<td>2018</td>
<td>Added Focus Tokens in Edit the Query Manually</td>
</tr>
<tr>
<td>Document Version</td>
<td>Release Date</td>
<td>Software Release</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>--------------</td>
<td>------------------</td>
<td>-------------</td>
</tr>
</tbody>
</table>
| 5.0              | Dec 2017     | 2018.01          | • Reorganized the topics and added content.  
• Added Mail Merge Property definitions to the Sort/Output Options Tab.  
• Added Query and Reporting Security  
• Added Synergy Actions to Report Overview  
• Added Synergy Actions  
• Added Viewing and Managing Scheduled Reports in Job Queue  
• Modified scheduling reports in Advanced Tab |
| -                | Jun 2018     | 2019             | No changes required |
Table of Contents

About This Manual ................................................................. 3
Conventions Used in This Manual ............................................. 3
Before You Begin .................................................................... 3
Software and Document History ................................................. 3
Table of Contents .................................................................... 5

Chapter 1: Lookup Table Setup .................................................. 8
Lookup Table Setup ................................................................... 9
  Add Values to Lookup Tables ................................................. 10
  Assign a State Reporting Code to an Existing Lookup Table Value ........................................................................ 11
  Deactivate a Lookup Table Value ......................................... 11
  Sort Lookup Values ............................................................ 12
  Lookup Table Definitions .................................................... 13

Chapter 2: Running Reports ......................................................... 14
Report Overview ................................................................... 15
  Job Status Screen .............................................................. 16
  Synergy Actions ................................................................ 16
  Options Tab ...................................................................... 17
  Label Setup Tab ................................................................ 18
  Sort/Output Options Tab .................................................... 19
  Conditions Tab .................................................................. 23
  Selection Tab .................................................................... 26
  Advanced Tab .................................................................... 29

Chapter 3: Managing Reports ....................................................... 34
District Report Options ........................................................... 35
  Apply Report Options ....................................................... 35
  Set Up a Custom Footer ..................................................... 36
  Mask Unlisted Phone Numbers ......................................... 37
  Indicate Who Printed the Report ........................................ 37
Changing a Report Interface ....................................................... 38
  Adding a Tab .................................................................... 38
  Add a Group Box .............................................................. 39
  Add a Line Break .............................................................. 40
  Add Layout Table ............................................................. 41
Add Field .................................................................42
Add Static Text .........................................................43
Changing Attributes ......................................................44
Report Groups ...........................................................45
Create a Report Group ..................................................45
Edit or Delete a Report Group .........................................47
Synergy Actions ..........................................................48
Job Queue ........................................................................49
Job Queue Viewer ...........................................................50
Viewing Queue and Managing Scheduled Reports ................54
Job Queue Admin .............................................................54

Chapter 4: Simple Queries .................................................56
Simple Query Using Find ..................................................57
Using Synergy Actions ......................................................60
Using the Query Results ....................................................61
Print Query as a Report ......................................................61
View as a Chart ..............................................................62
Create a Query ..............................................................63

Chapter 5: Customizing Query Output ..............................64
Customizing Query Output ..................................................65
Save a Query ....................................................................67
Filters from Queries ..........................................................68
Save a Query as a Report ....................................................70

Chapter 6: Basic Query ......................................................72
Introduction to Query .........................................................73
Defining the Content .........................................................74
Selecting Properties .........................................................74
Applying Conditions to Limit Output ...........................................78
Condition Groups .............................................................82
Changing the Condition Hierarchy of the Condition Group ......................83
Selecting Sort Order ..........................................................84
Labels ............................................................................85

Chapter 7: Managing Queries .............................................87
Open a Query ..............................................................88
Chapter 8: Advanced Techniques .............................................. 98
  Create a Query Using a Link Field ........................................ 99
  Add Fixed Text .................................................................. 101
  Manually Edit the Query ..................................................... 102
    Parts of a Query ................................................................ 103
    Focus Tokens .................................................................. 105
  Query Examples .................................................................. 107
Chapter 9: SQL Query and SSRS in Synergy ............................. 112
  Run an SQL Query .............................................................. 113
  Run SQL Queries from Other Databases ............................... 114
  SQL Server Reporting Services (SSRS) in Synergy .................. 115
    Pass a Parameter to an SSRS Report ................................. 116
Chapter 10: Job Queue Reports ............................................... 120
  JQE601 – Job Queue Execution Times .................................. 121
  JQE602 – Jobs by Hour ....................................................... 123
  JQE603 – Jobs by Type ........................................................ 125
Chapter 11: Security ................................................................. 127
  Security Overview .............................................................. 128
  Query and Reporting Security Definitions ............................ 129
  Query and Reporting Security .............................................. 130
  Controlling Buttons on Find Results Screen .......................... 130

Copyright 2016-2018 Edupoint Educational Systems, LLC
Chapter 1: Lookup Table Setup
Lookup Table Setup

Some drop-downs and checkbox lists use values configured in lookup tables. Hover over a field to view a tooltip icon that indicates which table controls the field.

Product-owned lookup tables use hard-coded values that are core to the programming and cannot be changed. You can customize other lookup tables to match district specifications and state reporting needs.

Consult the list of lookup tables for your state in the appropriate State Reporting Guide to identify tables that require a specific value.

At the top of the table, the Name of the table is listed and the Namespace lists the business object the table belongs to. If the table is locked and product-owned, it is indicated at the top of the table in the Locked value.
Add Values to Lookup Tables

To edit values for one specific field, hover over it and click the tooltip icon to open the Lookup Table screen in a new window. This allows you to quickly edit values. Refresh the original Synergy SIS screen after modifying values in lookup tables to view changes.

1. Navigate to Synergy SIS > System > Setup > Lookup Table Definition.
2. Locate the desired table.

3. Click Add in the Lookup Values section to add a new line.
4. Enter a ListOrder to display the list in a specific order, if necessary.
5. Enter a Code. This value must be unique.
6. Enter a Description. This information displays as an option in the drop-down.

   The lookup values are sorted by ListOrder first, then by Code, and then by Description.

7. Enter the Other SIS code to import data during the conversion process from another student records system.
8. Enter the State Code, if assigned.
9. Enter the Alt Code 3 and Alt Code SIF if used for reporting or system interoperability purposes, if necessary.
10. Enter the Ed-Fi Code if your district is part of the Ed-Fi Alliance, if necessary.

   Refer to your State Reporting Guide to identify if there is a specific code required.
11. If appropriate, enter a Year Start and/or Year End date to activate or deactivate the code.

If a code is inactive, it shows in historical data but is not available for selection for new records.

12. Click Save.

Assign a State Reporting Code to an Existing Lookup Table Value

Refer to your State Reporting Guide for more information.

1. Navigate to Synergy SIS > System > Setup > Lookup Table Definition.
2. Locate the desired table.
3. Enter the appropriate state reporting Code, State Code, or Alt Code 3 on a populated Lookup Value line.

4. Click Save.

Deactivate a Lookup Table Value

This procedure describes how to deactivate a lookup table value containing codes that are no longer valid. Deactivated values are no longer available for selection but remain in Synergy SIS for historical reporting purposes.

Do not modify or delete lookup table values that contain outdated state reporting codes. These are still used for historical reporting purposes. Instead, deactivate the value and then add a new lookup table value that contains the updated state reporting codes.

1. Navigate to Synergy SIS > System > Setup > Lookup Table Definition.
2. Locate the desired table.
3. Remove the text in State Code on the lookup value line.
4. Select the last year the lookup table value is valid in the Status Year End field.

![Image](Enter Code Lookup Table)

5. Click Save.

**Sort Lookup Values**

To temporarily change the sort order of the Lookup Values section, click the up and down arrows in any column heading.

![Image](Enter Code Lookup Table)

To permanently modify the sort order, change the ListOrder.
# Lookup Table Definitions

* Indicates there are specific entries required for these lookup tables. Click the lookup table name to be redirected to these specific entries.

^ Indicates there might be state-specific entries required for these lookup tables. Reference your state reporting guide for these values.

<table>
<thead>
<tr>
<th>Lookup Table</th>
<th>Purpose</th>
<th>Screen</th>
<th>Tab</th>
<th>Section</th>
<th>Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Revelation.QueryInfo</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Group</td>
<td>Group queries by function (group)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Synergy SIS or Synergy SE &gt; Query</td>
<td>NA</td>
<td>NA</td>
<td>Group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Synergy SIS or Synergy SE &gt; Query Admin</td>
<td>Public Queries</td>
<td>All Public Queries</td>
<td>Group</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Nominated Queries</td>
<td>Nominations</td>
<td>Query Group</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Synergy SIS &gt; System &gt; Setup &gt; Dashboard Control</td>
<td>NA</td>
<td>NA</td>
<td>Group</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Chapter 2: Running Reports

Report Overview ............................................................................................................. 15
Report Overview

Synergy SIS offers numerous pre-defined reports you can print. You can also customize each report at the time you print it.

Four types of reports display in the PAD tree.

- **Individual** – 200-level reports are Individual reports. These print information for a single student per page and can be printed for multiple students at once.
- **List** – 400-level reports are List reports. These show details for multiple values, such as students or teachers, on one page.
- **Summary** – 600-level reports are Summary reports. These provide numerical totals for each category specified.
- **Extracts** – 800-level reports are Extract reports. These export information from Synergy SIS into a text file that can then import data into another program.

There are several buttons at the top of the screen. They are:

- **Print** – Use to view a PDF of the report. You can save the file or send it to a printer.

  ![Print options change based on selections made in the Advanced tab.]

- **Save Default** – Use to save the options you selected as the default options for the report. These settings remain after printing the report, navigating to another tab or screen, and logging out.

  ![Saving defaults saves the selected options on the Options or Label Setup tabs. The saved defaults on the Options tab are specific to each school and user.]

- **Reset Saved Default** – Use to remove the saved default settings.
- **Email Me** – Use to send the completed report to your email.

![Report Interface Screen]

Every report has a set of tabs to define the output of the report.

- **Options** – This tab lists a set of options specific to the report that you can set.
- **Label Setup** – This tab defines the label dimension on reports that print labels, such as GRD802, GRD805, GRD806, and GRD808.
- **Sort/Output** – This tab allows you to change the sort order of the data and the format of the printed report.
- **Conditions** – This tab allows you define conditions to limit the information included in the report to the records that match the condition.
Selection – This tab allows you to define which students or student groups to include in the report.

Advanced – This tab allows you to schedule when you print reports.

### Job Status Screen

The Job Status screen opens when you click Print.

![Job Status Screen](image)

- Click Abort to cancel the report
- Click Check Status Later to close the Job Status screen.

You can still review the report and its results from the Job Queue Viewer screen.

When the report finishes, the Job Status screen closes and the report opens in a PDF Viewer.

### Synergy Actions

Synergy Actions:
- Displays on any focused to a student
- Includes most reports that have a Student grid in the Sort/Output tab, for example, the STU204 contains a Student Transcript Student grid

The Actions menu displays reports that are student-based.
Options Tab

This tab lists a set of options specific to the report that you can set.

![Report Interface Screen]

The Synergy SIS guide relating to the Synergy SIS module outlines each of these report-specific options.

Click Save Default to use the settings on the Options tab each time you run the report.
Label Setup Tab

This tab provides fields to specify the dimensions and orientation of the labels used for printing.

Tab Options:

- **Label Type** – Select the label you use for printing labels.
  - Select one of the Label Type options to auto-populate the Label Settings section.
  - Leave the Label Type field blank to clear the fields in the Label Settings section and allow you to manually enter the values.
    - Leave the Label Type blank if the label is not listed in the drop-down.
    - Click Save Default to use the label settings each time you run the report.
Sort/Output Options Tab

This tab changes the sort order of the data and the format of the printed report. You can also attach additional reports and mail merge documents to the report to assist with mailings.

![Report Interface Screen, Sort/Output Tab](image)
Tab Options:

- **File Type** – The default file type for most reports is *PDF* but you can generate reports in the following formats:
  - *TIFF Image* – A graphics file
  - *CSV* – A comma-separated 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
  - *PDF* – A Portable Document Format for Adobe Reader

- **Prompt for download** – Select to generate a prompt to either save or open the report after it generates.

- **Show Active/Inactive** – Select an option to include active, inactive students, or both on the report. Leaving this field blank includes both active and inactive students.

- **Display "Confidential"** – Select an option in to display the word *Confidential* on the report. The options allow you to indicate where the Confidential label appears on the report: *Footer*, *Header*, or *Header & Footer*.

- **Display "Printed by" User ID** – Select either Show "Printed by" User ID or Hide "Printed by" User ID. Leaving this field blank shows the "Printed by" User ID.
- **Mask Phone Numbers** – Select either *Mask unlisted phone numbers* or *Show unlisted phone numbers*. Leaving this field blank masks unlisted phone numbers.

- **Mandatory Sort Properties** – If the report was set up with a mandatory primary sort, this sort displays as Mandatory Sort Properties and cannot be changed. The default sort order displays in the middle of the screen. The properties or fields listed are different for each report. The report sorts by the order the properties are listed. For example, the report below is sorted first by the section ID, then by the student’s name.

  - **Sort By** - Select another option to change how the report is sorted.
    
    ![The list of properties available for sorting is different for each report.](image)

  - **Sort Order** – Select an option to change the direction of the sort.
    
    - *Ascending* sorts from smallest to largest value or from A to Z.
    - *Descending* sorts from largest to smallest, or from Z to A.

  - Click **Add** to add a new property to sort by. Select the desired property from the **Sort By** column and select the direction of the sort from the **Sort Order** column.

  - Select the box in the **X** column to remove the property immediately.

- **Additional Report to Run** – Select to run additional labels for the report in conjunction with the primary report.

  ![Mandatory Sort Properties](image)

  Not all reports have this field.

  - The labels print in exactly the same order as the report with exactly the same students, making it easier to complete a mailing.

  - The three additional reports currently available are:
    
    - **STU424** – *Student Oldest or Youngest* prints one mailing label per household with the information from either the oldest or youngest sibling.
    
    - **STU802** – *Student Mailing Labels* uses the student’s mailing address.
STU803 – Student Household Labels uses the parent’s mailing address.

Mail Merge Options – Select the options to print the report using a different format defined using mail merge.

- **Merge Document** – Select mail merge template to use for the report.
- **Merge Output Type** – Select either *Word Doc* or *PDF*.
- **Merge Language Property** – Select the language to print the document.
  - *Home Language* – Prints in the language defined by the *Home Language* field on the Student screen.
  - *Language to Home* – Prints in the language defined by the *Language to Home* field on the English Language Learners screen.
  - *Primary Language* – Prints in the language defined by the *Primary Language* field on the Student screen. (This field is not always visible on the screen.)

The language currently defaults to the *Home Language* of the student defined in the Student screen. When the merge document prints, it looks up the language of the student and then looks to see if there is a mail merge template saved in that language. If a mail merge template is not available in the student’s language, Synergy SIS uses the default language (generally English).

- To create a mail merge template in 1.0, refer to the instructions in the *Synergy SIS – System Administrator Guide*.
- To create a mail merge template in 2.0, refer to the instructions in the *Synergy SIS – Mail Merge 2.0 Guide*. 
Conditions Tab

This tab allows you to filter a report separately from the options available on the Options tab. Filtering a report limits the information included in the report to the records that match the filter or condition.

A condition is like a mathematical formula. It compares each record that Synergy SIS would normally include in the report to the condition. If the record matches the condition, Synergy SIS includes it in the report.

A condition has three main parts:

- Which property in the report to examine
- The mathematical operation to use, such as Equal or Not Equal
- The value to use as the criteria

Written out, it would look like this:

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

Tab Options:

- Click Add to create a new Condition.

You can add multiple conditions. For a record to print, it must match all of the conditions entered.
Condition – Select the property to use for the filter.

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 provides student properties such as the student’s language, birth date, city, etc.
- A report about sections provides section properties such as the section ID, course title, room number, etc.

The name of the table where the property comes from displays in parenthesis after the name of the property. This is useful for selecting properties with the same name in more than one table. For example, there is a **Phone** property both in the physician records and in the student records.

- **Operator/Not** – Set the condition to one of the following:

  Selecting **Not** from the drop-down adds a not before the operator. For example, if you set the **Operator** to **Equal To** and select **Not**, the operation becomes **Not Equal To**.

  - **Contains** – The property selected must contain the value entered. For example:
    - If you select **Email** as the property and enter ‘yahoo’ for the **Value**, the report lists all students with an email address that contains the letters yahoo anywhere (**billy@yahoo.com**, **melissa@yahoo.com**, etc.)
    - If you add **Not**, it lists all email addresses without yahoo in them (**george@gmail.com**, **sandra@hotmail.com**, etc.)
  
  - **Equal To** – The property you select must be exactly the same as the value entered. For example:
    - If you select **Home Language** as the property and enter **English** as the **Value**, the report lists all students whose home language is English.
    - If you add **Not**, it lists all students whose home language is not English.
  
  - **Ends With** – The property you select must end with the value entered. For example:
    - If the section ID were created with the Course and Period option and you enter **01** as the **Value** for the section ID property in a report, it lists all sections for period 01.
    - If you add **Not**, the report lists all sections not in period 01.
• **Greater or Equal** – The property you select must be greater than or equal to the value entered. For example:
  - If you select *Expected Graduation Year* as the property and enter the Value *2009*, the report lists all students with an expected graduation year of 2009 or later (2009, 2010, etc.).
  - If you add *Not*, the report lists only students with an expected graduation year of 2008 or earlier.

• **Greater Than** – The property you select must be greater than the value entered. For example:
  - If you select *Expected Graduation Year* as the property and enter the Value *2009*, the report lists all students with an expected graduation year of 2010 or later (2010, 2011, etc.).
  - If you add *Not*, the report lists only students with an expected graduation year of 2009 or earlier.

• **In List** – The property you select must include one of the values entered in the *Value* field. Enter list values in the *Value* field and separate them with a comma. For example:
  - If you select *Grade* as the property and enter the values 1, 2, 3, the report lists all students in grades 1, 2, or 3.
  - If you add *Not*, the report lists students not in grades 1, 2, or 3.

• **Less Than** – The property you select must be less than the value entered. For example:
  - If you select *Age* as the property and enter the Value *15*, the report lists all students younger than 15 (14, 13, etc.).
  - If you add *Not*, the report lists only students 15 or older (15, 16, 17, etc.).

• **Starts With** – The property you select must start with the value entered. For example:
  - If you select *Enter Code* as the property and enter the Value *R*, the report lists all students whose enter code started with R (R1, R2, R3, etc.).
  - If you add *Not*, it lists all students with enter codes that do not start with R (E1, E2, etc.).

• **Value** – Enter the value to use for the condition. The value can be numbers or letters and it is not case-sensitive.
  - When using a value from a drop-down, 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 selected or *N* for cleared.
  - When entering a date, enter it in *MM/DD/YY* or *MM/DD/YYYY* format.
When using dates in a condition, you must enter a full date as a value, such as 9/1/2009.

To filter a date, the most useful operators are:

- **Equal To** – List all students who have the same enter date
- **Greater Than** – List all students who started after a specific date
- **Greater Than or Equal** – List all students who started on or after a specific date
- **Less Than** – List all students who started before a specific date
- **Less Than or Equal** – List all students who entered on or before a specific date

Select the box in the X column to remove the condition.

### Selection Tab

This tab allows you to filter by Student, Student Group, Counselor, or Staff Member. If the report is a student-based report, you can select the specific students or student groups you want to include in the report. If the report is not a student-based report, this option is not available.
Tab Options:

Filter by Student

- Object Type – Select Student.
- Select – Click to use the Chooser to add students to the list of students to include in the report.
- Select the box in the X column to remove the condition.
- Clear – Click to remove the entire list of students as criteria for the report.

Filter by Student Group

You can select Student Groups in addition to individual students or as a stand alone condition.

- Click Add in the Select Groups to Filter section to add a new line.
- Student Group – Select a student group to filter by.
Filter by Counselor or Administrator

You can select a counselor or administrator in combination with individual students, student groups, or alone.

- Select Counselor Filter – Select the counselor to use for the report.
- Select Administrator Filter – Select the staff member to use for the report.
Advanced Tab

By default, when a report prints, it runs once and the options selected on all of the tabs of the interface reset. This tab allows you to run reports on a scheduled basis. 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 first ran.
- They run based on the year and school in focus.

Select all of the options to use on the report on the various tabs of the report interface screen.

You must schedule reports for a new school year once New Year Rollover is complete.

![Report Interface Screen, Advanced Tab](image)
Tab Options:

- **Schedule Task** – Select the frequency you want the report to run. You can set reports to run *Once, Daily, Weekly, or Monthly.*

  When selecting an option other than *Once* additional options display.
  - The Print button changes to Print/Schedule and an additional Schedule button displays.
  - A message indicating the date and time the report will print next displays in the Schedule Job group box.

- **Start Time** – Enter the time of day the report should run if running the report more than *Once.*

  Enter only the time numerals. The system formats the field once entered, for example, 900 formats as 9:00 AM. The default is the time you created the report.

- **Start Date** – Enter the date to start running the report. It defaults to the date you created the report.

- **Stop Date** – Enter date to stop running the report, for example, the date of the end of the school year.

- **Schedule Task** – Select the specific schedule you want the recurring report to run.
  - *Daily* – Enter the number of days between each report run. For example:
    - To run a report every day, enter the number 1.
    - To run a report once a week, enter 7, the report runs once a week.
- **Weekly:**
  - Enter the number of Week(s) between each report run. For example:
    - To run the report every week, enter 1.
    - To run the report once every four weeks, enter 4.
  - Select the days of the week you want the report to run. For example, you could schedule a report to run every week on Monday, Wednesday, and Friday.

- **Monthly:**
  - Select when to run the report on a Day of the month, such as the 1st or the 20th or a specific weekday, such as the First Monday of the month.
  - Select which months to run the report.
Notification – After the report runs at its scheduled time, you can open and print the results of the report from the Job Queue. However, you must remember to open up the Job Queue and get the report at each scheduled instance. Complete the Notification fields to remind the report users that the report ran, Synergy SIS via email.

- Enter the email addresses of the users to notify in the field provided. Separate multiple addresses with commas. You must enter the full formatted email address, such as user@domain.com.

Before sending notifications by email, you must configure Synergy SIS to send email via the local email server. See the System Configuration in the Synergy SIS – System Administrator Guide for instructions on configuring email.

- Include the result report as an attachment – Select to include the report in the email so users do not have to go to the Job Queue to view or print it.

External Interface – You can save reports as a file to a location on a server. You can use this function to export data from Synergy SIS that you can import or use in another program.

- Enter the full Universal Naming Convention (UNC) path and file name, such as \SERVER\Folder\FileName.txt, in the field at the top of the External Interface section.

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 saves as File20090703.txt.
• Enter the full UNC path and filename of the program in the field at the bottom of the section, such as `\SERVER\Folder\BatchFile.bat`, if another program should start each time the report saves to this file.

You can pass information about the saved file 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}`.

• Select a print option:
  
  • **Print** – Click to run the report immediately. This option displays when running the report *Once*.

  • **Print/Schedule** – Click to run the report immediately and schedule for the next date/time indicated in the Schedule Job group box. This option displays when running the report *Daily, Weekly, or Monthly*.

  • **Schedule** – Click to schedule the report in the job queue. A message displays indicating that the job is successfully scheduled. This option displays when running the report *Daily, Weekly, or Monthly*.

When you schedule reports, 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 first ran. You cannot edit these values after the report runs the first time.

Be sure to set up the report exactly as you want it to run each time before printing or scheduling. To change a previously scheduled report, you must delete/abort the report from the Job Queue and recreate it.

See [Job Queue](#) for information on viewing and managing scheduled reports.
Chapter 3: Managing Reports

District Report Options ................................................................. 35
Changing a Report Interface ......................................................... 38
Report Groups .............................................................................. 45
Synergy Actions ........................................................................... 48
Job Queue ..................................................................................... 49
Job Queue Admin .......................................................................... 54
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.
- Determine how unlisted phone numbers display on reports.

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

Apply Report Options

1. Navigate to Synergy SIS > System > Setup > District Setup.
2. Select the Reports tab.
3. Select the reports you want to display with these options using Chooser.
Set Up a Custom Footer

The following steps describe how to customize a footer that displays above the standard footer.

1. Enter the custom message in the **Footer Boiler Plate** field.

2. Select **Show Footer Boiler Plate** for each report to display the message.

3. Click **Save**.
Mask Unlisted Phone Numbers

The following steps describe the options for displaying unlisted phone numbers.

1. Select the desired option from the Mask Phone Numbers drop-down. Select either Mask unlisted phone numbers or Show unlisted phone numbers. Leaving this field blank masks unlisted phone numbers.

2. Click Save.

Indicate Who Printed the Report

These steps describe how to display or hide the person who printed the report.

1. Select the option from the Display “Printed by” User ID drop-down.
2. Click Save.

Users can override this setting for their printed reports on the Report Preferences tab of the User Password and Preferences screen.

![User Password And Preferences Screen, Report Preferences Tab](image)

**Changing a Report Interface**

See the [SIREN Report Designers Guide](#) for information on changing the layout of a user-defined report.

Use the Report Interface Change screen to customize query-based reports and user-defined (UD) reports. You can change the content of the Options tab of Report Interface screens and add tabs.

2. Scroll or use Find mode to locate the report to change.

**Adding a Tab**

1. Select Add New Tab from the Action... list. The Add Tab screen opens.
2. Enter a Label for the new tab.

![Add Tab Screen]

3. Enter a number in Layout Order to indicate where the tab appears relative to other tabs.

4. Click Save.

Add a Group Box

1. Select an object to modify under Report Interface Modifications.
2. Select the Add Group Box to "from the Action...list.

![Report Interface Change Screen]

3. Enter properties for the object.

4. Click Save.

![Add Group Box Screen]
Add a Line Break

1. Select an object to modify under Report Interface Modifications.
2. Select the Add Line Break to " from the Action...list.

3. Enter the Layout Order.
4. Click Save.
Add Layout Table

Use Layout Tables to format the information into columns. You can add lines, group boxes, layout tables, and static text to each column.

1. Select an object to modify under Report Interface Modifications.
2. Select the Add Layout Table to "from the Action...list.

3. Enter properties for the object.
4. Click Save.
Add Field

1. Select an object to modify under Report Interface Modifications.
2. Select the Add Field to ‘’ from the Action...list.

When you add a lookup table property to a Report Interface, select Show as Checklist to allow users to select multiple options from the list.

3. Select a Business Object and Property.
4. Click Save.
Add Static Text

1. Select an object to modify under Report Interface Modifications.
2. Select the Add Static Text to... from the Action... list.

3. Enter the Text to display on the screen and report.
4. Click Save.
Changing Attributes

Select the item in the tree to view additional settings. The available settings vary depending on the selected Business Object and Property.

Example

Added a group box, layout table, two layout columns with one field each, and some static text.
The resulting change to the Report Interface screen:

![Report U-001: Example SSRS Report Interface Screen](image)

### Report Groups

Occasionally, you might need to print several reports for a student or group of students. For example, when a student withdraws, the district might want to print several reports. Rather than printing each report individually, you can create and save a report group to streamline this process.

### Create a Report Group

1. Navigate to **Synergy SIS > System > Setup > Report Group**.
2. Click **Add**. The Report Group (Add) screen opens.

![Report Group Screen](image)

3. Enter the **Name** of the report group and a **Number**. Synergy SIS preferences the number by *U-* automatically when saved to keep the report group with the other user-defined reports in the PAD tree.
4. Click **Chooser** to select the reports to include in the group.

![Report Group (Add) Screen](image)

5. Select the report interface used for the group from **Select the primary report associated with this report group.**

6. Select the **Output Type**.
   - *Combined* – Select to print one PDF with all of the reports in the group.
   - *Separate Files* – Select to generate one PDF for each report in the group.

7. Enter the folder in the district PAD tree where the report group should save in **Location of the report group in the PAD tree.**

![Report Group Screen](image)

8. Click **Save**. Saved groups appear in the district PAD Tree as shown below.

![PAD Tree](image)

When printing the report group, the group uses the Report Interface of the selected primary report. Be sure this report has the options needed for all other reports in the group.
Edit or Delete a Report Group

1. Navigate to **Synergy SIS > System > Setup > Report Group**.
2. Locate the desired group.

3. Make changes as needed.
   - To remove a report from the group, select the box in the X column.
   - To delete the entire group, remove all reports in the group first, then click **Delete**.
   - To change the Name and/or Number of the group, select **Edit ReportDef Data** from the Menu. The Name and Number fields turn white and you can edit the text.

4. Click **Save** after making your changes.
Synergy Actions

You can execute reports for the student currently focused on the screen from the Actions drop-down.

1. Navigate to a student screen. For example Synergy SIS > Student > Student or Synergy SIS > Attendance > Period Attendance.
2. Locate a student to modify. The Actions icon does not appear until you focus on a student.
3. Click the Actions icon.
4. Select the appropriate report to execute.

Enter text in the filter field to locate a report without scrolling.
- Run a report by selecting the report name.
- Open the report by hovering over the report name and clicking 
  
  ![Report Interface Screen](image)

  *FDP201 – Student Fee Profile Report Interface Screen*

  If the selected report is a list or summary report, a message displays to confirm parameters before printing. Click OK to open the report Interface and display the student on the Selection tab.

### Job Queue

Once you submit a job, such as reports or processes like the New Year Rollover, its status displays in the Job Queue Viewer and the Job Q Adm Viewer.

- The Job Queue Viewer lists all of the jobs submitted by the user currently logged in to Synergy SIS
- The Job Q Adm Viewer lists all jobs regardless of user.

Both allow you to delete jobs, view the results of the job to print, and view the details of the job itself.
Job Queue Viewer

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

Each job displays with its submission and completion date and time. Also, the state of the job is indicated by an icon, as shown below:

- Waiting
- In Progress
- Completed
- Error

The **Job ID** and **Description** display for each job as well. For reports, these are the report ID and the name of the report.

- To view the result of the job, click the icon in the **Result** column. The results open in a new window, generally in PDF format. For jobs still in progress, click the **Result** icon to open the Job Status screen.

- Click **Abort** to cancel the job on the Job Status screen.
Click Check Status Later to close the Job Status screen. You can still view the job and its results from the Job Queue Viewer screen.

To delete a job from the queue, select the box in its X column and click Save.

To delete all the jobs at a particular state, select the state from the State Selection drop-down and click Delete Jobs.

To filter the list of jobs displayed, enter the criteria to filter and click Filter. You can filter jobs by:

- **Job ID** – Enter all or part of the ID.
- **Begin Date and End Date** – Enter a range of dates.
- **State** – Select a job status.
- **Server Name** – Enter the name of the process server used to process the job.
- **Show Recurring** – Select to show recurring jobs in the list.
Click Show Detail to view additional information about each job. The detailed information about each job appears to the right. Synergy SIS highlights the job displaying detailed information in blue to the left. To switch to another job, click the job on the left.

The Details tab displays by default. In addition to the information shown on the main screen, this tab shows the Result Type, the Job Type, the Date Processed, the Total Execution Time, and the Focus the job ran from.

Select the Recurring Pattern tab to view the details of the schedule of any recurring jobs.
Select the Results tab to view the results of the job by clicking the icon, as you would from the main screen. To have the results bring up a prompt to save or open the results file, select the Force Download Prompt option.

Select the System Info tab shows the name of the process server used to process the job. If the job is still processing, the Progress field shows how far the job has progressed. If the job generates an error, the top part of the error message displays in the Progress Message field.

- The Process State XML field contains more information for developers.
- The Error Info section shows the full text of the error message.
Viewing and Managing Scheduled Reports

1. Click [ ] and click JobQueue Viewer or navigate to Synergy SIS > System > Job Queue > Job Queue Viewer.

2. Select Show Recurring and click Filter.

   ![Job Queue Viewer Screen]

   - Click Show Detail to change the settings for a scheduled job.
   - Select a job and click Delete Jobs to unschedule the job.

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 display in the Admin Viewer rather than just the jobs of the logged-in user. In addition, the Admin Viewer allows you to adjust the priority of each job.

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, there might be a problem with the job queue and it should be investigated from the Admin Viewer.

![Job Status Screen]
In the Admin Viewer, three additional columns of information display:

- **Priority** – When a user submits a job, it has the priority of *Normal*.
  - If a job is still waiting that might delay the queue, you can adjust the job’s priority to *Low* to allow later jobs with a priority of *Normal* to finish first.
  - If there is an urgent job that is waiting, you can switch its priority to *High* to set that job to process next.

- **Process Server Machine Name** – Lists the server that ran the job

- **User Name** – Click to locate a user to filter jobs by and click Filter.

All other functions are the same as the Job Queue Viewer.
Chapter 4: Simple Queries

Simple Query Using Find ................................................................. 57
Using the Query Results ................................................................. 61
Simple Query Using Find

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

1. Adjust the focus to select the school and year to include in the report.
2. Select whether to include active or inactive students.

3. Open the screen with the information for the report. For example, if running a report that contains student information, open the Student screen.

Click Find Mode if the screen is not already in Find Mode. When a screen is in Find Mode, all of the fields are yellow.
4. Identify the fields to use in the query:
   - Enter an asterisk (*) in the field to include the field in the query, but not look for a specific value.

   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 (*).

   - You can select fields on multiple tabs before clicking Find to create reports that are more complex.
   - You cannot include fields in grids in the Find Mode results, such as the Phone grid on the Student screen or the Students grid on the Class Grades screen.
• Select the criteria from a drop-down in the appropriate field. For example, to show only students with a home language of Spanish, select Spanish from the Home Language drop-down.

• Filter any field by adding conditions. For example, enter text or numbers into the field to limit the results.
  
  • To exactly match the text entered, enter the text or numbers.
  
  • 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 criterion). For example, entering d* in the Counselor field lists all of the students who have a counselor whose last name starts with d.

  
  To match the last part of the field, enter the asterisk followed by the text. This is also known as an Ends With criterion. For example, entering *di in the Counselor field lists all of the students who have a counselor whose last name ends with di.

  
  To find the text in any part of the field, enter an asterisk followed by the text followed by another asterisk. This is called a Contains criterion. For example, entering *dia* in the Counselor field lists all of the students who have a counselor whose last name contains dia.

• Use operators 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 >= 9/1/15 in the Enter Date field returns all students whose enter date is greater than or equal to 9/1/2015. You can use operators with numbers, dates, or text.
5. Click Find to view the results. The Find results open in a new screen. You can print the results as a report, save them as a filter, or open them in a query.

Find Result Screen

Some fields are mandatory for the Find results, regardless of where the asterisks are placed. For example, the Student screen always includes the student’s Last Name, First Name, Middle Name, and Perm ID. The District Course screen always includes the Course ID and Course Title.

Using Synergy Actions

After executing a query, you can use Synergy Actions to modify the output beyond the boundaries of the report.

From the Query Results screen:

1. Click Actions.
2. Select a report.
3. Make changes to the output using the report interface.
4. Click Print.
Using the Query Results

Print Query as a Report

You can print the results of the query using the Find Result screen.

1. Create a Simple Query.
2. Select the Output Type. By default, the results print as a PDF file to the screen. The possible file types are:
   - **TIFF Image** – A graphics file
   - **CSV** – A comma-separated 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
   - **PDF** – A Portable Document Format for Adobe Reader
3. Click Print.
View as a Chart

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. (Optional) Select another field, if desired.

   You can select a field from any two tabs of the same screen but you can select only two fields at one time.

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

5. Customize the graphs by type, color, and results or print the graph using the buttons in the right corner.
Create a Query

You can use Find Mode to create a query that you can add functionality using the Query screen.

1. Create a Simple Query.
2. Click Open in Query. The results open in the Query screen.

For more information about customizing the query, see Introduction to Query.
Customizing Query Output

You can make some simple customizations to the display of the query in the Property Overrides grid of the Column tab of the Query screen.

- **Label Override** – Enter a new heading to change the default label heading. The default heading is the name of the property, such as *Perm ID* or *Gender*.
- **Order** – Enter the new order number. If two properties have the same number, the order defaults to alpha by *Name*.
- **Width** – Enter the new width in inches. Works in PDF output only.
- **Hide** – Select the option to hide a property so that the query calculation uses it but does not display it on the report. Generally, this is for hiding the link fields in more complicated queries, as outlined in *Advanced Queries*. However, you can use it so that a property used for sorting or filtering does not appear on the report.
- **Group** – Select the *Group #* from the drop-down to group options based on a property. You can use each of the properties listed to group the records with the same value in the property together. Because you can create multiple groups, Group 1 is the first property to group, Group 2 is the second, and so on. When you group a property, Synergy SIS removes it from the columns and places it at the top of each page where the group records display. Must be used with the *Break* option.

For groups to work correctly, you must sort the query in the same order as the groups. For more information about sorting, see the *Sort* section.

- **Break** – If using the *Group* option to group the records, insert a break into the report to allow the group information to display. While the group information appears at the top of the page, it is rare that the groups split exactly at the end of the page. Without the break, the records still group but the group does not appear on the report.
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>First Name</th>
<th>Gender</th>
<th>Perm ID</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Laurence</td>
<td>Jonathan</td>
<td>Male</td>
<td>157792</td>
<td>480-555-9641</td>
</tr>
<tr>
<td>Belgium, Kingdom of</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Last Name</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Renard</td>
<td>Amanda</td>
<td>Female</td>
<td>950761</td>
<td>480-555-5668</td>
</tr>
</tbody>
</table>

**Group Break**

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

**Display Type** – Select how to display properties that are drop-downs. Properties that are drop-downs have a *Code* and a *Description*. For example, the code for gender is *M* but the description is *Male*.

- **Default** – Select to allow Synergy SIS to 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*).
- **Both** – Select to have the *Code* display before 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>Ahistrom</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>

**Display Both Option**

**Aggregate** – Select an option to display the information.

- **None** – Select to remove the remove an option.
- **Average** – Select to have the found records display an average of the records found. Query adds up all values and calculates the average. You can only use with numeric values either integers or decimals.
- **Count** – Select to display the number of found records instead of each individual record. Must be identical to be counted. For example, the parent *Relation* of *Mother* or *Grade* of 5. If *Relation* returns, *Mother*, *Step-Mother*, and *Grandmother*, they are counted as three separated groups.
- **Max** – Select to display the record with the maximum value.
• *Min* – Select to display the record with the minimum value.
• *Sum* – Select to adds up all the values of the found records. You can only use with numeric values either integers or decimals.

Save a Query

While the information selected on the **Columns**, **Conditions**, and **Sort** tabs is different for every query, you must save the basic information recorded at the top of the **Query** screen for every query. To save a query:

1. Enter a short **Name** for the query.

![Query Screen](image)

2. Enter a longer explanation of the query in **Description**.

3. Select the **Group** to assign to the query from the drop-down. The **Group** categorizes the data from the query to make it easier to find in a long list. The groups are customized for each district using the **Lookup Table Definition** screen.

   The default **Type** of query is **Select**, which indicates this query shows information from the Synergy SIS database. You can change this default type but it is not recommended. **Update**, **Delete**, or **Insert** makes a direct change to the database. Only experienced users should attempt this.

4. The **Output Type** shows the default output format for the query. You can change it to any of the following by clicking on the drop-down:
   - **TIFF Image** – A graphics file
   - **CSV** – A comma-separated 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
   - **PDF** – A Portable Document Format for Adobe Reader
5. Select the Orientation to use in the printed output, either Landscape or Portrait. The Labels orientation is covered in the Labels section.

6. Save the Query:
   - Click Save to save the query to the list of queries for the logged-in user.
   - Select Save As from the Menu to rename the Query.

Filters from Queries

You can use Find Mode to create a filter to apply to a screen. Using the filter reduces the number of records displayed making it easier to scroll through the records. For example, you can apply a filter to the Student screen that finds all students in Grade 09 that are English Language Learners with a Code of newly identified.

Creating a Filter

1. Create a Simple Query.
2. Enter a Filter Name.
3. Select Make Active to turn the filter on immediately.
4. Click Save As Filter to save the new filter.

Find Result Screen

After saving a query, any changes made result in a new query saving on the My Queries tab in the Open button.
Applying Filters

All screens display 🎨. When a filter is activated, the screen displays 🎨.

1. Click the icon.

2. Make a selection:
   - Select the filter name to activate it, deactivate it, or choose another filter.
   - Click X next to the filter to delete it.

   Deactivate the filter prior to deleting it to completely remove it from the system.

3. Click Save.

4. Click Find to view a list or use the scroll buttons to view the records that match the filter one at a time.
Save a Query as a Report

You can save queries as reports. One advantage to saving queries as reports includes allowing anyone with access to the report to run it without having to have extensive knowledge in writing or running queries. You can also schedule reports to run at regular intervals.

For more about working with reports, see Reports.

A report saved from a query obeys all conditions saved in the query. To update the report, remove the conditions from the query and save the report again.

To save a query as a report:

1. Select Save As Report from the Menu. The Save User Report screen displays.

2. Enter the Report Name as you want it to appear in the User PAD Tree.
3. Enter a Report ID.
4. Select whether or not to **Overwrite the Existing Report Layout** and to **Overwrite the Existing Query Data** by selecting or clearing the boxes if a report exists with the same Report ID.

   The report layout is the information defined by the **Output Type** and the **Property Overrides**. The query data is the actual properties selected.

5. Select where to save the report in the User PAD tree by entering the folder structure in the **Location of Report in PAD** field. To indicate subfolders, separate folder names with a `\`.

   For more information about the User PAD Tree, see [Managing User-Defined Reports](#).

6. Click **Save**.
Chapter 6: Basic Query

Introduction to Query ................................................................. 73
Defining the Content ................................................................. 74
Applying Conditions to Limit Output ......................................... 78
Selecting Sort Order ................................................................. 84
Labels ....................................................................................... 85
Introduction to Query

A query is a way to define a custom report in Synergy SIS. A query can pull together any information in Synergy SIS.

- You can save the query so you can run it more than once.
- You can save it as a report so you can schedule it to run in the future.

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

The Query screen contains the following tabs:

- **Columns** – Selects the pieces of information included in the query. It can also customize how the information displays. It is called Columns because the information selected appears in the output report in columnar format.
- **Conditions** – Filters the information included in a query. For example, if you select student information on the Columns tab, the Conditions tab can define which students’ information to include.
- **Sort** – Defines the order the information displays.
- **Type in Query** – Use to enter a query by typing it in directly instead of using the first Columns, Conditions, and Sort tabs to guide the query construction.

Click Validate on the Type in Query tab for any query to verify it is formatted correctly.

![Query Screen](image)

Typing a query is only for advanced users who are familiar with the conventions of the query language in Synergy SIS.

On the Column tab, use the Business Objects section to find the data to display in the report and the Property Override section to display the data.

- Business Objects allow you to access the SQL database in a secure and safe manner.
- Properties are columns within the SQL database tables.
Defining the Content

The first part of creating a query is selecting what information appears in the final report. You can include any of the information contained within Synergy SIS in a query. Selecting the information for the query is done on the Columns tab.

You can begin a Query Using Find. Click Open as Query on the Find Result screen to view the Query screen with Business Objects and Property Overrides already populated.

Selecting Properties

To select what information to include in the query, complete the following steps:

1. Click Add Root Business Object in the Business Object grid to open the Select a Business Object screen.
2. Click the name of the business object to use in the query. There is a Frequently Used list of business objects or tables, such as Student, Course, etc. and a list of Primary business objects.

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 selected business object, such as Birth Date or Last Name for the Student object.
3. Click the name of the Properties to include in the query.
   - You can scroll through the list of properties on the right.
   - Some Business Objects contain 🎓.
     - Click 🎓 to select the business object only. The Business Object displays in the Business Objects tree.

See Create a Query Using a Link Field for more information about using linked fields.

- Click the name to select the property to select both. The name turns blue and the property displays below on the Property Overrides grid.
4. Continue adding properties until all the needed information displays in the Property Overrides grid. At this point, you created a basic query.

   - Click Clear All to clear the query and start over.
   - Drag and drop a property to a new location to reorder the columns.
   - Click the X next to the property to delete a property from the report. The property is instantly removed from the list.

   See Advanced Queries for instructions on how to use show all Business Objects, All Properties, and the Add Literal button.

   ![Property Overrides Grid]

   **Query Screen**

5. Click Execute to see view the results of the query. The query displays in the format selected (the default is HTML). If the information is correct, you can save the query or make further customizations.

   ![Query Results Screen]

   **Query Results Screen**

   You can click Execute as many times as needed to test the query.

6. Click Save. See Save a Query for more information.
Applying Conditions to Limit Output

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

A condition is like a mathematical formula. It compares each record that Synergy SIS would normally include in the report to the condition. If the record matches the condition, Synergy SIS includes it in the report.

A condition has three main parts:

- Which property in the report to examine
- The mathematical operation to use, such as Equal or Not Equal
- The value to use as the criteria

Written out, it would look like this:

\[ \text{Property} = \text{Value} \text{ or } \text{Property} \neq \text{Value} \]
To select Conditions for the query:

1. Select the **Conditions** tab.
2. Click **Add Condition**. The Create a Condition screen opens.

3. Create the condition.
   - **Object** – Select the object with the property to use. The only objects available are those objects added to the query.
   - **Property** – Select the property based on the selected **Object**.

   - You can use any of the properties of the object for the condition and not just the properties added to the query.
   - Any property contained in the objects being queried can be used to condition the output regardless of whether the property is displayed in the output (are not listed in **Property Overrides** grid.)
Operator/Not – Set the condition to one of the following:

- **Contains** – The property selected must contain the value entered. For example:
  - If you select Email as the property and enter ‘yahoo’ for the Value, the report lists all students with an email address that contains the letters yahoo anywhere (billy@yahoo.com, melissa@yahoo.com, etc.)
  - If you add Not, it lists all email addresses without yahoo in them (george@gmail.com, sandra@hotmail.com, etc.)

- **Equal To** – The property you select must be exactly the same as the value entered. For example:
  - If you select Home Language as the property and enter English as the Value, the report lists all students whose home language is English.
  - If you add Not, it lists all students whose home language is not English.

- **Ends With** – The property you select must end with the value entered. For example:
  - If the section ID were created with the Course and Period option and you enter 01 as the Value for the section ID property in a report, it lists all sections for period 01.
  - If you add Not, the report lists all sections not in period 01.

- **Greater or Equal** – The property you select must be greater than or equal to the value entered. For example:
  - If you select Expected Graduation Year as the property and enter the Value 2009, the report lists all students with an expected graduation year of 2009 or later (2009, 2010, etc.).
  - If you add Not, the report lists only students with an expected graduation year of 2008 or earlier.

- **Greater Than** – The property you select must be greater than the value entered. For example:
  - If you select Expected Graduation Year as the property and enter the Value 2009, the report lists all students with an expected graduation year of 2010 or later (2010, 2011, etc.).
  - If you add Not, the report lists only students with an expected graduation year of 2009 or earlier.
In List – The property you select must include one of the values entered in the Value field. Enter list values in the Value field and separate them with a comma. For example:

- If you select Grade as the property and enter the values 1, 2, 3, the report lists all students in grades 1, 2, or 3.
- If you add Not, the report lists students not in grades 1, 2, or 3.

Less Than – The property you select must be less than the value entered. For example:

- If you select Age as the property and enter the Value 15, the report lists all students younger than 15 (14, 13, etc.).
- If you add Not, the report lists only students 15 or older (15, 16, 17, etc.).

Starts With – The property you select must start with the value entered. For example:

- If you select Enter Code as the property and enter the Value R, the report lists all students whose enter code started with R (R1, R2, R3, etc.).
- If you add Not, it lists all students with enter codes that do not start with R (E1, E2, etc.).

Value – Enter the value to use for the condition. The value can be numbers or letters and it is not case-sensitive.

- When using a value from a drop-down, 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 selected or N for cleared.
- When entering a date, enter it in MM/DD/YY or MM/DD/YYYY format.

- When using dates in a condition, you must enter a full date as a value, such as 9/1/2009.
- To filter a date, the most useful operators are:
  - Equal To – List all students who have the same enter date
  - Greater Than – List all students who started after a specific date
  - Greater Than or Equal – List all students who started on or after a specific date
  - Less Than – List all students who started before a specific date
  - Less Than or Equal – List all students who entered on or before a date
• **Object** – Select the object that has a status for the property, such as an error code. First, select the business **Object** from the drop-down, then select the property below it.

```
<table>
<thead>
<tr>
<th>Value</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Object</td>
<td>R0.Student</td>
</tr>
<tr>
<td></td>
<td>InternetAuthorization</td>
</tr>
</tbody>
</table>
```

*Query Screen, Conditions Tab*

4. Click **Add** to save the condition to the query.

### Condition Groups

By default, conditions are added as an **And** condition type. After adding the And condition type, you can switch it to an **Or** condition type by right-clicking on the word **And** and clicking **Or** in the **Condition Type** menu.

- An **And** condition type means that the records must meet both conditions in the group for the query to include it.
- An **Or** condition type means that the records must only meet one of the conditions in the group for the query to include it.
Changing the Condition Hierarchy of the Condition Group

- Click + to insert a condition group.
- Click + in the And/Or box to insert a condition. Groups can be nested and you can add an unlimited number of groups and conditions to create very complicated conditions.
- Click X to remove the condition.
- Click ‐ to delete the condition group.
- Rearrange conditions by dragging them with your mouse.
Selecting Sort Order

Setting the sort order determines the display order of the records included in the query. If you do not select a sort order, the records sort by the default sort order of the primary object. For example, the Student object always sorts 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 already selected for use in the query on the Columns tab are available.
3. Change the direction of the sort by selecting it from the Sort Order column, if needed.
   - 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 displayed order of the properties on the Sort tab. For example, in the sort shown above, the properties sort by Last Name, then First Name.

Click X to delete a property from the sort. It immediately disappears.
Labels

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

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

3. Select the Label Dimensions tab to select and format the label.
4. Select the Label Type to use.

Labels are defined in the Label Detail screen, found at Synergy SIS > System > Setup. For more information about defining labels, refer to the Synergy SIS – System Administrator Guide.
Only adjust Top Margin (in.), Label Height (in.), Side Margin (in.), Label Width (in.), Vertical Pitch (in.), Number Across, Horizontal Pitch (in.), Number Down, Page Size, and Page Orientation if printing custom labels or the commercial labels need a slight adjustment after testing the settings.

5. Enter the value in Row Height to specify how much space each of the fields needs on a label.
6. Enter a value in Row Space to specify how much white space is between each row.

If Row Height and Row Space are blank, the system calculates the height automatically.

7. Select Scale Fields to have the fields in the label shrink or expand to fit the selected label size.
8. Enter a minimum Font Size if needed.
Chapter 7: Managing Queries

Open a Query ................................................................. 88
Delete a Query ............................................................ 89
Share a Query with Other Users ................................. 90
Manage Public Queries ............................................... 91
Manage User-Defined Reports ................................. 93
Open a Query

You can open any query you saved in your list of queries or you can open a public query.

1. Click **Open**. The Query Open screen displays. The **My Queries** tab lists all of the queries you saved.

   ![Query Screen](image)

   - To filter the list of queries, select the **Group** and/or **Type** of query and click **Filter**.
   - To open one of your queries, select a query and click **Open**.

2. Select the **Public Queries** tab to select a query saved for everyone to use in Synergy SIS.

   ![Query Open Screen](image)

   - To filter the list of public queries, select the **Group**, **Type**, and/or **Include in Product Owned** and click **Filter**.
   - To open a public query, select a query and click **Open**.

---

Edupoint Proprietary and Confidential
Delete a Query

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

1. Open a query.

2. Select the query to delete from the list of Saved Queries and click Open.

3. After opening the query in the Query screen, click Delete to delete the query.
Share a Query with Other Users

The *Share* option provides users with a quick way to nominate a query for public use.

1. Select *Share* in the Menu on the Query screen.

2. Select *Nominate for Public* to select the query for public use. The query displays on the Nominated Queries tab of the Query Admin screen for use by all users.

   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](#).
Manage Public Queries

When users create queries that all the Synergy SIS users in their district can benefit from, they can nominate to share them as public queries. Use the Query Admin screen to manage the public queries and review the nominated queries.

Public Queries

1. Navigate to Synergy SIS > Query > Query Admin. All of the queries approved for the public queries display in the Public Queries tab.

2. (Optional) Select the filter to apply from the Group, Type, and/or Include Product Owned queries and click Filter.

3. Edit the information about the query directly in the row.
   - You can edit the Name, Description by typing your changes in the fields. Include any special instructions on how to customize the report before running it in the Description.
   - You can select a different Output Type to change the default format for the query.
     - TIFF Image – A graphics file
     - CSV – A comma-separated 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
     - PDF – A Portable Document Format for Adobe Reader
   - You can use the Group to categorize queries to make them easier to find in a long list. The groups are customized for each district using the Lookup Table Definition screen.
• Click **Open** to review the query in the Query screen.

• Click the box in the **X** column next to the query and click **Save** to delete a public query.

You can change the **Type** of query by selecting it from the drop-down but this is not recommended. The **Select** type shows the data from the database for reports, but **Update**, **Delete**, or **Insert** makes direct changes to the database and only experienced users should attempt it.

4. Click **Save** to save the changes.

- The **User Name** indicates who created the query and cannot be changed.
- If the query came with Synergy SIS, the **Product Owned** column displays **Yes**. User-created queries display **No**. The **Product Owned** column entry cannot be changed.

### Approve or Reject Nominated for Public Queries

1. Select the **Nominated Queries** tab.

![Query Admin Screen, Nominated Queries Tab](image)

2. (Optional) Filter the list by selecting the **Group** and/or **Type** and click **Filter**.

3. Click **Open** to review the query in the Query screen.

- **Query Group** – Change the group the query is assigned before approving or rejecting the nominated query
- **Nomination Note** – Add a note to indicate that the query needs more work before acceptance or the reason why you rejected the query.
- **Nomination State** – Select either **Approved** or **Rejected** from the **Nomination State** column. Once approved or rejected, the query is removed from the list of nominated queries.
• If the query was approved, it displays on the Public Queries tab.
• If the query was rejected, it still displays in the user’s list of queries but it does not display in the Query Admin screen.

You can change and save the note and group without changing the nomination state.

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

Manage User-Defined Reports

The folder structure and report names in the User-Defined folders (also known as the UD PAD tree or User PAD Tree). The UD PAD tree is located above the Synergy SIS and 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 comes from the Locale defined in the license key (USA.AZ.District Abbreviation). Synergy SIS creates the folders and reports underneath this folder when a user saves a query as a report.

The folder structure can quickly become disorganized because users can create reports and folders in the Navigation Tree (or PAD Tree) by saving queries as reports (as outlined in Save a Query as a Report).

To edit and manage these folders and reports:

1. Navigate to Synergy SIS > System > Setup > UD PAD Definition. The folders and reports from the UD PAD Tree display in the User PAD Tree section.
2. Click the triangles to expand the tree to view additional folders.
Adding Folders

Add a Group Folder

1. Select *Add Group to FOLDERNAME* from Action….

The *UD Pad Definition Screen* opens.

2. Enter the Name.
3. Click Save.
Add Folder to a Group Folder

1. Select Add Report to FOLDERNAME from Actions….

![UD PAD Definition Screen](image)

The Add Report to UD Navigation Tree opens.

![Add Report To UD Navigation Tree Screen](image)

2. Select the report to add from the UD Reports drop-down. Only previously saved user-defined reports display.

3. Click Save. The report is added to the tree.
Modify Folder

Select the folder name to make modifications on the right side of the screen.

- Edit the Name if needed.
- Click Move Up or Move Down to move the folder to a new location.
- To delete the folder:
  1. Select Delete FOLDERNAME from Actions….
  2. Click Yes to confirm the deletion. Deleting the folder deletes all folders and reports stored in that folder.

3. Refresh the screen when finished to see the new folder structure.
Modify Report

Select the report to make modifications on the right side of the screen:

- Edit the Name and Report ID if needed.
- Click Move Up or Move Down to move the report to a new location.
- To delete the report:
  1. Select *Delete REPORTNAME* from Actions…
  2. Click Yes to confirm the deletion.

3. Refresh the screen when finished to see the new folder structure.
Create a Query Using a Link Field

You can create queries from multiple business objects by linking the business objects via a common property. The common property is referred to as a link field.

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 you selected the incorrect business object first.

For example, to create a query with information about a section and the students enrolled in the section, select the ClassStudent object or StudentClass object first and not the Student object.

Select the Business Objects to use in the query.

A limited number of business objects display by default. You can view all business objects by selecting All business objects.

Select A Business Object Screen
The selected business object displays on the Business Objects grid to the left and the properties associated with it display to the right.

- When selecting a business object that links to another business object, you can add the business object with or without the property.
  - Click \( \text{\textbullet} \) to add just the business object.
  - Click the name of the property to add both.

  In the example, the property links to RevAddress.

- Hover your mouse over the business object in the Business Objects grid and click \( \text{X} \) to remove a business object from a query.
• Select Hide in the Property Overrides grid to hide the link field.

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

Add Fixed Text

You can add a special type of property to queries called the Literal property. The Literal property adds a fixed text value as a column to any query.

1. Click Add Literal to add a new line to the grid.

2. Enter a Name for the Literal Property Override. The text in the Name field displays in the query results.

3. Modify the rest of the property values as needed.
Manually Edit the Query

Occasionally, you might want to edit a query manually. For example, with a query that has a condition with a date, you might want to change the date each time the query runs. This tab can also be used to insert a query you received from another.

Look for curly quotes at the beginning and end of query when you cut and paste from another application. They make the query invalid.

To edit a query manually:

1. Select the Type in Query tab.

2. Edit text in the Query field as necessary. In the example above, the query runs for a specific Course ID. Change the Course ID to run the query for a different course.

3. Click Validate to ensure you formatted the query correctly based on Synergy query standards.

Click Validate on any query to verify the query is valid.
Parts of a Query

In text format, each query has four sections:

- One to define the business objects
- One to list the properties
- One to define the conditions
- One to define the sort order

The conditions and the sort sections are optional but every query must have the business objects and properties sections.

Business Object

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 referring to the business object 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 names of the link fields follow the business object. These link fields 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:

```
K12.Student R0, K12.EnrollmentInfo.StudentSOREnrollment R1,
K12.ScheduleInfo.Section R2 (SectionGU, R1.HomeroomSectionGU),
K12.Setup.SchoolRoom R3 (RoomGU, R2.RoomGU)
```

Properties

The format for the properties section is:

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

- You must precede the properties section with the word \( COLS \). \( R\# \) indicates the business object that the property comes from.
- If there are any property overrides defined for the property, they display after the property name in the order indicated above in parenthesis. If you are not using a property override, use a space instead.
  - The Hide override is either blank or use 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)
```

**Conditions**

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.
- Indicate the condition groups with `AND/OR`
- Surround values with single quotes.
- Use parentheses to group nested conditions.

An example of a conditions section is:

```
If R4.CourseID = 'IT01'
```

**Sort**

The format for the properties section is:

```
Sort R#.PropertyName, R#.PropertyName Desc
```

- The section always starts with `Sort`.
- List the properties in the order you want them sorted, separated by commas. The sort is ascending unless followed by `Desc`.

An example of a sort section is:

```
Sort R0.FormattedName
```
There is a quick refresher guide on the format for queries at the bottom of the Type in Query tab.

Focus Tokens

You can use Focus Tokens in the Type in Query tab. If a query begins with K12.Student, the results correspond with the current focus by default. However, if you begin a query with a business object other than K12.Student, you can use the following tokens to change the focus.

- $FOCUSNUMERICYEAR - Revelation.OrganizationInfo.RevYear.SchoolYear of currently focused year. This does not take the extension into account.
- $FOCUSORGYEARGULIST – List of Revelation.OrganizationInfo.RevOrganizationYear.OrganizationYearGU properties for every Organization contained in the current focus. Used when focused to the District or on a branch node (such as Elementary Schools, High Schools, etc). Use with In List condition. OrganizationYearGUs encompass the Organization, Year, and Year Extension.
- $FOCUSORGYEARGUATLEAF – Revelation.OrganizationInfo.RevOrganizationYear.OrganizationYearGU of currently focused organization. NULL when focused to district or branch. OrganizationYearGUs encompass the Organization, Year, and Year Extension.
- $DATE – Today’s date. Used in arithmetic operations to limit results to a date in the past/future. Useful for creating date ranges. (for example, $DATE-30)
Example: List all Organizations appearing in the currently focused Organizational branch

Revelation.OrganizationInfo.RevOrganization R0,
Revelation.OrganizationInfo.RevOrganizationYear R1
(OrganizationGU,R0.OrganizationGU,Inner)
COLS R0.OrganizationName
If R1.OrganizationYearGU In ('$FOCUSORYEARGULIST')
Sort R0.OrganizationName

Example: List all schools having a year extension of any kind in the current school year (2016)

Revelation.OrganizationInfo.RevOrganization R0,
Revelation.OrganizationInfo.RevOrganizationYear R1
(OrganizationGU,R0.OrganizationGU,Inner), Revelation.OrganizationInfo.RevYear R2
(YearGU,R1.YearGU,Inner)
COLS R0.OrganizationName, R2.SchoolYear
If R2.SchoolYear = '$FOCUSNUMERICYEAR'
Sort R0.OrganizationName, R2.SchoolYear

Query Screen, Type In Query Tab
Query Examples

Query Condition BEGINS WITH

A query that returns all courses that begin with 'Alg' in a student's course history.

```
Student R0, K12.CourseHistoryInfo.StudentCourseHistory R1
COLS R0.SisNumber, R0.FormattedName, R1.CourseID, R1.CourseTitle
If R1.CourseTitle Start ('alg')
```

Query Results Screen

Query Condition ENDS WITH

A query that returns addresses for students whose name ends in 'ski'.

```
Student R0
COLS R0.SisNumber, R0.FormattedName, R0.HomeAddress
If R0.LastName End ('ski')
```
Query Condition CONTAINS

A query that returns all students whose addresses contain 'cab'.

```
Student R0
COLS R0.SisNumber, R0.FormattedName, R0.HomeAddress
If R0.HomeAddress Contain ('cab')
```

Query Using OR in your IF statement

A query that returns addresses for all students in 10th grade or 12th grade who are female.

```
Student R0, K12.EnrollmentInfo.StudentSchoolYear R1
COLS R0.SisNumber, R0.Gender, R0.FormattedName, R1.Grade
If R1.Grade = '10' Or (R1.Grade = '12' And R0.Gender = 'F')
```
Query Using $DATE in IF Statement

An Enrollment Activity query where the Last Activity Date is today.

```
Student R0, K12.EnrollmentInfo.StudentSchoolYear R1, K12.EnrollmentInfo.StudentEnrollment R2
COLS R0.SisNumber, R0.FormattedName, R2.LastActivityDate
IF R2.LastActivityDate = '$DATE'
```

Query Using Aggregate SUM

A query at a high school that returns students with their Grade, Credits Attempted, and Credits Completed totals where the Credits Complete is less than 20.

```
Student R0, K12.EnrollmentInfo.StudentSchoolYear R1, K12.CourseHistoryInfo.StudentCourseHistory R2
COLS R0.SisNumber, R0.FormattedName, R1.Grade, R2.CreditAttempted (,,,,,,,,Sum), R2.CreditCompleted (,,,,,,,,Sum)
IF R2.CreditCompleted < '20'
```
Query Using Aggregate COUNT in IF Statement

A query that counts the number of discipline incidents per student.

```
Student R0, K12.DisciplineInfo.StudentIncidentDiscipline R1
(StudentGU,R0.StudentGU,Inner), K12.DisciplineInfo.SchoolIncident R2
(SchIncidentGU,R1.SchIncidentGU,Outer)
COLS R0.SisNumber (,,Group1), R0.FormattedName (,,Group1), R2.IncidentID
('Number of Incidents',,,Count)
```
Query with a Manual Join

A school query ran against the district that is manually joined (uses a link field) to bring in the school table with Organization field that displays the School Code.

If R1.Grade = '10' Or R1.Grade = '12'
Chapter 9: SQL Query and SSRS in Synergy

Run an SQL Query ........................................................................................................... 113
Run SQL Queries from Other Databases ................................................................. 114
SQL Server Reporting Services (SSRS) in Synergy ........................................ 115
Run an SQL Query

Synergy provides the ability to run a SQL query on the Synergy database or another database. You can view the results within Synergy.

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 process. The query results display in a new screen.
Run SQL Queries from Other Databases

You can also execute queries on databases other than the Synergy database.

1. Navigate to Synergy SIS > Query > SQL Query.
2. Enter a query in the SQL Statement field.
3. Select Override Connection. The Connection Override group box displays.
4. Enter the connection information for a different database.

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

Queries executed from this screen pass directly to the database, bypassing all business logic and security. Users who have access to this screen can see any data stored in the database.

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

Synergy can 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 SIS.

1. Navigate to **Synergy SIS > System > Data and Views > Report Interface Change**.

![Add New SSRS Report Screen](image)

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 of 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. 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.

7. Enter a **Report Description** as you want it to appear on the new report interface.
8. (Optional) Select the **Open With URL** option to open the SSRS report from the SSRS server and use any of the data manipulation features of the SSRS report.

If you clear this option, Synergy SIS returns a PDF version of the SSRS report.
9. In the PAD Location field, enter the location in the PAD tree where you wish to save the report. Separate folders with a \\

10. Click Save.

Example of User Defined SSRS Report

Pass a Parameter to an SSRS Report

By default, Synergy SIS passes the following parameters to any SSRS report launched from Synergy SIS.

- @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})

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

2. Scroll to the SSRS report you want to pass a variable to.
3. Select the Tab – Options folder in the Report Interface Modifications tree.
4. Select Add Field to ‘Tab – Options’ from Actions.... The Report Interface Change Add Field screen opens.

![Report Interface Change Screen](image)

5. Select the desired Business Object and Property to add.

![Report Interface Change Add Field](image)
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.
6. Add the parameter in the SSRS project. You can use this parameter in your SSRS report.

![Report Parameter Properties Screen](image)

7. Navigate to the SSRS report in the PAD tree.
8. Enter a value in the added fields to pass that value to the SSRS report.
9. Click Print to launch the SSRS report.

![SSRS Report Output Example](image)
Chapter 10:  
Job Queue Reports

JQE601 – Job Queue Execution Times .....................................................121
JQE602 – Jobs by Hour ........................................................................123
JQE603 – Jobs by Type .......................................................................125
JQE601 – Job Queue Execution Times

Synergy SIS > System > Job Queue > Reports > Summary

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.

![JQE601 – Job Queue Execution Times Report Interface Screen](image)

Report Options:

- **Job Type** – Filter the report output to include processed jobs based on Job Type.
- **Maximum Time Duration** – Filter the report output to include all the jobs with minutes and seconds less than or equal to the Minutes and Seconds entered in these fields.
### Hope High School
#### Job Queue Execution Times

<table>
<thead>
<tr>
<th>TotalTime</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>00:00:01</td>
<td>1163</td>
<td>11.55%</td>
<td>12.10%</td>
</tr>
<tr>
<td>00:00:02</td>
<td>2034</td>
<td>19.99%</td>
<td>22.99%</td>
</tr>
<tr>
<td>00:00:03</td>
<td>1403</td>
<td>14.08%</td>
<td>14.11%</td>
</tr>
<tr>
<td>00:00:04</td>
<td>956</td>
<td>9.57%</td>
<td>55.40%</td>
</tr>
<tr>
<td>00:00:05</td>
<td>776</td>
<td>7.35%</td>
<td>62.79%</td>
</tr>
<tr>
<td>00:00:06</td>
<td>576</td>
<td>5.05%</td>
<td>68.38%</td>
</tr>
<tr>
<td>00:00:07</td>
<td>452</td>
<td>4.53%</td>
<td>72.91%</td>
</tr>
<tr>
<td>00:00:08</td>
<td>354</td>
<td>3.43%</td>
<td>78.39%</td>
</tr>
<tr>
<td>00:00:09</td>
<td>276</td>
<td>2.71%</td>
<td>79.00%</td>
</tr>
<tr>
<td>00:00:10</td>
<td>216</td>
<td>2.12%</td>
<td>81.20%</td>
</tr>
<tr>
<td>00:00:11</td>
<td>152</td>
<td>1.50%</td>
<td>82.99%</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>1.25%</td>
<td>86.01%</td>
</tr>
<tr>
<td>00:00:14</td>
<td>120</td>
<td>1.18%</td>
<td>87.18%</td>
</tr>
<tr>
<td>00:00:15</td>
<td>60</td>
<td>0.60%</td>
<td>88.05%</td>
</tr>
<tr>
<td>00:00:16</td>
<td>79</td>
<td>0.77%</td>
<td>88.83%</td>
</tr>
<tr>
<td>00:00:17</td>
<td>60</td>
<td>0.60%</td>
<td>89.50%</td>
</tr>
<tr>
<td>00:00:18</td>
<td>58</td>
<td>0.58%</td>
<td>90.80%</td>
</tr>
<tr>
<td>00:00:19</td>
<td>64</td>
<td>0.63%</td>
<td>90.60%</td>
</tr>
<tr>
<td>00:00:20</td>
<td>48</td>
<td>0.47%</td>
<td>91.15%</td>
</tr>
<tr>
<td>00:00:21</td>
<td>26</td>
<td>0.26%</td>
<td>91.42%</td>
</tr>
<tr>
<td>00:00:22</td>
<td>42</td>
<td>0.41%</td>
<td>91.63%</td>
</tr>
<tr>
<td>00:00:23</td>
<td>25</td>
<td>0.27%</td>
<td>92.11%</td>
</tr>
<tr>
<td>00:00:24</td>
<td>31</td>
<td>0.30%</td>
<td>92.44%</td>
</tr>
<tr>
<td>00:00:25</td>
<td>30</td>
<td>0.28%</td>
<td>92.67%</td>
</tr>
<tr>
<td>00:00:26</td>
<td>20</td>
<td>0.23%</td>
<td>92.89%</td>
</tr>
<tr>
<td>00:00:27</td>
<td>14</td>
<td>0.14%</td>
<td>93.03%</td>
</tr>
<tr>
<td>00:00:28</td>
<td>20</td>
<td>0.20%</td>
<td>93.27%</td>
</tr>
<tr>
<td>00:00:29</td>
<td>20</td>
<td>0.20%</td>
<td>93.25%</td>
</tr>
<tr>
<td>00:00:30</td>
<td>18</td>
<td>0.18%</td>
<td>93.70%</td>
</tr>
<tr>
<td>00:00:31</td>
<td>18</td>
<td>0.18%</td>
<td>93.89%</td>
</tr>
<tr>
<td>00:00:32</td>
<td>16</td>
<td>0.16%</td>
<td>94.04%</td>
</tr>
<tr>
<td>00:00:33</td>
<td>15</td>
<td>0.16%</td>
<td>94.23%</td>
</tr>
<tr>
<td>00:00:34</td>
<td>15</td>
<td>0.16%</td>
<td>94.41%</td>
</tr>
<tr>
<td>00:00:35</td>
<td>11</td>
<td>0.11%</td>
<td>94.52%</td>
</tr>
<tr>
<td>00:00:36</td>
<td>6</td>
<td>0.06%</td>
<td>94.67%</td>
</tr>
<tr>
<td>00:00:37</td>
<td>6</td>
<td>0.06%</td>
<td>94.67%</td>
</tr>
<tr>
<td>00:00:38</td>
<td>10</td>
<td>0.10%</td>
<td>94.86%</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>9</td>
<td>0.09%</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>95.32%</td>
</tr>
</tbody>
</table>

*Printed by Admin User at 07/17/2015 10:59 AM*

JQE601 – Job Queue Execution Times Report Output
JQE602 – Jobs by Hour

Synergy SIS > System > Job Queue > Reports > Summary

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

![JQE602 – Jobs By Hour Report Interface Screen](image)

Report Options:

- **Job Type** – Filter the report output to include processed jobs based on Job Type.
- **State** – Filter the report based on the state of the jobs included in the report.
- **Show Errors** – Select to include jobs not completed because of errors in the totals for the report.
### Job Queue Reports

#### JQE602 – Jobs By Hour Report Output

<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>6</td>
<td>2</td>
</tr>
<tr>
<td>4 AM</td>
<td>6</td>
<td>21</td>
</tr>
<tr>
<td>5 AM</td>
<td>Error</td>
<td>3</td>
</tr>
<tr>
<td>6 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>6</td>
<td>54</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>7 AM</td>
<td>6</td>
<td>107</td>
</tr>
<tr>
<td>8 AM</td>
<td>6</td>
<td>261</td>
</tr>
<tr>
<td>8 AM</td>
<td>Error</td>
<td>27</td>
</tr>
<tr>
<td>9 AM</td>
<td>6</td>
<td>137</td>
</tr>
<tr>
<td>10 AM</td>
<td>Complete</td>
<td>163</td>
</tr>
<tr>
<td>10 AM</td>
<td>In Progress</td>
<td>2</td>
</tr>
<tr>
<td>10 AM</td>
<td>6</td>
<td>1106</td>
</tr>
<tr>
<td>11 AM</td>
<td>Complete</td>
<td>267</td>
</tr>
<tr>
<td>11 AM</td>
<td>6</td>
<td>1092</td>
</tr>
<tr>
<td>11 AM</td>
<td>5</td>
<td>10</td>
</tr>
<tr>
<td>11 AM</td>
<td>Error</td>
<td>30</td>
</tr>
<tr>
<td>12 PM</td>
<td>Complete</td>
<td>252</td>
</tr>
<tr>
<td>12 PM</td>
<td>Error</td>
<td>54</td>
</tr>
<tr>
<td>1 AM</td>
<td>5</td>
<td>12</td>
</tr>
<tr>
<td>1 AM</td>
<td>Complete</td>
<td>117</td>
</tr>
<tr>
<td>1 AM</td>
<td>6</td>
<td>1037</td>
</tr>
<tr>
<td>2 AM</td>
<td>Error</td>
<td>21</td>
</tr>
<tr>
<td>3 AM</td>
<td>6</td>
<td>1106</td>
</tr>
<tr>
<td>3 AM</td>
<td>Error</td>
<td>27</td>
</tr>
<tr>
<td>4 AM</td>
<td>5</td>
<td>3</td>
</tr>
<tr>
<td>4 AM</td>
<td>Complete</td>
<td>180</td>
</tr>
<tr>
<td>5 AM</td>
<td>5</td>
<td>2</td>
</tr>
<tr>
<td>5 AM</td>
<td>In Progress</td>
<td>1</td>
</tr>
<tr>
<td>6 AM</td>
<td>Error</td>
<td>30</td>
</tr>
</tbody>
</table>
JQE603 – Jobs by Type

Synergy SIS > System > Job Queue > Reports > Summary

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 processed.

![JQE603 – Jobs By Type Report Interface Screen](image)

Report Options:

- **Job Type** – Filter the report output to include processed jobs based on Job Type.
- **Show Errors** – Select to include jobs not completed because of errors in the totals for the report.
### Job Queue Reports

**Report: JQE603**

<table>
<thead>
<tr>
<th>JobID</th>
<th>Desc</th>
<th>Count</th>
<th>Errors</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACC201</td>
<td>Classroom Accommodations by Section</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>ACC202</td>
<td>Classroom Accommodations by Student</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>ACC203</td>
<td>Classroom Accommodations by Accommodation</td>
<td>18</td>
<td></td>
</tr>
<tr>
<td>ADM475</td>
<td>Average Daily Membership</td>
<td>70</td>
<td></td>
</tr>
<tr>
<td>ADM601</td>
<td>Cumulative ADM/Absence Rate Report</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>ADM602</td>
<td>Student Count Report</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>ADM640</td>
<td>Current Year ADM</td>
<td>29</td>
<td></td>
</tr>
<tr>
<td>ADM675</td>
<td>Average Daily Membership Summary</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>ADS201</td>
<td>Student Discipline Profile</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>ADS401</td>
<td>Student Discipline Listing</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>ADS402</td>
<td>Student Data List</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>ADS403</td>
<td>Discipline Disposition List</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>ADS501</td>
<td>Discipline Summary by Grade</td>
<td>6</td>
<td></td>
</tr>
<tr>
<td>ADS502</td>
<td>Discipline Summary by Ethnic Code</td>
<td>7</td>
<td></td>
</tr>
<tr>
<td>ADS503</td>
<td>Disciplinary Action Form</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>ATD201</td>
<td>Daily Attendance Profile</td>
<td>45</td>
<td></td>
</tr>
<tr>
<td>ATD202</td>
<td>Daily Attendance Minutes Profile</td>
<td>17</td>
<td></td>
</tr>
<tr>
<td>ATD401</td>
<td>Daily Student Absence Totals</td>
<td>84</td>
<td>1</td>
</tr>
<tr>
<td>ATD402</td>
<td>Daily Attendance List</td>
<td>56</td>
<td></td>
</tr>
<tr>
<td>ATD403</td>
<td>Daily Absent List</td>
<td>66</td>
<td></td>
</tr>
<tr>
<td>ATD404</td>
<td>Daily Tardy List</td>
<td>21</td>
<td></td>
</tr>
<tr>
<td>ATD405</td>
<td>Daily Perfect Attendance List</td>
<td>42</td>
<td></td>
</tr>
<tr>
<td>ATD406</td>
<td>Daily Student List by Attendance</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>ATD407</td>
<td>End Of Year Attendance List</td>
<td>53</td>
<td></td>
</tr>
<tr>
<td>ATD412</td>
<td>Student Gain Loss</td>
<td>22</td>
<td></td>
</tr>
<tr>
<td>ATD413</td>
<td>Class Reduction Summary</td>
<td>27</td>
<td></td>
</tr>
<tr>
<td>ATD414</td>
<td>Student Days Enrolled</td>
<td>10</td>
<td></td>
</tr>
<tr>
<td>ATD415</td>
<td>Attendance Audit List</td>
<td>26</td>
<td></td>
</tr>
<tr>
<td>ATD401</td>
<td>Daily Attendance Summary</td>
<td>28</td>
<td></td>
</tr>
<tr>
<td>ATD403</td>
<td>Monthly ADA Detail</td>
<td>11</td>
<td></td>
</tr>
<tr>
<td>ATD404</td>
<td>Monthly ADA Summary</td>
<td>19</td>
<td></td>
</tr>
<tr>
<td>ATD505</td>
<td>Cumulative Enrollment Totals</td>
<td>23</td>
<td></td>
</tr>
<tr>
<td>ATD508</td>
<td>Monthly ADM Summary</td>
<td>12</td>
<td></td>
</tr>
<tr>
<td>ATD510</td>
<td>Student Attendance Summary</td>
<td>44</td>
<td></td>
</tr>
<tr>
<td>ATD510</td>
<td>Student Attendance Summary</td>
<td>44</td>
<td></td>
</tr>
<tr>
<td>ATD510</td>
<td>Student Attendance Summary</td>
<td>44</td>
<td></td>
</tr>
<tr>
<td>ATD520</td>
<td>260 Day Accountability Report</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>ATD528</td>
<td>Director's Vocational Class FTEADA Report</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>ATD529</td>
<td>Director's Vocational Class FTEADM Report</td>
<td>1</td>
<td></td>
</tr>
<tr>
<td>ATD901</td>
<td>Attendance Sheet</td>
<td>42</td>
<td>2</td>
</tr>
<tr>
<td>ATD902</td>
<td>Attendance Sheet</td>
<td>13</td>
<td>12</td>
</tr>
<tr>
<td>ATD805</td>
<td>Attendance Letters</td>
<td>53</td>
<td>3</td>
</tr>
<tr>
<td>ATD805</td>
<td>Class Attendance Reminder</td>
<td>66</td>
<td>10</td>
</tr>
<tr>
<td>ATP01</td>
<td>Period Student Attendance Profile</td>
<td>67</td>
<td></td>
</tr>
<tr>
<td>ATP02</td>
<td>Period Attendance List</td>
<td>67</td>
<td></td>
</tr>
<tr>
<td>ATP02</td>
<td>Period Student Absence Totals</td>
<td>78</td>
<td>4</td>
</tr>
<tr>
<td>ATP03</td>
<td>Period Perfect Attendance List</td>
<td>12</td>
<td></td>
</tr>
</tbody>
</table>

**Note:** JQE603 – Jobs By Type Report Output
Chapter 11: Security

Security Overview ........................................................................................................... 128
Query and Reporting Security Definitions ................................................................. 129
Query and Reporting Security ...................................................................................... 130
Controlling Buttons on Find Results Screen ............................................................... 130
Security Overview

The PAD Security (Synergy SIS > System > Security > PAD Security) and the Security Definition screen (Synergy SIS > System > Security > Security Definition) define security for each of the screens discussed in this guide. This chapter outlines the security location for each of the screens within Security Definition.

While the Security Definition screen contains report security options, Edupoint recommends that users only secure reports through PAD Security.

For more details regarding security definitions, see the Synergy SIS – Security Administrator Guide.
# Query and Reporting Security Definitions

<table>
<thead>
<tr>
<th>Screen</th>
<th>PAD Location</th>
<th>Tab</th>
<th>Grid/Pop-Out Screen</th>
<th>Field</th>
<th>Security Node</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Queue Viewer</td>
<td>System &gt; Job Queue</td>
<td>Current</td>
<td>All</td>
<td>All</td>
<td>Revelation.JobQueueInfo.JobQueue</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Results tab in Jobs in Queue</td>
<td>All</td>
<td>Revelation.JobQueueInfo.JobQueueResultGrid</td>
</tr>
<tr>
<td>Job Q Adm Viewer</td>
<td>System &gt; Job Queue</td>
<td>Current</td>
<td>All</td>
<td>All</td>
<td>Revelation.JobQueueInfo.JobQueue</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Results tab in Jobs in Queue</td>
<td>All</td>
<td>Revelation.JobQueueInfo.JobQueueResultGrid</td>
</tr>
<tr>
<td>Query</td>
<td>N/A</td>
<td>N/A</td>
<td>Name, Group, Type, Output Type,</td>
<td>All</td>
<td>Revelation.Query.RevQuery</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td>Orientation, Type, Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Type in Query</td>
<td>All</td>
<td>All</td>
<td></td>
<td>Revelation.Query.RevQuery</td>
</tr>
<tr>
<td></td>
<td>Columns</td>
<td>Business</td>
<td>All</td>
<td>Revelation.Query.BusinessObjectGrid</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Objects</td>
<td>Revelation.Query.BusinessObjectProperty</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Property Overrides</td>
<td>All</td>
<td>All</td>
<td>Revelation.Query.AllPropertyGrid</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Conditions</td>
<td>All</td>
<td>All</td>
<td>Revelation.Query.RevQueryCondition</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Create a Condition</td>
<td>All</td>
<td>All</td>
<td>Revelation.Query.RevQueryCondition</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Sort</td>
<td>All</td>
<td>All</td>
<td>Revelation.Query.RevQuerySort</td>
<td></td>
</tr>
<tr>
<td>Query Admin</td>
<td>Public Queries</td>
<td>All</td>
<td>All</td>
<td>Revelation.Query.QueryPublicGrid</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Nominated Queries</td>
<td>All</td>
<td>All</td>
<td>Revelation.Query.QueryEvalGrid</td>
<td></td>
</tr>
<tr>
<td>SQL Query</td>
<td>Statement</td>
<td>All</td>
<td>All</td>
<td>Revelation.Query.QuerySQLUI</td>
<td></td>
</tr>
<tr>
<td>Add New SSRS Report</td>
<td>System &gt; Data and Views</td>
<td>N/A</td>
<td>Name, Number, Pad Location</td>
<td>All</td>
<td>Revelation.ReportDef</td>
</tr>
<tr>
<td></td>
<td>&gt; Report Interface</td>
<td></td>
<td>All except Name, Number, Pad</td>
<td>All</td>
<td>Revelation.SSRSCfg</td>
</tr>
<tr>
<td></td>
<td>Change</td>
<td></td>
<td>Location</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

- Revelation.JobQueueInfo.JobQueueRecur
- Revelation.Query.ConditionGrid
- Revelation.Query.QueryPublic
- Revelation.JobQueueInfo.JobQueueResult
- Revelation.Query.QueryExecute
- Revelation.Query.RevQueryRI
- Revelation.JobQueueInfo.JobQueueUI
- Revelation.Query.QueryOpenPublicGrid
- Revelation.Query.QueryUser
Query and Reporting Security

Use the PAD Security screen to change whether users can see various buttons and tabs on the screens.

- **Group Access tab** – Allows configuration of document tabs and buttons for user groups
- **User Access tab** – Allows configuration of document tabs and buttons for specific users

Controlling Buttons on Find Results Screen

1. Navigate to **Synergy SIS > Non PAD > Find Object > Find Results**.
2. Select the row that contains the User Group Name on the Group Access tab or find and select the user on the User Access tab.
3. Click **Show Detail** to display the document properties.
4. Select the type of Access for the group or user.
5. Click **Save**.

PAD Security Screen