SYNERGETIC
Management Systems

# SynWeb User Manual

# Introduction

**Version 7**



Published: 19 September 2016

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# Contents

# Introduction

## Introduction

The Synergetic Management System (Synergetic) is a comprehensive management system for schools, tertiary institutions and other educational organisations. It incorporates and integrates all of the administrative functions that you use to run your organisation.

You can manage all of the day-to-day activities as well as managing future students, appeals and fundraising activities, and all aspects of student, staff and community.

Synergetic revolves around a database of information, called the *Community*. The database contains the details of all the people and entities, such as companies, involved with your organisation. For more information, see *Introduction to the community (on page 56).*

Synergetic also interfaces to other programs. For example, it uses Crystal Reports to generate reports.

SynWeb is a web-based interface to the Synergetic database. It has been designed primarily for teaching staff and has a targeted set of features compared to the full version of Synergetic. Using SynWeb you can:

- view your timetable and classes
- allocate students to classes
- enter attendance records for a class or study period
- find which room and class a student is currently in
- find students that are unaccounted for
- view student details
- view class details
- view a staff member's classes, personal details, students and timetable
- view your own banking details, leave entitlements and payslips
- apply for professional development courses
- enter and approve staff timesheets
- enter student results
- enter substitute staff for classes
- create tagged lists of students
- run reports
- maintain object bookings
- maintain accommodation bookings
- edit SynWeb configuration settings, preferences and passwords.

To help you get the most from using SynWeb, familiarise yourself with:

- *Using the online help* (on page 6)
- *Introduction to the community* (on page 56)
- *Conventions used in this documentation* (on page 13)
- *Using SynWeb* (on page 15)
- *Searching* (on page 59)
- *Overview of security* (on page 65)
- *File types* (on page 69)
- *Sending emails and SMS messages from grids* (on page 71)
- *Configuring notifications* (on page 103)
- *Exporting information to other programs* (on page 121)
- *Using tag lists* (on page 131)
- *Managing tasks* (on page 185)
- *Action Centre* (on page 223)
- *Using document management* (on page 259)
- *Running reports* (on page 283).

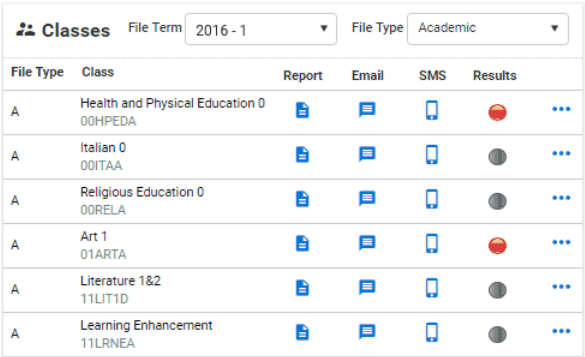
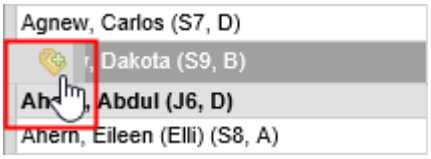
You can also:

- review *what's new to SynWeb*
- *contact Synergetic Management Systems* (on page 287).

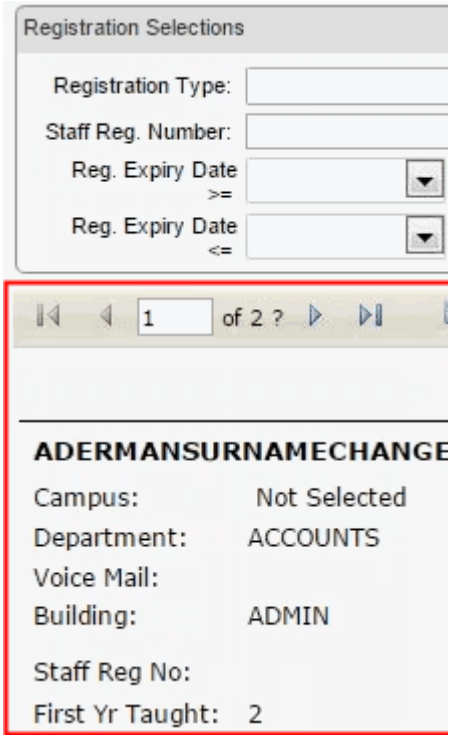
# What's new to the Introduction

## Version 67

This section outlines changes to the Introduction manual arising from changes made to SynWeb 7.01.

| Change | More information | See... |
|---|---|---|
| New Dashboard replaces the Home window. | The **Dashboard** has replaced the **Home** window as the SynWeb homepage. You can use the **Dashboard** to access key information and functions such as:<br>• class lists<br>• class timetables<br>• map locations.<br>  <br> | *Using the Dashboard* (on page 23)<br>*luDashboardTile lookup table* in the System maintenance manual. |
| Replaceable email fields updated. | The list of replaceable email fields has been updated. | *Using replaceable fields in the body of emails* (on page 96) |
| **Edit Email Template** window has been updated. | The **Edit Email Template** window has been updated. You can select:<br>• **Template is Private** field to create a private template for the current user<br>• **Classification** drop-down to select a document classification for email templates<br>• **Owner** to select the owner of the email template. | *Maintaining email templates* (on page 100) |
| New tag icon for tagging individual community records. | You can use the tag icon to quickly tag individual community records in maintenance windows.<br>  <br> | *Tagging individual community members from a grid* (on page 144) |

| Change | More information | See... |
|---|---|---|
| **Add/Edit Tasks** window buttons updated. | The following buttons have been added:<br>• Remove<br>• Add Task.<br>The following buttons have been removed:<br>• Start Task<br>• Complete Task. | *Using the Add/Edit Tasks window* (on page 193) |
| New **DocMan** tab added to **Task Maintenance**. | You can use the **DocMan** tab of the **Add/Edit Tasks** window to link documents, spreadsheets and photos to tasks. | *Add/Edit Tasks window - DocMan tab* (on page 213) |
| New buttons added to the Action Centre. | The following buttons have been added to the **Action Centre**:<br>• Mark as read<br>• Mark as read<br>• Mark as Read and Launch<br>• Start And Launch<br>• Complete And Launch. | *Using the Action Centre window* (on page 224) |
| New **DocMan** tab added to the **Action Centre**. | You can use the **DocMan** tab of the **Action Centre** to link documents, spreadsheets and photos to task messages. | *Action Centre - DocMan tab* (on page 240) |
| New fields added to the **Fields Changed** tab. | You can use the **Fields Changed** tab of the **Action Centre** to view and approve changes. | *Action Centre - Fields Changed tab* (on page 256) |
| DocMan processes updated. | The following DocMan processes have been updated:<br>• Importing one or more documents<br>• Linking documents using tag lists<br>• Updating document details. | *Importing one or more documents* (on page 263)<br>*Linking documents using tag lists* (on page 273)<br>*Updating document details* (on page 277) |
| New process for importing URL/web links documented. | You can import URL/web links using the document management windows to import URL/web links. | *Importing one or more URL/web links* (on page 269) |

| Change | More information | See... |
|---|---|---|
| Embedded SSRS reports. | SSRS reports are now embedded into the **Available Reports** window after creation.<br>  <br> | *Running reports* (on page 283) |

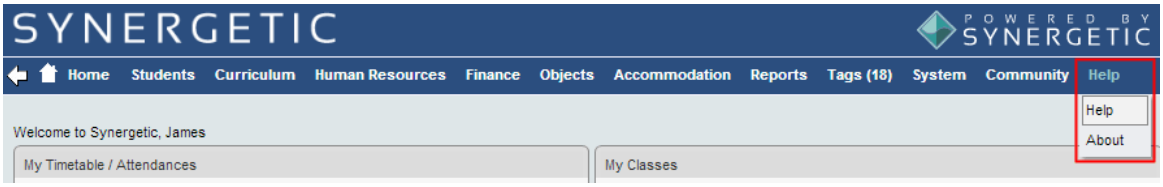
# Using the online help

Most people are familiar with printed user guides. Online help is even more useful. For example, you can:

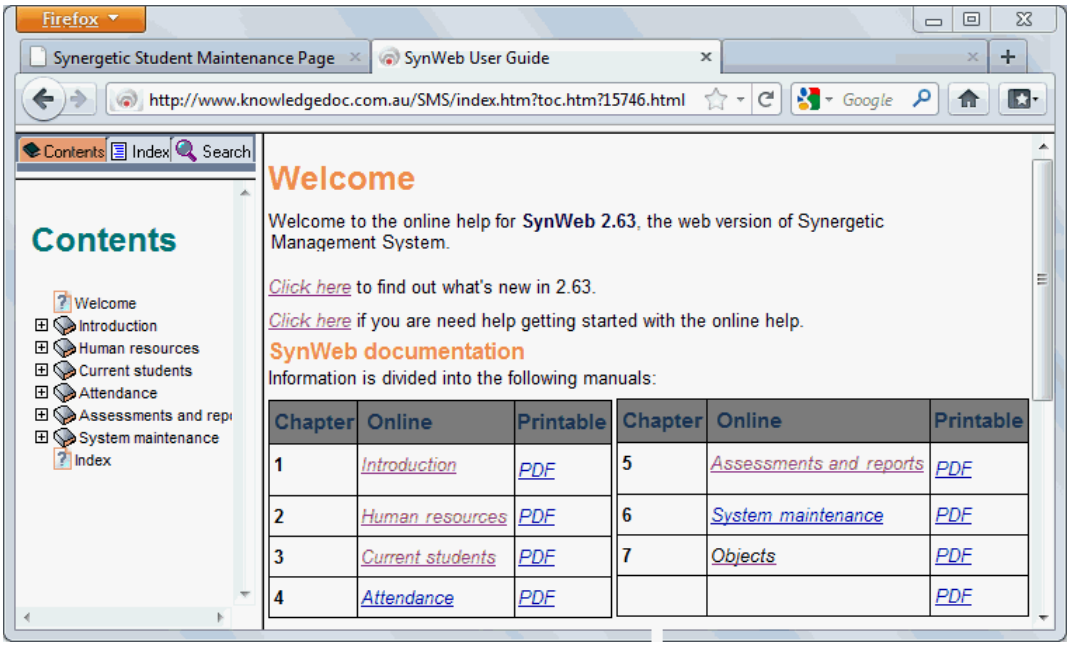
- use search tools to quickly locate the information
- jump between related topics using the links.

**Note:** The content between the printed user guides and online help is identical except for a few differences in graphics and capabilities.

The easiest way to get to the online help is to select **Help > Help** from the SynWeb main menu.




The **Welcome** help topic is displayed on another tab on your web browser.



## How to:

- Link directly to a help topic from some functions. See *Linking to online help topics* (on page 11).
- Navigate around the online help, using the:
  - **Contents** tab to find your way to a specific topic
  - **Index** tab to find information about a particular subject
  - **Search** tab to search for a word or phrase
  - **See Also** links to other related topics
  - **Previous** and **Next** buttons to view the previous topic or next topic. See *Navigating around the online help* (on page 8).
- Use drop-down hotspots to display:
  - how to get to a window or bar
  - representative screen captures. See *Using drop-down hotspots* (on page 10).

## Navigating around the online help

There are a several ways to navigate around the online help. Use the:

- **Contents** tab to find your way to a specific topic
- **Index** tab to find information about a particular subject
- **Search** tab to search for a word or phrase
- **See Also** links to other related topics
- **Previous** and **Next** buttons to view the previous topic or next topic.

### Contents tab


The **Contents** tab displays all of the contents of the help in a structured way.

At the top level, the **Welcome** page is followed by the **What's new** heading, then each of the chapters for each function covered. For example, the **Introduction** is usually the first chapter displayed.

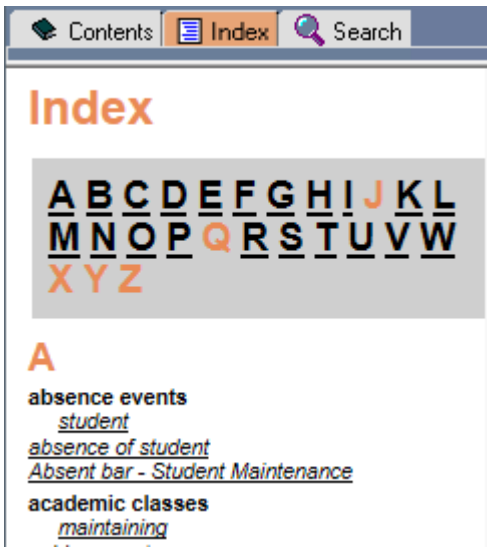
To expand the chapter, click on the plus symbol next to the chapter name. The main chapter topics are expanded.

Some of the main chapter headings need to be expanded further to reach the topic of interest.

Click on the topic name to display the topic's contents in the right-hand pane.

To collapse the chapter or main chapter, click on the minus symbol.

### Index tab

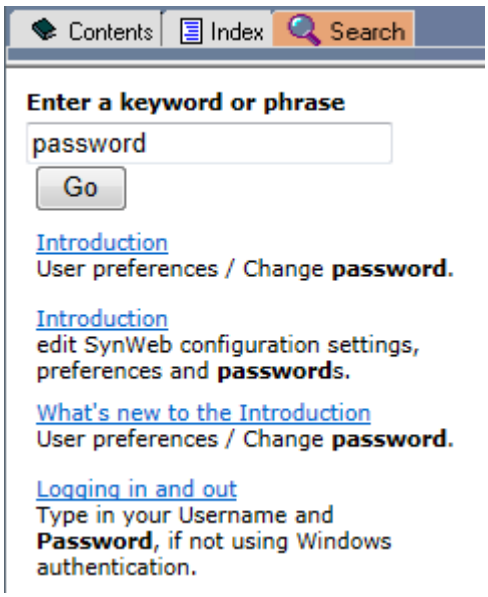



The **Index** tab contains all the terms available in the index. You can scroll down to a particular term, or click on one of the capital letters at the top of the index pane to jump to that letter in the index.

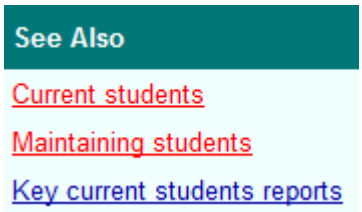
The index uses lots of synonyms for words that you might search on, and so you have a much greater chance of finding a particular piece of information.

The index also differentiates between the relevance of the information in a topic where a word or phrase is used. If a word is used in passing in a topic, the index is unlikely to direct you to that topic. The full text search feature cannot differentiate between what is important and what is not.

## Search tab

| | |
|---|---|
|  | To search for a word or phrase in the online help:<br>• type it into the **Enter a keyword or phrase** field<br>• click **Go**.<br>The **Search** tab is different from the index because it allows you to search for any word or phrase used in the online help. The difference is that if the term you want to search for is not used in the actual text of the online help, you won't find the information you want. |

## See Also links

| | |
|---|---|
|  | Each topic has a list of related topics displayed at the end. This **See Also** list contains hyperlinks to other topics of interest. |

## Using drop-down hotspots

Many topics contain drop-down hotspots with:

- information on how to navigate to the window or bar
- a screen capture of a representative window or bar.

This information is only displayed when you click on the hotspot. This avoids cluttering the help with information only needed occasionally.

A drop-down hotspot is displayed like a hyperlink, in a blue font and underlined.

▸ Opening the Flags bar

Click anywhere on the text to expand the hotspot. Click on it again to contract it.

▾ Opening the Flags bar

To open the **Flags** bar:

1. Select **Students > Student Maintenance** from the SynWeb main menu.

   The **Current Student Search Criteria** window is displayed.

2. Search for the student. See *Searching for students*.

   The first student's record is displayed on the **Student Maintenance** window. One or more bars may be expanded depending on your last session or earlier selections.

3. Scroll down to the **Flags** bar, if required.
4. Click the **Flags** bar.

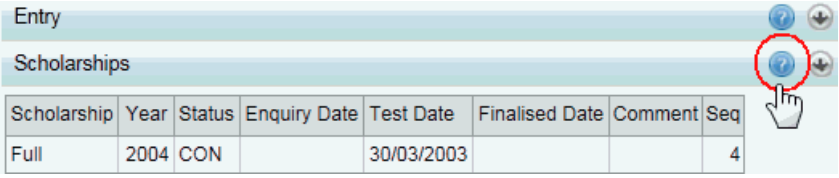
   **Tip**: You can click anywhere on the bar to open it. You may not need to expand it if it is already open from your last session.

   The **Flags** bar of the **Student Maintenance** window is expanded.

## Linking to online help topics

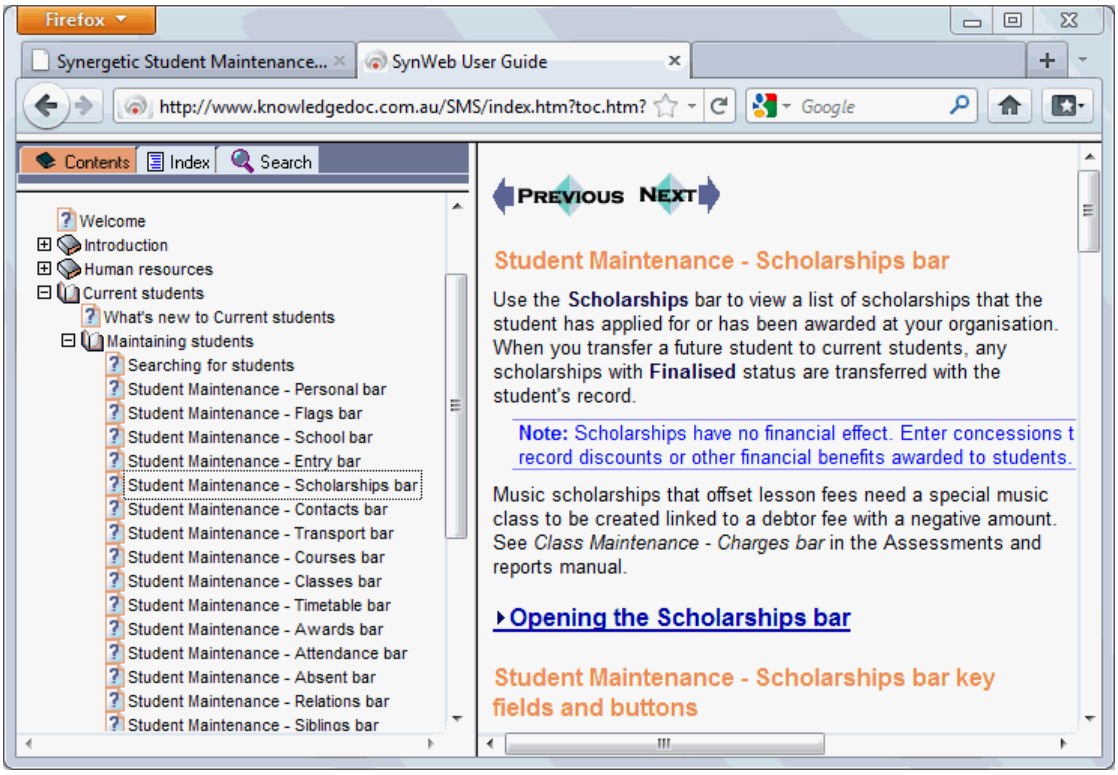
You can link directly to a help topic from some functions. In the following example:

1. Click on the  (help icon) next to the **Scholarships** bar of **Student Maintenance**.




The help topic for the **Scholarships** bar is displayed on another tab on your web browser.

2. Click on the tab of the web browser to display the help topic.




3. Review the information available.

4. You can also:

   - Click on the **Opening the Scholarships bar** drop-down hotspot to display:
     - how to navigate to the bar
     - a graphic of representative data on the bar. See *Using drop-down hotspots* (on page 10).
   - Navigate to other useful information. See *Navigating around the online help* (on page 8).

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# Conventions used in this documentation

Throughout the documentation for Synergetic and SynWeb, the following conventions are used:

| Convention | Description |
|---|---|
| **Click** | Indicates that you click on the left mouse button.<br>See **Right click** below. |
| **Right click** | Indicates that you click on the right mouse button. This usually displays a context menu from which you select a menu option.<br>See **Click** above. |
| **Select** | Indicates that you choose a menu or menu option by:<br>• moving the mouse pointer to the desired selection<br>• then clicking. |
| **Bold print &<br>Arial font** | Indicates:<br>• A menu or list item that you choose or select. For example, **File Type** drop-down list<br>• Text that needs to be typed. For example, **Surname** field. |
| **Note:** | Indicates a note. For example, more explanation about a point. |
| **Tip:** | Indicates a shortcut method or tip to perform the function in an easier way. |

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# Using SynWeb

SynWeb is a web-based interface to Synergetic that runs in a web browser. Supported web browsers are:

- Firefox version 3 or later
- Internet Explorer version 7 and later
- Safari version 4 or later
- Google Chrome.

All the usual web browser rules apply to the way you navigate around the system.

You can:

- Log in and out of SynWeb. See *Logging in and out* (on page 17).
- Use the **Dashboard** to view:
  - your class timetable
  - your class lists
  - progress in assigning student marks to your classes. See *Using the Dashboard* (on page 23).
- Navigate around SynWeb using a combination of:
  - SynWeb menus
  - buttons
  - command links
  - launch links
  - toolbar icons
  - field icons. See *Navigating around SynWeb* (on page 30).
- Use drop-down lists to select from a set of valid values. See *Using drop-down lists* (on page 34).
- Use navigation bars to view details or conserve space:
  - expand navigation bars to view details, similar to tabs in Synergetic
  - collapse navigation bars to conserve space. See *Using navigation bars* (on page 35)
  - show, hide or customise the order of the navigation bars. See *Customising navigation bars* (on page 37).
- Sort grids in ascending or descending order based on the selected column. See *Sorting grids* (on page 39).
- Select dates using a calendar or by typing in the date. See *Entering dates and times* (on page 42).

- Handle when records are locked. See *Record locking* (on page 49).
- Change your preferred SynWeb work settings, including:
  - year and semester (that is, term or reporting period)
  - default file type
  - campus, if applicable. See *Changing your user preferences* (on page 50).

# Logging in and out

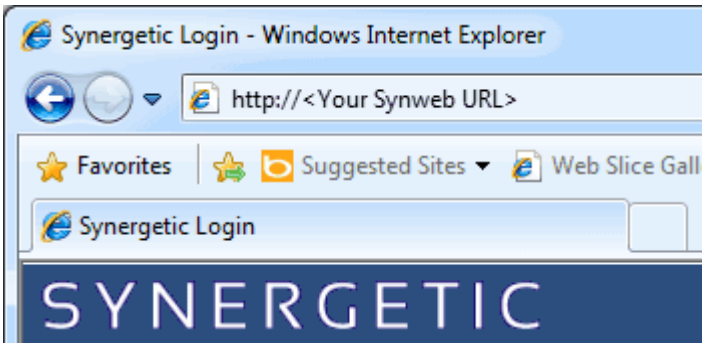
## Logging in

**Note:** Before starting, contact your system administrator for details of the URL (web address) for SynWeb at your organisation. Typically, this is **http://<synergetic server>:7007** where **<synergetic server>** is the name of the server running Synergetic at your organisation.

To start SynWeb:

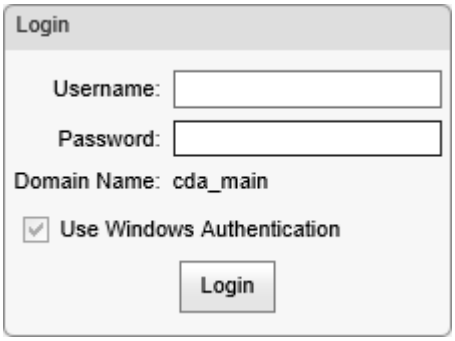
1. Start your Internet browser.

   For example, select **Start > Programs > Internet Explorer**.




2. Type the URL of SynWeb.

   The SynWeb **Login** window is displayed.




3. Depending on the settings at your organisation, you can:

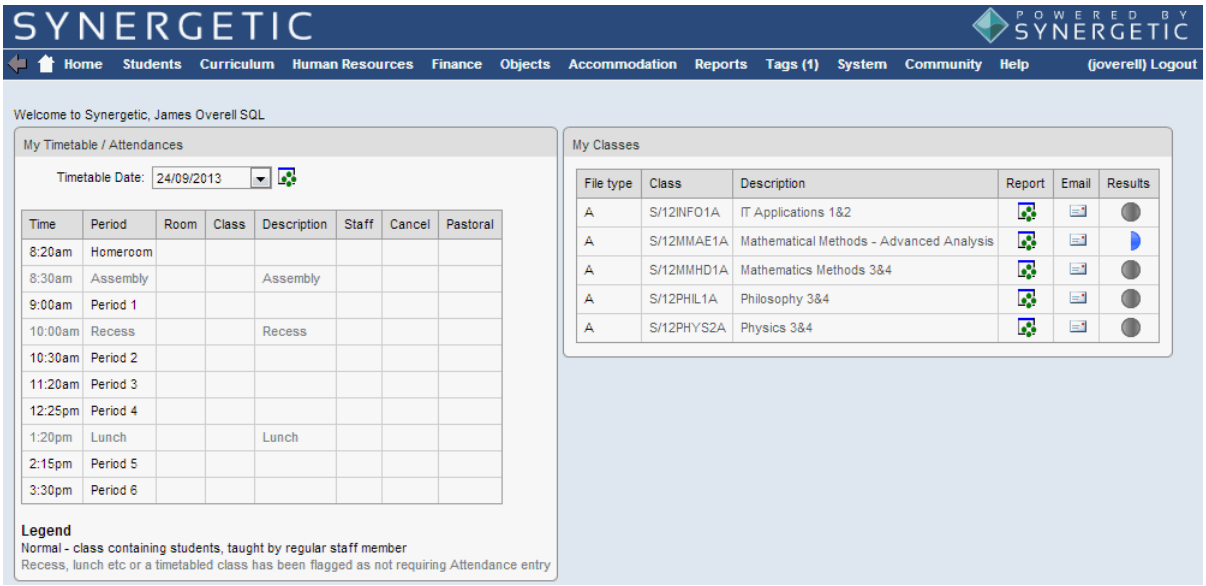
   - Type in your **Username** and **Password,** if **not** using Windows authentication.

   **Note:** This is your usual Synergetic user name and password.

   - Select **Use Windows Authentication** if you want to log in this way.
   - Skip this step, if your organisation is set to use **only** Windows authentication.

4. Click Login.

   The **Home** window is displayed.



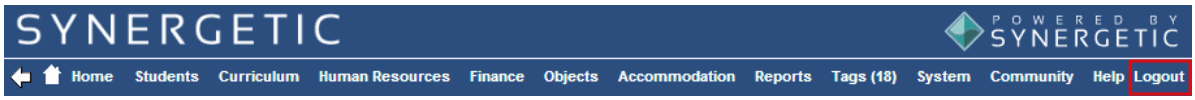

**Note:** Any system messages created by your system administrator are displayed. See *Synergetic system messages* (on page 21).

Your system administrator sets an inactivity timeout time. If you do not use your session within the set time, you will have to log in again.

**Remember:** Save your work regularly! If you time out or move to another window without saving, you will lose any changes you have made.

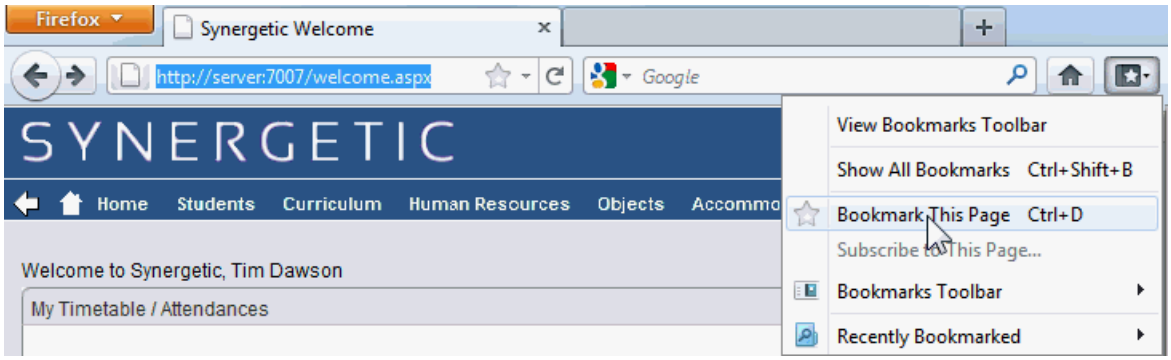
## Logging out

To log out of SynWeb, click **Logout** on the menu bar.



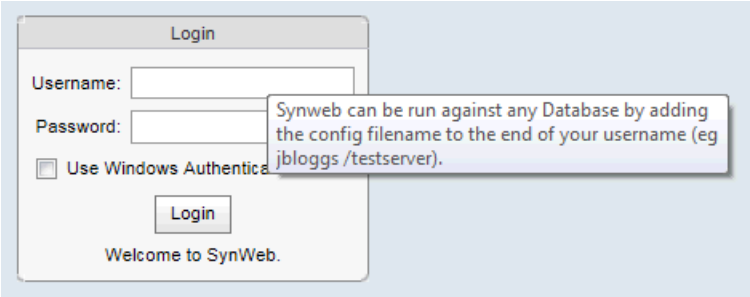

## Adding SynWeb to your Favourites

It is useful to add SynWeb to your browser favourites so that you do not have to remember the web address every time you log on.



## Login window key fields and buttons

### Fields

| Field | Description |
|---|---|
| **Username** | Synergetic user name.<br>Not required when using Windows authentication. Either:<br>• you select **Use Windows Authentication** below<br>• Windows authentication is used by all users at your organisation.<br>To use a different database, add a suffix to your username:<br>• Backslash character (*/*)<br>• Synergetic database name.<br>  <br><br>For example, this might be a test database use to test new features without impacting on your production data. |
| **Password** | Synergetic password.<br>**Tip:** Contact your system administrator if you have forgotten your password. They can reset it in Synergetic.<br>Not required when using Windows authentication. |
| **Use Windows Authentication** | Select to use Windows authentication if your organisation offers a choice between:<br>• Windows authentication<br>• SQL Server authentication. SQL Server is the database management system used by Synergetic. |

## Buttons

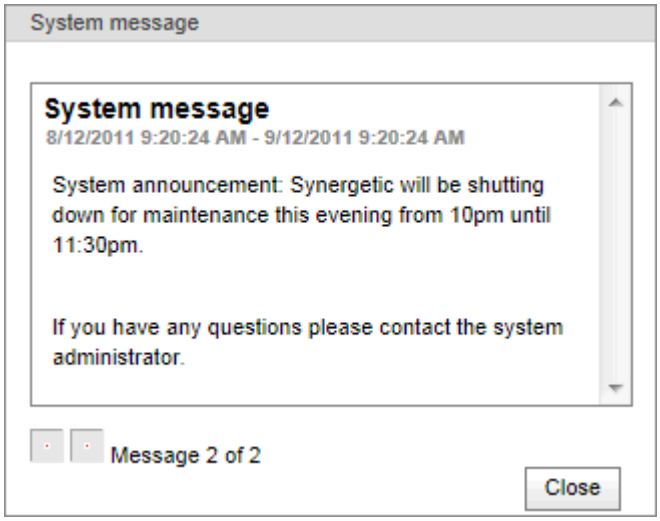
| Button | Description |
|---|---|
| Login | If:<br>• using Windows authentication<br>– type your **Username and Password**<br>– click Login.<br>• **not** using Windows authentication, click Login.<br>**Tip:** Press the **Enter** key instead of clicking the Login button. |

## Synergetic system messages

Sometimes when you log in to SynWeb a system message appears. These messages may be:

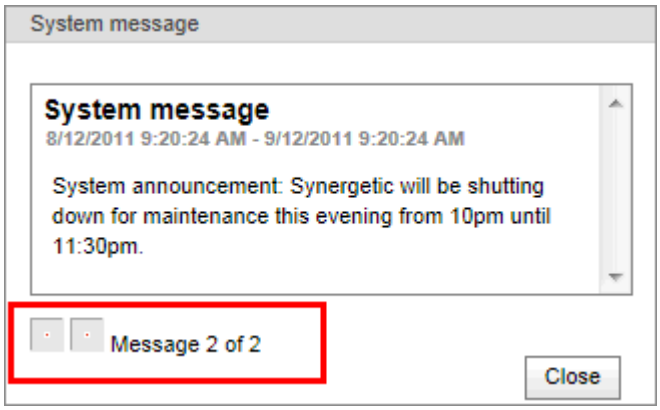
- announcements about system shutdowns
- announcements about new policies or procedures
- other important information.

System messages appear each time you log in during their display period. See *Maintaining system messages* in the **Synergetic** System maintenance manual.



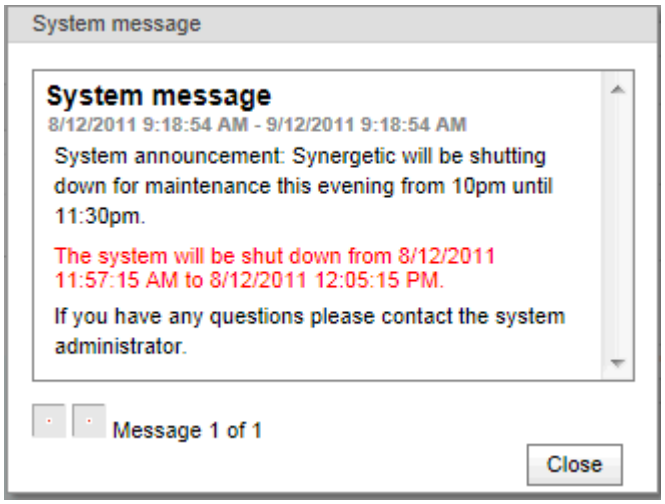

## Reading multiple messages

There may be several messages displayed at once. Multiple messages are indicated by the small buttons down the bottom of the window. To read multiple messages, click the buttons at the bottom of the message window.



## System shutdown warnings

If you log in when the Synergetic system has been scheduled to shutdown, notice of the shutdown is displayed.

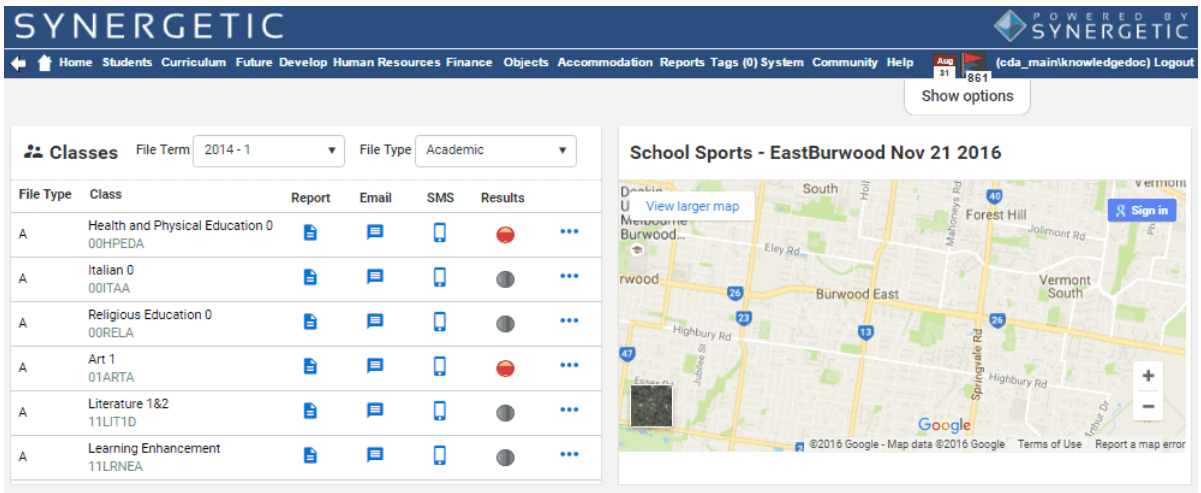



If you are still logged when Synergetic is scheduled to shutdown, a timer is displayed. Synergetic automatically logs you out when the timer reaches zero so it can shutdown. The timer can be paused and the window closed so that you can finish your work and save.

## Using the Dashboard

Each time you log in the **Dashboard** displays a series of tiles with information and functions you might want to access quickly, such as:

- your class lists
- your class timetable
- weather
- map locations.



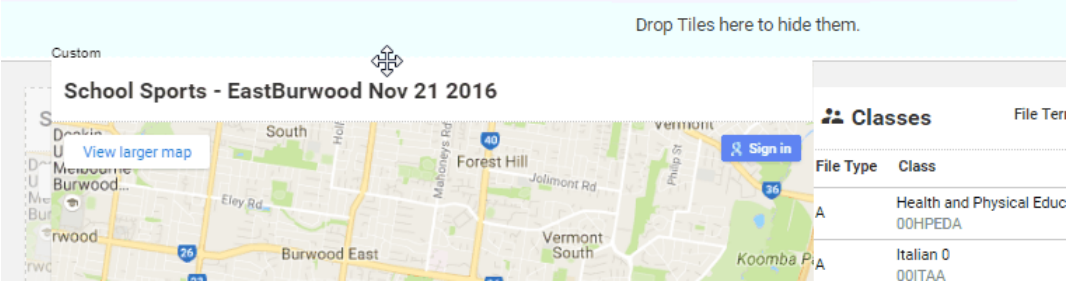

**Note:** You can return to the **Dashboard** at any time by clicking 

on the SynWeb main menu.

**Note:** You can determine which dashboard tiles are available at your organisation using the **luDashboardTile** lookup table. See *luDashboardTile lookup table* in the System maintenance manual.

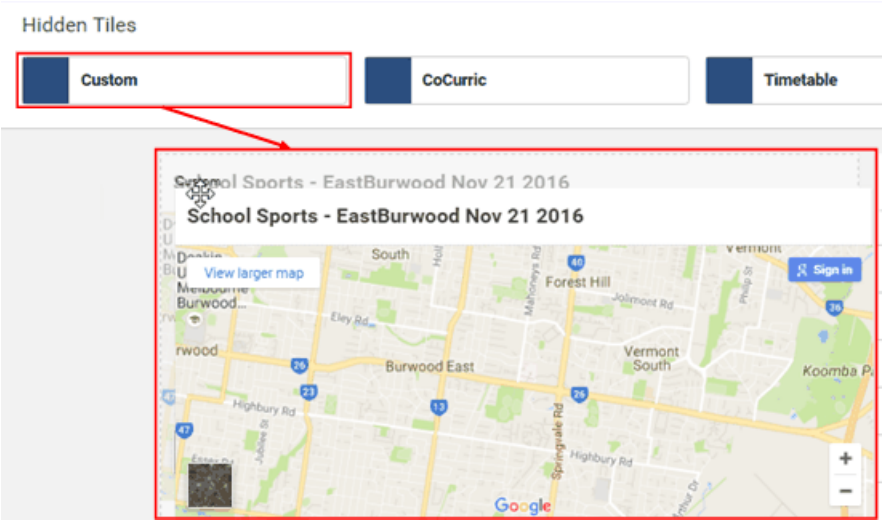
## Hiding tiles

You can hide dashboard tiles by dragging them into the top margin of the dashboard.



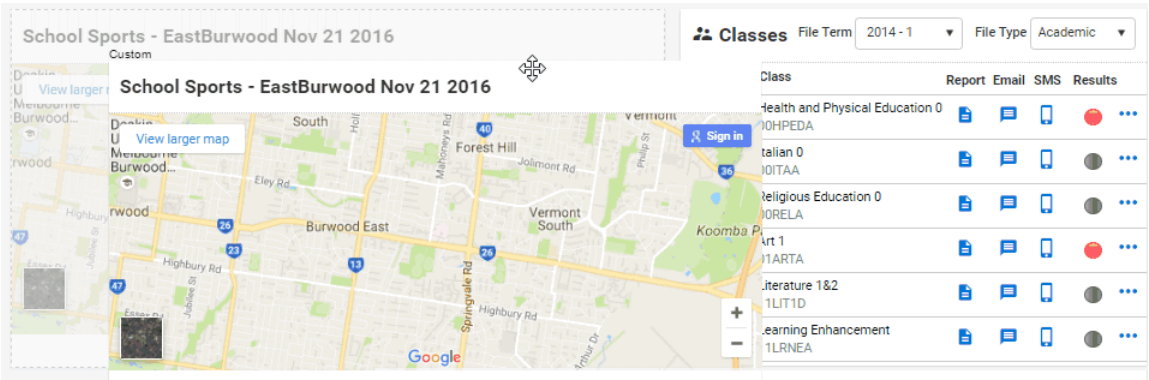

## Adding hidden tiles

You can view hidden dashboard tiles by clicking Show options. Once the hidden tiles are displayed you can add a tile by dragging and dropping it onto the **Dashboard**.

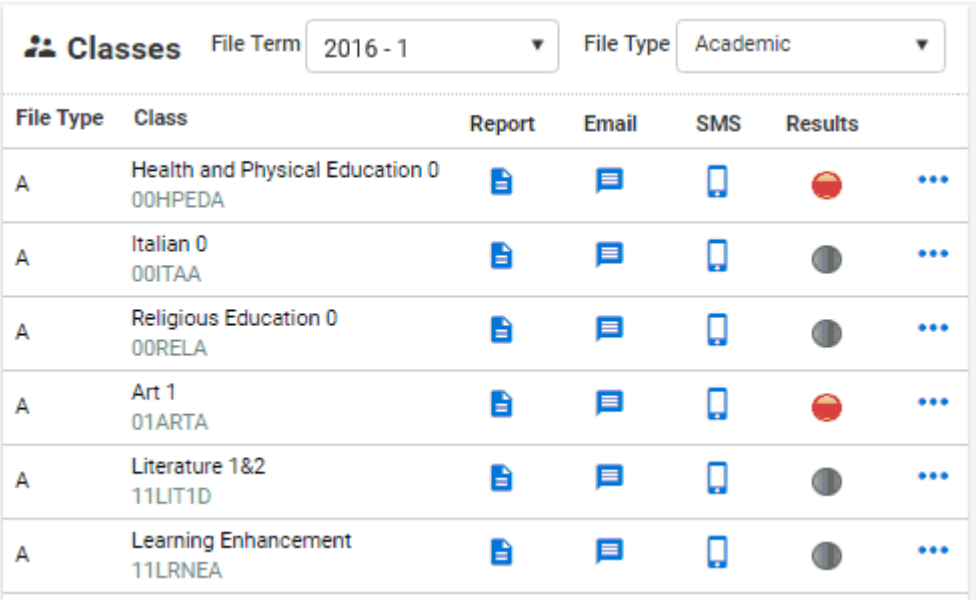



## Rearranging dashboard tiles

You can drag and drop dashboard tiles to rearrange the **Dashboard** according to your preferences.



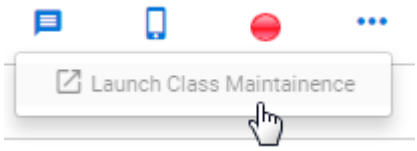
## Dashboard - Classes tile fields and buttons

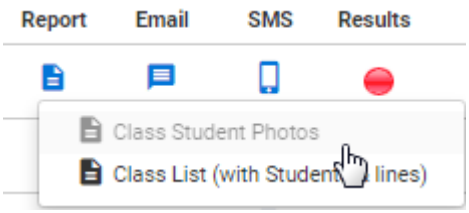
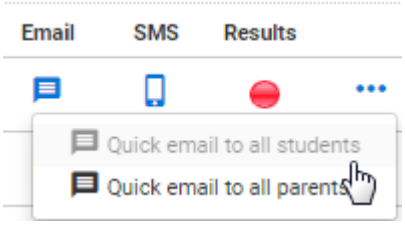
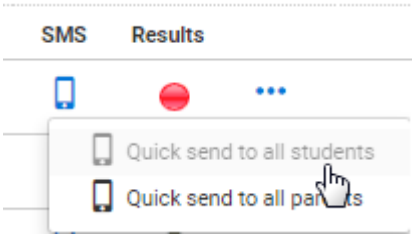



You can use the **Classes** tile to either:

- view details of classes
- launch a class hot report
- send emails and SMSs to students and parents
- view class results.

### Grid area fields

| Field | Description |
|---|---|
| **File Term** | Select a file term to filter the classes displayed in the grid area. |
| **File Type** | Select a file type to filter results displayed in the grid area.<br>For example Academic, Music, Sport. See *File types* (on page 69). |
| **Class** | Class description and unique class code used to identify the class.<br>**Note:** You can click ••• to launch into **Class Maintenance** for that class.<br>  <br> |

| Field | Description |
|---|---|
| **Report** | Click to launch a hot report for the class.<br>  <br><br>Hot reports can be viewed in:<br>• PDF<br>• Microsoft Word<br>• Microsoft Excel.<br>See *Configuring attendance hot reports* in the System maintenance manual. |
| **Email** | Click to send an email to either:<br>• all students in the class<br>• all parents of students in the class.<br>  <br> |
| **SMS** | Click to send an SMS to either:<br>• all students in the class<br>• all parents of students in the class.<br>  <br> |

| Field | Description |
|---|---|
| **Results** | Progress made in entering student results.<br>**Note:** You can click on a results icon to launch **Assessment Maintenance** for that class. |

| Icon | Description |
|---|---|
| | No reports have been entered for this subject. |
| | 12%-19% of reports have been entered for this subject. |
| | 20%-49% of reports have been entered for this subject. |
| | 50%-59% of reports have been entered for this subject. |
| | 60%-79% of reports have been entered for this subject. |
| | 80%-99% of reports have been entered for this subject. |
| | All reports have been entered for this subject. |

## Dashboard- Timetable tile fields and buttons

You can use the **Timetable** tile to view timetable details.

### Fields

| Field | Description |
|---|---|
| **Timetable Date** | Select the date of the timetable you want to view.<br>See *Entering dates and times* (on page 42). |
| **Time** | Time the class is scheduled to begin. |
| **Period** | Period the class occurs in. |
| **Room** | Room the class is scheduled in. |
| **Class** | Description and unique class code used to identify the class.<br>**Tip:** You can click the class code launch link to open the selected class in **Class Maintenance**. |

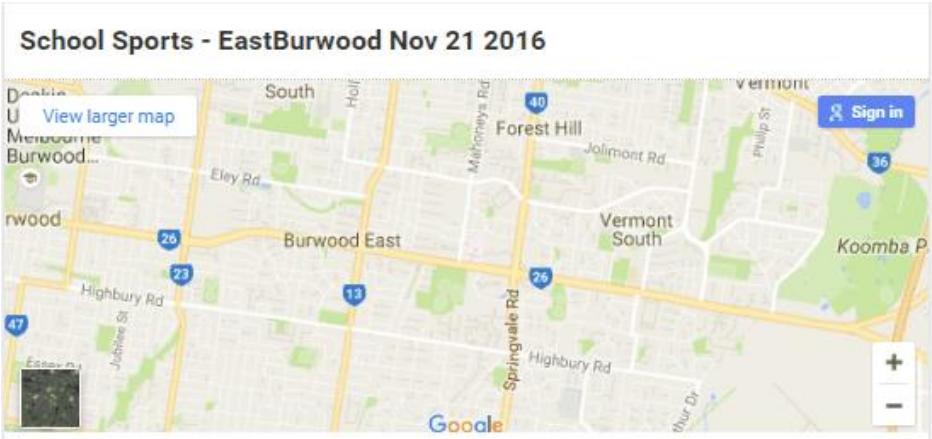
## Buttons

| Button | Description |
|---|---|
| | SynWeb allows you to cancel an entire class to maintain accurate records.<br><br>For example, you cancel classes when the regular timetable is disrupted due to:<br><br>• a sports day<br>• a school camp<br>• another event.<br><br>See *Cancelling a class* in the Attendance manual. |
| | Create a pastoral care item relating to a student in this class. |
| Mark | Click to launch Attendance Maintenance for the selected class. Once attendance is marked the icon changes to . |

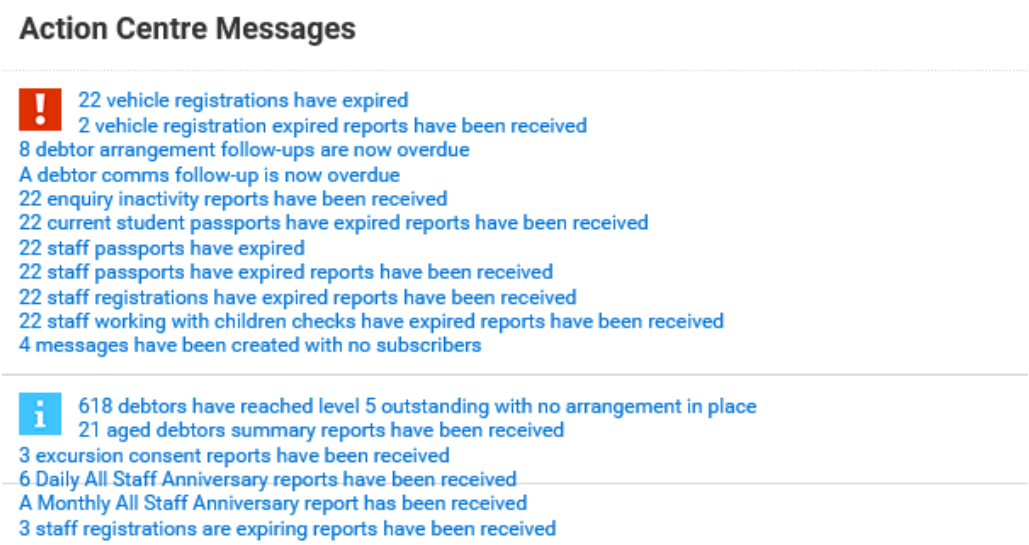
## Dashboard - Custom tile

You can use custom tiles display custom web content defined in the **Content** field of the **luDashboardTile** lookup table. See *luDashboardTile lookup table*.

For example, the following tile displays the location of school sports in Google Maps.




## Dashboard - Action Centre tile




You can use the **Action Centre** tile to view Action Centre messages.

> **Note:** You can click a message to display the message in the Action Centre. See *Using the Action Centre window* (on page 224).

# Navigating around SynWeb

You navigate around SynWeb using a combination of:

- SynWeb menus
- buttons
- command links
- launch links
- toolbar icons
- field icons.

## SynWeb menus

There is a menu bar at the top of each window, named the **SynWeb main menu**.


Click on the module you want and select a function from the drop-down menu.


Using the example above, this is written as **Select Students > Student Maintenance**.

## Buttons

Many SynWeb windows contain buttons to allow you to perform specific functions, such as Search and Clear.

On the SynWeb main menu, click:

- to return to the previous window, except for some transactions
- Home to return to the **Dashboard** that appears when you first log in.

## Command links

Some grids contain commands such as **Add**. Click on the command next to the record you want to perform the function on. In the following example, you can click on the **Add** command link to substitute the teacher taking each of the classes.

| Time | Period | Room | Class | Description | Covered by | |
|---|---|---|---|---|---|---|
| 1:30pm | Per 5 | C201 | S/MAC17 | Mathematics - 1A | | Add |
| 2:30pm | Per 6 | Q008 | S/AC341 | Accounting 3 1 | | Add |

Some functions present a list to choose from. For example, click the **Select** command link next to the staff member's name to assign that staff member as a substitute for a class.

| # | Code | Name |
|---|---|---|
| Select | GSM | Ms G Smith |
| Select | JSB | Mrs J Shadbolt |

## Launch links

When you have a grid, you can click on one of the links to launch into the maintenance window for that record. In the following examples, if you click on:

- **S/MAC17** in the **Class** column, you launch into **Class Maintenance** for **Mathematics - 1A**

| Time | Period | Room | Class | Description | Staff |
|---|---|---|---|---|---|
| 1:30pm | Per 5 | C201 | S/MAC17 | Mathematics - 1A | TED |

- any of the five launch links, you launch into **Attendance Maintenance** for the selected class.

| Time | Period | Room | Class | Description | Staff | Cancel | Pastora |
|---|---|---|---|---|---|---|---|
| 8:00am | Before School | GND1 | PG | Playground Duty | TED | | |
| 8:30am | Per 1 | | | | | | |
| 9:30am | Per 2 | 101 | J/00EN1 | English | TED | | |
| 10:30am | Recess | | | Recess | | | |
| 10:45am | Per 3 | Q008 | S/AC341 | Accounting 3 1 | TED | | |
| 11:45am | Per 4 | GENA1 | S/ENC11 | English Unit 1 | TED | | |

## Toolbar icons

There are a number of icons that are displayed on the **Student Maintenance** window:

- Some of the icons allow you to activate certain functions such as emailing students.
- Others alert you to important information about the student. For example a medical alert or a court order relating to the student.

Hover your cursor over an icon to display the tool tip which explains what the icon signifies.

You can click on an icon to launch into the relevant **Student Maintenance** bar. For example, if you click on the icon, you launch into the student's **Legal** bar where you can view the information about the court order.

See *Using the SynWeb toolbar icons* (on page 33) for information on how to use the icons and what each of them means.

You can set up custom icons. For example, identifying children **under 18** using accommodation. See *Maintaining custom maintenance window icons* in the System maintenance manual.

## Field icons

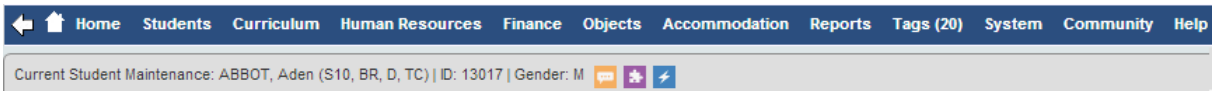
Some functions have icons associated with each field. In the following example, four icons are associated with the topic comment field shown: **Spell Check**, **Comment Bank**, **Copy** and **Paste**.


Click on the icons as you would any button.

## Using the SynWeb toolbar icons

Toolbar icons are displayed on SynWeb maintenance windows below the menu, next to other relevant information for the window. Only relevant icons are displayed.

There are a number of toolbar icons that are common across all programs in SynWeb. In the example below, the medical alert and the special needs alert icons are displayed.




To view the information that the icon is referring to, click on the icon to open the relevant bar. For example, if you click :

- the **Medical** bar is expanded
- you can view the student's public medical details.

**Note:** If a toolbar icon does not appear, it is because the option is not relevant in the current context. For example, the icon is not displayed unless there are important comments for the student.

| Icon | Description |
|---|---|
| | Indicates that the student has special needs. Click to open the **Flags** bar to view or update the student's flags. |
| | Indicates that there is a court order regarding parent's access to the student.<br>Click to open the **Legal** bar to view or change the details about the court order. |
| | List the reports that are available. |
| | Indicates that there are important comments about the student. Click to open the **Comment** bar to view or change the important comments. |
| | Indicates that the parents are separated. Click to open the **Legal** bar to view or change the details about the family's legal situation. |
| | Medical alert. Click to open the **Medical** bar to view or update the student's public medical details. |
| | Individual plan. Click to open the Individual Plan bar to view or update the student's individual learning plan. |
| | Anaphylaxis. Indicates that the student suffers from anaphylactic reactions. |

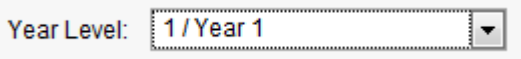
# Using drop-down lists

If a field has a down arrow to the right of the box, it indicates that a drop-down list is available. The drop-down list allows you to select from a set of valid values.

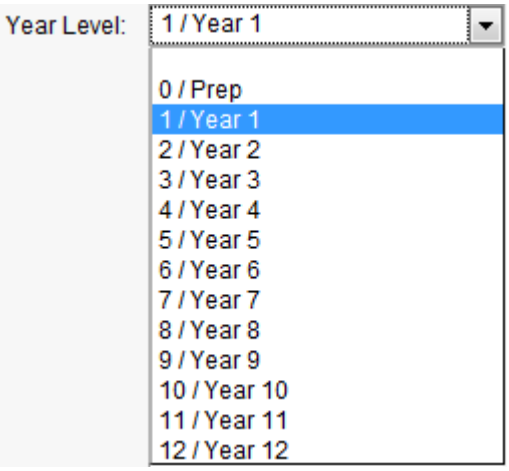
These lists:

- ensure consistent data is used
- can save you a lot of time.

In the example below, the **Year Level** field has a drop-down list associated with it.




When you click on the arrow to the right of the field, the available choices are displayed.




## Selecting entries

To select the required entry, either click on the one you want or use the arrow keys on your keyboard to move up and down the list. When the one you want is highlighted, press **Enter** to select it.

You can also type in the abbreviated form of an entry. For example, if you type **3** in the **Year Level** field, Synergetic automatically finds the closest match to this, which is **3 / Year 3**. When the correct entry is displayed, press **Enter** to choose it.

## Lookup tables

The majority of drop-down lists have an associated lookup table; which stores all the valid values for the field. For example, the **Year Level** field has a lookup table associated with it called **luYearLevel**. If the lookup table entry does not exist, then you need to create it.

It is up to your organisation to decide who can maintain these lookup table entries. Some organisations choose to:

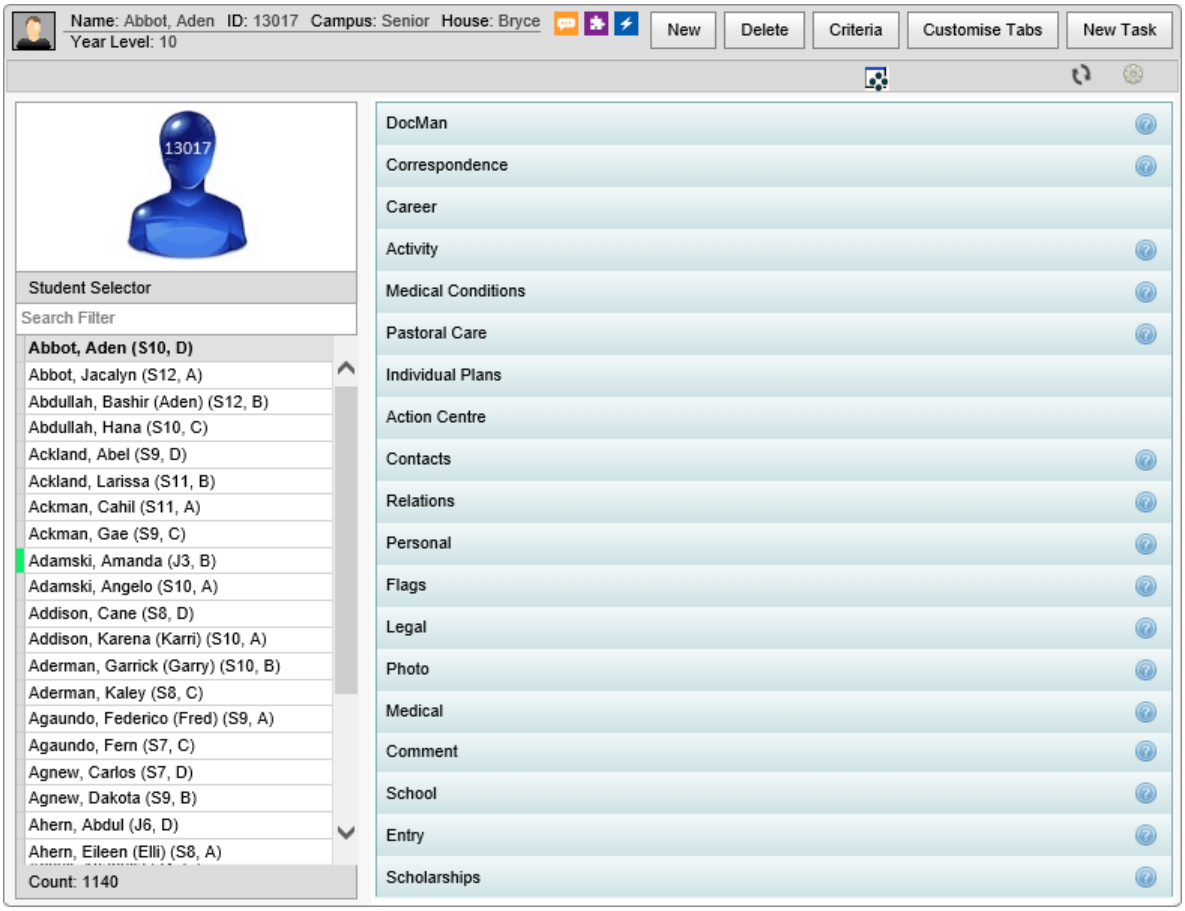
- Have the system administrator update all tables.
- Delegate this responsibility to the experts in each area. For example, the person managing debtors is able to maintain the debtors-related lookup tables and so on.

## Using navigation bars

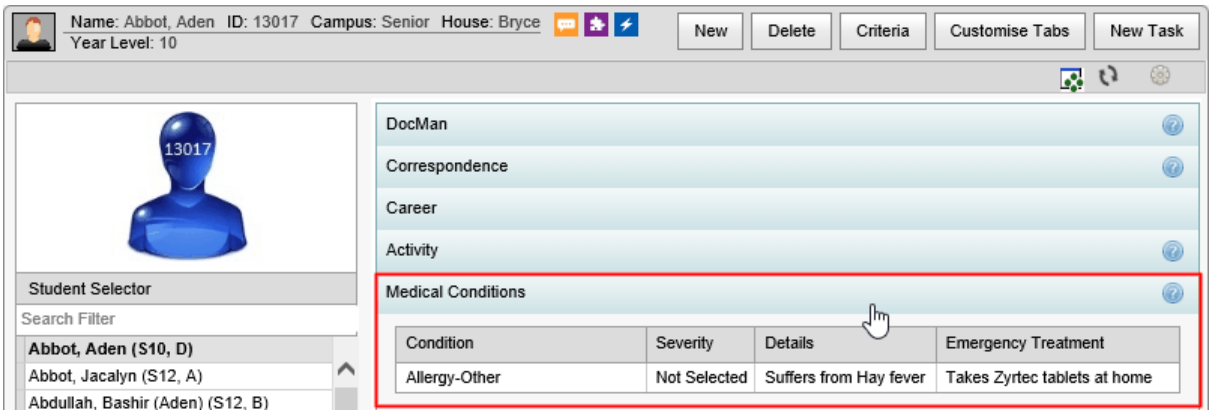
Most maintenance pages have several navigation bars that can be expanded to allow you to view details.

SynWeb uses your Synergetic preferences to decide which navigation bars are displayed and the order they appear in.

**Tip**: Which navigation bars are displayed and the order they appear in can be customised using the Customise Tabs button. See *Customising navigation bars* (on page 37).




To open a navigation bar, click anywhere on the bar. The details are displayed underneath the navigation bar.



You can only have one bar open at a time. SynWeb remembers which bar was open if you:

- return to that maintenance page
- select another search result. See *Searching* (on page 59).

You can also click

- to refresh information for the selected record
- to save any changes made
- to configure auto save settings.

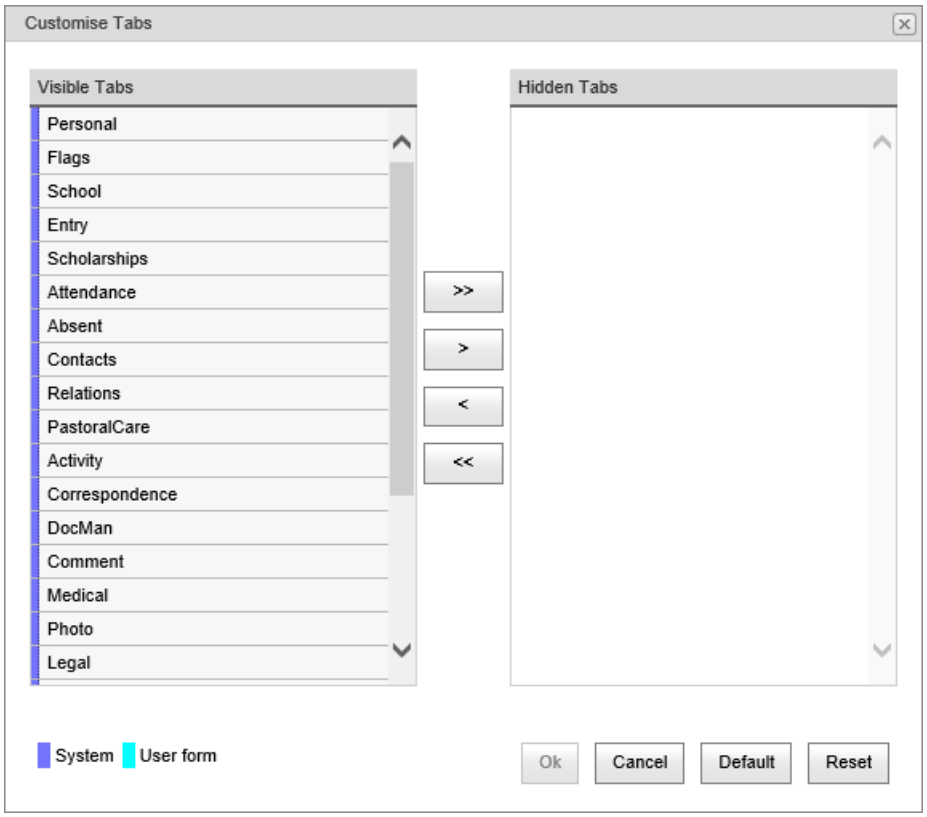
# Customising navigation bars

You can customise which bars you want to see on maintenance windows with the **Customise Tab Layout** window.

## Opening the Customise Tab Layout window

To open the **Customise Tab Layout** window, click Customise Tabs on the maintenance screen that you want to customise.

The **Customise Tab Layout** window is displayed.



## Customise Tab Layout window key fields and buttons

### Fields

| Field | Description |
|---|---|
| **Visible Tabs** | Bars that are displayed on the maintenance window.<br>**Note:** Bars appear on the maintenance window in the order they are listed in this field.<br>**Tip**: Click, hold and drag bars to rearrange their order. |
| **Hidden Tabs** | Bars that are not displayed. |

### Buttons

| Button | Description |
|---|---|
| >> | Move all bars into the Hide area. |
| << | Move all bars into the Show area. |
| > | Move the selected bar into the Hide area. |
| < | Move the selected bar into the Show area. |

# Sorting grids

You can sort most grids into ascending or descending order and filter some grids to display only the items relevant to you.

## Sorting grids

You can sort most grids into ascending or descending order by clicking on the field (column) name.

1. Click once on the heading field you want to sort by.

| Time | Period | Room | Class | Description | Staff |
|---|---|---|---|---|---|
| 10:30am | Recess | B202 | S/SCEM5 | Science - Medical Science | SGG |
| 12:45pm | Lunch | B204 | S/SCEM4 | Science - Medical Science | GN |
| 8:30am | Per 1 | B205 | S/SCEP2 | German A | RMA |

The column is sorted into ascending order (A to Z).

2. To reverse the order and sort into descending order (Z to A), click again on the heading field.

| Time | Period | Room | Class | Description | Staff |
|---|---|---|---|---|---|
| 8:30am | Per 1 | B205 | S/SCEP2 | German A | RMA |
| 12:45pm | Lunch | B204 | S/SCEM4 | Science - Medical Science | GN |
| 10:30am | Recess | B202 | S/SCEM5 | Science - Medical Science | SGG |

**Tip:** If the **Loading** dialog is displayed for more than a few seconds, this can indicate that your session has timed out. Click the **Refresh** button on your web browser (such as Internet Explorer) and log in again.

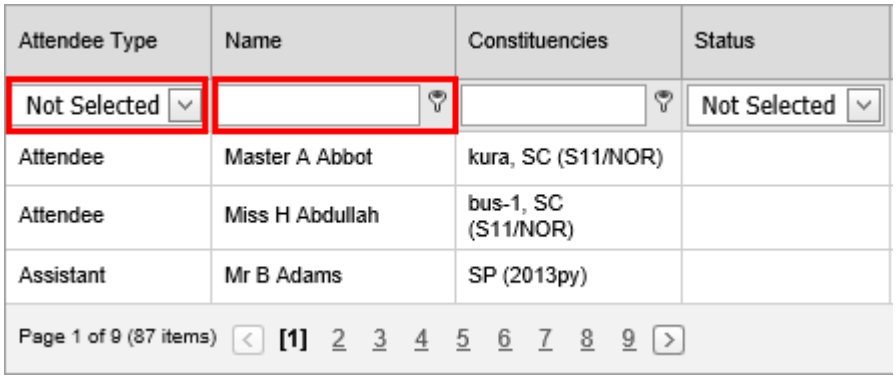
| Time | Period | Room | Class | Description | Staff |
|---|---|---|---|---|---|
| 11:45am | Per 4 | Q111 | S/ENES1 | English | CTS |
| 2:30pm | Per 6 | Q008 | S/AC341 | Accounting 3 1 | TED |
| 10:45am | Per 3 | Q008 | S/AC122 | Accounting 1 2 | RMA |
| 2:30pm | Per 6 | Q004 | S/GEEA | | GN |
| 9:30am | Per 2 | B205 | S/SCEP | | |
| 1:30pm | Per 5 | B204 | S/SCEM4 | Science - Medical Science | |
| 8:30am | Per 1 | B202 | S/SCEM5 | Science - Medical Science | SGG |

Loading...

## Filtering grids

Some grids have filter fields below the grid column heading. These grid areas can be filtered to only display information relevant to you.

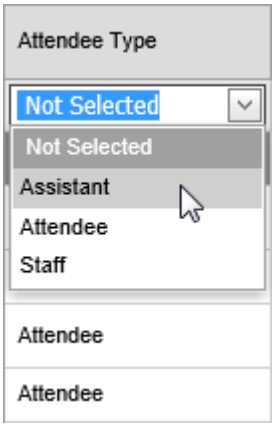
There are two types of filters, drop-down lists and text filters.



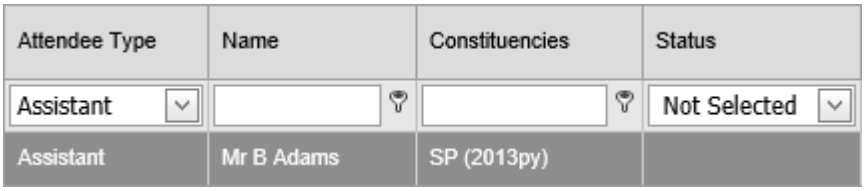

### Filtering grids with a drop-down list

To filter a grid with a drop-down list:

1. Click the arrow to the right of the field.
2. Select the desired option from the list.




All entries with the specified value are displayed.



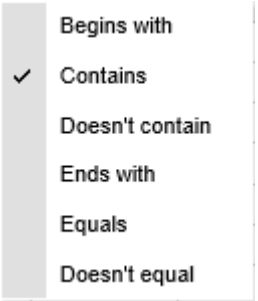
## Filtering grids with a text filter

You can filter grids with text items that:

- are equal or not equal to a number or piece of text
- are greater than, less than or between a number
- begins with, ends with or contains a piece of text
- doesn't contain a piece of text
- is before, after or exactly matching a date
- is within a range of two dates.

To filter a grid with a text filter:

1. Type the desired text, number or date.
2. Click the to view the filter options for that field.

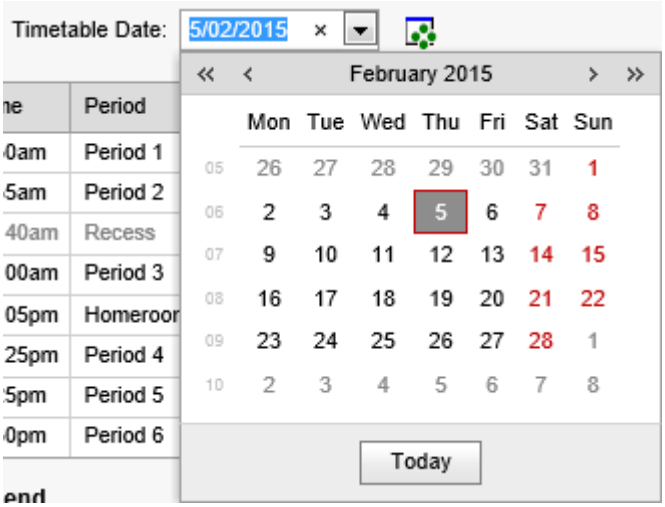



3. Select the desired filter option.

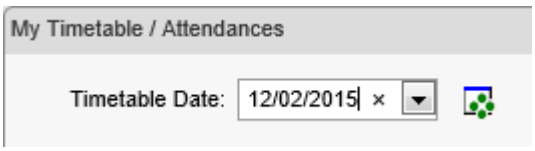
## Entering dates and times

There are different ways to enter a date:

- Using the graphical calendar. See *Using the graphical calendar* (on page 43).



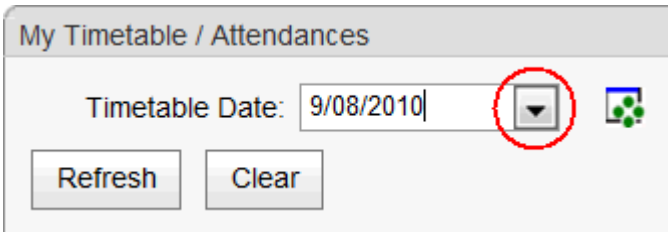

- Editing the date field manually. See *Editing date fields directly* (on page 48).



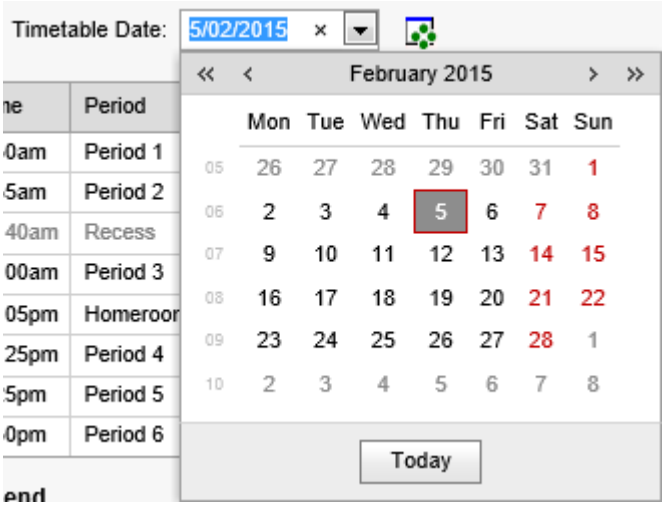
## Using the graphical calendar

To use the graphical calendar:

1. Click on the down arrow next to a date field.



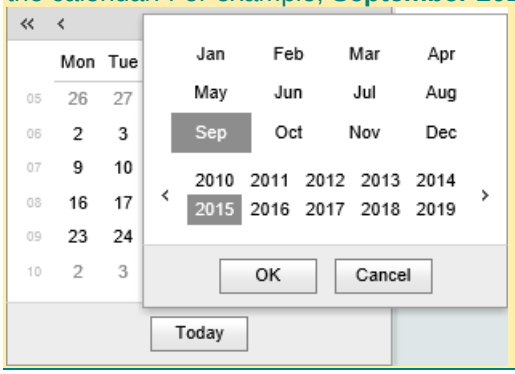

The calendar dialog window is displayed, with the current date bordered in red and the selected day highlighted in grey.



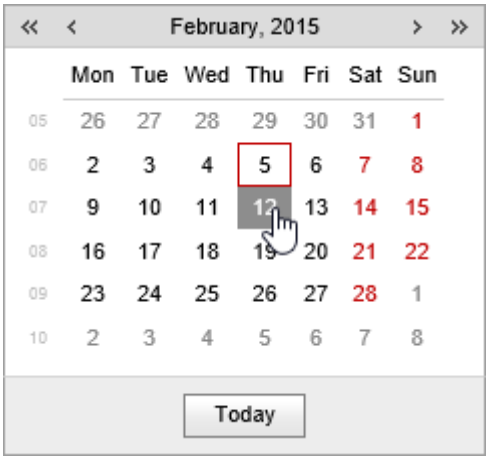

2. To change the year, either click:
   - « to go to the same month in the previous year
   - » to go to the same month in the next year.
3. Repeat step **2** until you reach the required year.
4. To change the month, either click:
   - < to go to the previous month
   - > to go to the next month.

5. Repeat step **4** until you reach the required month and year.

**Tip:** You can select a different year or month by clicking on the year and month label at the top of the calendar. For example, **September 2015**.

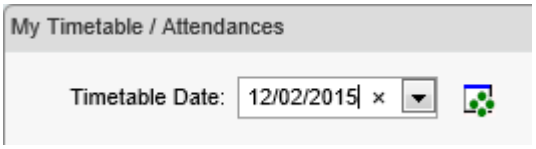



6. Select the required day.

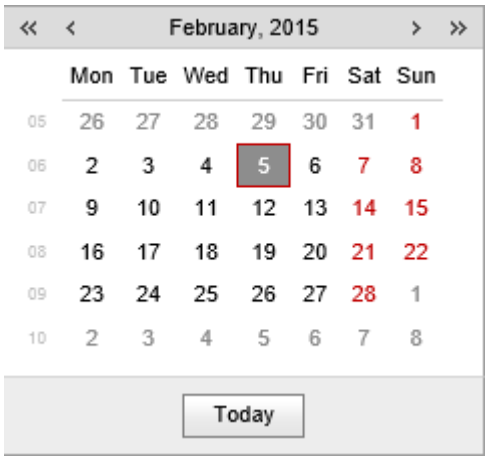



**Tip:** You can use the cursor keys to move about the days and weeks, and then press **Enter**.

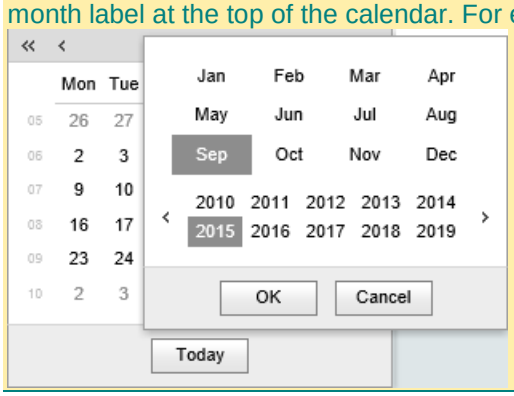
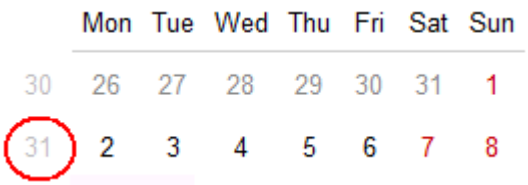
The calendar is closed and the required date is set in the field.

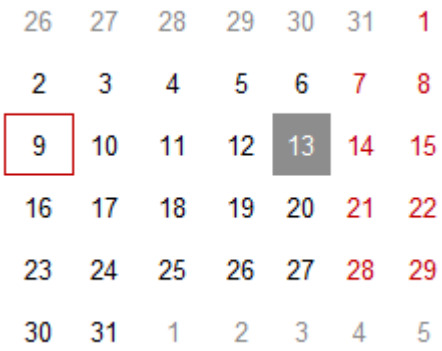


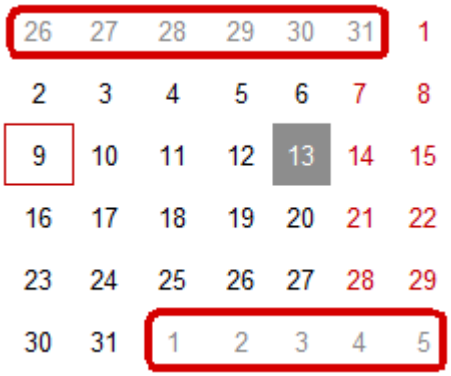
## Calendar dialog window key fields and buttons




## Fields

| Field | Description |
|---|---|
| **Month / Year** | Selected month and year.<br>In the example, this is **February 2015**.<br>**Tip:** You can select a different year or month by clicking on the year and month label at the top of the calendar. For example, **September 2015**.<br>  <br> |
| **Week** | Week from the start of the selected year. Six weeks are displayed.<br>In the example, the first full week is week **06**, from the **2** to **8 February 2015**.<br>  <br> |
| **Day of week** | Abbreviation for the day of the week. For example, **Mon** for **Monday** and so on. |

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Day</td><td>
Day of the selected month and year. These are:
<ul>
<li>all days of the selected month and year</li>
<li>some days from the previous or next week.</li>
</ul>


The font, border and highlighting is used to indicate the type of day:
<table>
<tr><th>Treatment</th><th>Description</th></tr>
<tr><td>Black font</td><td>Weekdays. That is, Mondays through Fridays.</td></tr>
<tr><td>Grey box</td><td>Selected day for the current month and year.<br>For example, 13.</td></tr>
<tr><td>Red border</td><td>Today's date. For example, 9.</td></tr>
<tr><td>Red font</td><td>Weekend days. That is, Saturdays and Sundays.</td></tr>
<tr><td>Grey font</td><td>Days in previous or next month. In the example:
<ul>
<li>26 - 31 July 2010</li>
<li>1 - 5 September 2010.</li>
</ul>

</td></tr>
</table>
</td></tr>
</table>

## Buttons

| Button | Description |
|---|---|
| < | Go to the previous month. If the current month is January, the year is set to the previous year. |
| > | Go to the next month. If the current month is December, the year is set to the next year. |
| « | Go to the same month in the previous year. |
| » | Go to the same month in the next year. |
| Today | Close the calendar and set the date to today's date. |

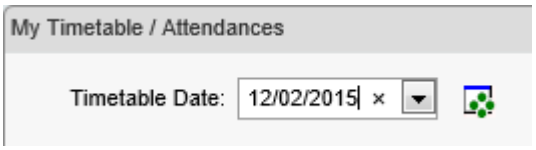
## Editing date fields directly

### Typing in the date

You can edit the date field manually by typing in the date.

The date field is highlighted in blue if you:

- tab to the field
- triple click on the field.




To replace the date:

1. Type the date, in a **DD/MM/YYYY** format.

   As you type, the existing characters are replaced.

2. Press **Enter**.

### Deleting a date

If you set a date then want to remove it, highlight it and then press the **Delete** key.

# Record locking

## SynWeb record locking

SynWeb uses a web browser to display and update records, allowing you to update:

- student results
- student attendance
- staff and room substitutions
- student documents in the **DocMan** bar of **Student Maintenance**.

The web browser has limited capabilities and cannot:

- lock records
- distinguish which fields have been updated.

The following message is displayed if you attempt to update a class record using SynWeb while another user is updating the same class record using Synergetic.

Another User (Dawson, Tim) editing Class

SynWeb prevents you from editing the class results while another Synergetic user is accessing the same results. The record is locked until the Synergetic user has finished editing the results and exited the class. If this occurs, close the record entirely and try again later.

# Changing your user preferences

Use the **User Preferences** window to set either

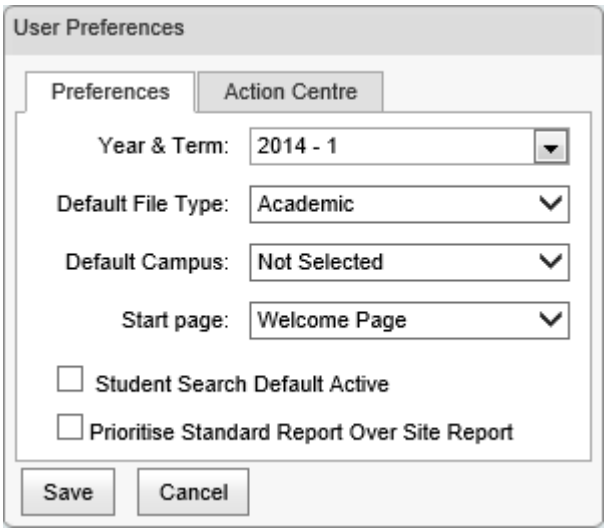
- **General** preferences including:
  - year and semester, term or reporting period
  - default file type
  - campus, if applicable
  - set whether the **Active Student** field is set to default to **Yes** on the **Current Student Search Criteria** window
- **Action Centre** preferences.

## Opening the User Preferences - Preferences tab

To open the **Preferences** tab:

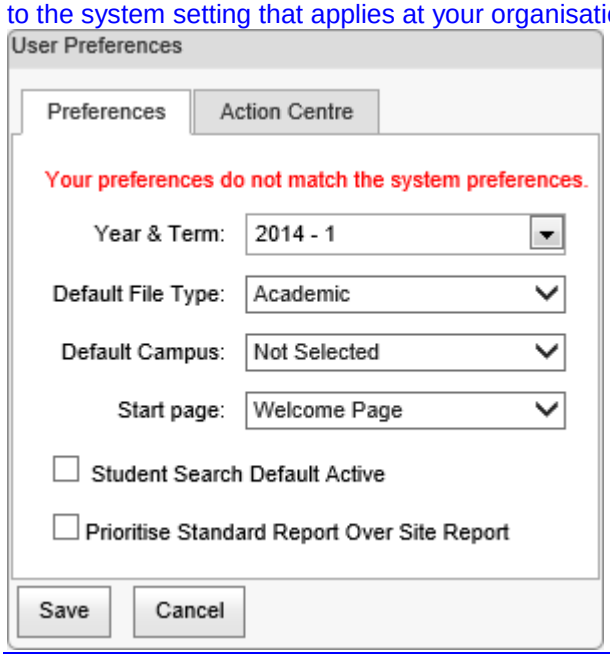
1. Click **System > Edit Preferences** on the SynWeb main menu.

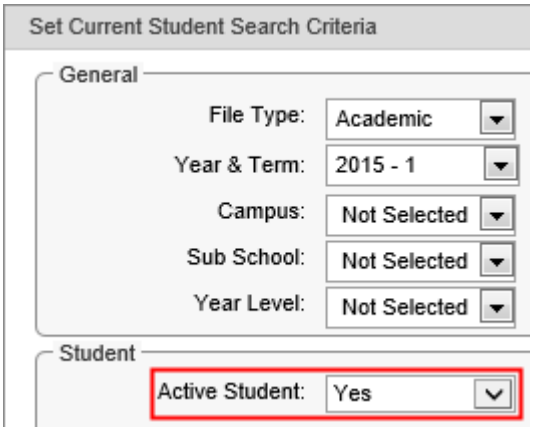
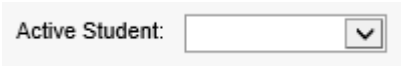
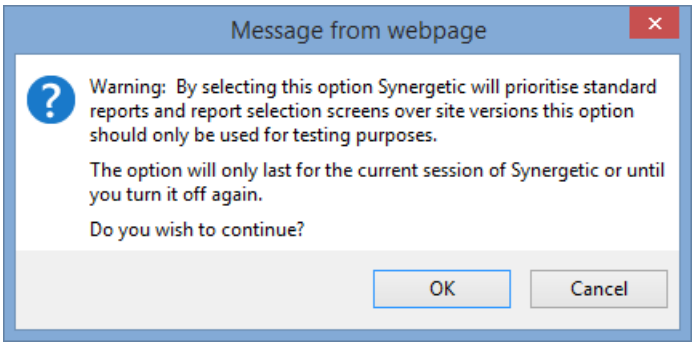
   The **Preferences** tab is displayed.



## User Preferences tab key fields and buttons

### Fields

| Field | Description |
|---|---|
| **SemYear & Sem** | Select the year and semester, term or reporting that you want to work from.<br>**Note:** You are notified if the selected **Year** and **Semester** are different to the system setting that applies at your organisation.<br>  <br> |
| **Default File Type** | Select the file type that SynWeb uses by default. See *File types* (on page 69). |
| **Default Campus** | Select the campus that you usually work from, if there are multiple campuses in your organisation. |
| **Start Page** | Select the window that is displayed after you log in to SynWeb. |

| Field | Description |
|---|---|
| **Student Search Default Active** | Select to set the **Active Student** field to default to **Yes** on the **Current Student Search Criteria** window. See *Searching for students* in the Current students manual.<br>  <br><br>Clear the field to **not** set the **Active Student** field to a default value.<br>  <br> |
| **Prioritise Standard Report Over Site Report** | Select to prioritise standard reports and report selection screens over site versions.<br>  <br><br>**Note:** This field is only used for testing purposes and lasts for the duration of the current session. |

## Buttons

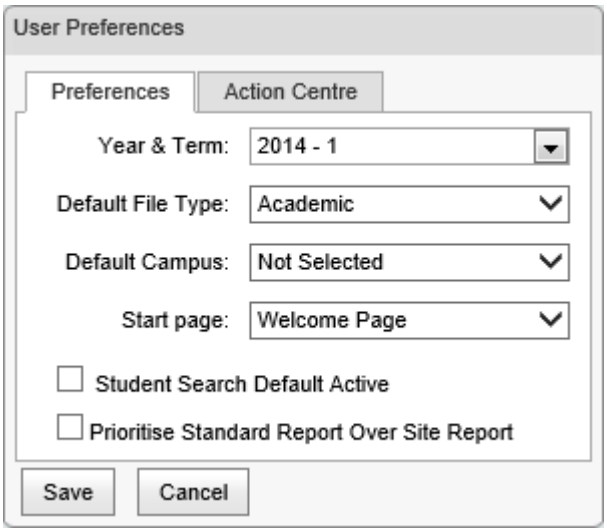
| Button | Description |
|---|---|
| Save | Save your preferences.<br>**Tip**: Select another function after saving your preferences. SynWeb web browser windows often behave differently to similar Synergetic windows. |
| Cancel | Cancel the changes and return to the **Home** window. |

## Opening the User Preferences - Action Centre tab

To open the **User Preferences - Action Centre** tab:

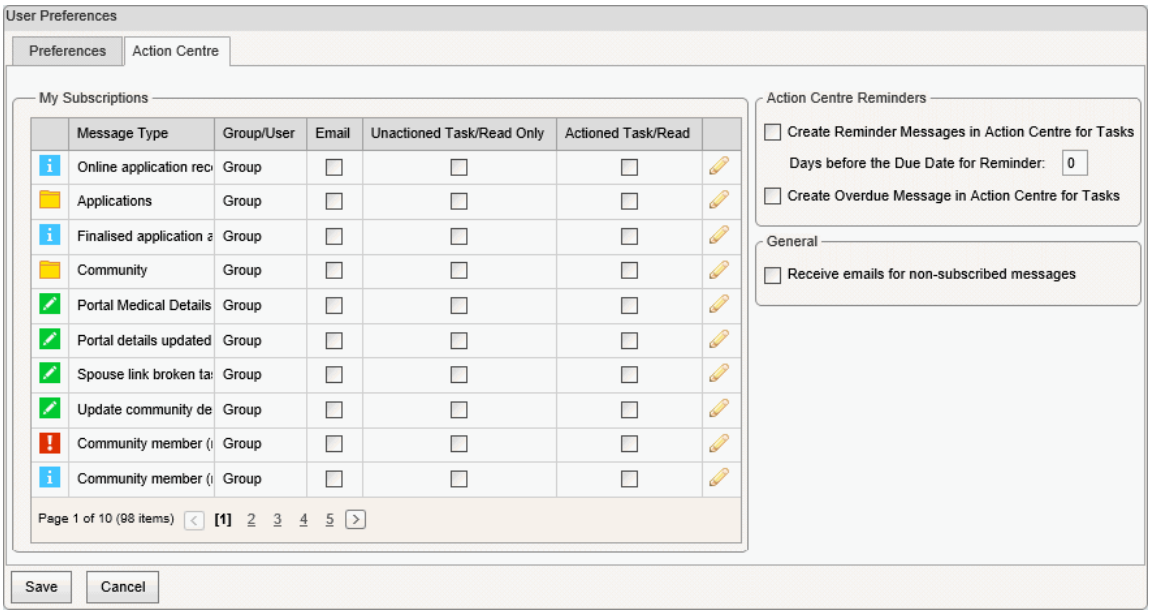
1. Click **System > Edit Preferences** on the SynWeb main menu.

   The **User Preferences - Preferences** tab is displayed.




2. Click the **Action Centre** tab.

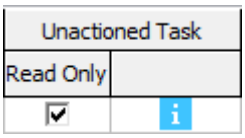
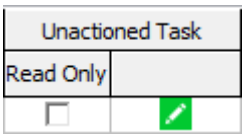
   The **User Preferences - Action Centre** tab is displayed.

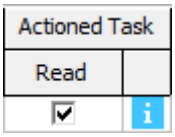


## User Preferences - Action Centre tab key fields

System administrators can make the following settings specific to the Action Centre:

### Grid area fields

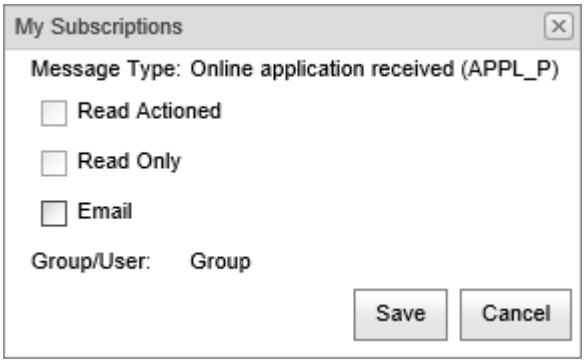
| Field | Description |
|---|---|
| **Type** | Type of **Action Centre** notification. Either:<br>• message<br>• task<br>• error. |
| **Message Type** | Description of the Action Centre notification. |
| **Group/User** | Level of subscription. You can be subscribed as either:<br>• user<br>• group.<br>**Note:** Groups of users can be subscribed to Action Centre messages using the **Action Centre Types** group security resource. See *Group/User Security Maintenance - Groups View* in the **Synergetic** System Maintenance manual. |
| **Email** | Whether the current user receives email notifications for the currently selected Action Centre message type.<br>**Note:** Groups of users can be subscribed to Action Centre email notifications using the **Action Centre Types** group security resource. See *Group/User Security Maintenance - Groups View* in the **Synergetic** System Maintenance manual. |
| **Unactioned Task/Read Only** | Status of unactioned Action Centre tasks.<br>You can either:<br>• Select the **Unactioned Task/Read Only** field:<br>The Action Centre task is marked as a message and the message icon is displayed.<br>  <br><br>• Leave the **Unactioned Task/Read Only** field blank:<br>The Action Centre task is marked as a task and the task icon is displayed.<br>  <br> |

| Field | Description |
|---|---|
| **Actioned Task/Read** | Status of actioned Action Centre tasks.<br><br>You can either:<br><br>• Select the **Read** field:<br><br>The Action Centre task is marked as a message and the message icon is displayed when the task is actioned.<br><br>  <br><br><br>• Leave the **Read** field blank:<br><br>The Action Centre task remains a task and no icon is displayed when the task is actioned. |

## Fields

| Field | Description |
|---|---|
| **Create Reminder Messages in Action Centre for Tasks** | Select to create reminder messages in the Action Centre for upcoming tasks. |
| **Days before the due date for reminder** | Days before the task due date that the Action Centre displays the reminder. |
| **Create Overdue Message in Action Centre for Tasks** | Select to create overdue messages in the Action Centre for overdue tasks. |
| **Receive emails for non-subscribed messages** | Select to receive emails for non-subscribed messages. |

## Buttons

| Button | Description |
|---|---|
| | Launch the **My Subscriptions** window to manage your subscriptions for the selected Action Centre message type.<br><br>  <br> |

# Introduction to the community

## Community concept

The operation of SynWeb is based around the concept of a community. Every person or company that has any relationship to your organisation has a record in the Synergetic community database. This database contains information about each *individual* in your organisation's community.

The community of people your organisation deals with are all represented within the Synergetic community database as:

- Individual community members with all of their information stored about them.
- Their membership of various constituencies. Constituencies are used to define how an individual relates to your organisation. Because an individual might relate in several ways, they are generally members of many constituencies. For example, they may be a parent (@**PC** constituency), staff member (@**STF** constituency) and a debtor (@**DEB** constituency).

**Important Note:** There are two types of constituencies within Synergetic: system-defined constituencies and user-defined constituencies. You can create any constituencies that you like to group your community members (for example, school council member). System-defined constituencies all start with @.

- Their relationships with other individuals. Relationships represent how one member of the community relates to another. For example, the community member may be the son or daughter of another.

## Community database

The community database maintains:

1. Core personal information. For example:
   - Title, Surname, Given Names, Mail Address, Home Address
   - Contacts: telephone home/business/mobile, facsimile, email
   - Occupations: code, description, employer
   - Flags: primary/partner, deceased.
2. Constituency information. That is, how an individual relates to your organisation. For example:
   - Future parent, current parent, current student, past student
   - Current staff, past staff, foundation member, friend, supplier.
3. Relationship information. That is, how one individual relates to another. For example:
   - mother of / son of
   - brother of / sister of
   - aunt / uncle.

The following diagram shows an overview of the community database and shows how the different areas of your organisation's operations interact with the Synergetic community.

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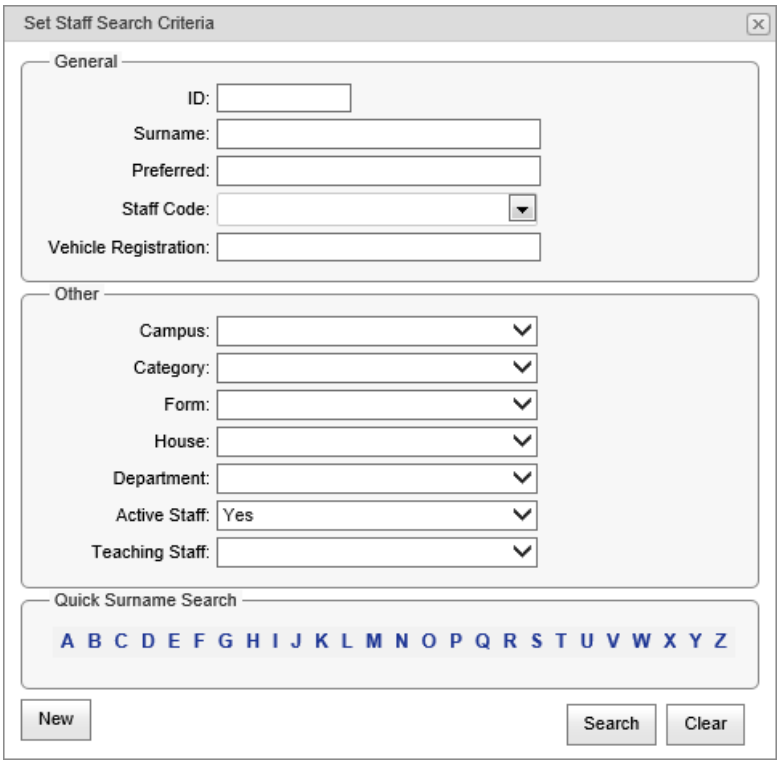
# Searching

When you first start maintenance functions within SynWeb, a search window is displayed. For example, the **Set Staff Search Criteria** window.




**Note:** Your previous settings on each **Search Criteria** window are retained from the last time you used it. Click Clear to reset all the settings to their default values.

## How to use the Search Criteria window

On the **Search Criteria** window you can:

- Click Search, leaving all fields blank. This returns all available records in SynWeb and displays them on the next window.
- Restrict the search by entering information in one or more fields and then click Search. You can enter all or part of a name in a field and use wildcard characters to further narrow the search. See *Using wildcards to search* (on page 63).

  The more fields that you use to search on, the more filters you apply so that less data is returned. Less data for SynWeb to process means that less time is taken to retrieve the data.

**Note:** Make sure that you enter the required data into the corresponding fields in the correct format. For example, you must enter the ID as a number and not a letter or alphabetic character.

- Click a letter of the alphabet to display a search results grid of all records whose last name starts with that letter.

  A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

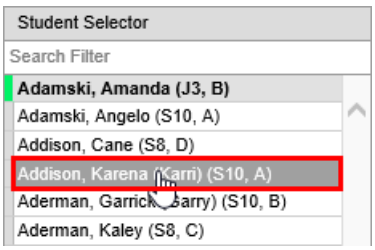
At any stage you can change your selections. To do this, click Clear and then make your new selections.

Fields that you type in are not case sensitive and can be entered in either upper or lower case or a mix of upper and lower case. For example, name fields are not case sensitive.

Fields that have a drop-down list to choose from are case sensitive and depend on how they have been set up in the database lookup tables. We recommend that you always select these fields from the drop-down list rather than typing them in to avoid issues of case sensitivity.

## Choosing a selection from the search results

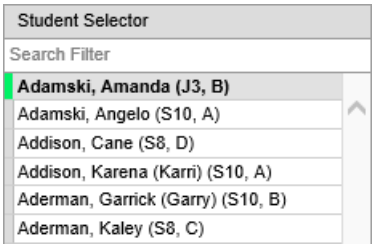
You can easily choose a different record when the records are displayed on the search results window. To display a different record click the launch link on the selector grid for the required record, as described below.



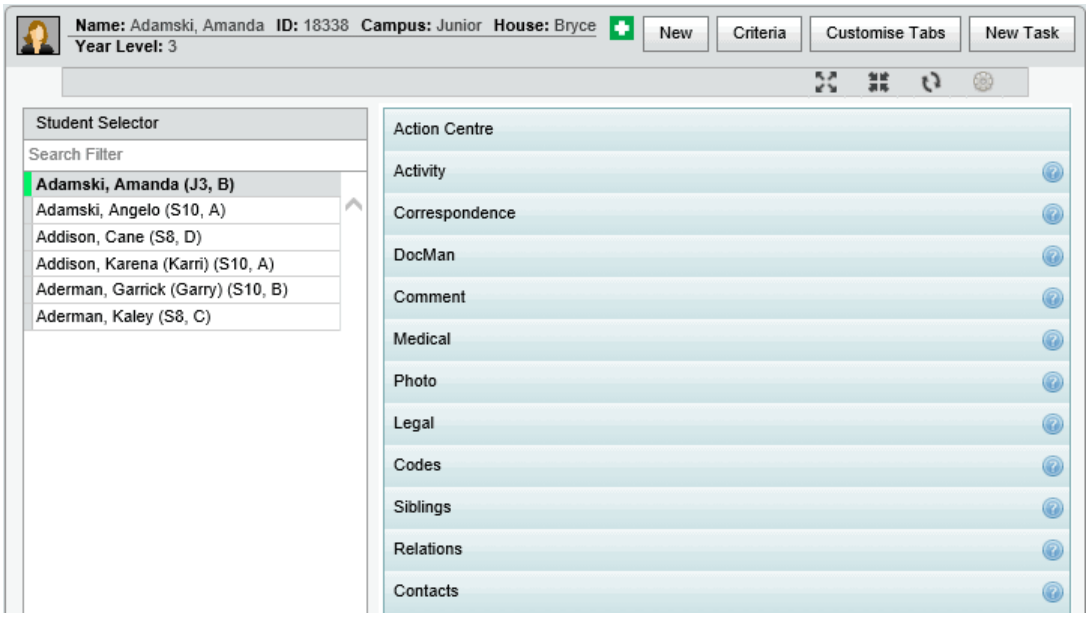

To choose a selection using the selector grid:

1. Search for the records.

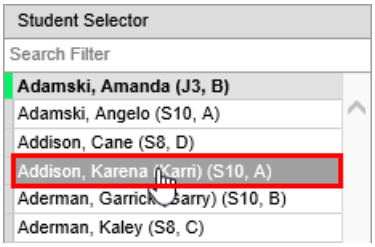
   In this example, several records are returned when we search for students; these are listed on the **Student Selector** grid.



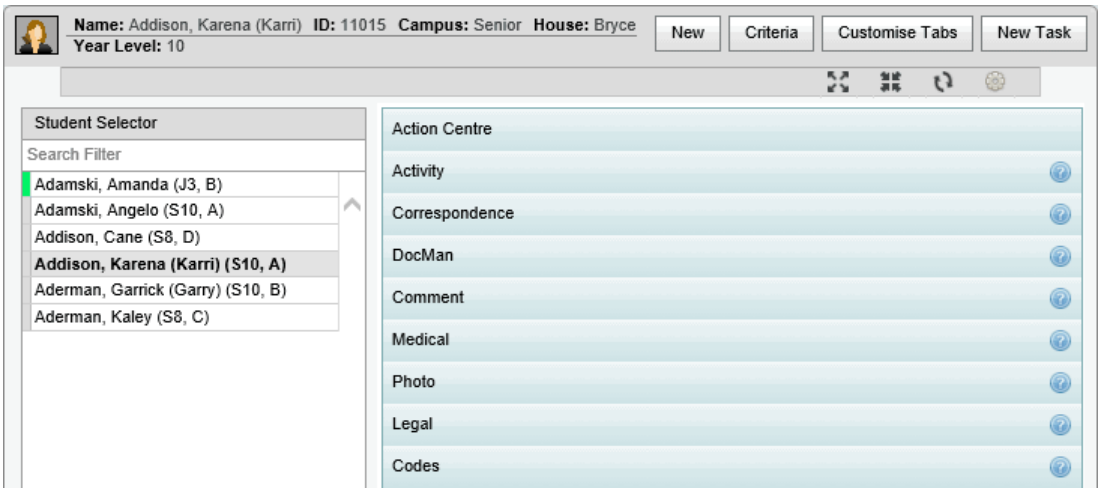

   The first record is displayed by default. In this case, Amanda Adamski.



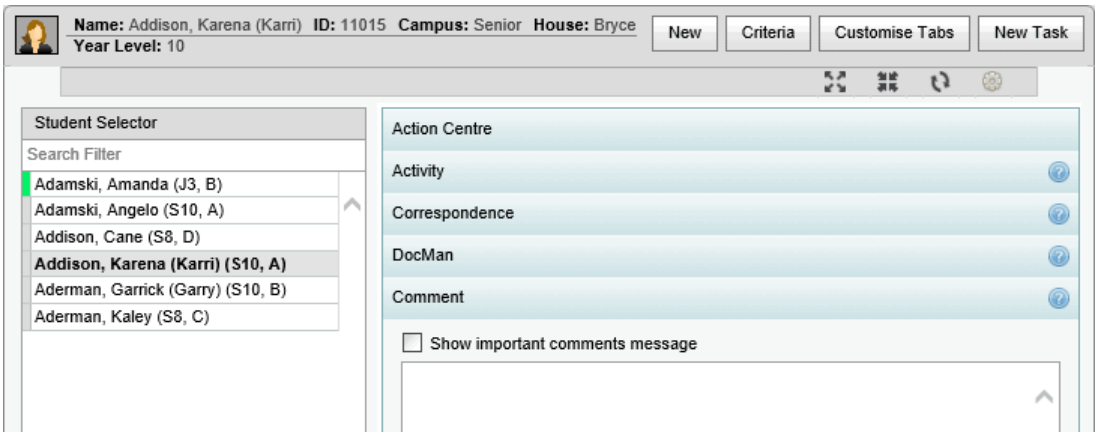
2. Click on the **Name** launch link of the required student on the **Student Selector** grid. In this case, Karena Addison.




The selected student's record is displayed.

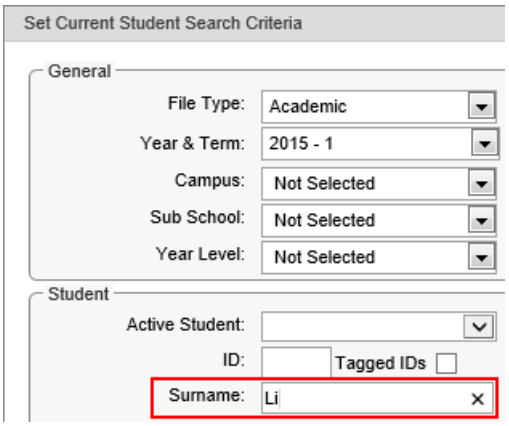



3. Expand or collapse the required navigation bars, as required. See *Using navigation bars* (on page 35).



## Using wildcards to search

You never need to enter a full name to search on, because by default, Synergetic assumes that you have typed in all or part of the beginning of the string of characters.




For example, searching in the **Surname** field for a student starting with the letters **Li** returns:

- **Li**em, Luke
- **Li**ll, Vivien
- **Li**m, Christopher
- and so on.

**Tip:** The characters you enter are case sensitive. So, searching for **Li** is not the same as **LI**.

You can also search using the **%** symbol in a string as a wildcard or LIKE parameter. When searching by name (given, preferred, surname and so on), you can use the **%** wildcard to match all those records containing only the letters that you entered.

Depending on the placement of the **%**, you can return many different matches from the database.

Placing the percent symbol (**%**) first (before a string of characters you have entered) returns any surnames that match the characters that you entered. These can be either on the end or in the middle of the surname.

For example, search for surname **%es** returns:

- Barn**es**, Domenic
- Bat**es**, Adele
- B**es**t, Amy
- Bow**es**, Charles
- W**es**ton, Julie
- Week**es**, Craig
- and so on.

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# Overview of security

The system administrator is responsible for setting up security rights to Synergetic, and to functions and data within the system. Access to the system is controlled by a username and password.

Within the system, your access is restricted according to your role within the organisation. For example:

- the bursar will probably be given access to all financial functions
- individual financial administration staff might only have access to the area that they administer. For example, debtors.

Access can be granted according to:

- The program within Synergetic. For example, students and debtors.
- Individual bars within the program.
- Specific types of data. See *Maintaining security permissions* in the **Synergetic** System maintenance for information on how to maintain security access rights.

The screen captures within this documentation assume that all access rights have been granted and so may not match with what you see on your screen.

## How to:

- Change your password. See *Changing your password* (on page 66).
- Handle when an activity timeout occurs. See *Handling inactivity timeouts* (on page 68).

# Changing your password

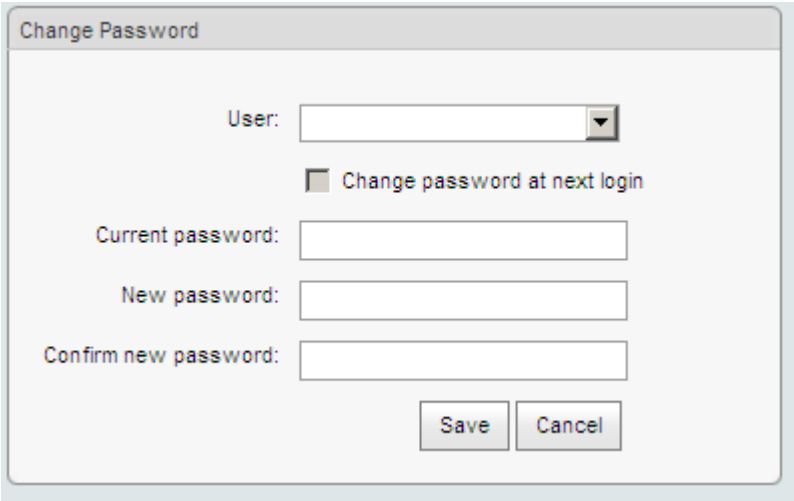
Use the **Change Password** window to change your password.

## Opening the Change Password window

To open the **Change Password** window:

1. Click **System > Change Password** on the SynWeb main menu.

   The **Change Password** window is displayed.



## Change Password window key fields and buttons

### Fields

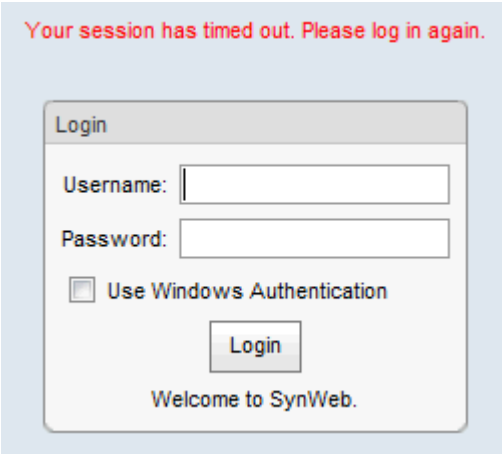
| Field | Description |
|---|---|
| **User** | If you leave this blank, it is assumed that you are changing your own password.<br>If you are a system administrator, select the user whose password you want to change. |
| **Change password next login** | If you are a system administrator, select this if you want to prompt the user to change their password the next time they log in.<br>This option is unavailable if you select your current logon. |
| **Current password** | Type in your current password. |
| **New password / Confirm new password** | Type your new password into both fields.<br>If you are a system administrator, type the new password that you are assigning to the user into both fields. |

### Buttons

| Button | Description |
|---|---|
| Save | Save the new password for either:<br>• yourself<br>• another user you are administering. |
| Cancel | Cancel the changes and return to the **Home** window. |

## Handling inactivity timeouts

If you do not use SynWeb for a certain period of time, SynWeb logs you out and displays the **Login** window.




Log back in to SynWeb. See *Logging in and out* (on page 17).

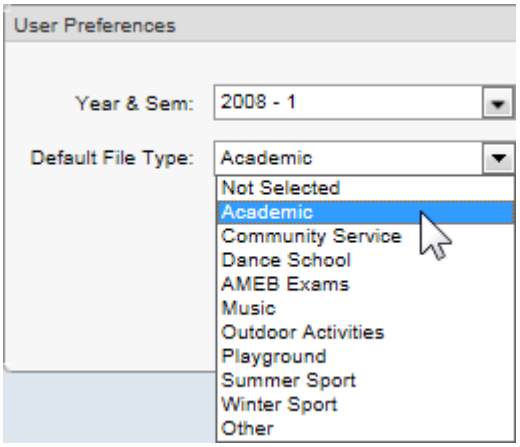
The default inactivity period is 30 minutes. This period is set for your organisation as a whole, when SynWeb is installed. *Contact Synergetic Management Systems* (on page 287) if you want to change the setting.

**Tip:** When some buttons or functions do not work, this usually indicates that your session has timed out. Cancel out of the function and go to another function. If the **Login** window above appears this explains the problem.

# File types

**File types** are used to classify the different types of classes. The file type can then be used to easily select records of students who are undertaking a certain type of class. That is, academic classes, music classes and so on.

For example, if you want to display your timetable for **Music** students, you would choose a **FileType** equal to **M** (for music).




The following table lists some sample file types:

| File Type | Description |
|---|---|
| **A** | **Academic**. |
| **C** | **Community Service**. |
| **D** | **Dance School**. |
| **E** | **AMEB Exams**. |
| **M** | **Music**. |
| **O** | **Outdoor Activities**. |
| **P** | **Playground**. Alternatively, see **Y** below. |
| **S** | **Sport** or **Summer Sport**, if distinguished by season. |
| **W** | **Winter Sport**, if distinguished by season. |
| **Y** | **Yard duty**. Alternatively, see **P** above. |
| **Z** | **Other**. |

**Note:** File types are maintained in the **luFileType** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual.

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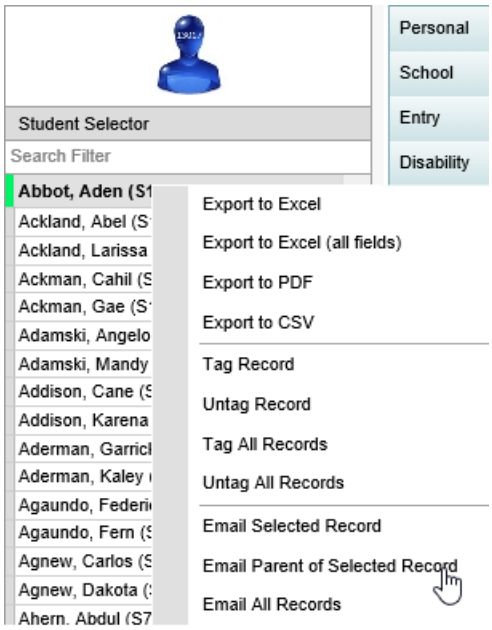
# Sending emails and SMS messages from grids

You can send emails and SMS messages from grids that list community members.

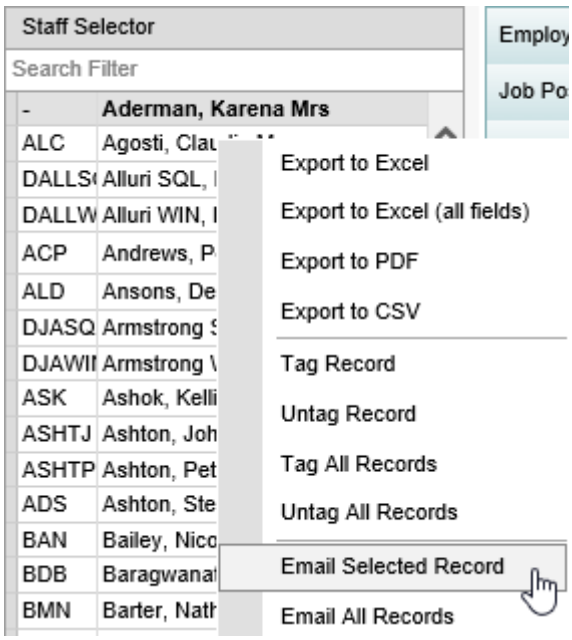
## Examples

The **Student Selector** area of **Student Maintenance** lists students and you can either email or SMS:

- the students
- their parents or guardians.




The staff selector area of **Staff Maintenance** lists staff members that you can email or send SMS messages to.



## Requirements:

Before you can:

- email community members, you need to have:
  - email addresses set up for the community members
  - a mail server that is configured to operate with SynWeb.
- send SMS messages to community members, you need to have:
  - mobile phone numbers set up for the community members
  - an SMS SMTP server or SMS service that is configured to operate with SynWeb, an SMS gateway.

## How to:

- Send an **Email** or an **SMS message** to a community member selected from a grid. See *Sending emails or SMS messages to a community member selected from a grid* (on page 73).
- Send an **Email** or an **SMS message** to most, if not all, community members listed in a grid. See *Sending emails or SMS messages to multiple community members from a grid* (on page 81).
- Use replaceable fields in the body of email or SMS messages, to generate the email. See *Using replaceable fields in the body of emails* (on page 96).
- Maintain email signatures. See *Maintaining email signatures* (on page 98).
- Maintain email templates. See *Maintaining email templates* (on page 100).

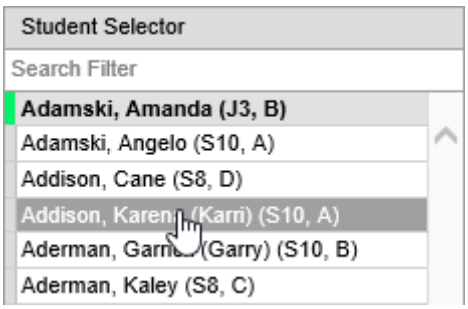
## Sending emails or SMS messages to a community member selected from a grid

You can send an email or an SMS message to a community member selected from a grid.

**Note:** To email or SMS several listed community members at once see *Sending emails or SMS messages to multiple community members from a grid* (on page 81).

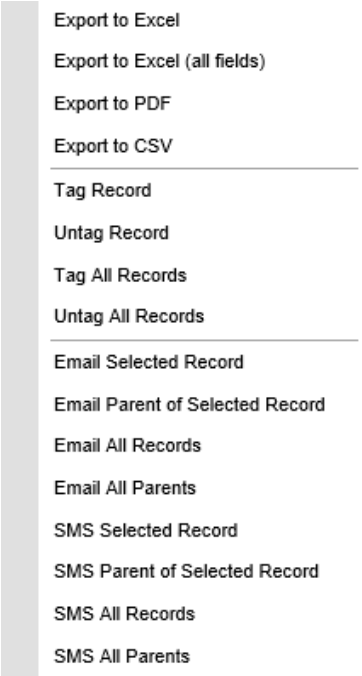
To select an individual community member from a grid and send an email or SMS to them:

1. Place the cursor over the community member you want to email.



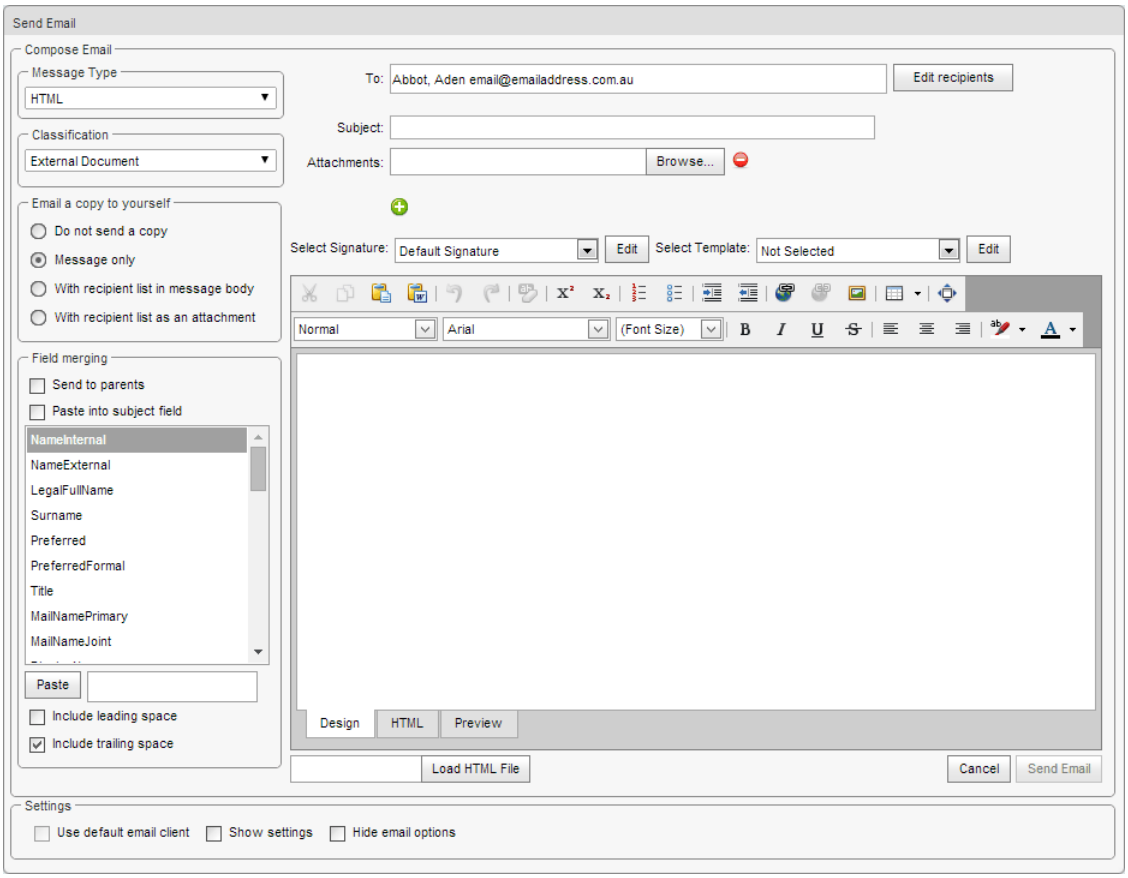

2. Right click.

   The following menu is displayed.



3. Select **Email Selected Record** or **SMS Selected Record** option.

   The **Send Email** window or the **Send SMS** window is displayed.

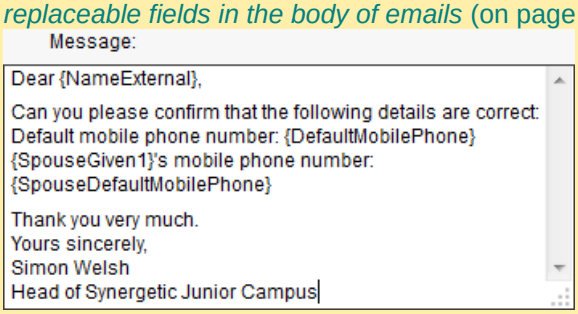



4. Type the subject of the email in the **Subject** field.

**Note**: When sending an SMS, this field does not appear.

5. Type the body of the email or SMS in the **Message** field.

**Tip:** You can use replaceable fields using Synergetic data about the recipients. See *Using replaceable fields in the body of emails* (on page 96).




**Tip**: Format the email based on the standards used at your organisation.

6. If you want to add an attachment:

**Note**: You cannot add an attachment to an SMS. These fields only appear if you are sending an email.

- click Browse...
- search for and select the attachment
- click Open.

The attachment is added to the **Attachments** field.


**Tip**: Click in the **Attachments** field to search and select a different attachment.

7. If you want to add another attachment:

- click
- repeat the previous step.


8. Update the other fields as required. See the field descriptions below.

9. Click Send Email.

The **View sent Email(s)** window is displayed, similar to the example shown.

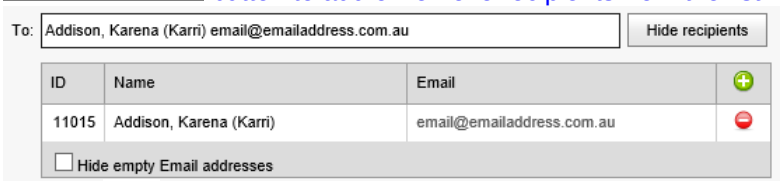
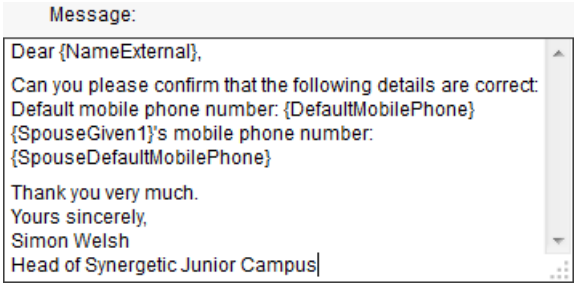

**Note**: If you have sent an SMS, the **SMS messages sent** window is displayed.

10. Select the **Back** navigation link.

The **Send Email** window is redisplayed.

## Send Emails window key fields, links and buttons

### Compose Emails area fields

| Field | Description |
|---|---|
| **To** | Recipients of the email or SMS. This is either:<br>• the email address or mobile phone number of the community member or staff member<br>• **<Multiple Recipients>** if there are several currently selected.<br>**Note:** You cannot edit this field manually. You must use the Edit recipients button to add or remove recipients from the list.<br>  <br><br>Use the button to remove a contact from the list of recipients and click to add a contact to the list.<br>Tick **Hide Empty Email addresses** to remove contacts without an email address from the recipient list. |
| **Subject** | Summarise the reason for sending the email.<br>**Note**: This field does not appear if you are sending an SMS. |
| **Attachments** | Records the directory structure and file name of any additional attachments.<br>**Note:** This field does not appear if you are sending an SMS. |
| **Message** | Enter your detailed message in the body of the email or SMS.<br>You can use replaceable fields in the body of email messages. This uses data about the community members to generate the email.<br>See *Using replaceable fields in the body of emails* (on page 96).<br>  <br> |
| **Select Signature** | Select a premade signature to apply to the email. |
| **Select Template** | Select a premade email template to use. |

### Message Type area fields

| Field | Description |
|---|---|
| **Message Type** | Whether the message is sent as:<br>• **Plain Text -** that is, without formatting<br>• **HTML Raw (including tags)** - that is, text with HTML formatting. See *Sending emails using HTML Raw format* (on page 90).<br><br>**Note**: These options do not appear if you are sending an SMS. |

### Classification area fields

| Field | Description |
|---|---|
| **Classification** | Select a document classification for the email. |

### Email a copy to yourself area fields

| Field | Description |
|---|---|
| **Do not send a copy** | Select if you do not want a copy of the email sent to your email address. |
| **Message only** | Select if you want a copy of the message but not of the recipient list sent to your email address. |
| **With recipient list in message body** | Select if you want a copy of the email sent to your email address with the recipient list included as part of the message body. |
| **With recipient list as an attachment** | Select if you want a copy of the email sent to your email address with the recipient list as an attachment. |

### Field Merging area fields

| Field | Description |
|---|---|
| **Send to Parents** | Select to send the email or SMS to the parents or guardian instead, if the recipient is either a:<br>• current student<br>• future student.<br><br>**Note:** If you select to send it to the parents or guardians, the first priority is relationships that have **Use Email** set. If not, then Synergetic searches for contacts with the **Lives With** flag set.<br>Only one email is sent, unless the contacts are separate **Lives With** contacts, in which case they will both receive an email.<br><br>**Note:** This field is not displayed if you have edited the recipient list. |
| **Paste into subject field** | Select to include merge fields in the subject of the email. See *Using replaceable fields in the body of emails* (on page 96). |

| Field | Description |
|---|---|
| Paste | Paste the merge field into the subject or body of the email at the position of the cursor.<br>**Tip:** You can use the check boxes fields under the Paste button to insert a space before or after the merge field. |

### Settings area fields

| Field | Description |
|---|---|
| **Use default email client** | Select to use the default email client to send the email.<br>**Note**: this field is not displayed if you are sending an SMS. |
| **Show settings** | Select to expand the **Settings** area, displaying the **Authentication settings** and **Advanced settings** areas. |
| **Hide email options** | Select to hide the **Email a copy to yourself** and **Field Merging** areas. |

### Authentication settings area fields

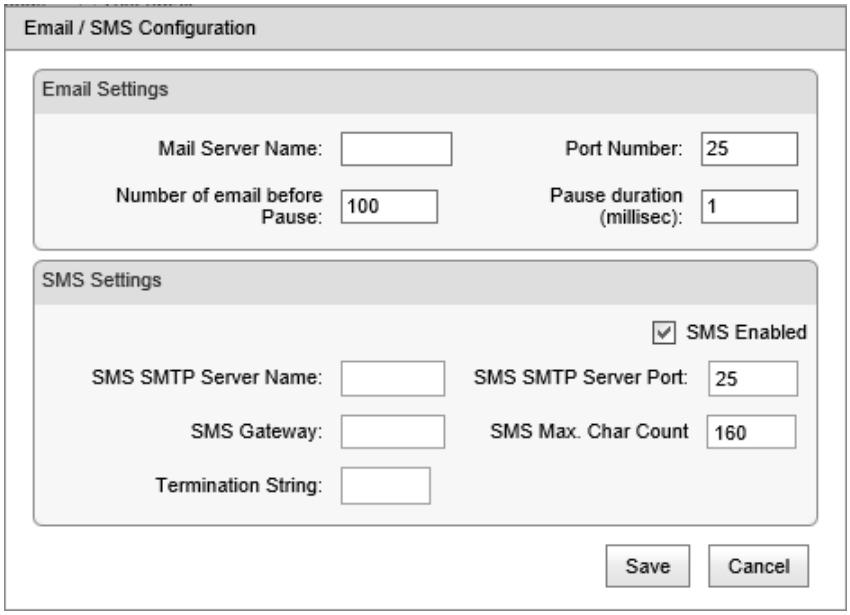
This area appears after selecting the **Show Settings** field.

| Field | Description |
|---|---|
| **Authentication Type** | You can select to use:<br>• login authentication, where you must provide a valid username and password before sending the email<br>• no authentication. |
| **Remember** | Select to remember the username and password for future emails in the current session. Clear this field to forget the username and password. |
| **Login** | User name for email authentication, if using **Login** authentication type. |
| **Password** | Password for email authentication, if using **Login** authentication type. |
| **Sender Name** | Name of the person the recipients receive as the sender's name. This defaults to your name.<br>**Note:** If you select a different sender, text may be added to the email to indicate this. See *OverrideSenderText configuration setting* in the **Synergetic** System maintenance manual. |
| **Sender Email Address** | Email address of the person the recipients receive as the sender's email address. This defaults to your email address. |

## Grid area fields

| Field | Description |
|---|---|
| **ID** | Identification number of the community member. |
| **Name** | Name of the community member. |
| **Email** | Email address of the community member. |
| **Hide empty Email addresses/ Hide empty Mobile Phone Number(s)** | Select to hide community members who do not have email addresses or a mobile phone number entered in the **Synergetic** database. |

## Launch links

| Link | Description |
|---|---|
| **Configure Email & SMS server settings** | Configure the email and SMS authentication settings.<br>  <br><br>See *Using the Email / SMS Configuration window* in the System maintenance manual. |

## Buttons

| Button | Description |
|---|---|
| Browse... | Search for a file to attach.<br>Once a file is selected, the directory and file details are displayed in the **Attachments** field, on the same line as the Browse... button. |
| | Click to add an extra line with:<br>• an **Attachments** field<br>• a Browse... button.<br>  <br><br>**Tip:** Click each time you need to add another line. |
| | Click next to the attachment entry to remove the:<br>• **Attachments** field and any associated attachment<br>• Browse... button<br>• button.<br>**Tip:** Click if you need to add back an **Attachments** line. |
| | Click next to the attachment entry to remove the attached file. |
| Edit **(Signature)** | Launch the **Edit Email Signature** window to create or edit email signatures. See *Maintaining email signatures* (on page 98). |
| Edit **(Template)** | Launch the **Edit Email Template** window to create or edit email templates. See *Maintaining email templates* (on page 100). |
| Load HTML File | Load an HTML file into the email body. |
| Send Email | Send the email to the recipients.<br>**Note:** This button is not active if there are no valid recipients. |
| Send SMS | Send the SMS to the recipients. |
| Cancel | Cancel the email or SMS and return to the previous page. |

## Sending emails or SMS messages to multiple community members from a grid

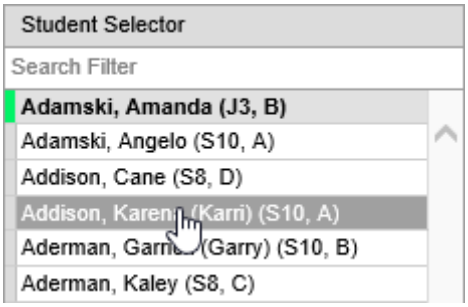
You can send an email or an SMS message to:

- all community members listed in a grid
- all parents of community members listed in a grid
- some of the community members listed in a grid. That is, you can refine the list to send to only the people you need to.

**Note:** To email or SMS individual community members, see *Sending emails or SMS messages to a community member selected from a grid* (on page 73).

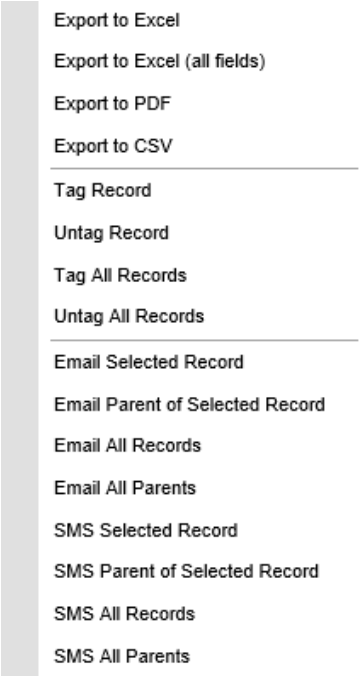
To send an email or an SMS message to several community members listed in the grid:

1. Place the cursor anywhere over the selector grid.




2. Right click.

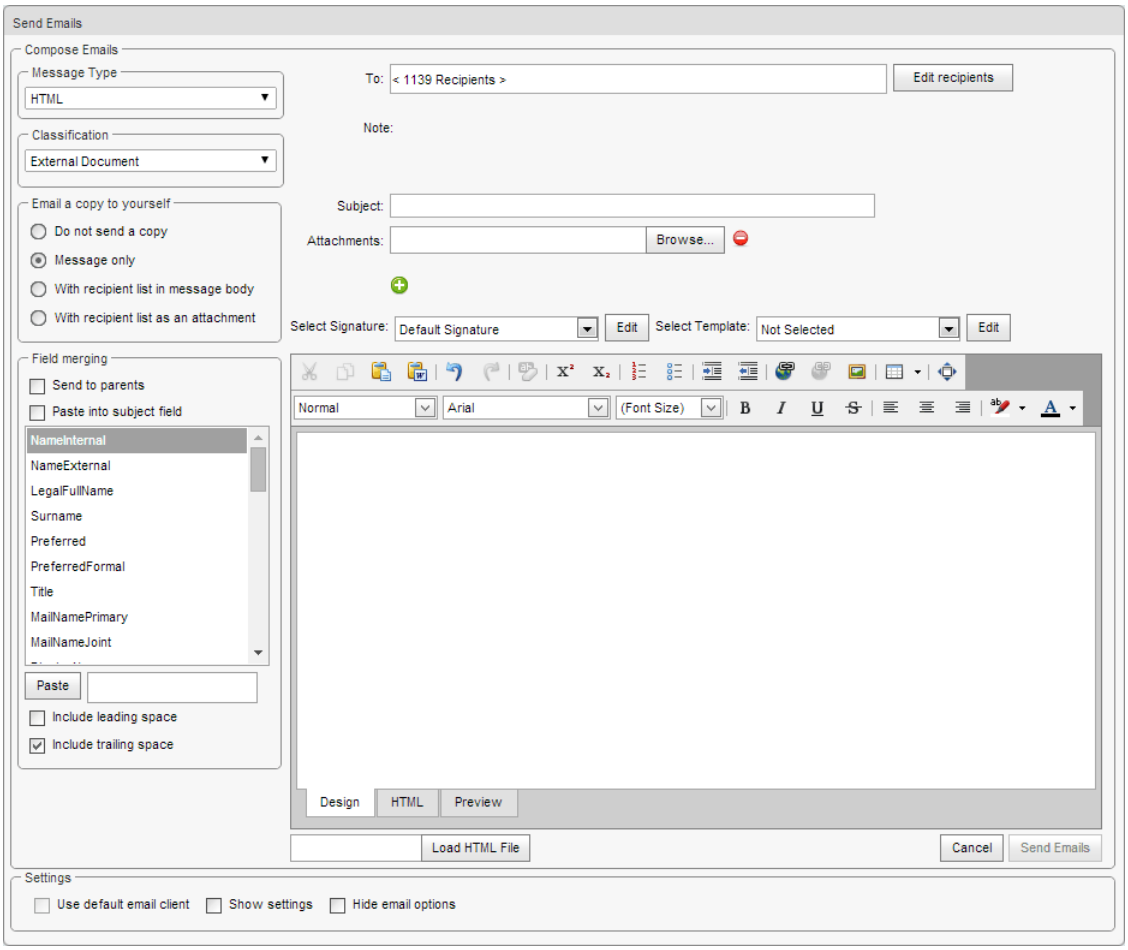
   The following menu is displayed.



3. Select either:

- **Email Parent of Selected Record**
- **Email All Records**
- **Email Parents of All Patents**
- **SMS Parent of Selected Record**
- **SMS All Records**
- **SMS Parents of All Parents**.

The **Send Emails** window or the **Send SMS** window is displayed.

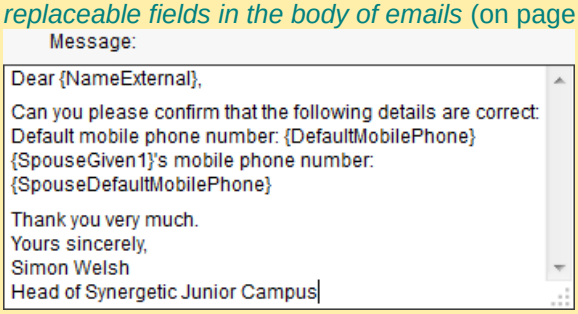



4. Type the subject of the email in the **Subject** field.

**Note**: When sending an SMS, this field does not appear.

5. Type the body of the email or SMS in the **Message** field.

**Tip:** You can use replaceable fields using Synergetic data about the recipients. See *Using replaceable fields in the body of emails* (on page 96).




**Tip**: Format the email based on the standards used at your organisation.

6. If you want to add an attachment:

**Note**: You cannot add an attachment to an SMS. These fields only appear if you are sending an email.

- click Browse...
- search for and select the attachment
- click Open.

The attachment is added to the **Attachments** field.


**Tip**: Click in the **Attachments** field to search and select a different attachment.

7. If you want to add another attachment:

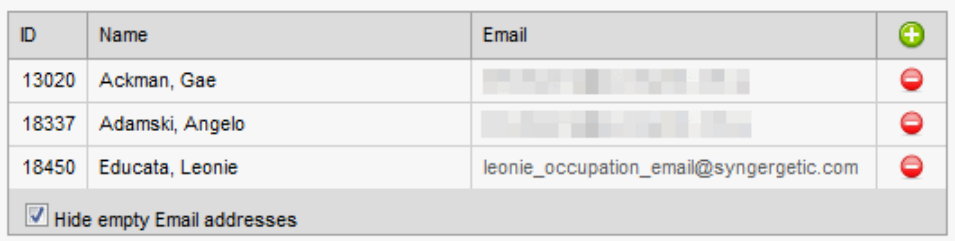
- click
- repeat the previous step.


8. Click Edit recipients.

The recipient list is displayed.

9. Select **Hide empty Email addresses** or **Hide empty Mobile Phone numbers**, if you have some missing email addresses or mobile phone numbers.

   The list of recipients is reduced to those with an email address or a mobile phone number.



| ID | Name | Email |
|---|---|---|
| 13020 | Ackman, Gae | |
| 18337 | Adamski, Angelo | |
| 18450 | Educata, Leonie | leonie_occupation_email@syngergetic.com |

☑ Hide empty Email addresses

10. Click ⊖ next to recipients you do not want to send the email or SMS to.

| ID | Name | Email |
|---|---|---|
| 13020 | Ackman, Gae | |
| 18337 | Adamski, Angelo | |
| 18450 | Educata, Leonie | leonie_occupation_email@syngergetic.com |

☑ Hide empty Email addresses

11. Update other fields as required.

12. Click Send Email or Send SMS.

    The **View sent Email(s)** window is displayed, similar to the following example.

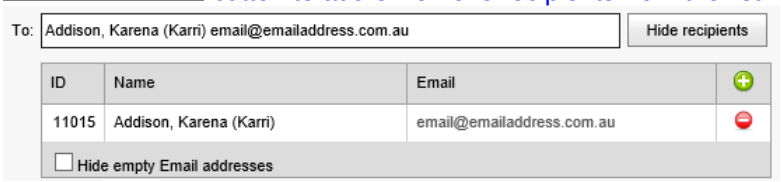
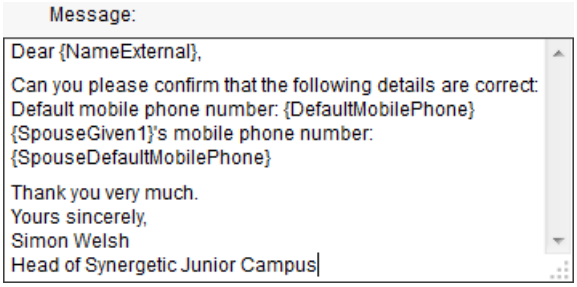

13. Select the **Back** navigation link.

    The **Send Emails** window is redisplayed.

**Note**: If you have sent an SMS message, the **SMS messages sent** window is displayed.

## Send Emails window key fields, links and buttons

### Compose Emails area fields

| Field | Description |
|---|---|
| **To** | Recipients of the email or SMS. This is either:<br>• the email address or mobile phone number of the community member or staff member<br>• **<Multiple Recipients>** if there are several currently selected.<br><br>**Note:** You cannot edit this field manually. You must use the Edit recipients button to add or remove recipients from the list.<br>  <br><br>Use the button to remove a contact from the list of recipients and click to add a contact to the list.<br>Tick **Hide Empty Email addresses** to remove contacts without an email address from the recipient list. |
| **Subject** | Summarise the reason for sending the email.<br><br>**Note**: This field does not appear if you are sending an SMS. |
| **Attachments** | Records the directory structure and file name of any additional attachments.<br><br>**Note:** This field does not appear if you are sending an SMS. |
| **Message** | Enter your detailed message in the body of the email or SMS.<br>You can use replaceable fields in the body of email messages. This uses data about the community members to generate the email.<br>See *Using replaceable fields in the body of emails* (on page 96).<br>  <br> |
| **Select Signature** | Select a premade signature to apply to the email. |
| **Select Template** | Select a premade email template to use. |

### Message Type area fields

| Field | Description |
|---|---|
| **Message Type** | Whether the message is sent as:<br>• **Plain Text -** that is, without formatting<br>• **HTML Raw (including tags)** - that is, text with HTML formatting. See *Sending emails using HTML Raw format* (on page 90).<br><br>**Note**: These options do not appear if you are sending an SMS. |

### Classification area fields

| Field | Description |
|---|---|
| **Classification** | Select a document classification for the email. |

### Email a copy to yourself area fields

| Field | Description |
|---|---|
| **Do not send a copy** | Select if you do not want a copy of the email sent to your email address. |
| **Message only** | Select if you want a copy of the message but not of the recipient list sent to your email address. |
| **With recipient list in message body** | Select if you want a copy of the email sent to your email address with the recipient list included as part of the message body. |
| **With recipient list as an attachment** | Select if you want a copy of the email sent to your email address with the recipient list as an attachment. |

### Field Merging area fields

| Field | Description |
|---|---|
| **Send to Parents** | Select to send the email or SMS to the parents or guardian instead, if the recipient is either a:<br>• current student<br>• future student.<br><br>**Note:** If you select to send it to the parents or guardians, the first priority is relationships that have **Use Email** set. If not, then Synergetic searches for contacts with the **Lives With** flag set.<br>Only one email is sent, unless the contacts are separate **Lives With** contacts, in which case they will both receive an email.<br><br>**Note:** This field is not displayed if you have edited the recipient list. |
| **Paste into subject field** | Select to include merge fields in the subject of the email. See *Using replaceable fields in the body of emails* (on page 96). |

| Field | Description |
|---|---|
| Paste | Paste the merge field into the subject or body of the email at the position of the cursor.<br>**Tip:** You can use the check boxes fields under the Paste button to insert a space before or after the merge field. |

### Settings area fields

| Field | Description |
|---|---|
| **Use default email client** | Select to use the default email client to send the email.<br>**Note**: this field is not displayed if you are sending an SMS. |
| **Show settings** | Select to expand the **Settings** area, displaying the **Authentication settings** and **Advanced settings** areas. |
| **Hide email options** | Select to hide the **Email a copy to yourself** and **Field Merging** areas. |

### Authentication settings area fields

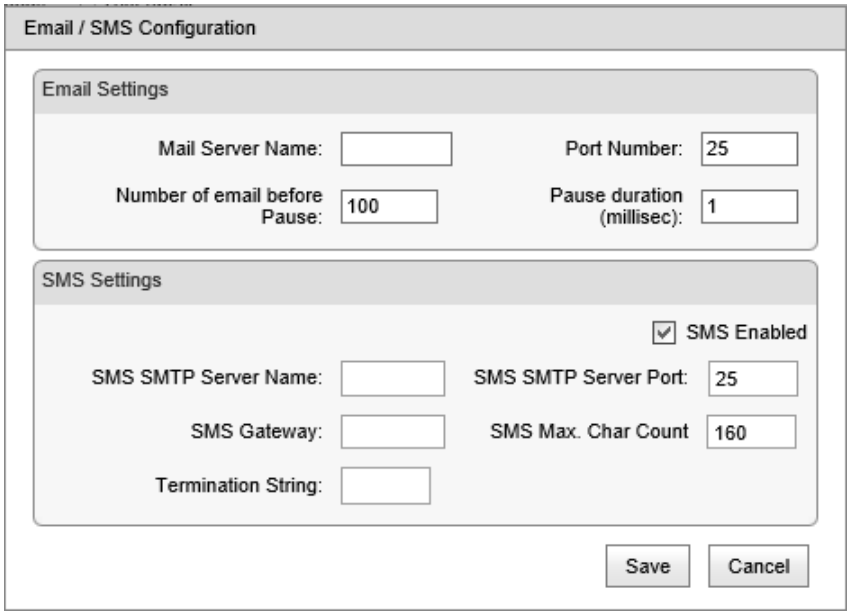
This area appears after selecting the **Show Settings** field.

| Field | Description |
|---|---|
| **Authentication Type** | You can select to use:<br>• login authentication, where you must provide a valid username and password before sending the email<br>• no authentication. |
| **Remember** | Select to remember the username and password for future emails in the current session. Clear this field to forget the username and password. |
| **Login** | User name for email authentication, if using **Login** authentication type. |
| **Password** | Password for email authentication, if using **Login** authentication type. |
| **Sender Name** | Name of the person the recipients receive as the sender's name. This defaults to your name.<br>**Note:** If you select a different sender, text may be added to the email to indicate this. See *OverrideSenderText configuration setting* in the **Synergetic** System maintenance manual. |
| **Sender Email Address** | Email address of the person the recipients receive as the sender's email address. This defaults to your email address. |

## Grid area fields

| Field | Description |
|---|---|
| **ID** | Identification number of the community member. |
| **Name** | Name of the community member. |
| **Email** | Email address of the community member. |
| **Hide empty Email addresses/ Hide empty Mobile Phone Number(s)** | Select to hide community members who do not have email addresses or a mobile phone number entered in the **Synergetic** database. |

## Launch links

| Link | Description |
|---|---|
| **Configure Email & SMS server settings** | Configure the email and SMS authentication settings.<br>  <br><br>See *Using the Email / SMS Configuration window* in the System maintenance manual. |

## Buttons

| Button | Description |
|---|---|
| Browse... | Search for a file to attach.<br>Once a file is selected, the directory and file details are displayed in the **Attachments** field, on the same line as the Browse... button. |
| | Click to add an extra line with:<br>• an **Attachments** field<br>• a Browse... button.<br>  <br>**Tip:** Click each time you need to add another line. |
| | Click next to the attachment entry to remove the:<br>• **Attachments** field and any associated attachment<br>• Browse... button<br>• button.<br>**Tip:** Click if you need to add back an **Attachments** line. |
| | Click next to the attachment entry to remove the attached file. |
| Edit **(Signature)** | Launch the **Edit Email Signature** window to create or edit email signatures. See *Maintaining email signatures* (on page 98). |
| Edit **(Template)** | Launch the **Edit Email Template** window to create or edit email templates. See *Maintaining email templates* (on page 100). |
| Load HTML File | Load an HTML file into the email body. |
| Send Email | Send the email to the recipients.<br>**Note:** This button is not active if there are no valid recipients. |
| Send SMS | Send the SMS to the recipients. |
| Cancel | Cancel the email or SMS and return to the previous page. |

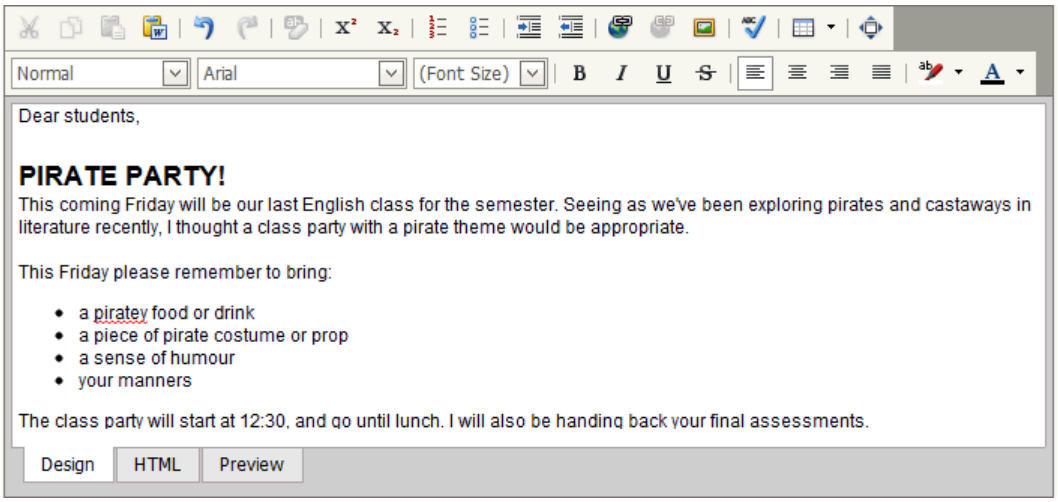
## Sending emails using HTML format

You can send emails in plain text or in HTML Raw format. HTML Raw format allows you to include:

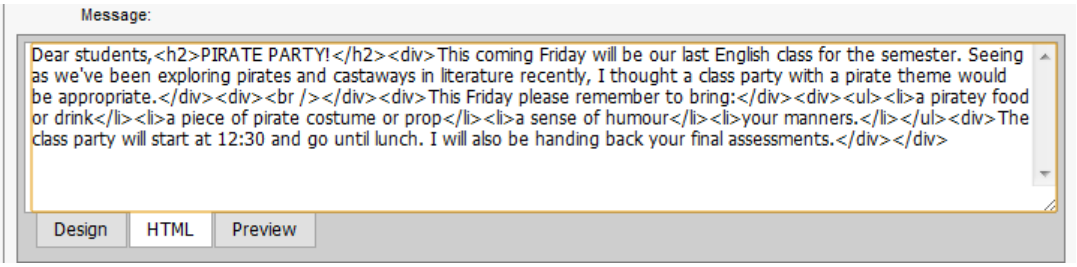
- text formatting such as bold, italic, strikethrough and underline
- different fonts, sizes and colours
- superscript and subscript text
- justification and indentation
- bullets and numbering
- tables
- hyperlinks
- images.

There are three tabs to the **HTML Raw email editor**. Use the:

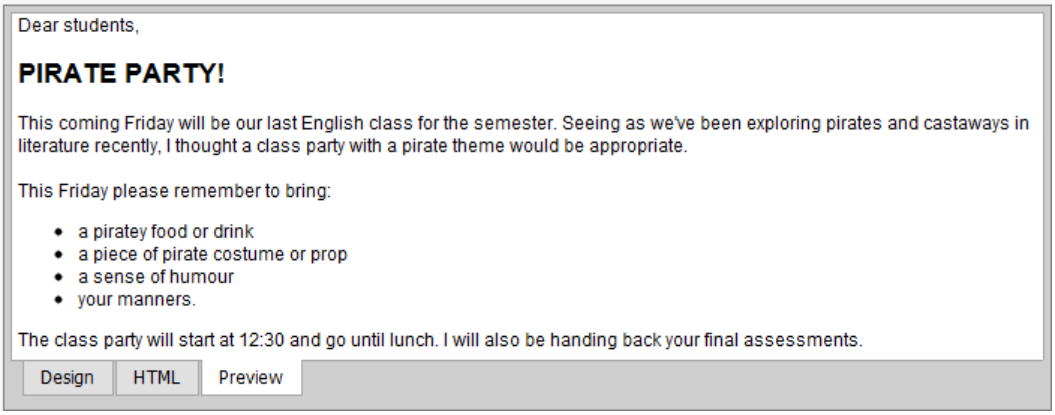
- **Design** tab to format the email in a "what you see is what you get" editor




- **HTML** tab to write the HTML code by hand



- **Preview** tab to preview what the email looks like before sending.



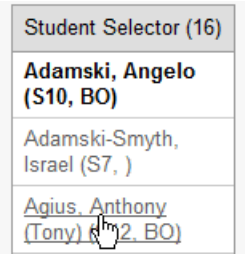

**Note:** Not all email applications support HTML tags. Where HTML is unsupported, the email displays the HTML tags as part of the text. To see how your email would look in an email application that doesn't support HTML, click the **HTML** tab.

## Opening the HTML Raw format email editor

To open the **HTML Raw email editor**:

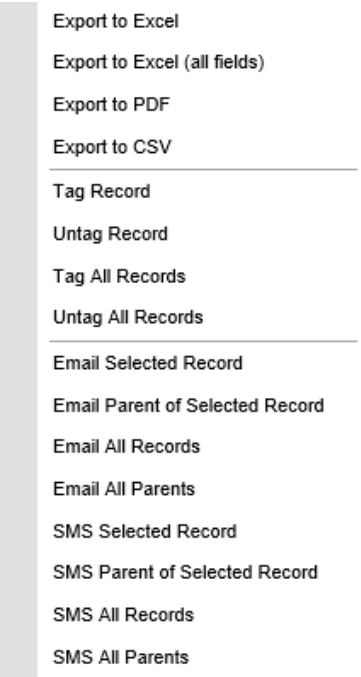
To select an individual community member from a grid and send an email to them:

1. Place the cursor over the community member you want to email to.




2. Right click.

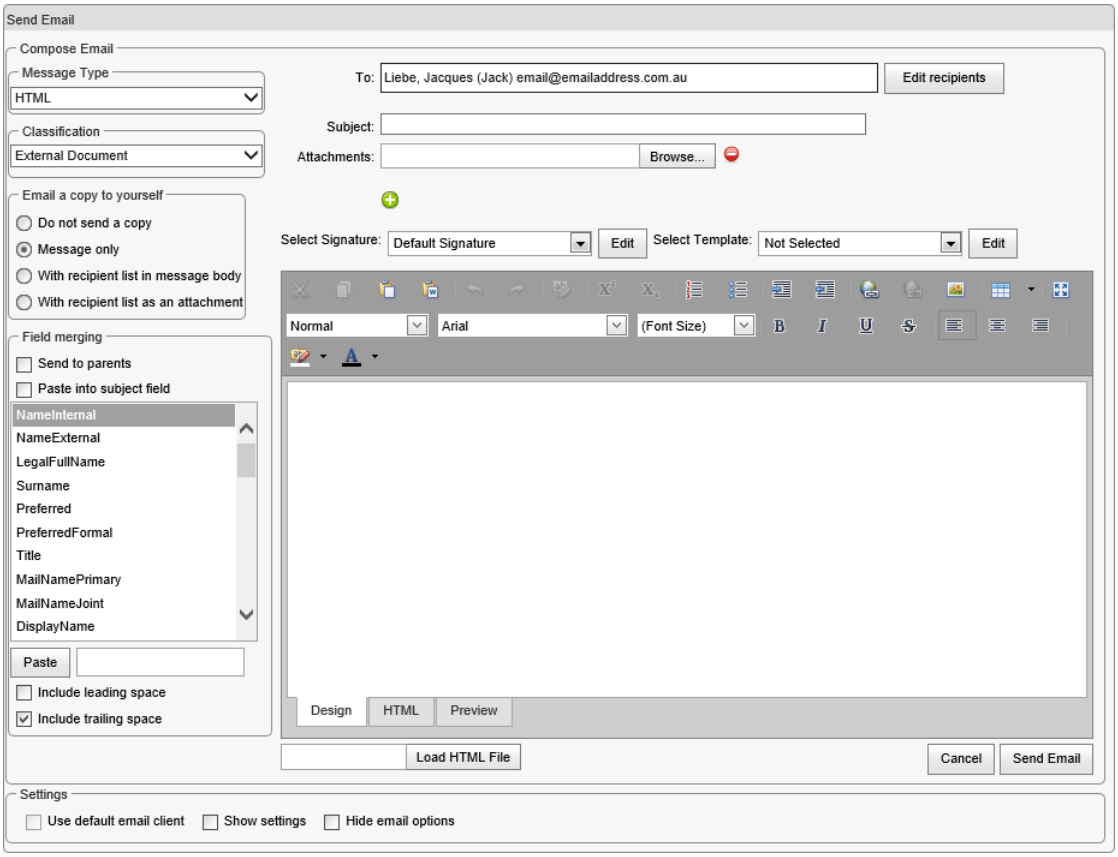
   The following menu is displayed.



3. Select **Email Selected Record**.

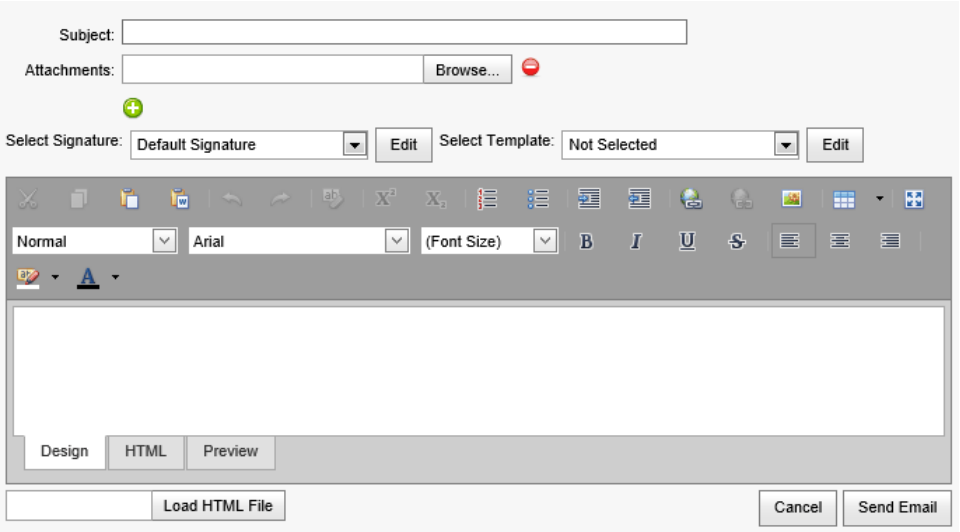
**Note:** If you want to send the email to everyone in the list, select **Email All Records**.

The **Send Email** window is displayed.




4. Select **HTML Raw (including tags)** from the **Message Type** drop-down list.

The **Design** tab of the **HTML Raw format email editor** is displayed.



## HTML Raw format email editor - Design tab key fields and buttons

### Fields

| Field | Description |
|---|---|
| **Font Style** | Select the font style you want to use. For example, **Heading 1** for a main heading or **Normal** for regular text. |
| **Font** | Select the font you want to use. For example, **Arial** or **Times New Roman**. |
| **Font Size** | Select the font size you want to use. |

### Buttons

| Button | Description |
|---|---|
| | Cut the selected text. |
| | Copy the selected text. |
| | Paste text at the cursor position. |
| | Paste text from Microsoft Word at the cursor position. |
| | Undo the last action. |
| | Redo the last undone action. |
| | Remove formatting from the selected text. |
| | Make the selected text superscript. |
| | Make the selected text subscript. |
| | Make the selected text a numbered list. |
| | Make the selected text a bulleted list. |
| | Indent the selected text one level. |
| | Unindent the selected text one level. |
| | Add a hyperlink to the selected text. |
| | Remove a hyperlink from the selected text. |
| | Add a picture at the cursor position. |
| | Add a table. |
| | Expand the message field to fill the browser window. |
| B | Bold the selected text. |
| *I* | Italicise the selected text. |

| Button | Description |
|---|---|
| | Underline the selected text. |
| | Strikethrough the selected text. |
| | Make the selected text left-justified. |
| | Make the selected text centred. |
| | Make the selected text right-justified. |
| | Make the selected text left and right-justified. |
| | Highlight the selected text. |
| | Change the font colour of the selected text. |

## Using replaceable fields in the body of emails

Use replaceable fields that populate data from the Synergetic database for the selected community members. SynWeb replaces the replaceable fields with the actual values when sending the email to one or more recipients.

**Note:** This only works with community members, as SynWeb draws on their data from the Synergetic database.

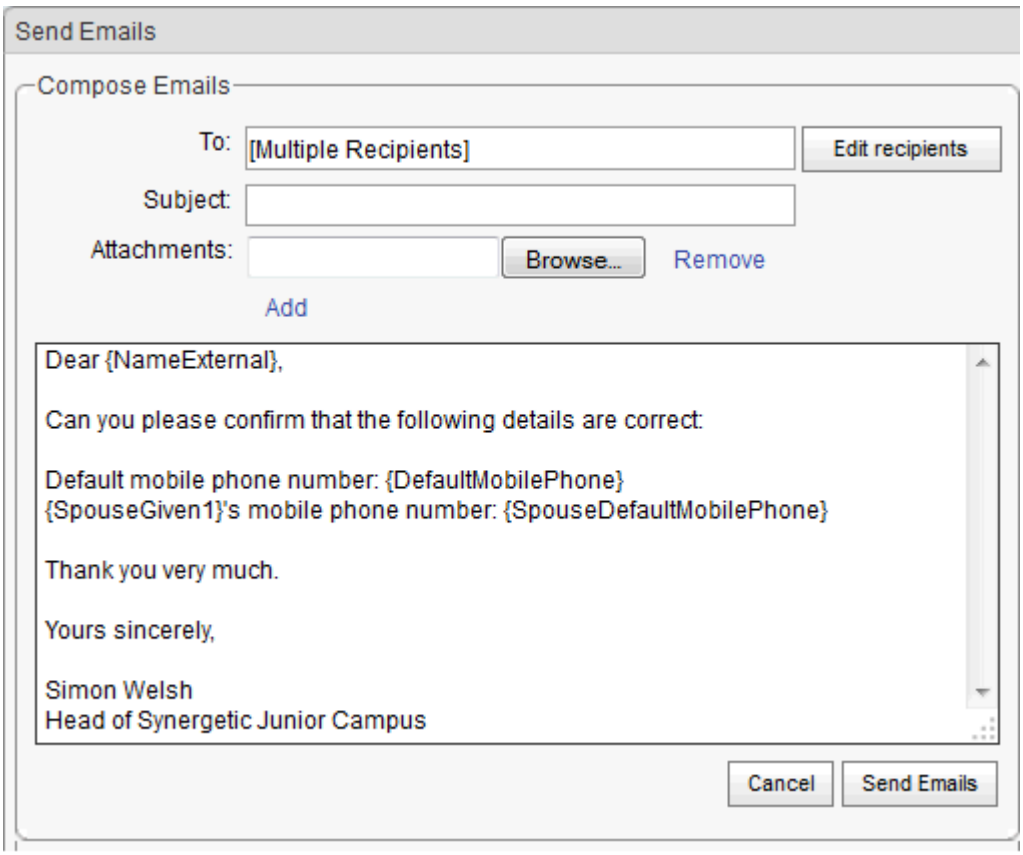
### Examples

You can prepare and save the body of emails that you regularly send to community members. You can then paste the text into the email body or subject field. This is useful if you regularly send similar emails to community members.

**Tip:** Select the **Paste into subject field** checkbox above the list of merge fields to use the merge field in the email subject.

You can write an email to multiple recipients using information about each recipient. In the following example, data from the Synergetic database is used to refer to the:

- Recipient. That is, **{NameExternal}**.
- Recipient's spouse. That is, **{SpouseGiven}**.
- Mobile phone numbers. That is:
  - **{DefaultMobilePhone}**
  - **{SpouseDefaultMobilePhone}**.



## Default replaceable fields

The following default replaceable fields are defined:

| | | |
|---|---|---|
| {NameInternal} | {AddressComma} | {OccupFax} |
| {NameExternal} | {AddressFull} | {OccupSuburb} |
| {LegalFullName} | {AddressSuburb} | {OccupState} |
| {Surname} | {AddressPostcode} | {OccupPostcode} |
| {Preferred} | {Phone} | {ID} |
| {PreferredFormal} | {MobilePhone} | {Form} |
| {Title} | {DefaultMobilePhone} | {House} |
| {MailNamePrimary} | {Fax} | {TutorGroup} |
| {MailNameJoint} | {OccupDesc} | {StaffName} |
| {DisplayName} | {OccupCompany} | {HomeroomTutor} |
| {DefaultEmail} | {OccupAddressFull} | {StudentYearLevel} |
| {MailSalutation Primary} | {OccupAddressComma} | {DateToday} |
| {MailSalutation Joint} | {OccupPhone} | {NetworkLogin} |
| {Email} | {OccupMobilePhone} | {EnrolYear} |
| {Campus} | | |

**Tip:** Replaceable fields are normally student related. However, you can add **+** to the end of replaceable fields to refer to primary parent information. For example, **{Given1}** refers to the student Angelo Adamski and is replaced by **Angelo**. **{Given1+}** refers to his father, Guy Adamski, and is replaced by **Guy**.

## Extending the list of replaceable fields

The default replaceable fields are defined in the stored procedure **spgSysEmailGetBodyText**.

To extend the list of replaceable fields, create your own stored procedure **upgSysEmailGetBodyText**, based on **spgSysEmailGetBodyText**.

*Contact Synergetic Management Systems* (on page 287) for more information.

# Maintaining email signatures

You can edit email signatures using the **Edit Email Signature** window.

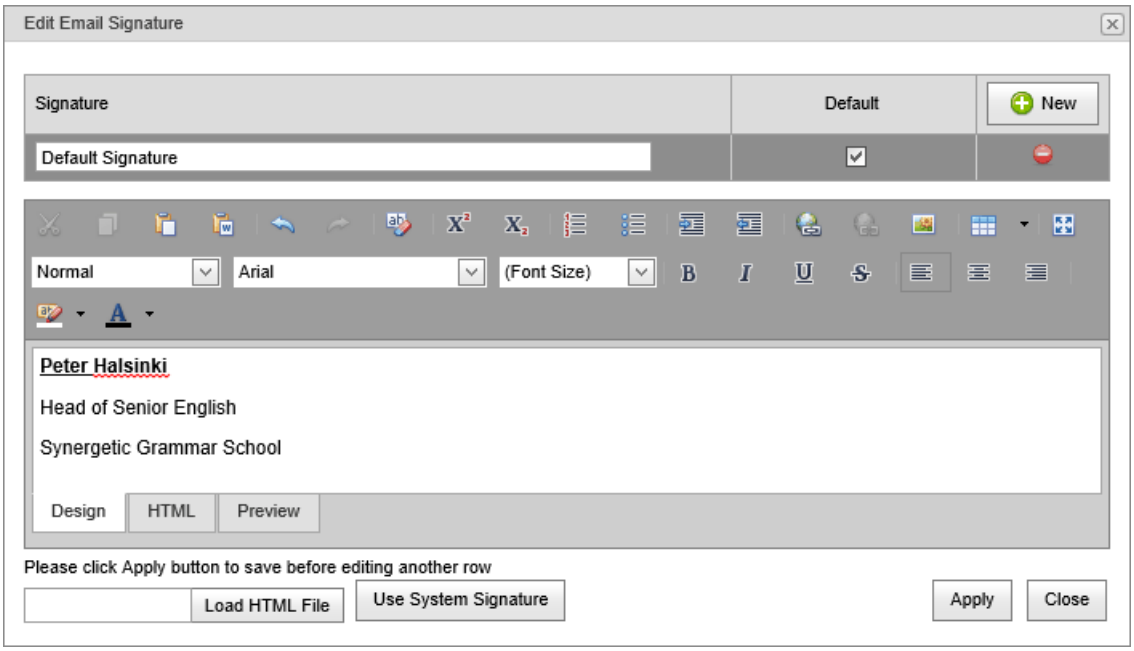
## Opening the Edit Email Signature window

To open the **Edit Email Signature** window:

1. Open the **Send Email** window. See *Sending emails or SMS messages to multiple community members from a grid* (on page 81).

2. Click Edit next to the **Select Signature** field.

   The **Edit Email Signature** window is displayed.



## Edit Email Signature window key fields and buttons

### Fields

| Field | Description |
|---|---|
| **Signature** | Description of the signature. Select a signature to edit.<br>**Note:** Save any changes you have made by clicking Apply before you select another signature to edit. |
| **Default** | If selected, this is the default signature used when you create a new email. |
| **Editor** | Type and format the signature. The editor has three views:<br>• **Design** view, which lets you use text formatting similar to Microsoft Word.<br>• **HTML** view, which lets you see the HTML-tagged text.<br>• **Preview** view, which shows you how the signature appears on emails. |

### Buttons

| Button | Description |
|---|---|
| New | Create a new signature. |
| | Delete this signature. |
| Load HTML File | Load an HTML file into the signature body. |
| Use System Signature | Load the default signature. See *DefaultSignature configuration setting* in the **Synergetic** System maintenance manual. |
| Apply | Save the changes you have made to this signature. |
| Close | Close the **Edit Email Signature** window. |

# Maintaining email templates

You can maintain email templates for certain types of emails in the **Edit Email Template** window.

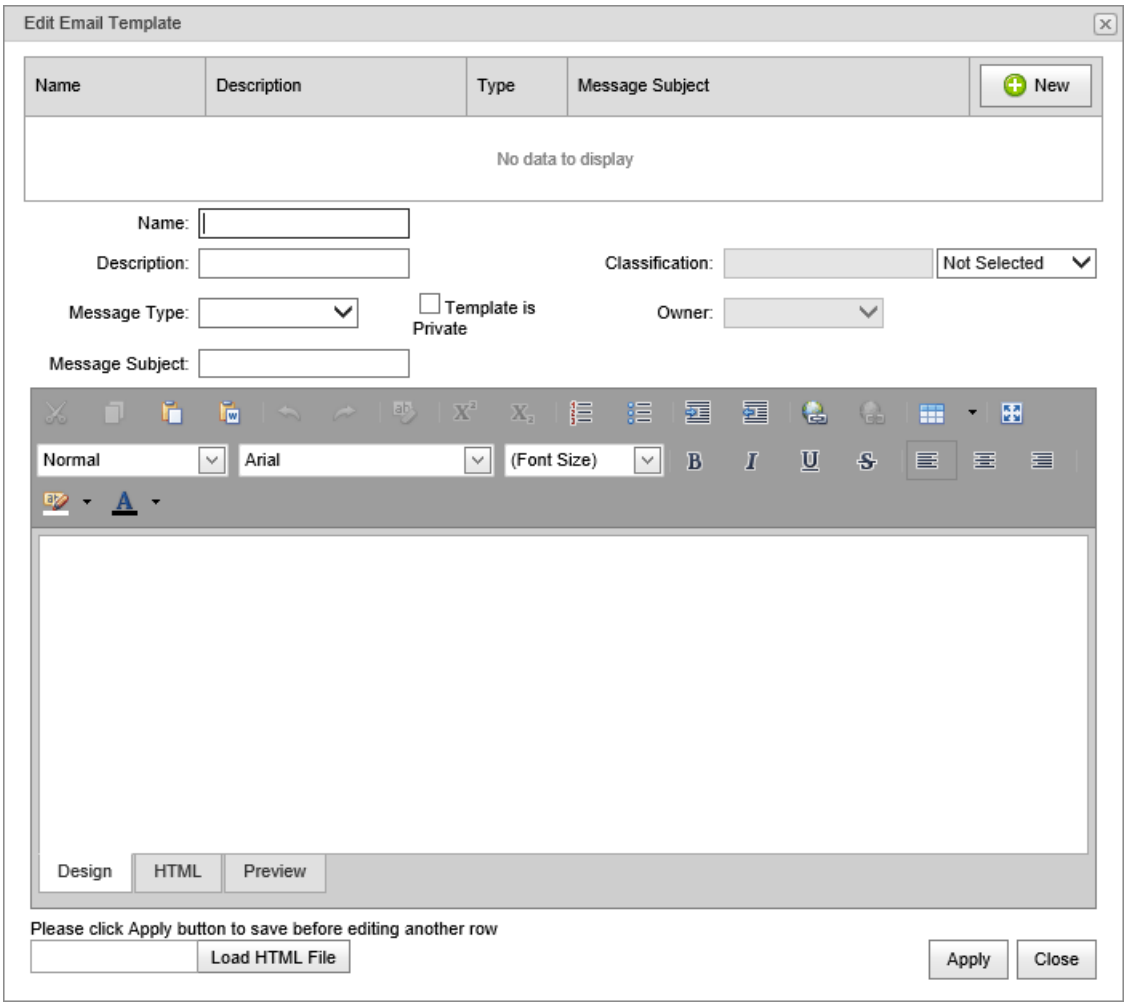
## Opening the Edit Email Template window

To open the **Edit Email Template** window:

1. Open the **Send Email** window. See *Sending emails or SMS messages to multiple community members from a grid* (on page 81).

2. Click Edit next to the **Select Template** field.

   The **Edit Email Template** window is displayed.



## Edit Email Template window key fields and buttons

### Fields

| Field | Description |
|---|---|
| **Name** | Name of the template. Select a template to edit.<br>**Note:** Save any changes you have made by clicking Apply before you select another template to edit. |
| **Description** | Description of the email template. |
| **Message Type** | Message type of the template. Either **HTML** or **Plain text**. |
| **Message Subject** | Subject line of the email template. |
| **Template is Private** | Select to indicate that the template is a private template for the selected user. |
| **Classification** | Select the document classification of the email template. |
| **Owner** | Owner of the email template. |
| **Editor** | Type and format the signature. The editor has three views:<br>• **Design** view, which lets you use text formatting similar to Microsoft Word.<br>• **HTML** view, which lets you see the HTML-tagged text.<br>• **Preview** view, which shows you how the signature appears on emails. |

### Buttons

| Button | Description |
|---|---|
| New | Create a new template. |
| | Delete this template. |
| Load HTML File | Load an HTML file into the template body. |
| Apply | Save the changes you have made to this template. |
| Close | Close the **Edit Email Template** window. |

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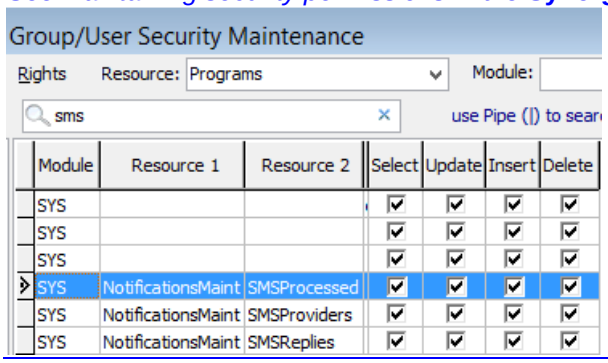
# Configuring notifications

SynWeb can send emails or SMS messages to community members in response to events such as:

- student absences
- incomplete attendance records.

**Note:** You must have the **SYS:NotificationsMaint** security permissions to maintain notifications. See *Maintaining security permissions* in the **Synergetic** System maintenance manual.




## How to

Create notification rules to automatically send emails or SMS messages to community members. See *Creating notifications* (on page 104).

## What you can do...

| You can... | See |
|---|---|
| Maintain:<br>• rules from which notifications are generated<br>• the schedule for each notification rule. | *Notifications Maintenance - Rules Maintenance tab* (on page 108) |
| View notifications before they are sent to recipients and:<br>• edit the notification<br>• send the notification to the recipient<br>• delete the notification. | *Notifications Maintenance - Queued Notifications tab* (on page 113) |
| View and delete notifications that have been sent to recipients. | *Notifications Maintenance - Processed Notifications tab* (on page 115) |
| Process SMS replies for two-way SMS messaging. | *Notifications Maintenance - SMS Replies tab* (on page 117) |
| Display deleted notifications for two-way SMS messaging. | *Notifications Maintenance - SMS Processed tab* (on page 119) |

## Creating notifications

**Note:** Create the notification rule first, then schedule when it should run in the **Rules Maintenance** tab. See *Notifications Maintenance - Rules Maintenance tab* (on page 108).

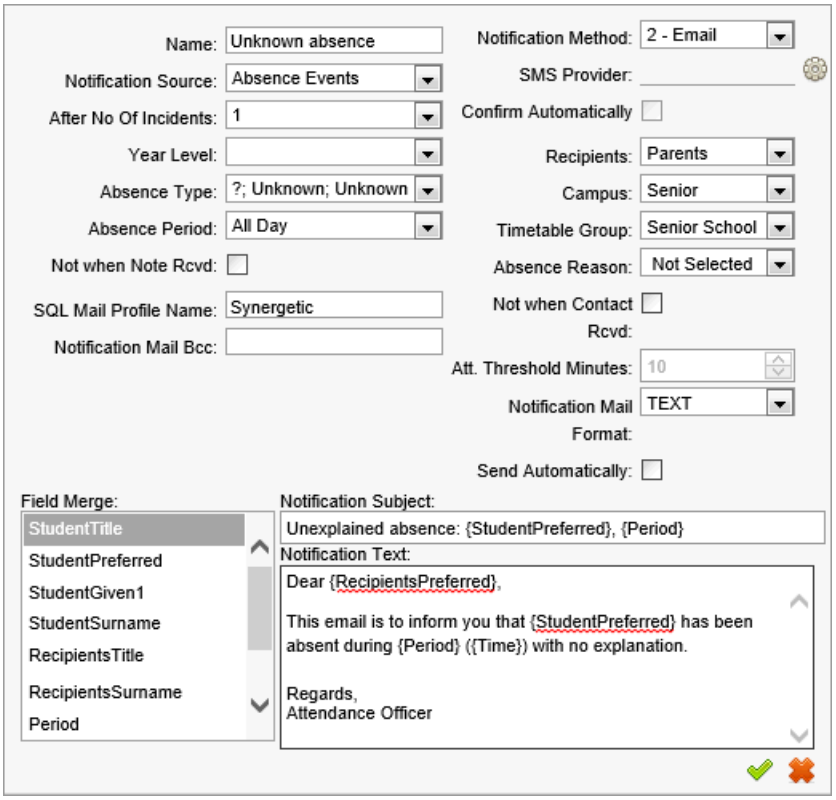
To create a notification rule:

1. Select **System > Notifications Maintenance** from the SynWeb main menu.

   The **Rules Maintenance** tab of the **Notifications Maintenance** window is displayed.

2. Click Create New Notification Rule.

   The **New Notification Rule** area is displayed.




3. Type the name of the notification rule in the **Name** field.

4. Select the **Notification Method** of either **Email** or **SMS**.

5. Select what will trigger the notification, either:

   - student **Absence Events**
   - missing **Attendance** records.

6. Select the recipients of the notification. For example, you may want to send absence events notices to a student's parents, or to their head of house.

   **Note:** Only one recipient type can be selected per notification rule. To send notifications to an absent student's parents and to their head of house, create two separate notification rules.

7. Select how many incidents should occur before a notification is sent. For example, if **After No Of Incidents** is **3**, the notification is sent after the student has had three absence events created.

8. Select the **Year Levels**, **Campus** and **Timetable Group** the notification rule applies to.
9. Select the **Absence Type** and **Absence Reason** the notification applies to. For example, you may want to only send notifications for unexplained absences.

   **Note:** This field is disabled for **Attendance** notification events.

10. Select if you **do not** want a notification to be sent:
    - when a note has been received
    - when contact from the parent has been received.

    **Note:** This field is disabled for **Attendance** notification events.

11. Select the number of minutes after the start of class before an attendance reminder is sent.

    **Note:** This field is disabled for **Absence Event** notification events.

12. Type the name of the mail profile used by the Synergetic database in the **SQL Mail Profile Name** field.
13. Type the **Subject** line to appear for notification emails.

    **Note:** This field is disabled if the **SMS Notification Method** is selected.

    **Tip**: Use **Replaceable Fields** listed below to personalise the message to the recipient.

14. Type any addresses to which **Blind Carbon Copies** of the notification should be sent.
15. Select whether the message is formatted as plain **Text** or **HTML**.

    **Note:** This field is disabled if the **SMS Notification Method** is selected.

16. Select **Send Automatically** if you want SynWeb to send the notifications as soon as they are created.

    Clear this field if you want to review them in the **Queued Notifications** tab and send them manually later. See *Notifications Maintenance - Queued Notifications tab* (on page 113).

    **Note:** Notifications are created according to the schedule configured for the notification rule. See *Notifications Maintenance - Rules Maintenance tab* (on page 108).

17. Type the message to send to recipients in the **Notification Text** field.

    **Tip**: Use **Replaceable Fields** listed below to personalise the message to the recipient.

18. Click  .

    The notification rule is created.

## Replaceable fields

**Note:** All replaceable fields must be spelled exactly as given and typed within two curly brackets. For example, **{Period}**.

### Subject Line replaceable fields

| Field | Description |
|---|---|
| **Period** | The period that the absence or attendance notification refers to. For example "Period 1". |
| **StudentGiven1** | The student's given name. |
| **StudentPreferred** | The student's preferred name. |
| **StudentSurname** | The student's surname. |
| **StudentTitle** | The student's title. |

### Notification Text replaceable fields

| Field | Description |
|---|---|
| **ClassCode** | Code of the class that the:<br>• student is absent from<br>• teacher has not marked attendance for. |
| **ClassDescription** | Description of the class that the:<br>• student is absent from<br>• teacher has not marked attendance for. |
| **Period** | The period that the absence or attendance notification refers to. For example "Period 1". |
| **RecipientsGiven1** | The recipient's given name. |
| **RecipientsPreferred** | The recipient's preferred name. |
| **RecipientsSurname** | The recipient's surname. |
| **RecipientsTitle** | The recipient's title. |
| **Room** | The room of the class that the:<br>• student is absent from<br>• teacher has not marked attendance for. |
| **SchoolStaffCode** | Staff code of the teacher who:<br>• reported the student's absence<br>• has not marked attendance. |
| **StaffGiven1** | Given name of the teacher who:<br>• reported the student's absence<br>• has not marked attendance. |

| Field | Description |
|---|---|
| **StaffPreferred** | Preferred name of the teacher who:<br>• reported the student's absence<br>• has not marked attendance. |
| **StaffSurname** | Surname of the teacher who:<br>• reported the student's absence<br>• has not marked attendance. |
| **StaffTitle** | Title of the teacher who:<br>• reported the student's absence<br>• has not marked attendance. |
| **StudentGiven1** | The student's given name. |
| **StudentPreferred** | The student's preferred name. |
| **StudentSurname** | The student's surname. |
| **StudentTitle** | The student's title. |
| **Time** | The time the class started. |
| **TimeTableDateTime-From** | The date and time the class was scheduled to start according to the timetable. |

# Notifications Maintenance - Rules Maintenance tab

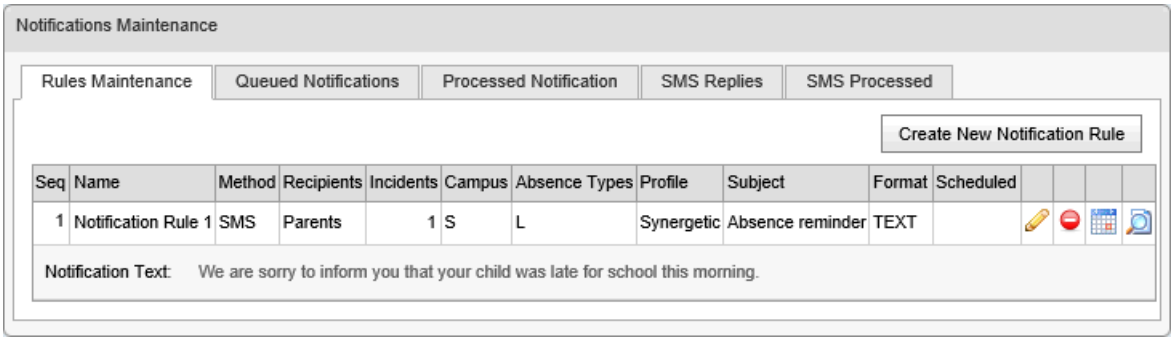
Notifications are sent according to notification rules. You can create, maintain and delete notification rules on the **Rules Maintenance** tab.

## Opening the Rules Maintenance tab

To open the **Rules Maintenance** tab:

1. Select **System > Notifications Maintenance** from the SynWeb main menu.

   The **Rules Maintenance** tab of the **Notifications Maintenance** window is displayed.

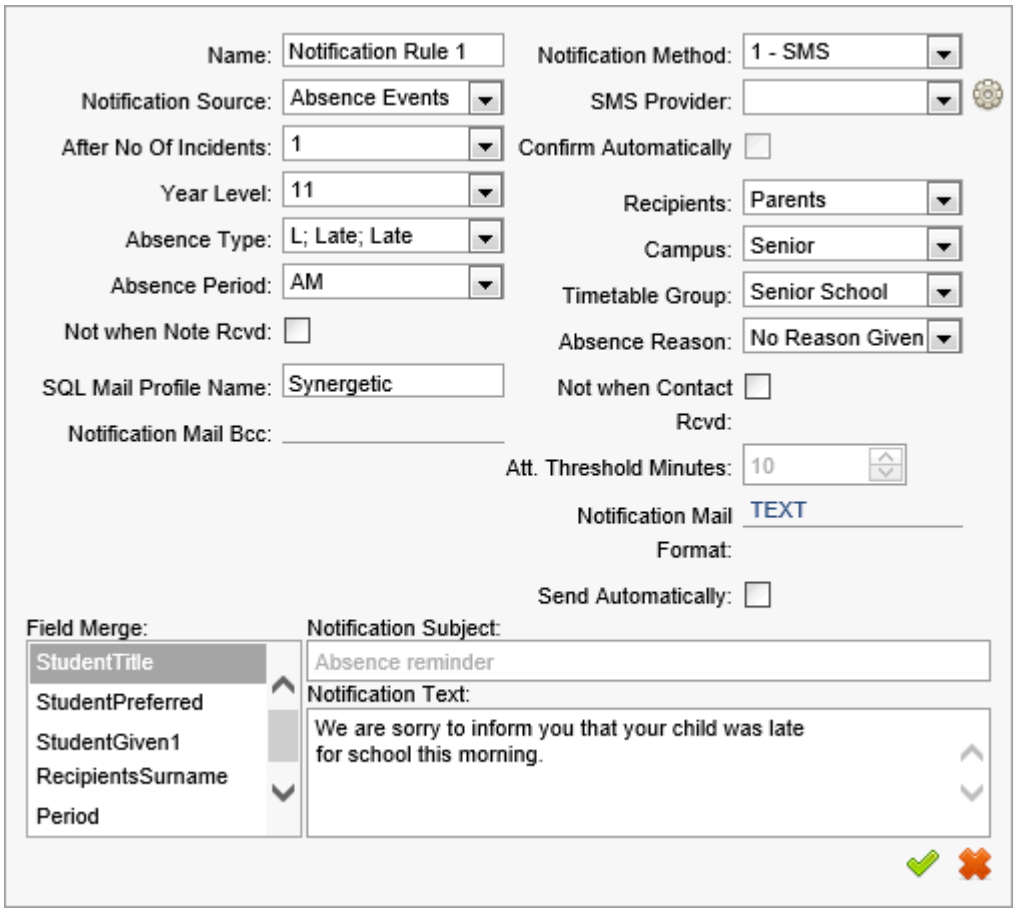


## Notifications Maintenance - Rules Maintenance tab key fields and buttons

### Grid area fields

| Fields | Description |
|---|---|
| **Seq** | Unique identifier for the notification rule. |
| **Name** | Name of the notification rule. |
| **Method** | Method of notification used. Options include:<br>• SMS<br>• Email. |
| **Recipients** | Type of community members the notification is sent to. Options include:<br>• Parents<br>• Form Teacher<br>• Tutor<br>• House Teacher<br>• Year Level Coordinator. |
| **Incidents** | Number of incidents before the notification is sent. |
| **Campus** | Campus that the notification is restricted to. |
| **Absence Types** | Absence types the notification is triggered by, if any. |
| **Profile** | Name of the profile used to send mail. |
| **Subject** | Subject line of the notification emails. |
| **Format** | Format of the notification. Options include:<br>• Text<br>• HTML. |
| **Scheduled** | When the notification process is next scheduled to run. |

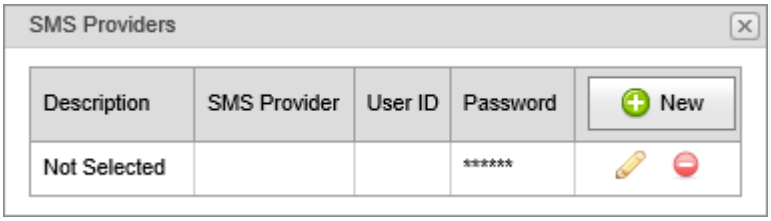
## Fields




**Tip:** Click  to reveal the fields for editing.

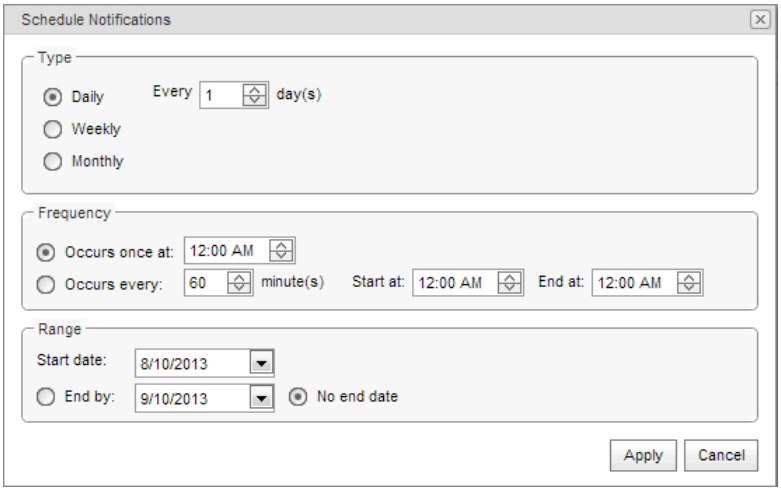
The files are identical to the grid area fields, except for some additional fields.

| Fields | Description |
|---|---|
| **Name** | Unique name for the notification rule. |
| **Notification Method** | Method of notification used, as per the **Method** field above. Options include:<br>• SMS<br>• Email. |
| **Notification Source** | Whether the notification is triggered by:<br>• student **Absence Events**<br>• unsubmitted **Attendance** records. |

| Fields | Description |
|---|---|
| **SMS Provider** | SMS provider used for the notification rule.<br><br>Click  to maintain the SMS providers on the **SMS Providers** window.<br>  <br> |
| **After No. of Incidents** | The number of incidents after which the notification is generated, as per the **No. Incidents** field above. For example, if an **Absence** notification has an **After No. of Incidents** value of **3**, notifications are generated after the student's third absence. |
| **Confirm Automatically** | Automatically confirm two-way SMS MessageMedia messages.<br><br>**Note**: Can only confirm if SMS content matches code in **luAbsenceNotificationReply**. |
| **Year Level** | Restrict this notification rule to a year level, if applicable. |
| **Recipients** | Type of community members the notification is sent to. |
| **Absence Type** | Restrict this notification rule to absences of this **Absence Type**. |
| **Campus** | Restrict this notification rule to a campus, if applicable. |
| **Absence Period** | Restrict this notification rule to absences that occur during this time period. |
| **Timetable Group** | Timetable group the notification rule applies to. |
| **Not when Note Rcvd** | Select to only generate notifications if a note has not been received. |
| **Absence Reason** | Restrict this notification rule to absences of this **Absence Reason**. |
| **SQL Mail Profile Name** | Name of the profile used to send mail, as per the **Profile** field above. |
| **Not when Contact Rcvd** | Select to only generate notifications if no contact has been made. |
| **Notification Mail BCC** | Additional recipients who receive blind carbon copies of the notification. |
| **Attendance Threshold Minutes** | Number of minutes after the start of each attendance period after which attendance records are considered late.<br><br>For example, if the **Attendance Threshold (Minutes)** is **15**, teachers who have not submitted their attendance records within **15** minutes of the class starting have notifications generated. |
| **Notification Mail Format** | Format of the notification, as per the **Format** field above. Options include:<br>• Text<br>• HTML. |
| **Send Notifications Automatically** | Either:<br>• select to send notifications as they are generated<br>• clear to queue notifications for review before sending. |

| Fields | Description |
|---|---|
| **Notification Subject** | Subject line of the notification emails. |
| **Notification Text** | The body of the email or SMS notification.<br>Note: You can use replaceable fields to personalise the notification messages. See *Creating notifications*. |

## Buttons

| Button | Description |
|---|---|
| Create New Notification Rule | Create a new notification rule. See *Creating notifications* (on page 104). |
| | Edit the notification rule. See *Creating notifications* (on page 104). |
| | Delete the notification rule. |
| | Schedule when the notification rule should be run.<br>  <br> |
| | Send a test notification to yourself to test settings.<br>**Note:** Merge fields will not be replaced from the notification subject and text. |
| | Save changes to the notification rule. |
| | Cancel changes to the notification rule. |

# Notifications Maintenance - Queued Notifications tab

Use the **Queued Notifications** tab to check notifications that have been generated according to the notification rules, but not yet sent to recipients. You can:

- edit the message content of a notification
- delete one or more notifications
- send one or more of the notifications.

Once notifications have been sent, they are removed from the **Queued Notifications** tab and appear on the **Processed Notifications** tab.

## Opening the Queued Notifications tab

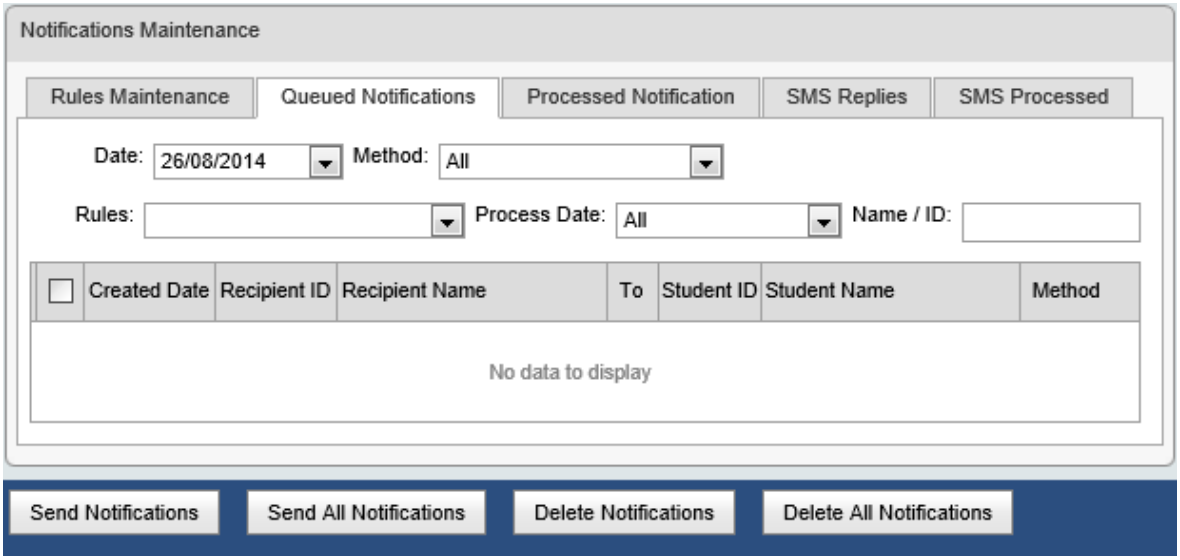
To open the **Queued Notifications** tab:

1. Select **System > Notifications Maintenance** from the SynWeb main menu.

   The **Rules Maintenance** tab of the **Notifications Maintenance** window is displayed.

2. Select **Queued Notifications**.

   The **Queued Notifications** tab of the **Notifications Maintenance** window is displayed.



## Notifications Maintenance - Queued Notifications tab key fields and buttons

### Selection area fields

| Field | Description |
|---|---|
| **Date** | Show only notifications generated on this date. |
| **Method** | Show only notifications of this method type. |
| **Rules** | Show only notifications generated from this rule. |
| **Process Date** | Show only notifications of the selected processing date. |
| **Name/ID** | Show only notifications generated for community members with this name or Synergetic ID. |

### Grid area fields

| Field | Description |
|---|---|
| **Select** | Select this notification to send or delete. |
| **Created Date** | Date the notification was generated. |
| **Recipient ID** | Synergetic ID of the notification recipient. |
| **Recipient Name** | Name of the notification recipient. |
| **To** | The email address or phone number of the notification recipient. |
| **Student ID** | Synergetic ID of the student the notification is about, if applicable. |
| **Student Name** | Name of the student the notification is about, if applicable. |
| **Method** | Method of the notification. |

### Buttons

| Button | Description |
|---|---|
| Send Notifications | Send the selected notifications to the recipients. |
| Send All Notifications | Send all notifications. |
| Delete Notifications | Delete the selected notifications without sending to recipients. |
| Delete All Notifications | Delete all notifications. |

# Notifications Maintenance - Processed Notifications tab

Use the **Processed Notifications** tab to check notifications that have been generated according to the notification rules and sent to recipients. You can re-send notifications from this tab.

Once notifications have been sent, they cannot be edited or deleted.

## Opening the Processed Notifications tab

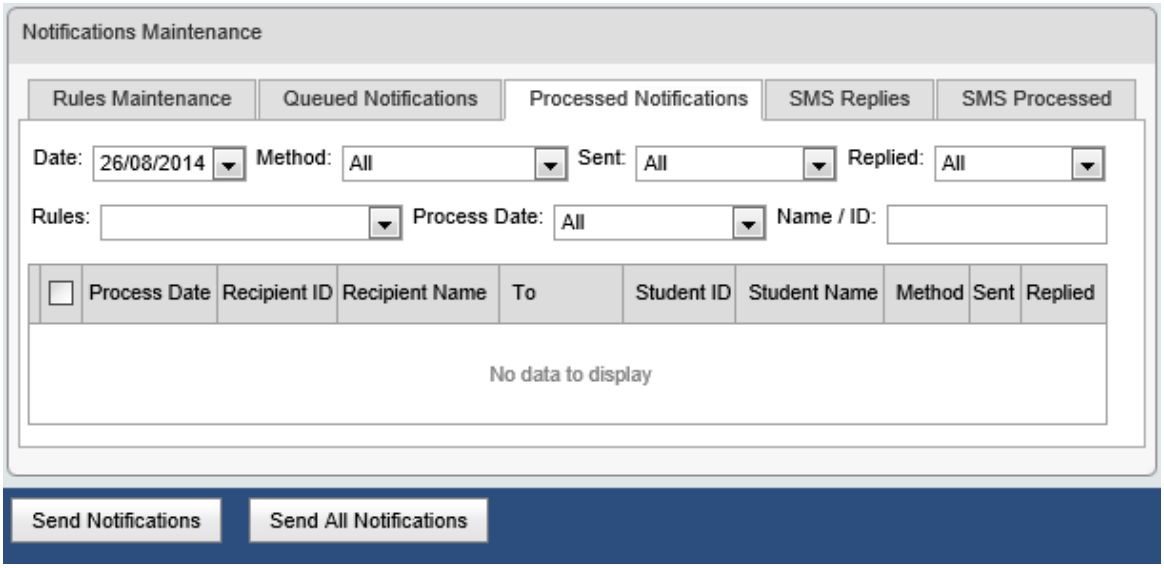
To open the **Processed Notifications** tab:

1. Select **System > Notifications Maintenance** from the SynWeb main menu.

   The **Rules Maintenance** tab of the **Notifications Maintenance** window is displayed.

2. Select **Processed Notifications**.

   The **Processed Notifications** tab of the **Notifications Maintenance** window is displayed.



## Notifications Maintenance - Processed Notifications tab key fields and buttons

### Selection area fields

| Field | Description |
|---|---|
| **Date** | Show only notifications generated on this date. |
| **Method** | Show only notifications of this method type. |
| **Sent** | Show only notifications of this sent status. |
| **Replied** | Show only notifications of this replied status. |
| **Rules** | Show only notifications generated from this rule. |
| **Process Date** | Show only notifications of the selected processing date. |
| **Name/ID** | Show only notifications generated for community members with this name or Synergetic ID. |

### Grid area fields

| Field | Description |
|---|---|
| **Select** | Select this notification to delete. |
| **Process Date** | Date the notification was processed. |
| **Recipient ID** | Synergetic ID of the notification recipient. |
| **Recipient Name** | Name of the notification recipient. |
| **To** | The email address or phone number of the notification recipient. |
| **Student ID** | Synergetic ID of the student the notification is about, if applicable. |
| **Student Name** | Name of the student the notification is about, if applicable. |
| **Method** | Method of the notification. |
| **Sent** | Whether or not the notification has been sent.<br>**Note:** Deleted notifications will be displayed in the sent status column as 'Deleted'. |
| **Replied** | Whether or not the notification has been replied to. |

### Buttons

| Button | Description |
|---|---|
| Send Notifications | Send the selected notifications to the recipients. |
| Send All Notifications | Send all notifications to the recipients. |

# Notifications Maintenance - SMS Replies tab

Use the **SMS Replies** tab to process SMS replies for two-way SMS messaging.

## Opening the SMS Replies tab

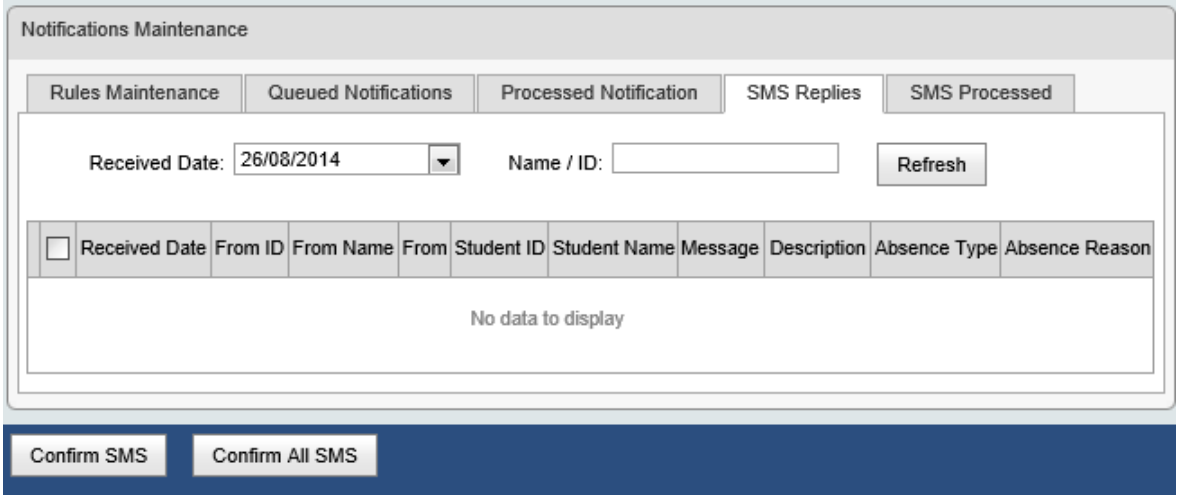
To open the **Processed Notifications** tab:

1. Select **System > Notifications Maintenance** from the SynWeb main menu.

   The **Rules Maintenance** tab of the **Notifications Maintenance** window is displayed.

2. Click the **SMS Replies** tab.

   The **SMS Replies** tab of the **Notifications Maintenance** window is displayed.



## Notifications Maintenance - SMS Replies tab key fields and buttons

### Fields

| Fields | Description |
|---|---|
| **Received Date** | Date the SMS was received. |
| **Name/ID** | The name and ID number of the recipient of the SMS. |

### Grid area fields

| Fields | Description |
|---|---|
| **Received Date** | Date the SMS was received. |
| **From ID** | ID of the sender. |
| **From Name** | Name of the sender. |
| **From** | Sender of the SMS. |
| **Student ID** | Student's ID. |
| **Student Name** | Student's name. |
| **Message** | The message to be sent. |
| **Description** | Description of the message to be sent. |
| **Absence Type** | Type of absence event. |
| **Absence Reason** | Reason given for the absence. |

### Buttons

| Button | Description |
|---|---|
| Refresh | Refresh the SMS replies data based on the input fields. |
| Confirm SMS | Confirm the selected SMS message has been sent. |
| Confirm All SMS | Confirm all SMS messages have been sent. |

# Notifications Maintenance - SMS Processed tab

Use the **SMS Processed** tab to display deleted notifications for two-way SMS messaging.

## Opening the SMS Processed tab

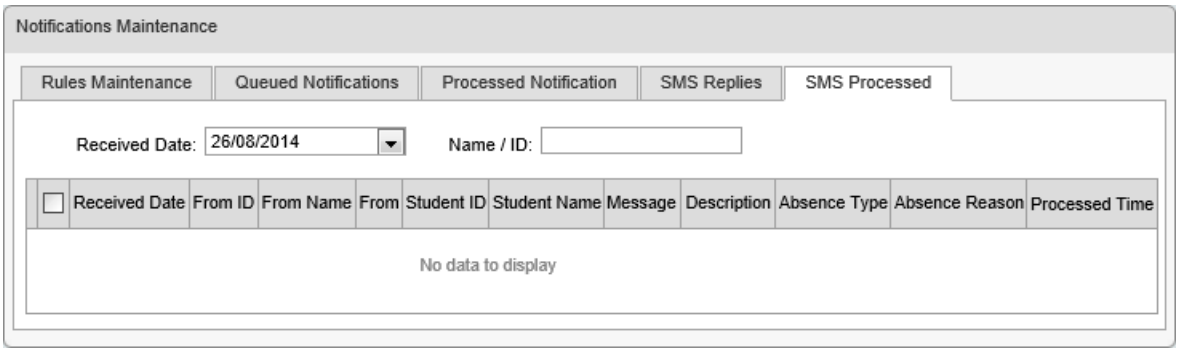
To open the **Processed Notifications** tab:

1. Select **System > Notifications Maintenance** from the SynWeb main menu.

   The **Rules Maintenance** tab of the **Notifications Maintenance** window is displayed.

2. Click the **SMS Processed** tab.

   The **SMS Processed** tab of the **Notifications Maintenance** window is displayed.



## Notifications Maintenance - SMS Processed tab key fields

### Fields

| Fields | Description |
|---|---|
| **Received Date** | Date the SMS was received. |
| **Name/ID** | The name and ID number of the recipient of the SMS. |

### Grid area fields

| Fields | Description |
|---|---|
| **Received Date** | Date the SMS was received. |
| **From ID** | ID of the sender. |
| **From Name** | Name of the sender. |
| **From** | Sender of the SMS. |
| **Student ID** | Student's ID. |
| **Student Name** | Student's name. |
| **Message** | The message to be sent. |
| **Description** | Description of the message to be sent. |
| **Absence Type** | Type of absence event. |
| **Absence Reason** | Reason given for the absence. |
| **Processed Time** | Time the SMS was processed. |

# Exporting information to other programs

You can export information from grid cells in SynWeb and use that information in other programs.

## How To:

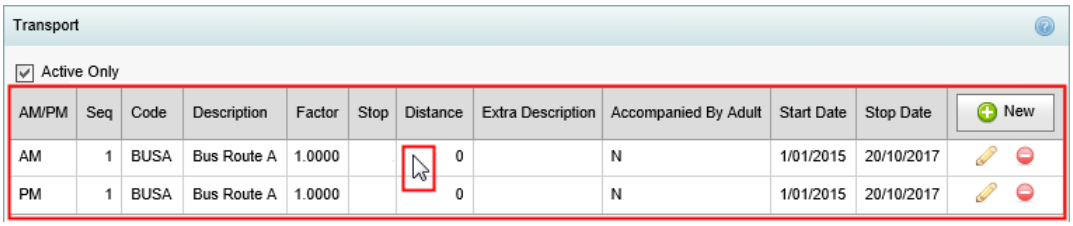
- Copy the contents into a Microsoft Excel spreadsheet. See *Exporting information to Microsoft Excel* (on page 122).
- Copy the contents including hidden fields into a Microsoft Excel spreadsheet. See *Exporting all information to Microsoft Excel* (on page 124).
- Copy the contents into an Adobe PDF. See *Exporting information to PDF* (on page 126).
- Copy the contents into a comma-separated file. See *Exporting information to CSV* (on page 128).

## Exporting information to Microsoft Excel

You can export information displayed in grid cells into Microsoft Excel.

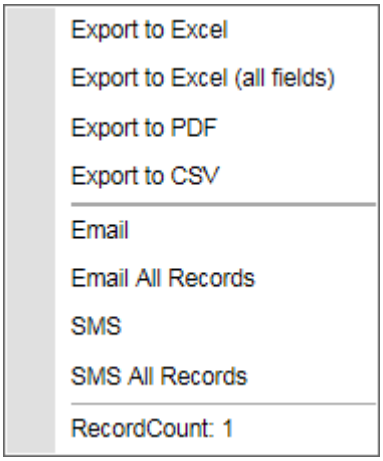
1. Place the cursor within the grid.

**Tip:** You can place the cursor anywhere within the boundaries of the grid.




2. Right click.

   The following menu is displayed:

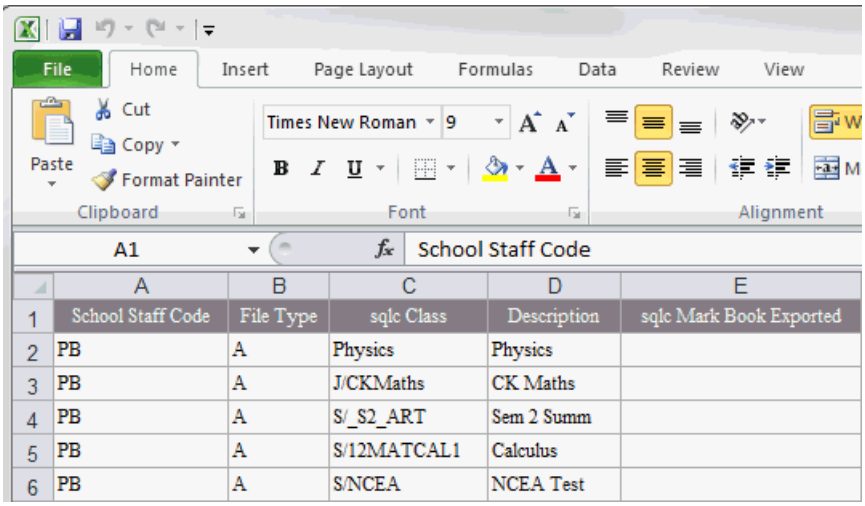



3. Select **Export to Excel**.

   The **File Download** window is displayed.

4. Click Open.

   The contents of the grid are copied into an Excel spreadsheet.




| | A | B | C | D | E |
|---|---|---|---|---|---|
| 1 | School Staff Code | File Type | sqlc Class | Description | sqlc Mark Book Exported |
| 2 | PB | A | Physics | Physics | |
| 3 | PB | A | J/CKMaths | CK Maths | |
| 4 | PB | A | S/_S2_ART | Sem 2 Summ | |
| 5 | PB | A | S/12MATCAL1 | Calculus | |
| 6 | PB | A | S/NCEA | NCEA Test | |

5. You can then manipulate the data as desired.

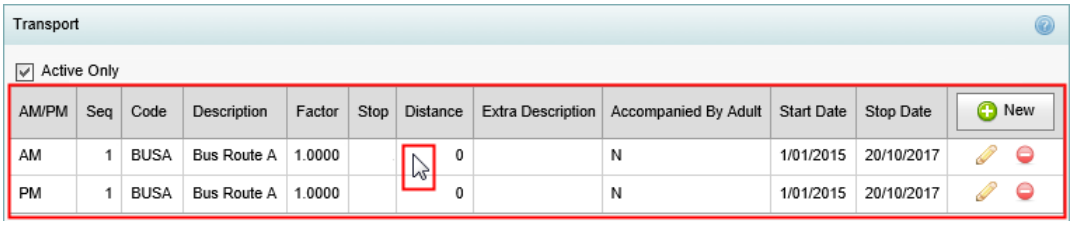
**Tip:** To save the data as an Excel spreadsheet without opening Excel, click Save.

## Exporting all information to Microsoft Excel

Grids contain information not displayed by SynWeb. You can export this information along with the visible fields to Microsoft Excel.

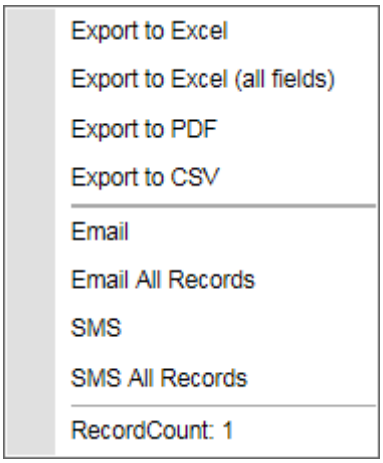
1. Place the cursor within the grid.

**Tip:** You can place the cursor anywhere within the boundaries of the grid.




2. Right click.

   The following menu is displayed:

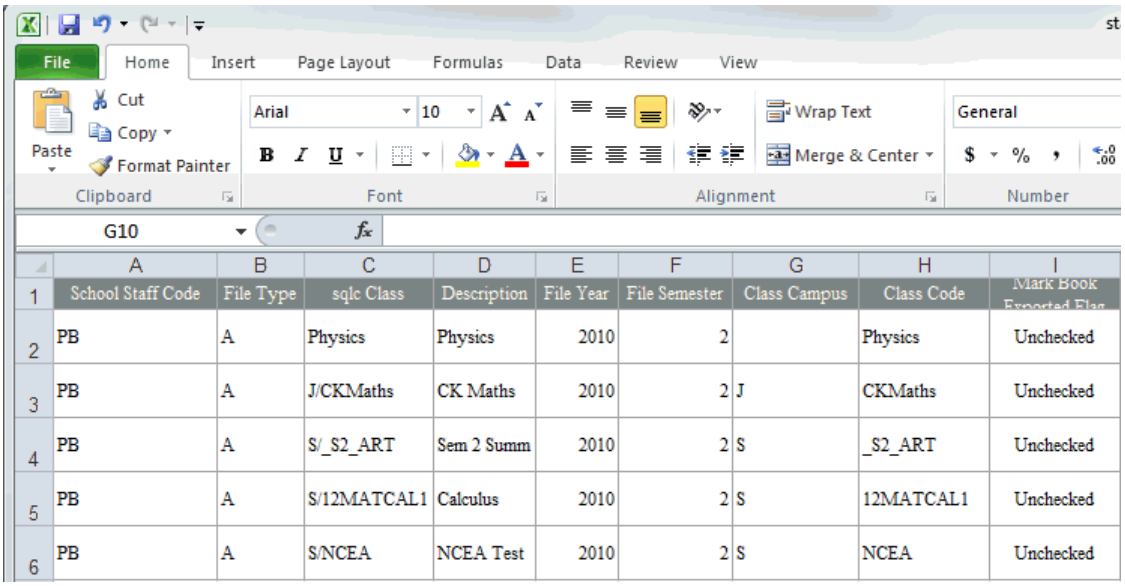



3. Select **Export to Excel (all fields)**.

   The **File Download** window is displayed.

4. Click Open.

   The contents of the grid, including the hidden fields, are exported to an Excel spreadsheet.



| | A | B | C | D | E | F | G | H | I |
|---|---|---|---|---|---|---|---|---|---|
| 1 | School Staff Code | File Type | sqlc Class | Description | File Year | File Semester | Class Campus | Class Code | Mark Book Exported Flag |
| 2 | PB | A | Physics | Physics | 2010 | 2 | | Physics | Unchecked |
| 3 | PB | A | J/CKMaths | CK Maths | 2010 | 2 | J | CKMaths | Unchecked |
| 4 | PB | A | S/_S2_ART | Sem 2 Summ | 2010 | 2 | S | _S2_ART | Unchecked |
| 5 | PB | A | S/12MATCAL1 | Calculus | 2010 | 2 | S | 12MATCAL1 | Unchecked |
| 6 | PB | A | S/NCEA | NCEA Test | 2010 | 2 | S | NCEA | Unchecked |

5. You can then manipulate the data as desired.

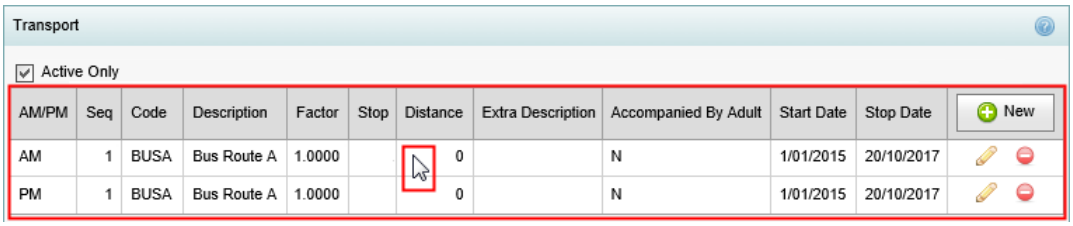
**Tip:** To save the data as an Excel spreadsheet without opening Excel, click Save.

## Exporting information to PDF

You can export grid cell information to Adobe PDF files.

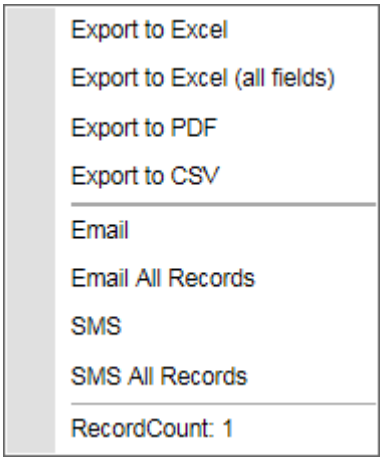
1. Place the cursor within the grid.

**Tip:** You can place the cursor anywhere within the boundaries of the grid.




2. Right click.

   The following menu is displayed:

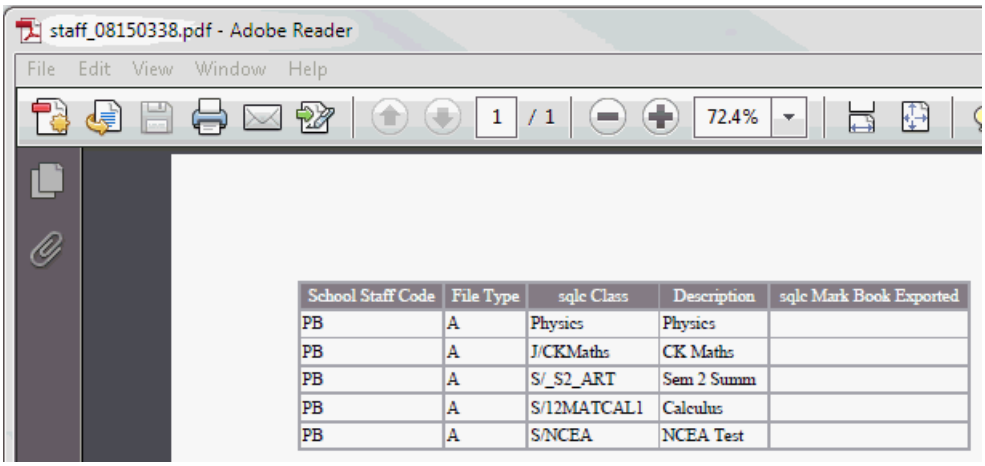



3. Select **Export to PDF**.

   The **File Download** window is displayed.

4. Click Open.

   The contents of the grid cells are displayed in PDF format.




| School Staff Code | File Type | sqlc Class | Description | sqlc Mark Book Exported |
|---|---|---|---|---|
| PB | A | Physics | Physics | |
| PB | A | J/CKMaths | CK Maths | |
| PB | A | S/_S2_ART | Sem 2 Summ | |
| PB | A | S/12MATCAL1 | Calculus | |
| PB | A | S/NCEA | NCEA Test | |

5. You can then save or print the PDF.

**Tip:** To save the data as a PDF without opening Adobe Acrobat, click Save.

## Exporting information to CSV

You can export grid cell information to comma-separated value (CSV) files.

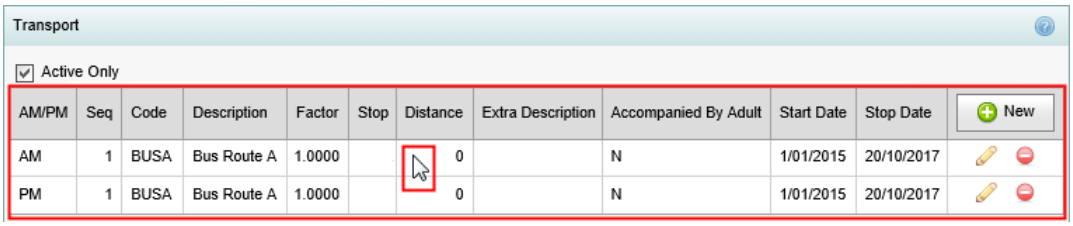
Exporting to CSV files is useful if you need to:

- save the information as a very a small file
- import the information into a database.

**Note:** CSV files save one grid row per line, with each grid cell value separated by a comma. They can be opened by Microsoft Excel or any text editor.

1. Place the cursor within the grid.

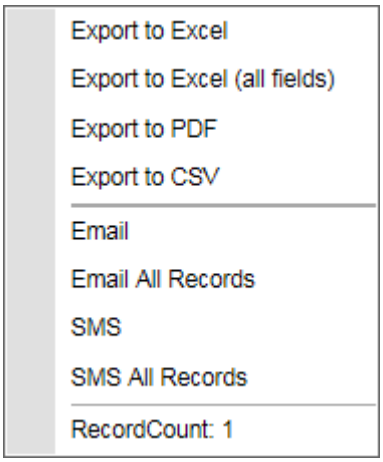
**Tip:** You can place the cursor anywhere within the boundaries of the grid.




| AM/PM | Seq | Code | Description | Factor | Stop | Distance | Extra Description | Accompanied By Adult | Start Date | Stop Date |
|---|---|---|---|---|---|---|---|---|---|---|
| AM | 1 | BUSA | Bus Route A | 1.0000 | | 0 | | N | 1/01/2015 | 20/10/2017 |
| PM | 1 | BUSA | Bus Route A | 1.0000 | | 0 | | N | 1/01/2015 | 20/10/2017 |

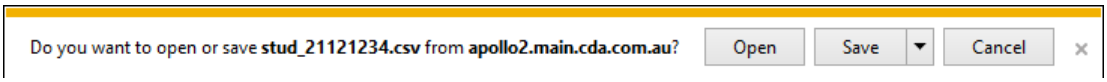
2. Right click.

   The following menu is displayed:



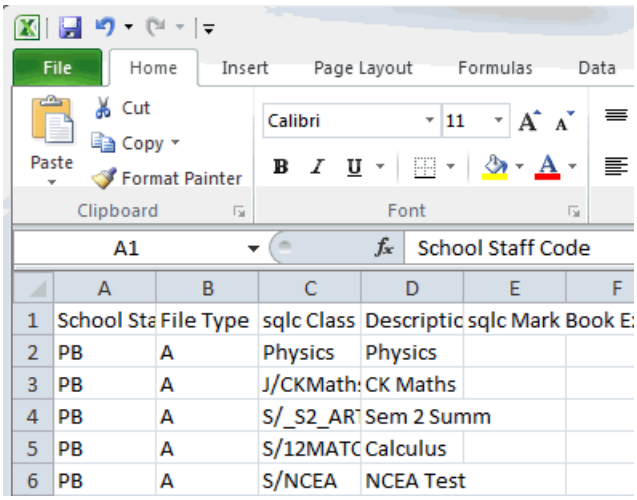
3. Select **Export to CSV**.

   The **File Download** window is displayed.




4. Click Open.

   The contents of the grid cells are exported into CSV format and opened in Microsoft Excel.




5. You can then manipulate the data as desired.

**Tip:** To save the data as a CSV without opening Microsoft Excel, click Save.

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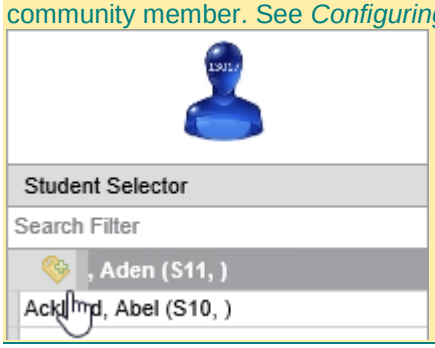
# Using tag lists

Tag lists are used to pull together an otherwise unrelated group of records. For example, you can create a group to:

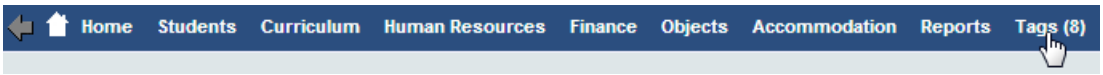
- send emails to
- report on
- link documents or photos to.

The currently tagged community members are marked with green tag indicators and maintained in a list called the **Tag List** that you can view at any time.

**Tip:** Hovering over the left of a record reveals a tag icon can be clicked to quickly tag or untag a community member. See *Configuring tag lists* in the System maintenance manual.




To display the **Tag List** window at any time, select **Tags (n)** from the SynWeb main menu.




The **Tag List** window is displayed.

## Examples

You can use a tag list for a variety of reasons:

- You want to generate a report for a group of otherwise unrelated community members. When you select a relevant report, you can elect to only report on tagged community members.
- You want to send a communication to a group of otherwise unrelated community members. For example, a swimming team made up of students from different year levels, campuses and houses. Instead of searching for the students and sending messages to each individual, tag the records, then send communications to your tag list.
- You want to link a document to a group of otherwise unrelated community members. For example, a newspaper article about competitors in a fun run sponsored by your organisation.

## How to:

- Add individual community members to the current tag list:
  - From the **Tag List** window. See *Tagging community members from the Tag List window* (on page 139).
  - From a grid. See *Tagging individual community members from a grid* (on page 144).
- Add multiple community members to the current tag list. See *Tagging multiple community members from a grid* (on page 148).
- Delete community members from the current tag list:
  - From a grid. See *Deleting community members from the current tag list from a grid* (on page 152).
  - From the **Tag List** window. See *Deleting community members from the Tag List window* (on page 156).
- Store a tag list, so that you can keep it for later use by:
  - you (private tag list)
  - anyone at your organisation (public tag list). See *Storing tag lists* (on page 170).
- Load an existing tag list, created by:
  - you (private or public tag lists)
  - another person at your organisation (public tag list). See *Loading tag lists* (on page 158).
- Extend a private tag list past its current expiry date. See *Extending the expiry dates of tag lists* (on page 173).
- Save the community members in a tag list into an existing constituency. See *Saving tag lists into constituencies* (on page 176).
- Save the current students in a tag list into an existing class. See *Saving tag lists into classes* (on page 179).
- Run a report for community members who have been tagged. See *Running reports on tag lists* (on page 183).
- Link or embed a document so that it is available from the **DocMan** bar of the selected community members, using a tag list. See *Linking documents using tag lists* (on page 273).

From **Synergetic**, you can also load a list of community members from:

- An Excel spreadsheet. See *Loading community members from an Excel spreadsheet* in the **Synergetic** Introduction manual.
- A text file. See *Loading community members from a file* in the **Synergetic** Introduction manual.

## What you can do:

| You can... | See |
|---|---|
| Create groups of community members that are otherwise unrelated. Tag lists can be:<br>• stored<br>• loaded<br>• added to a class<br>• added to a constituency<br>• linked to an uploaded document<br>• reported to<br>• emailed to. | *Using the Tag List window* (on page 134) |

# Using the Tag List window

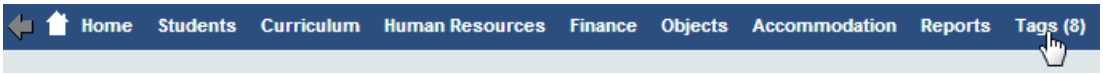
Use the **Tag List** window to create groups of community members that are otherwise unrelated. Tag lists can be:

- stored
- loaded
- added to a class
- added to a constituency
- linked to an uploaded document
- reported to
- emailed to.

## Opening the Tag List window

To open the **Tag List** window:

1. Select **Tags (n)** from the SynWeb main menu.



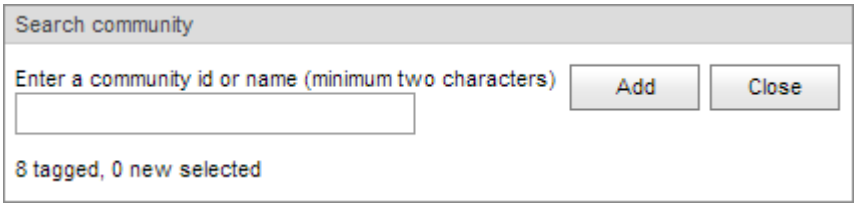

The **Tag List** window is displayed.

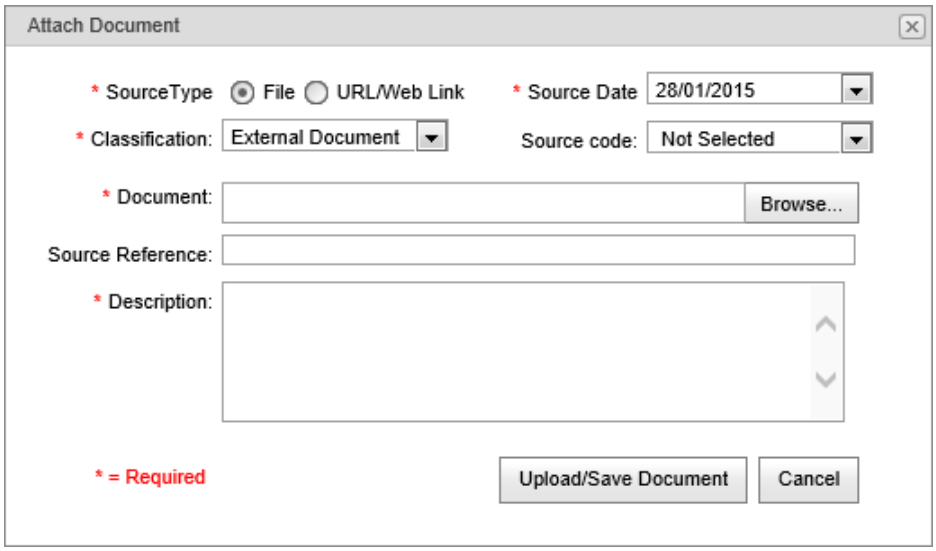
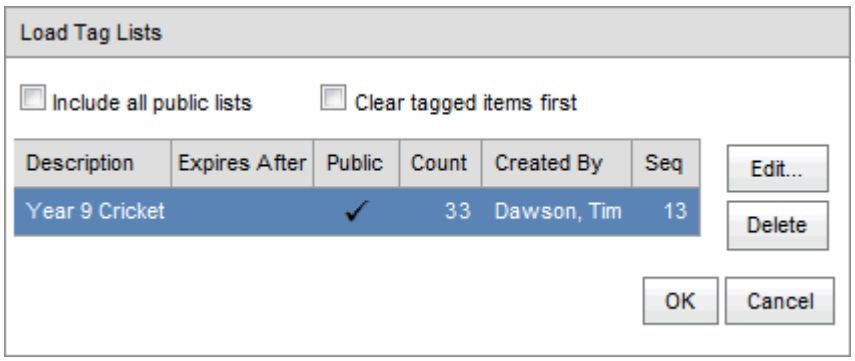
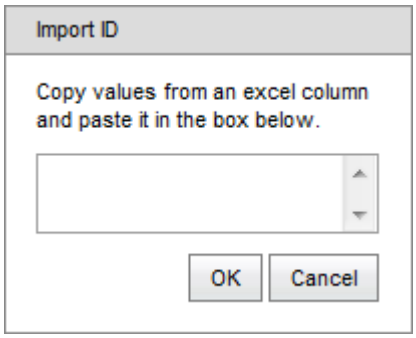
## Tag List window key fields, links and buttons

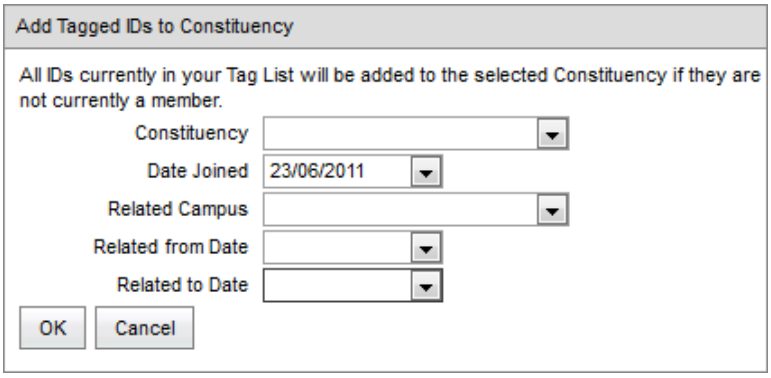
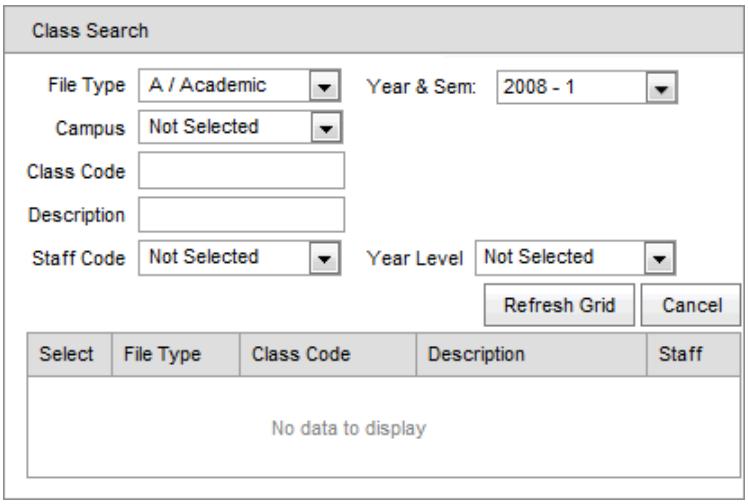
### Grid area fields and links

| Field / Link | Description |
|---|---|
| # | Select the student or students that you want to manage from the tag list. For example, select one student and click Email to email only the selected student. |
| **ID** | Community member's Synergetic ID. |
| **Name** | Community member's name. |
| **Launch Into** | SynWeb maintenance program where the community member can be managed.<br>**Note:** Click the link to open a new window with the community member's record in the maintenance program. |

### Buttons

| Button | Description |
|---|---|
| Add... | Search for community members to add to the tag list.<br>See *Tagging community members from the Tag List window* (on page 139).<br>**Note:** You must enter at least two characters to perform the search.<br>  |
| Delete | Delete the **selected** community member from the tag list.<br>See *Deleting community members from the Tag List window* (on page 156). |
| Clear | Delete **all** community members from the tag list.<br>See *Deleting community members from the Tag List window* (on page 156). |
| Email | Send an email to the selected community members in the tag list.<br>See *Sending emails or SMS messages to a community member selected from a grid* (on page 73). |
| Email All | Send an email to all community members in the tag list.<br>See *Sending emails or SMS messages to multiple community members from a grid* (on page 81). |
| SMS | Send an SMS to the selected community members in the tag list.<br>See *Sending emails or SMS messages to a community member selected from a grid* (on page 73). |
| SMS All | Send an SMS to all community members in the tag list.<br>See *Sending emails or SMS messages to multiple community members from a grid* (on page 81). |

| Button | Description |
|---|---|
| DocMan | Upload a document link to all community members in the tag list.<br>See *Using document management (DocMan)* (on page 259).<br>  |
| Load... | Load a different tag list as the current tag list.<br>See *Loading tag lists* (on page 158).<br>  |
| Import ID... | Import community members into the tag list by copying Synergetic IDs from a spreadsheet. See *Creating tag lists from imported Synergetic IDs* (on page 164).<br>  |

| Button | Description |
|---|---|
| Store | Save the tag list for future use.<br>See *Storing tag lists* (on page 170).<br>  |
| Constit | Add the tagged community members to a constituency.<br>See *Saving tag lists into constituencies* (on page 176).<br>  |
| Class | Add the tagged community members into a class.<br>See *Saving tag lists into classes* (on page 179).<br>  |
| Refresh | Display records that have recently been tagged. |

## Paging area

Pages of community members can be displayed and navigated to using the buttons and page links.


**Note:** See *Paging:EnabledFlag* and *Paging:Size* configuration settings in the **Synergetic** System maintenance manual.

| Link / Button | Description |
|---|---|
| < | Go to the **previous** page of community members in the tag list.<br>In the example, **1136** community members (items) are displayed. |
| **[n]** | Current page number. |
| n | Numbered page. Click on the link to go to the page.<br>In the example, you can click on pages 2, 3, 4, 6, 7, 55, 56 or 57 (last page). |
| > | Go to the **next** page of community members in the tag list. |

## Tagging community members from the Tag List window

You can add individual community members to your current tag list from the **Tag List** window.

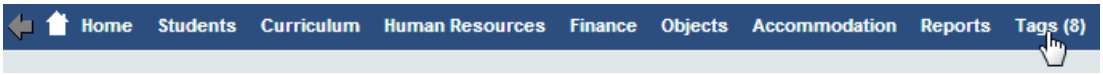
**Note:** You must have the **TagListAddManual** security permissions to use this feature.

Also see:

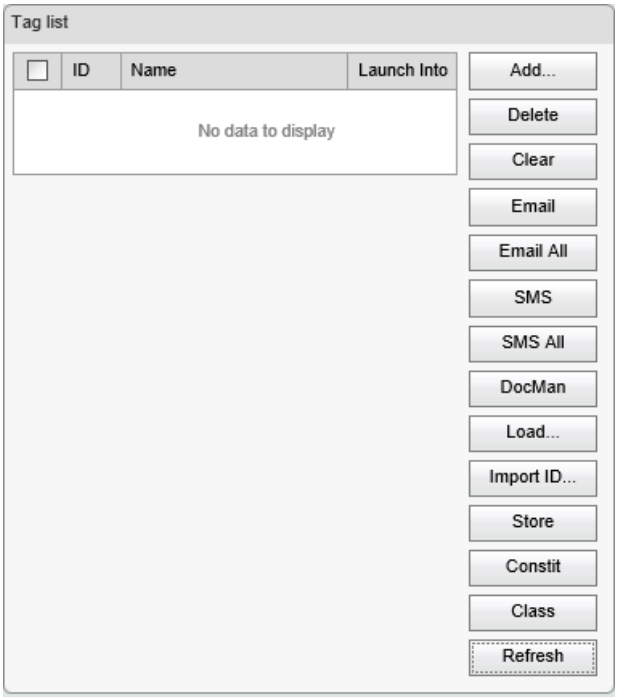
- *Deleting community members from the Tag List window* (on page 156)
- *Tagging individual community members from a grid* (on page 144)
- *Tagging multiple community members from a grid* (on page 148)
- *Deleting community members from the current tag list from a grid* (on page 152).

To add individual community members to your current tag list:

1. Select **Tags (n)** from the SynWeb main menu.

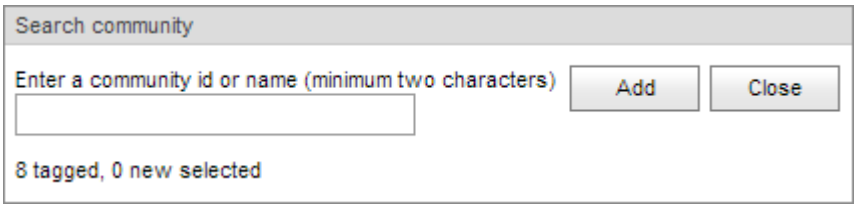



The **Tag List** window is displayed.




2. Click Add...

The **Search community** window is displayed.

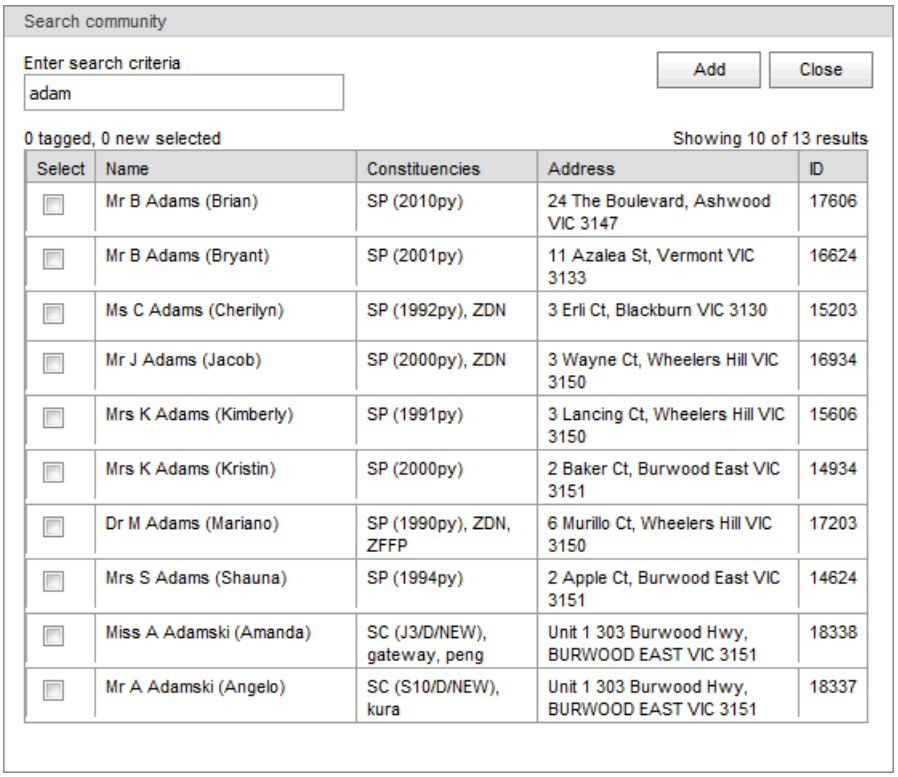



**Note:** You must enter at least two characters to perform the search.

3. Type your search criteria in the fields. You can search on a community member's ID, given name or surname. For example:

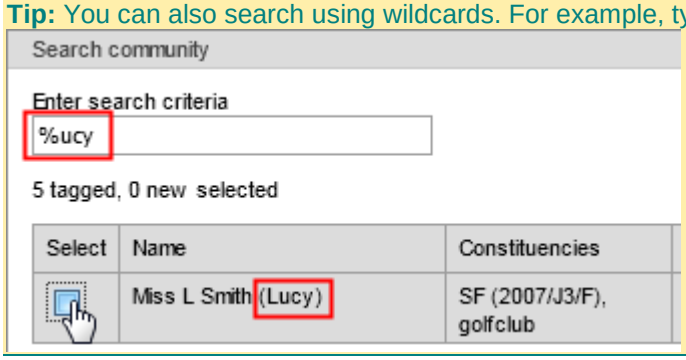
   - 17606
   - Adams
   - Brian
   - Brian Adams
   - Adams,Brian
   - Adams, Brian.

   The **Search community** window is redisplayed with matching community members.



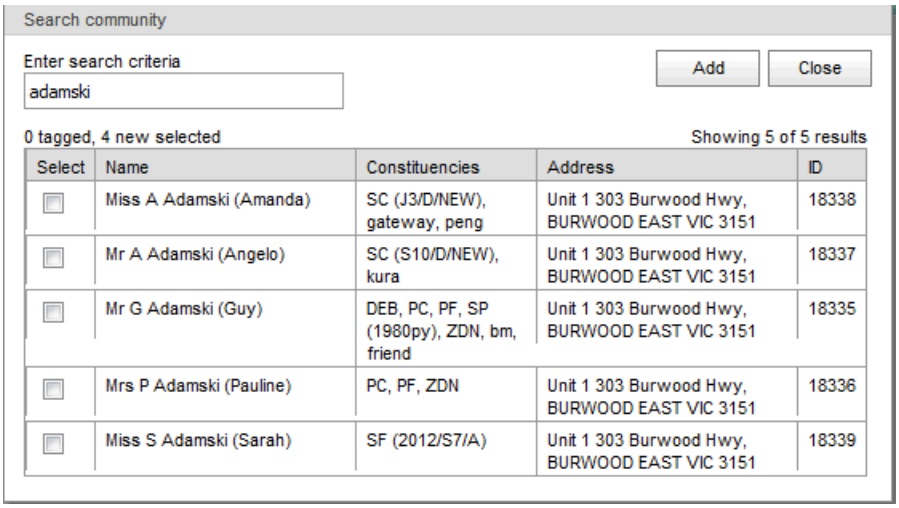

| Select | Name | Constituencies | Address | ID |
|---|---|---|---|---|
| | Mr B Adams (Brian) | SP (2010py) | 24 The Boulevard, Ashwood VIC 3147 | 17606 |
| | Mr B Adams (Bryant) | SP (2001py) | 11 Azalea St, Vermont VIC 3133 | 16624 |
| | Ms C Adams (Cherilyn) | SP (1992py), ZDN | 3 Erli Ct, Blackburn VIC 3130 | 15203 |
| | Mr J Adams (Jacob) | SP (2000py), ZDN | 3 Wayne Ct, Wheelers Hill VIC 3150 | 16934 |
| | Mrs K Adams (Kimberly) | SP (1991py) | 3 Lancing Ct, Wheelers Hill VIC 3150 | 15606 |
| | Mrs K Adams (Kristin) | SP (2000py) | 2 Baker Ct, Burwood East VIC 3151 | 14934 |
| | Dr M Adams (Mariano) | SP (1990py), ZDN, ZFFP | 6 Murillo Ct, Wheelers Hill VIC 3150 | 17203 |
| | Mrs S Adams (Shauna) | SP (1994py) | 2 Apple Ct, Burwood East VIC 3151 | 14624 |
| | Miss A Adamski (Amanda) | SC (J3/D/NEW), gateway, peng | Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151 | 18338 |
| | Mr A Adamski (Angelo) | SC (S10/D/NEW), kura | Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151 | 18337 |

**Tip:** You can also search using wildcards. For example, type **%** to replace any letter.

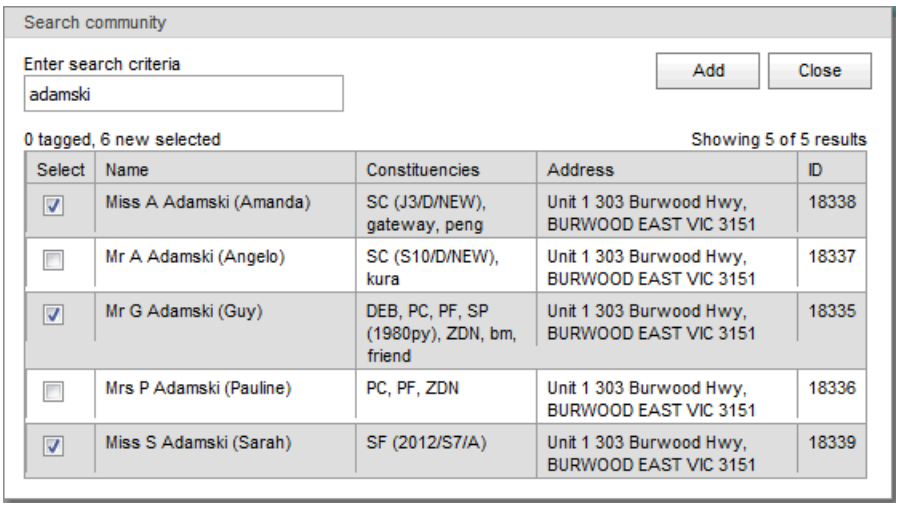


4. If there are too many records displayed, type more of the community member's name.

   The **Search community** window is redisplayed with matching community members.




5. Select the community members you want to add.




6. Click Add.

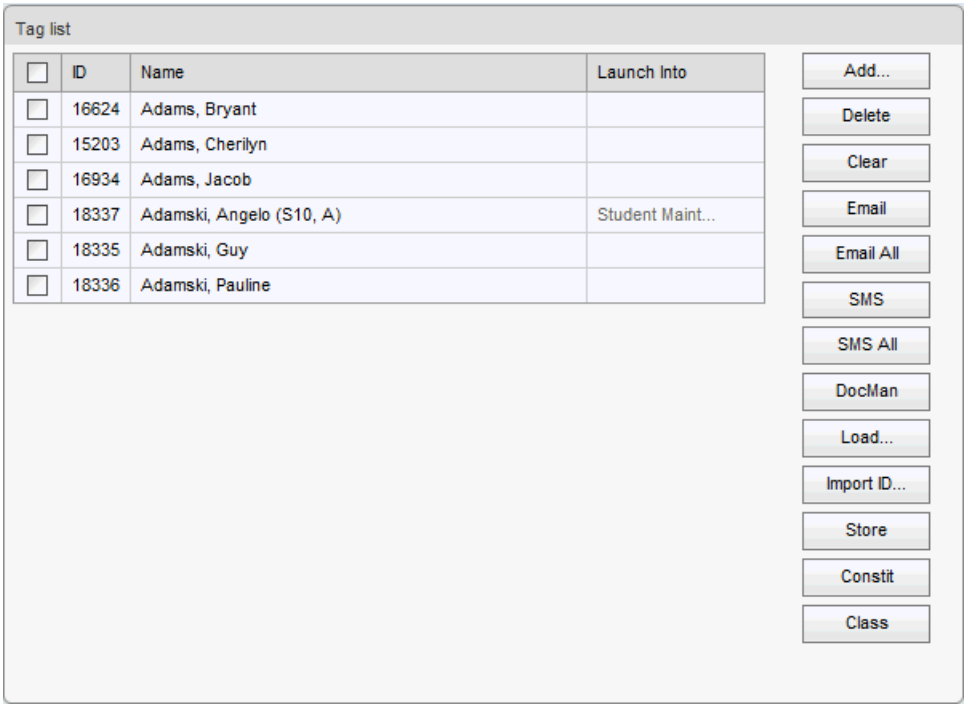
   The community members are added to the tag list.

**Note:** The displayed tag list is not updated until you close the **Search community** window.

7. Repeat steps **2** through **6** until there are no more community members to tag.

8. Click Close.

   The added community members are displayed in the tag list.

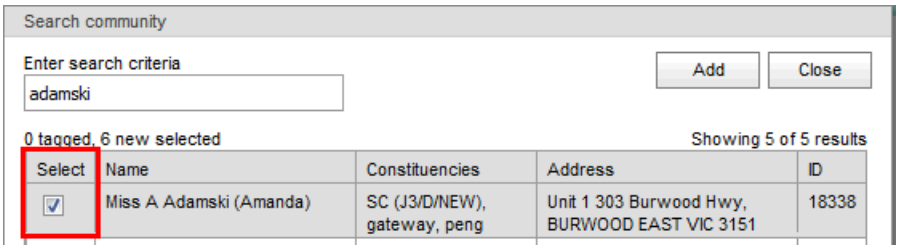


## Search Community Member window key fields and buttons

### Fields

| Field | Description |
|---|---|
| **Search** | Search using all or part of a community member's name or ID. |

### Grid area fields and links

| Field / Link | Description |
|---|---|
| **Select** | Select the field next to the community member to add them to the current tag list.<br>  <br> |
| **Constituencies** | Lists membership of user-defined constituencies. |
| **ID** | Synergetic ID of the community member. |

### Buttons

| Button | Description |
|---|---|
| Add | Add the selected community members to the tag list.<br>**Note:** This button does not respond if you return to this window after some time. Click Close and log back into SynWeb. |
| Close | Close the **Search community** window. |

## Tagging individual community members from a grid

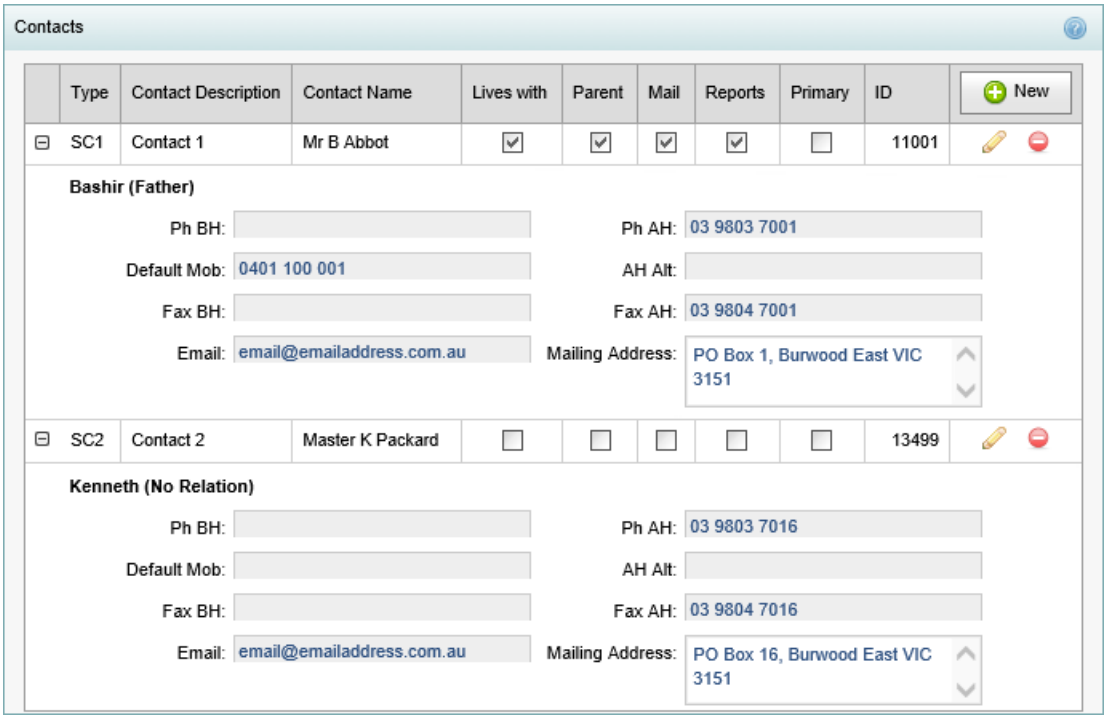
You can add individual community members to your current tag list from any grid with an **ID** (**Synergetic ID**) field.

Also see:

- *Tagging community members from the Tag List window* (on page 139)
- *Deleting community members from the Tag List window* (on page 156)
- *Tagging multiple community members from a grid* (on page 148)
- *Deleting community members from the current tag list from a grid* (on page 152).

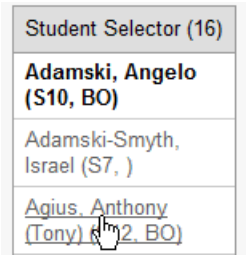
To add individual community members to your current tag list:

1. Navigate to a:
   - Grid with an **ID** field. For example, the **Contacts** bar of **Student Maintenance**.

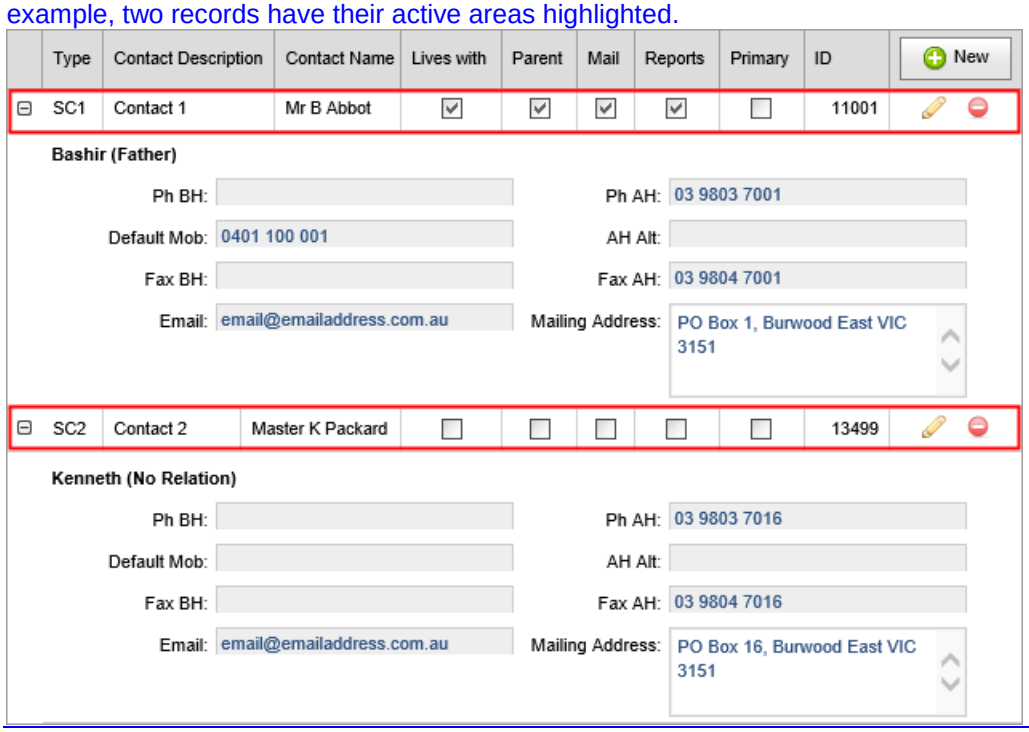



   - Window with launch links to community members. For example, the **Student Selector** area.

2. Place the cursor over the community member you want to add to the current tag list.

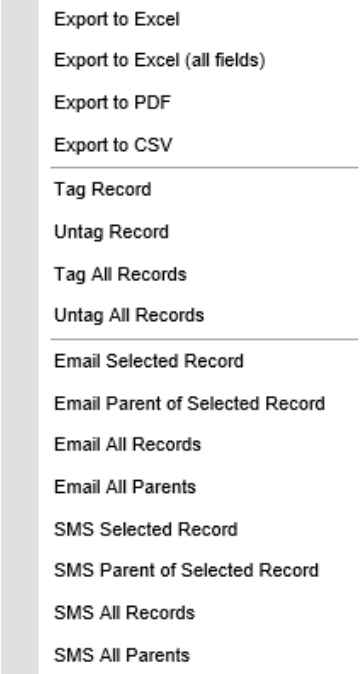



**Note:** In some cases, you need to be positioned over the community member's record. In the example, two records have their active areas highlighted.



3. Right click.

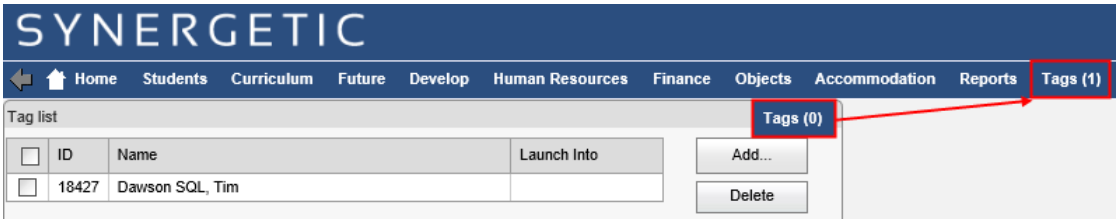
   The following menu is displayed.



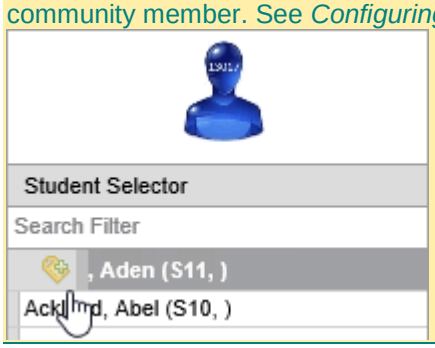

**Tip:** You can tag community members by hovering your mouse cursor on the left edge of the row then selecting the tag icon. Once the community member is tagged a green rectangle is displayed.


4. Select **Tag Record**.

The community member record is marked with the green tag indicator, added to the **Tag List** window and the count on the **Tags (n)** menu option is incremented by **1**.




**Tip:** Hovering over the left of a record reveals a tag icon can be clicked to quickly tag or untag a community member. See *Configuring tag lists* in the System maintenance manual.




5. Repeat steps **1** through **4** for each individual community you want to tag.

## Tagging multiple community members from a grid

You can add multiple community members to your current tag list from any grid with an **ID** (**Synergetic ID**) field.

This is useful if you want to add:

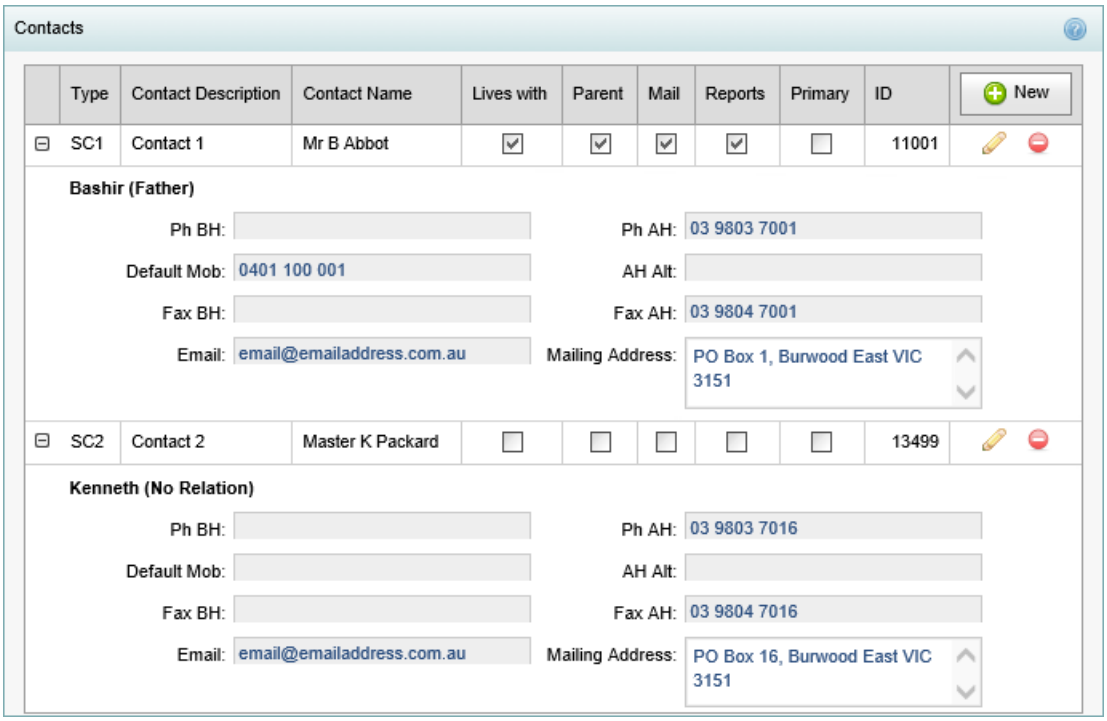
- All of the community members listed to the current tag list.
- Most of the community members. You can first add all of the community members then remove those that are not needed.

Also see:

- *Tagging community members from the Tag List window* (on page 139)
- *Deleting community members from the Tag List window* (on page 156)
- *Tagging individual community members from a grid* (on page 144)
- *Deleting community members from the current tag list from a grid* (on page 152).

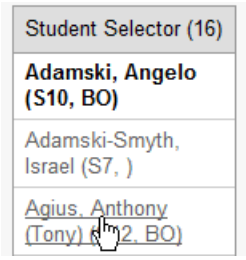
To add multiple community members to your current tag list:

1. Navigate to a:
   - Grid with an **ID** field. For example, the **Contacts** bar of **Student Maintenance**.

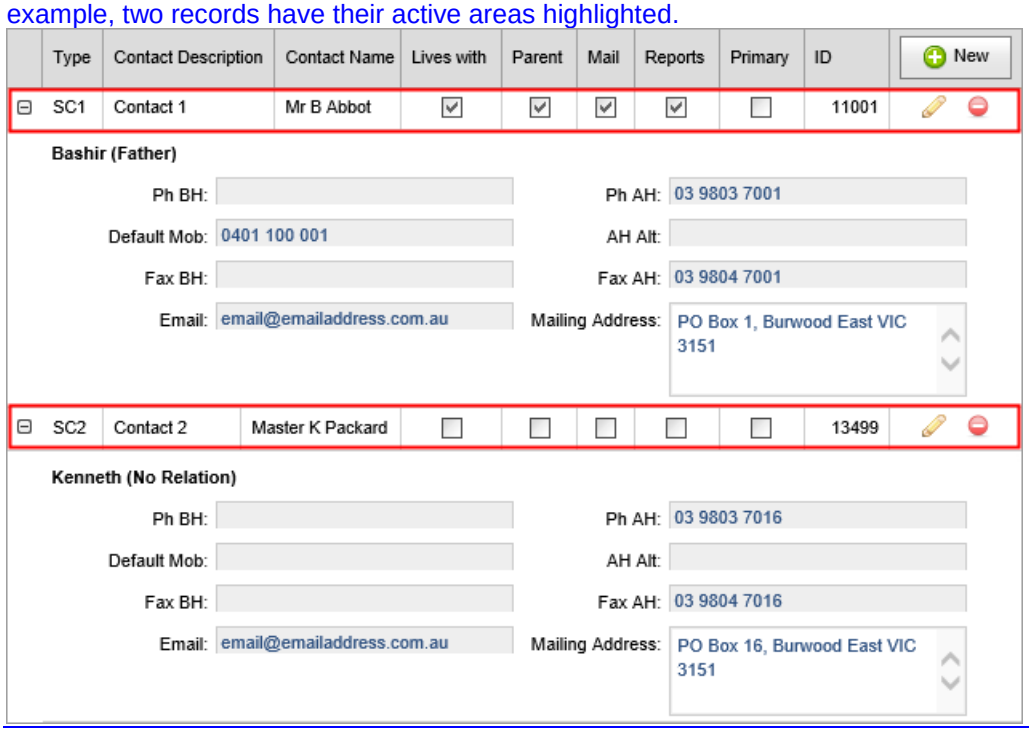


- Window with launch links to community members. For example, the **Student Selector** area.


2. Place the cursor over the community member you want to add to the current tag list.

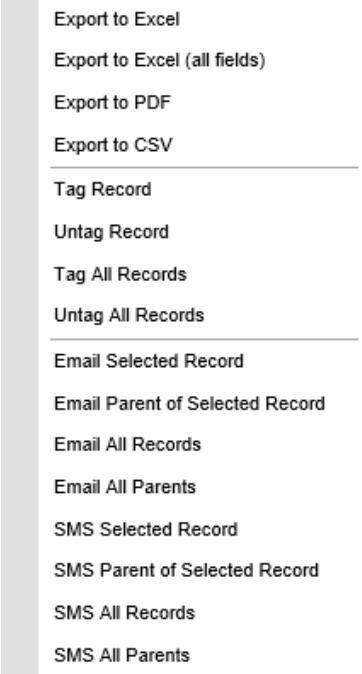



**Note:** In some cases, you need to be positioned over the community member's record. In the example, two records have their active areas highlighted.



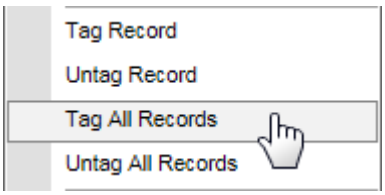
3. Right click.

   The following menu is displayed.



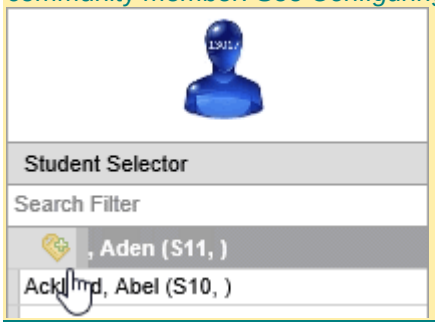

**Tip:** You can tag community members by hovering your mouse cursor on the left edge of the row then selecting the tag icon. Once the community member is tagged a green rectangle is displayed.


4. Select **Tag All Records**.




All the community member records are marked with the green tag indicator, added to the tag list and the count on the **Tags (n)** menu option is updated.

**Tip:** Hovering over the left of a record reveals a tag icon can be clicked to quickly tag or untag a community member. See *Configuring tag lists* in the System maintenance manual.



5. If needed, you can remove some community members from the current tag list:

   - Using the **Tag List** window. See *Deleting community members from the Tag List window* (on page 156).
   - From a grid. See *Deleting community members from the current tag list from a grid* (on page 152).

## Deleting community members from the current tag list from a grid

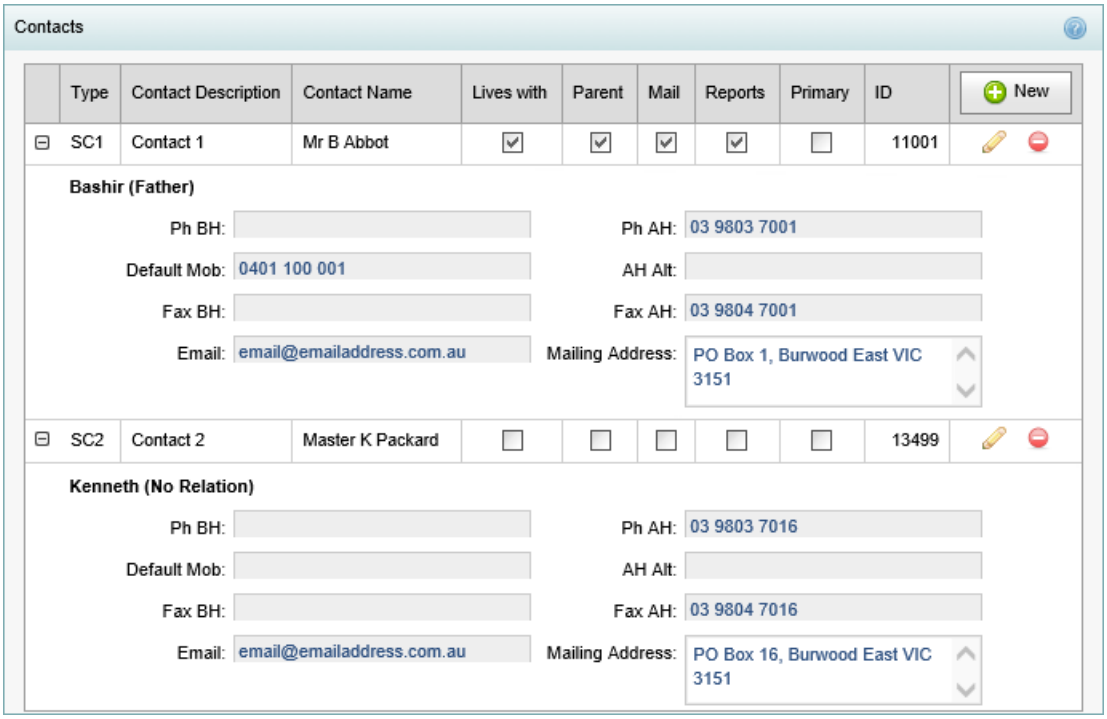
You can delete community members from the current tag list from any grid with an **ID** (**Synergetic ID**) field.

Also see:

- *Tagging community members from the Tag List window* (on page 139)
- *Deleting community members from the Tag List window* (on page 156)
- *Tagging individual community members from a grid* (on page 144)
- *Tagging multiple community members from a grid* (on page 148).

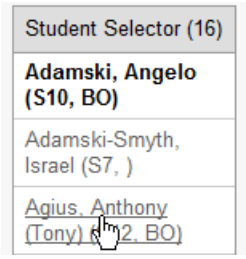
To delete community members from your current tag list:

1. Navigate to a:
   - Grid with an **ID** field. For example, the **Contacts** bar of **Student Maintenance**.

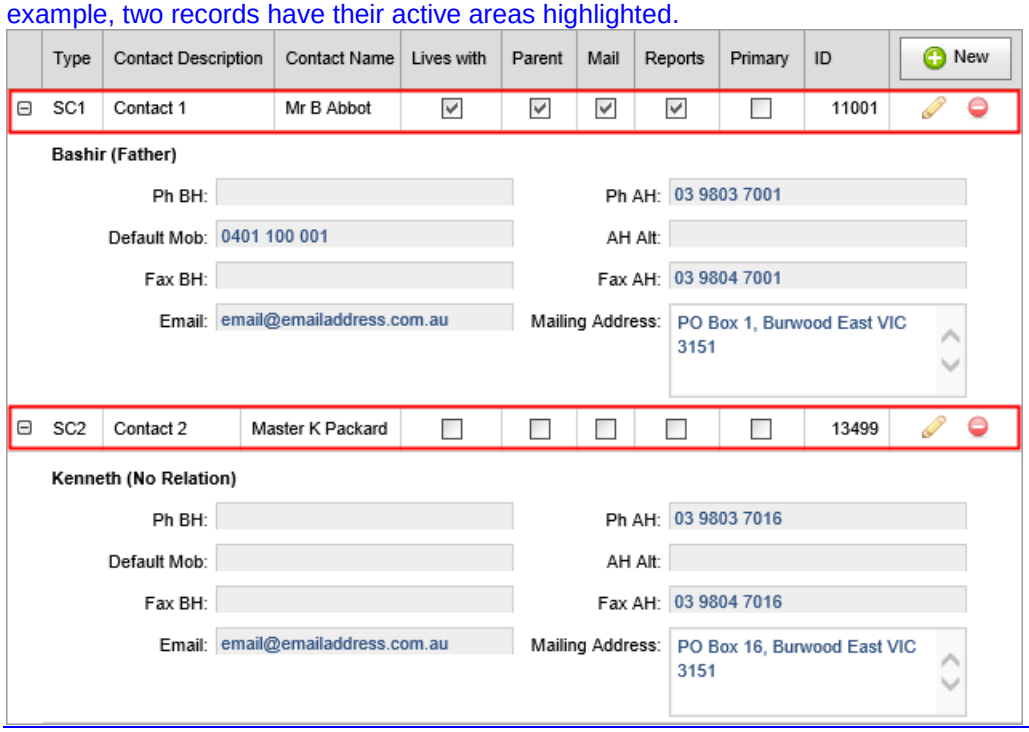



   - Window with launch links to community members. For example, the **Student Selector** area.

2. Place the cursor over the community member you want to delete from the current tag list.

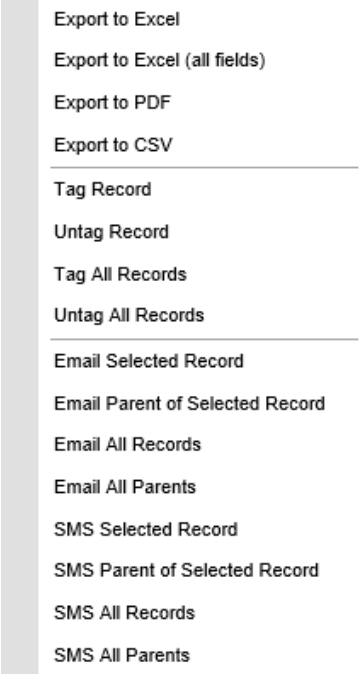



**Note:** In some cases, you need to be positioned over the community member's record. In the example, two records have their active areas highlighted.



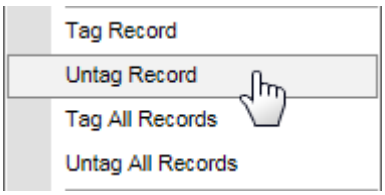
3. Right click.

   The following menu is displayed.



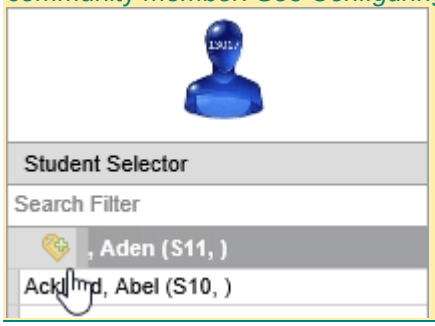

**Tip:** You can tag community members by hovering your mouse cursor on the left edge of the row then selecting the tag icon. Once the community member is tagged a green rectangle is displayed.


4. Select **Untag Record**.



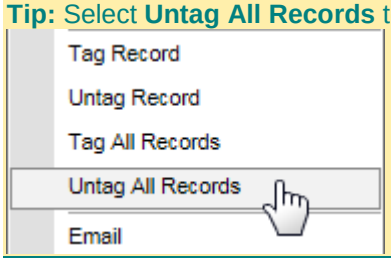

The community member is deleted from the tag list, the count on the **Tags (n)** menu option is reduced by **1**, and the green tag indicator is cleared.

**Tip:** Hovering over the left of a record reveals a tag icon can be clicked to quickly tag or untag a community member. See *Configuring tag lists* in the System maintenance manual.



5. Repeat steps **2** through **4** until there are no more community members to delete from the tag list.

**Tip:** Select **Untag All Records** to delete all community members from the tag list.



## Deleting community members from the Tag List window

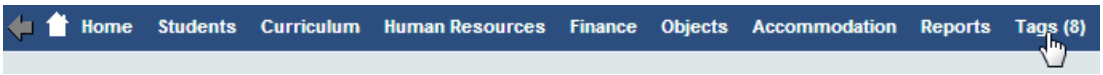
You can delete community members from your current tag list from the **Tag List** window.

Also see:

- *Tagging community members from the Tag List window* (on page 139)
- *Tagging individual community members from a grid* (on page 144)
- *Tagging multiple community members from a grid* (on page 148)
- *Deleting community members from the current tag list from a grid* (on page 152).

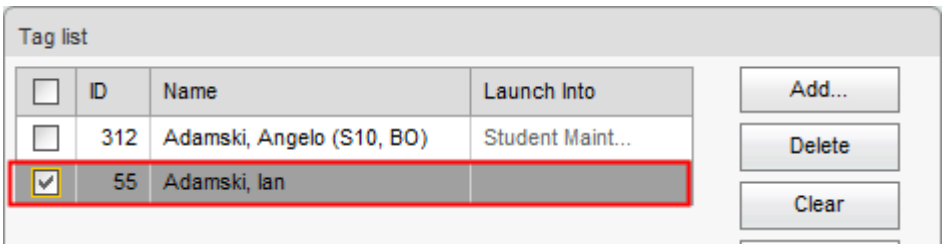
To delete community members from your current tag list:

1. Select **Tags (n)** from the SynWeb main menu.



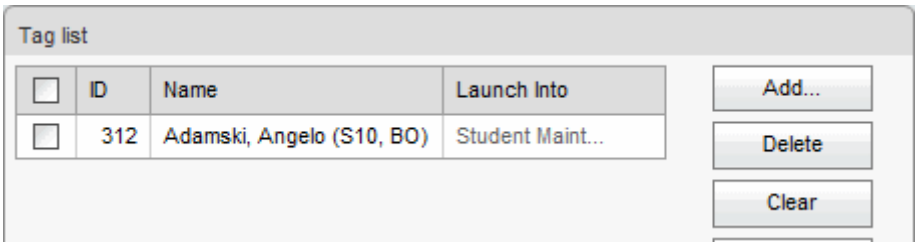

The **Tag List** window is displayed.


2. Select the community member you want to delete.



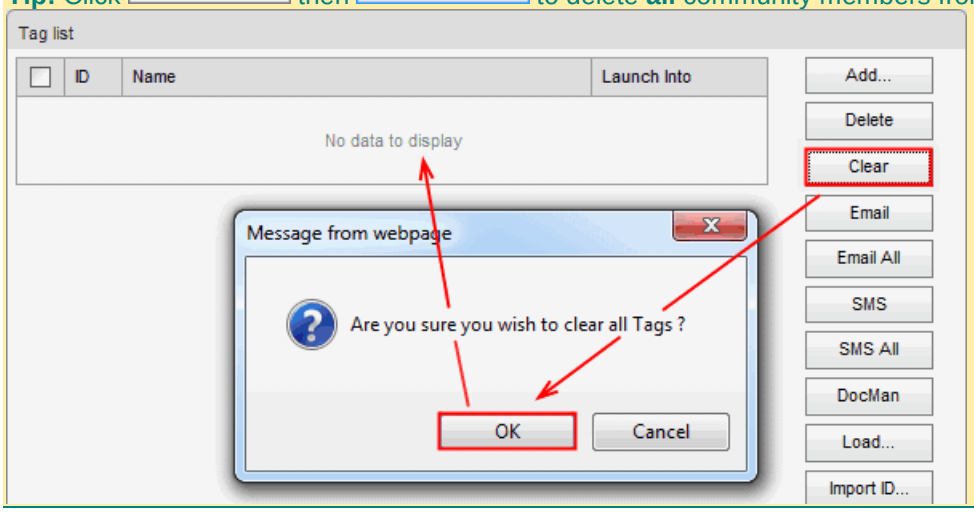
3. Click Delete.

   The community member is deleted from the **Tag List** window and the count on the **Tags (n)** menu option is reduced by **1**.




4. Repeat steps **2** and **3** until there are no more community members to delete from the tag list.

**Tip:** Click Clear then OK to delete **all** community members from the tag list.



## Loading tag lists

You can load a list of community members into your current tag list, from a tag list previously created and stored in SynWeb.

Also, see *Storing tag lists* (on page 170).

Use the **Load Tag Lists** window to:

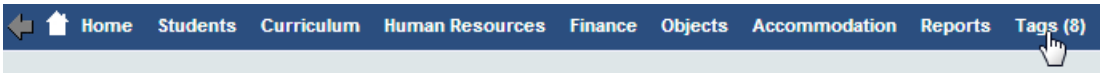
- list all public lists or just your own saved lists
- clear all items from the current list or add this list to the current tag list
- edit the selected list's name, expiry and whether or not it is public
- delete the selected list
- load the selected list.

From **Synergetic**, you can also load a list of community members from:

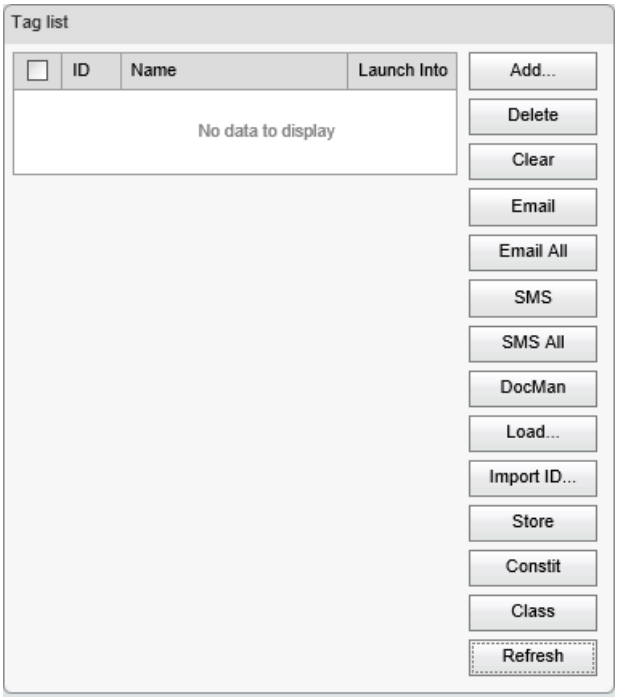
- An Excel spreadsheet. See *Loading community members from an Excel spreadsheet* in the **Synergetic** Introduction manual.
- A text file. See *Loading community members from a file* in the **Synergetic** Introduction manual.

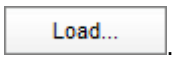
To load an existing tag list into the current tag list:

1. Select **Tags (n)** from the SynWeb main menu.




The **Tag List** window is displayed.

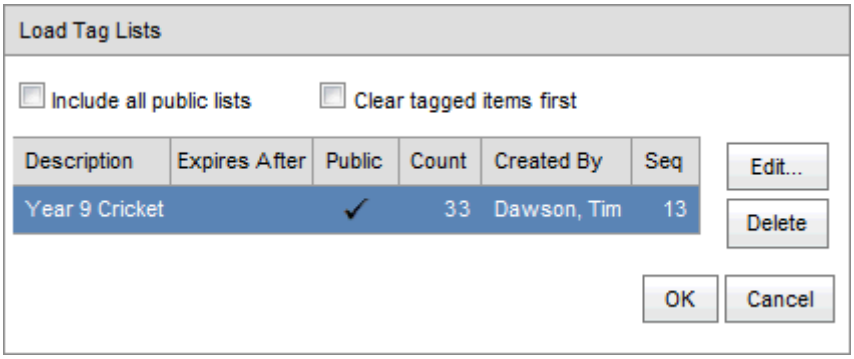



2. Click 

.

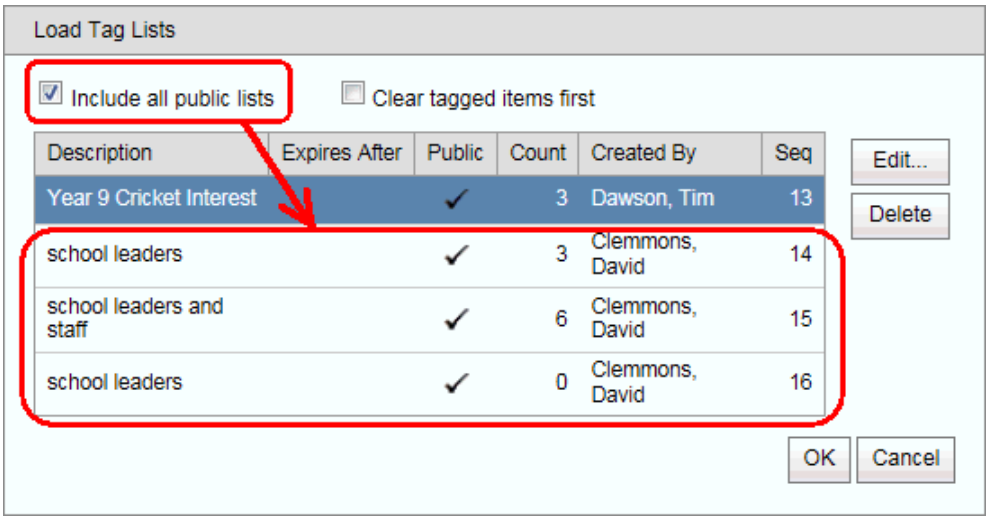
The **Load Tag Lists** window is displayed with:

- your private tag lists
- public tag lists created by you.



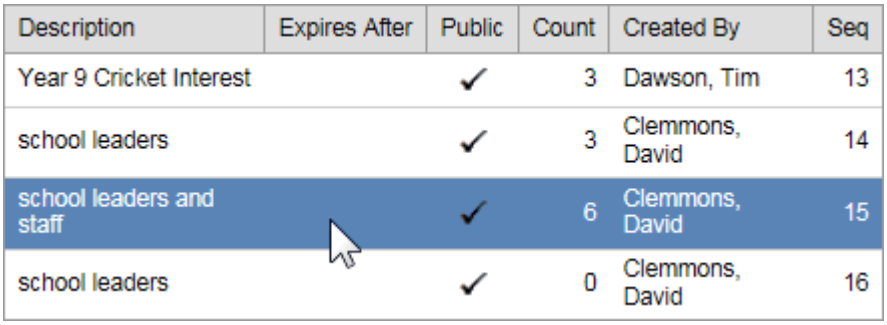
3. Select **Include all public lists**, if required.

   This displays all available public lists as well.



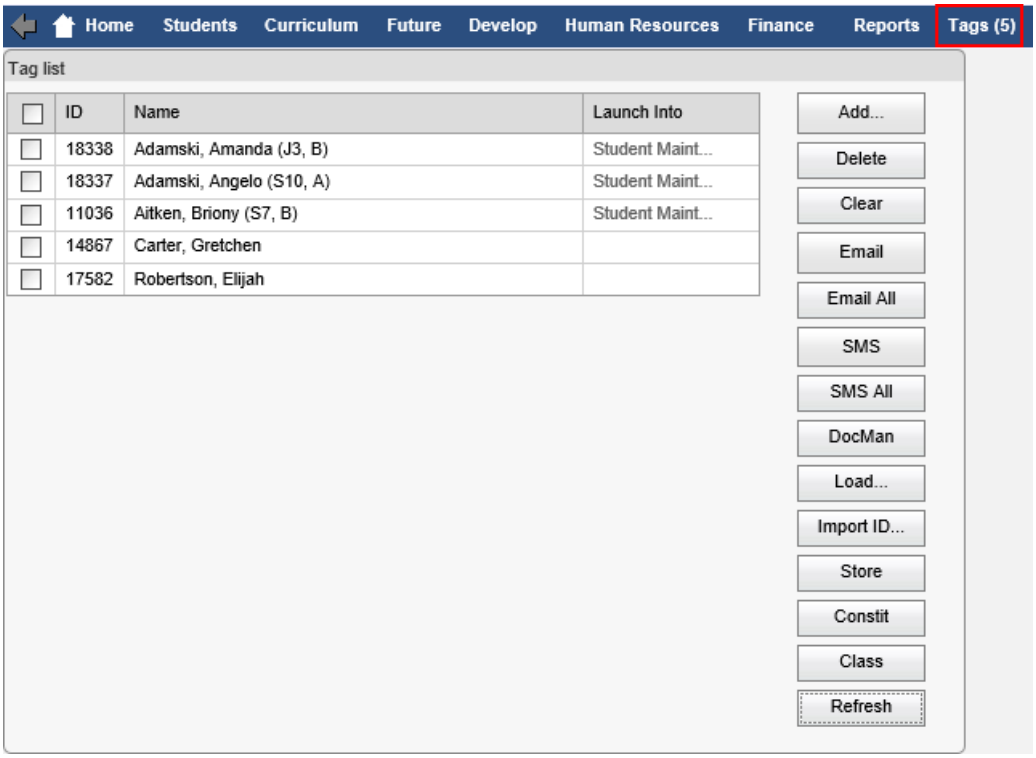

4. Select **Clear tagged items first**, if you are overwriting rather than appending to your current tag list.

5. Select the required tag list in the grid.



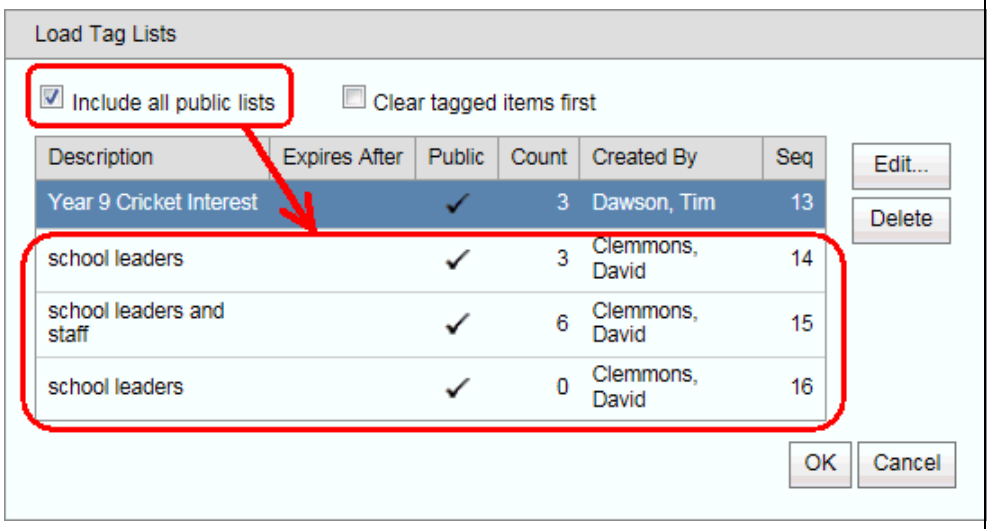
6. Click OK.

   The stored tag list is copied to your current tag list and the count on the **Tags (n)** menu option is updated.



## Load Tag Lists window key fields and buttons

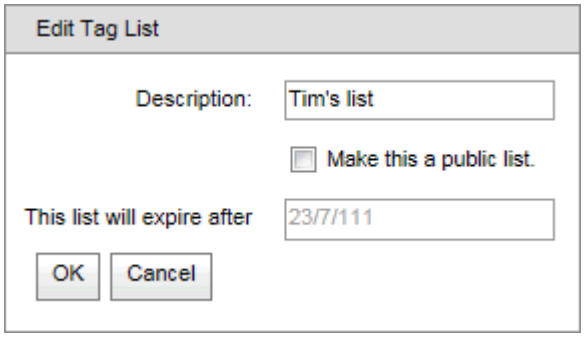
### Fields

| Field | Description |
|---|---|
| **Include all public lists** | Select the field to display any public tag lists that you have **not** created yourself.<br>  <br><br>These can be used by all staff members, rather than each staff member having to create a new list each to serve the same purpose.<br>Clear the **Include all public lists** field to display only tag lists that you have created.<br>**Note:** If you have created any public lists yourself these are displayed even if the **Include all public lists** field is cleared. |
| **Clear tagged items first** | Select this field to clear the current tag list before you load new community members.<br>**Tip:** Save any existing tagged records on the **Tag List** window, if required, so that they these are available at a later date.<br>Clear this field to append the new community members to the current tag list. |

## Grid area fields

| Field | Description |
|---|---|
| **Description** | Meaningful description of the tag list. |
| **Expires After** | Date that the tag list is due to expire.<br>This shows **Never** if public lists are set not to expire. |
| **Public List** | Tag lists that are available to all users at your organisation have this field selected.<br>The field is cleared if the tag list is private to you alone. |
| **Count** | Number of community members included in the tag list. |

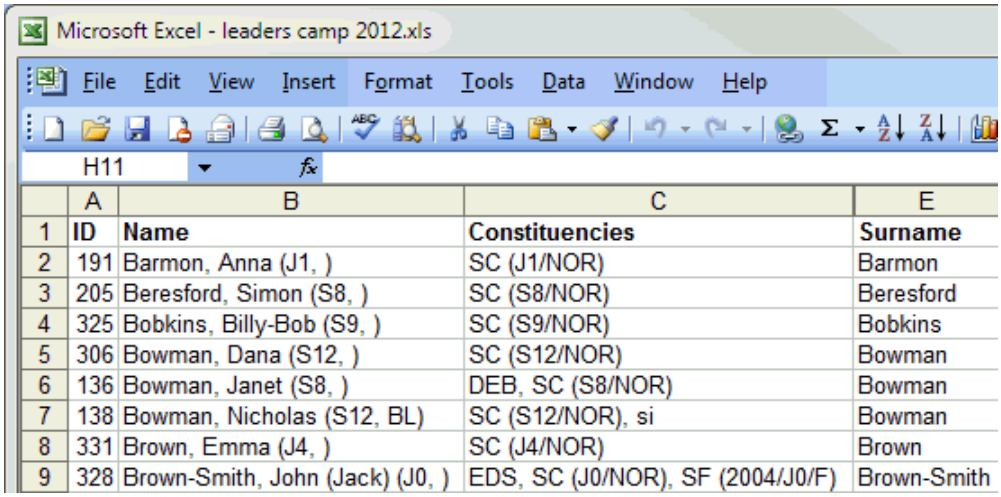
## Buttons

| Button | Description |
|---|---|
| Edit... | Edit the following tag list details:<br>• the description of the tag list<br>• whether to make the list public to other users or not.<br>  <br> |
| Delete | Delete the selected tag list. |

## Creating tag lists from imported Synergetic IDs

You can add community members from an external file to your current tag list, from the **Tag List** window.

Before you start, prepare a spreadsheet or file containing the Synergetic IDs of the community members you want to add to the current tag list.




| | A | B | C | E |
|---|---|---|---|---|
| 1 | **ID** | **Name** | **Constituencies** | **Surname** |
| 2 | 191 | Barmon, Anna (J1, ) | SC (J1/NOR) | Barmon |
| 3 | 205 | Beresford, Simon (S8, ) | SC (S8/NOR) | Beresford |
| 4 | 325 | Bobkins, Billy-Bob (S9, ) | SC (S9/NOR) | Bobkins |
| 5 | 306 | Bowman, Dana (S12, ) | SC (S12/NOR) | Bowman |
| 6 | 136 | Bowman, Janet (S8, ) | DEB, SC (S8/NOR) | Bowman |
| 7 | 138 | Bowman, Nicholas (S12, BL) | SC (S12/NOR), si | Bowman |
| 8 | 331 | Brown, Emma (J4, ) | SC (J4/NOR) | Brown |
| 9 | 328 | Brown-Smith, John (Jack) (J0, ) | EDS, SC (J0/NOR), SF (2004/J0/F) | Brown-Smith |

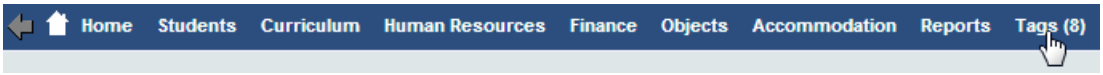
**Tip:** You can export community members from Synergetic then update the spreadsheet. See *Exporting information to Microsoft Excel* in the **Synergetic** Introduction manual.

Also see:

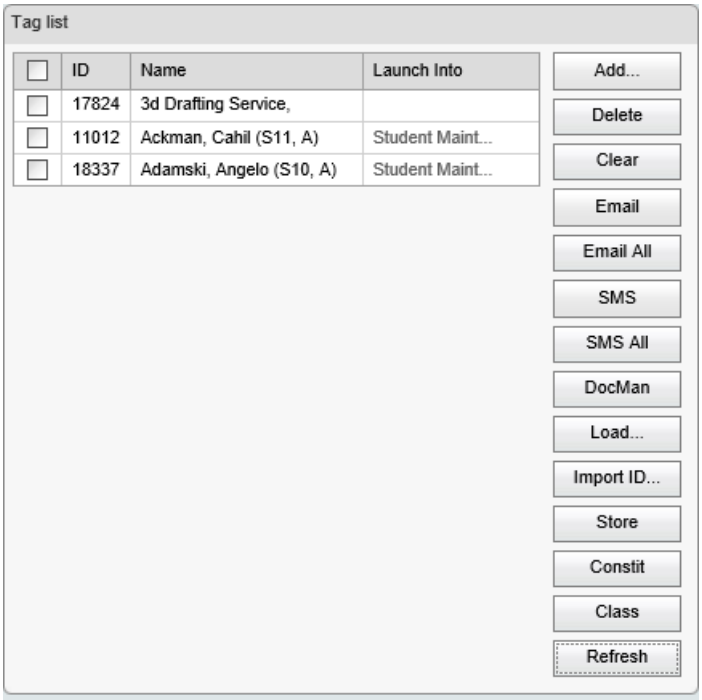
- *Tagging community members from the Tag List window* (on page 139)
- *Tagging individual community members from a grid* (on page 144)
- *Tagging multiple community members from a grid* (on page 148).

To add community members from an external file to your current tag list:

1. Select **Tags (n)** from the SynWeb main menu.

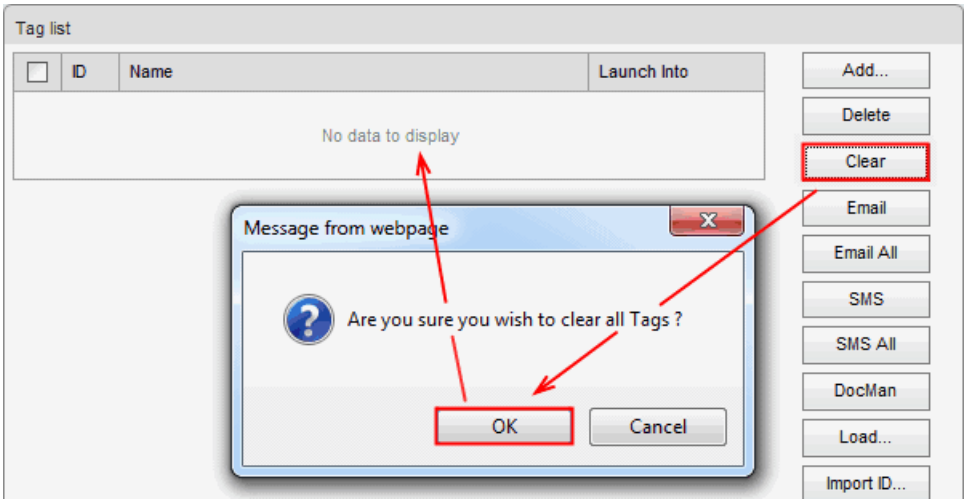



The **Tag List** window is displayed.



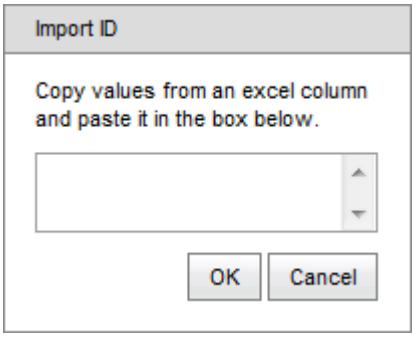
2. Delete **all** community members from the tag list, if needed. To do this:

   - click Clear
   - click OK.

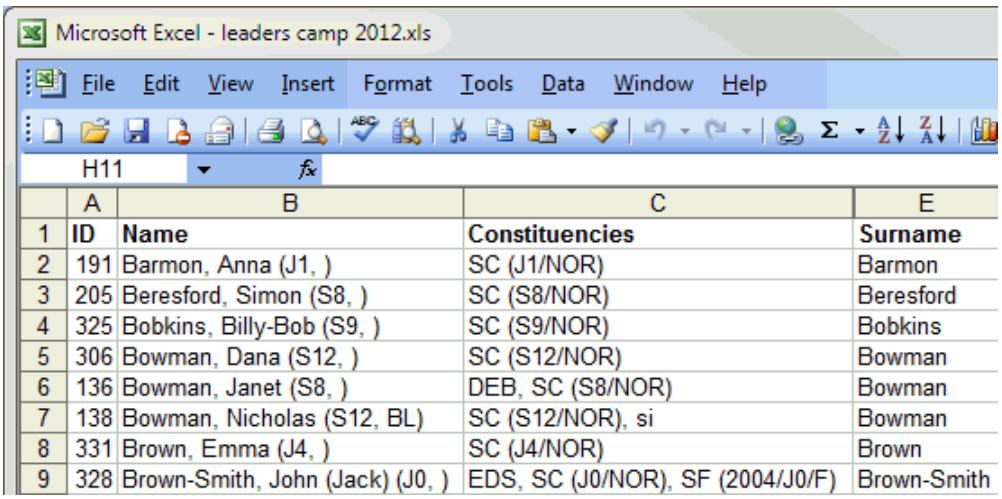



3. Click Import ID...

   The **Import ID** window is displayed.

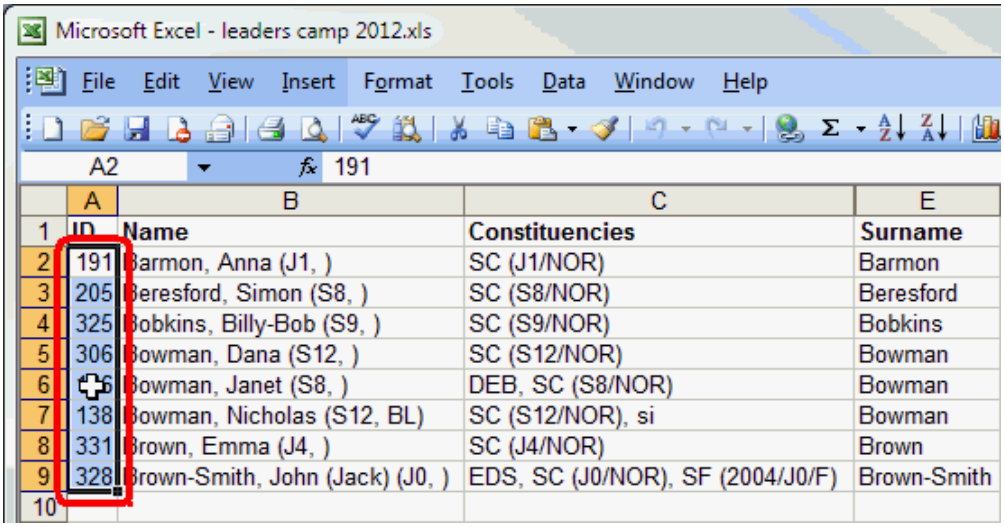



4. Switch to the spreadsheet.




| | A | B | C | E |
|---|---|---|---|---|
| 1 | ID | Name | Constituencies | Surname |
| 2 | 191 | Barmon, Anna (J1, ) | SC (J1/NOR) | Barmon |
| 3 | 205 | Beresford, Simon (S8, ) | SC (S8/NOR) | Beresford |
| 4 | 325 | Bobkins, Billy-Bob (S9, ) | SC (S9/NOR) | Bobkins |
| 5 | 306 | Bowman, Dana (S12, ) | SC (S12/NOR) | Bowman |
| 6 | 136 | Bowman, Janet (S8, ) | DEB, SC (S8/NOR) | Bowman |
| 7 | 138 | Bowman, Nicholas (S12, BL) | SC (S12/NOR), si | Bowman |
| 8 | 331 | Brown, Emma (J4, ) | SC (J4/NOR) | Brown |
| 9 | 328 | Brown-Smith, John (Jack) (J0, ) | EDS, SC (J0/NOR), SF (2004/J0/F) | Brown-Smith |

5. Select the Synergetic IDs that you want to import.

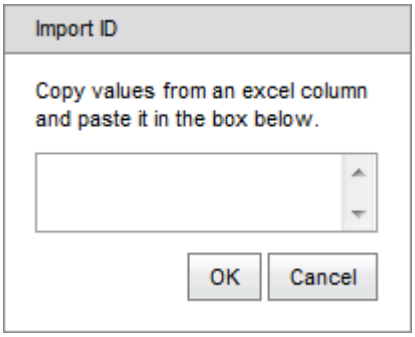



| | A | B | C | E |
|---|---|---|---|---|
| 1 | ID | Name | Constituencies | Surname |
| 2 | 191 | Barmon, Anna (J1, ) | SC (J1/NOR) | Barmon |
| 3 | 205 | Beresford, Simon (S8, ) | SC (S8/NOR) | Beresford |
| 4 | 325 | Bobkins, Billy-Bob (S9, ) | SC (S9/NOR) | Bobkins |
| 5 | 306 | Bowman, Dana (S12, ) | SC (S12/NOR) | Bowman |
| 6 | 6 | Bowman, Janet (S8, ) | DEB, SC (S8/NOR) | Bowman |
| 7 | 138 | Bowman, Nicholas (S12, BL) | SC (S12/NOR), si | Bowman |
| 8 | 331 | Brown, Emma (J4, ) | SC (J4/NOR) | Brown |
| 9 | 328 | Brown-Smith, John (Jack) (J0, ) | EDS, SC (J0/NOR), SF (2004/J0/F) | Brown-Smith |
| 10 | | | | |

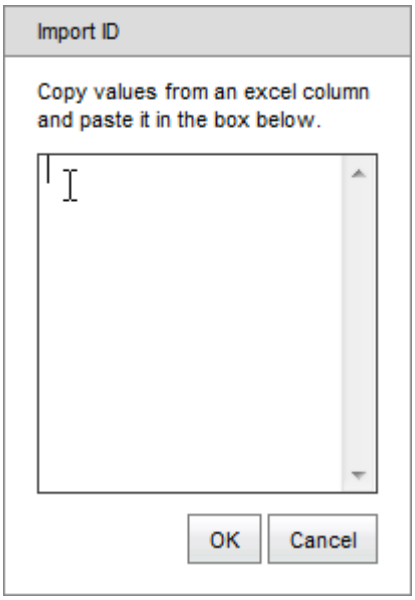
6. Copy the Synergetic IDs to your clipboard.

**Tip:** In Windows, press **Ctrl** and **c**.

7. Switch back to the **Import ID** window of SynWeb.

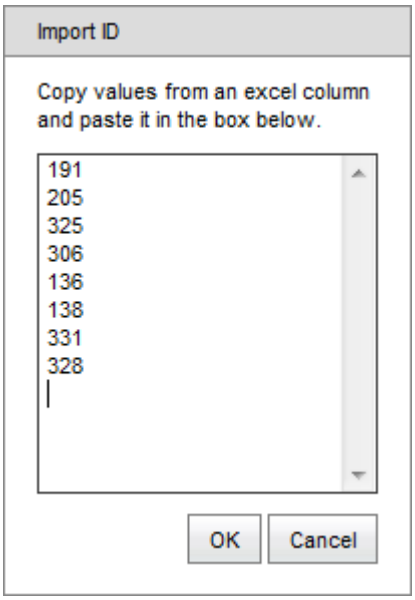


8. Click in the field.



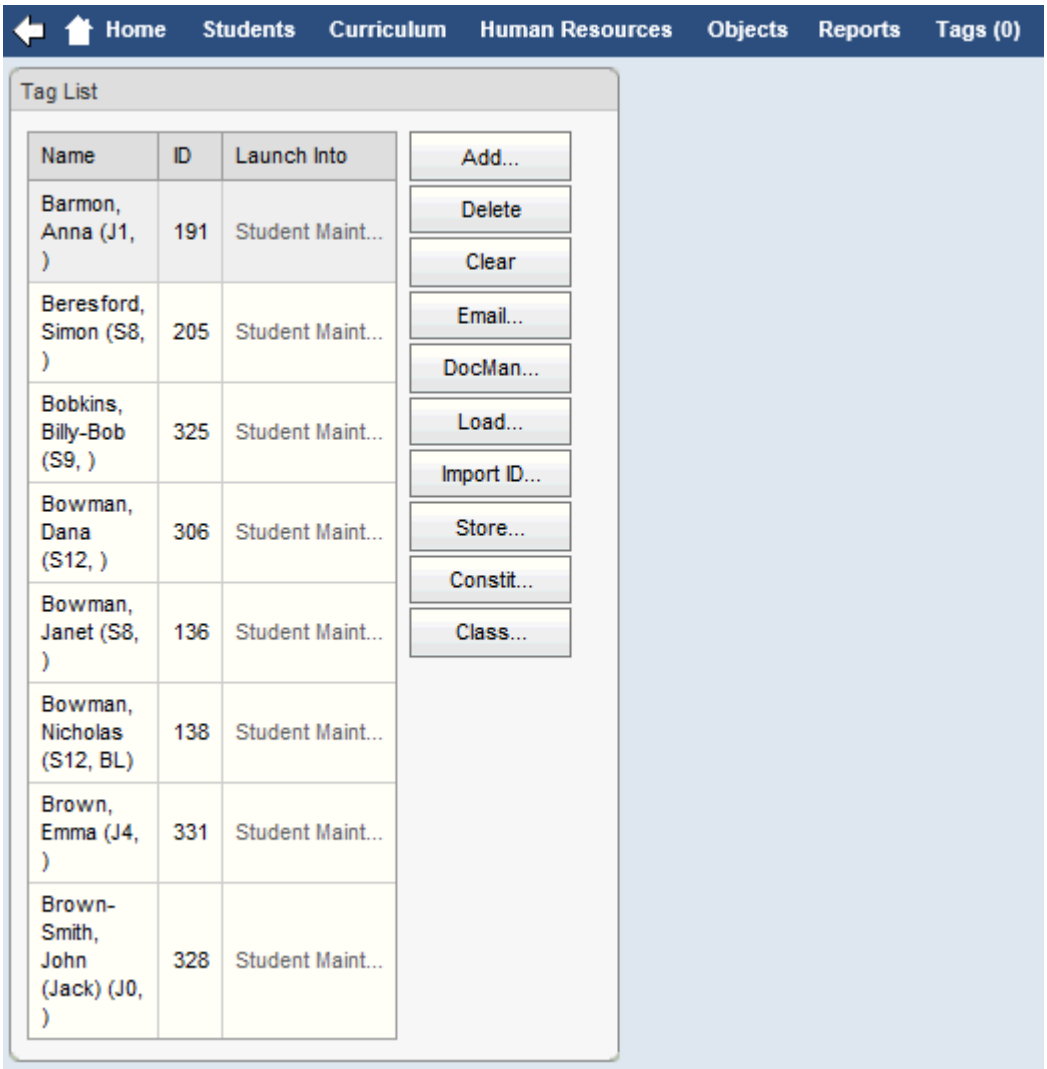

9. Paste the Synergetic IDs from your clipboard into the field.

**Tip:** In Windows, press **Ctrl** and **v**.



10. Click OK.

Community members with valid Synergetic IDs are added to the tag list and the count on the **Tags (n)** menu option is updated.



## Storing tag lists

When you create a group of community members in a tag list, the list can either be:

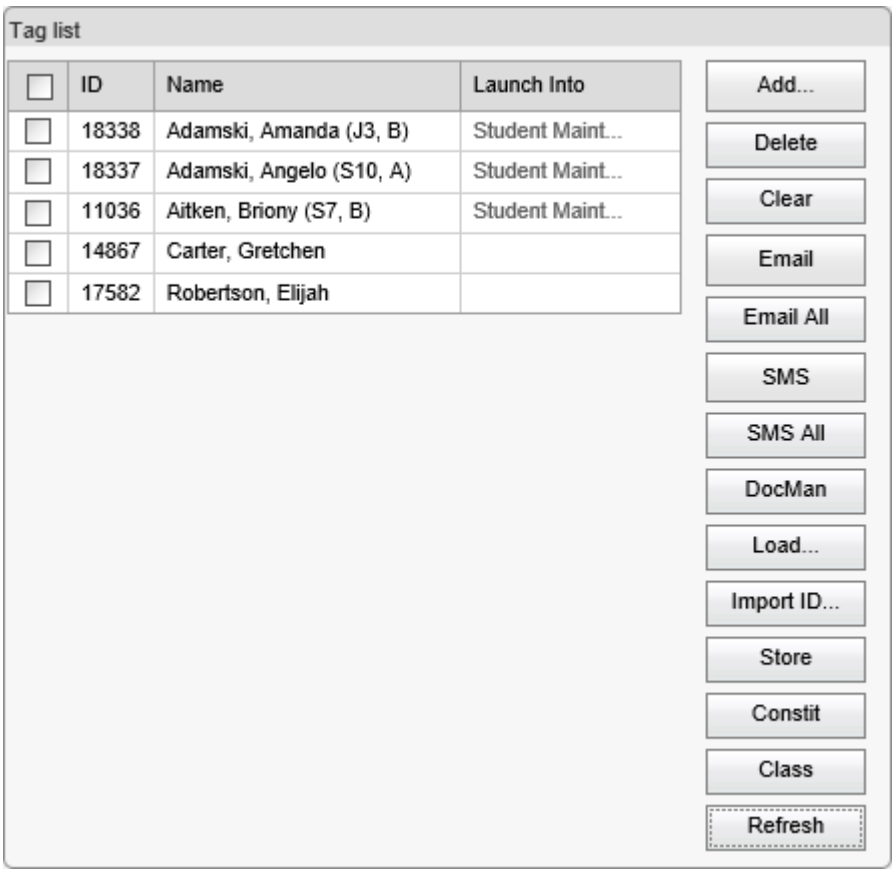
- Temporary for the duration of your Synergetic session.
- Permanent by storing it. When you store a tag list, you can either:
  - keep it private just for you to use
  - make it available publicly for anyone to use.

**Note:** To retrieve a stored tag list, see *Loading tag lists* (on page 158).

To store a tag list:

1. Create your tag list. See:
   - *Tagging community members from the Tag List window* (on page 139)
   - *Tagging individual community members from a grid* (on page 144)
   - *Tagging multiple community members from a grid* (on page 148).

   The **Tag List** window is displayed.



2. Click Store.

   The **Store Tag List** window is displayed.


3. Type in a meaningful **Description** for the list.

4. Select **Make this a public list** if you want other people to be able to use the tag list.

   **Note:** The system administrator for your organisation has the ability to edit or delete public tag lists.

5. Click OK.

   The tag list is stored for later use.

## Store Tag List window key fields

| Field | Description |
|---|---|
| **Description** | Meaningful description for the tag list.<br>The **Description** field is a drop-down list showing existing tag lists that you own, either:<br>• private tag lists<br>• public tag lists that you maintain on behalf of others. |
| **Make this a public list** | Select this field to make the tag list available to other users at your organisation as well.<br>When this field is cleared, the tag list is only available for your use. You can convert the tag list to a public list later if required. |
| **List expires after** | The expiry date is set based on the settings in **Configuration File Maintenance**. There are two expiry settings available:<br>• **PrivateList:ExpiryDays** which defaults to **30** days.<br>See **PrivateList:ExpiryDays** configuration setting in the **Synergetic** System maintenance manual.<br>• **PublicList:ExpiryDays** which defaults to **never to expire**.<br>See **PublicList:ExpiryDays** configuration setting in the **Synergetic** System maintenance manual.<br>The tag list is marked as **deleted** once it passes its expiry date but the tag list is still present in the Synergetic database. *Contact Synergetic Management Systems* (on page 287) to help to recover a tag list that has just passed its expiry. Synergetic deletes any expired tag lists 30 days after their expiry date.<br>This shows **Never** if public lists are set not to expire. |

## Extending the expiry dates of tag lists

Tag lists are intended for temporary use for such things as maintaining a list of students who have yet to return their medical forms prior to an excursion.

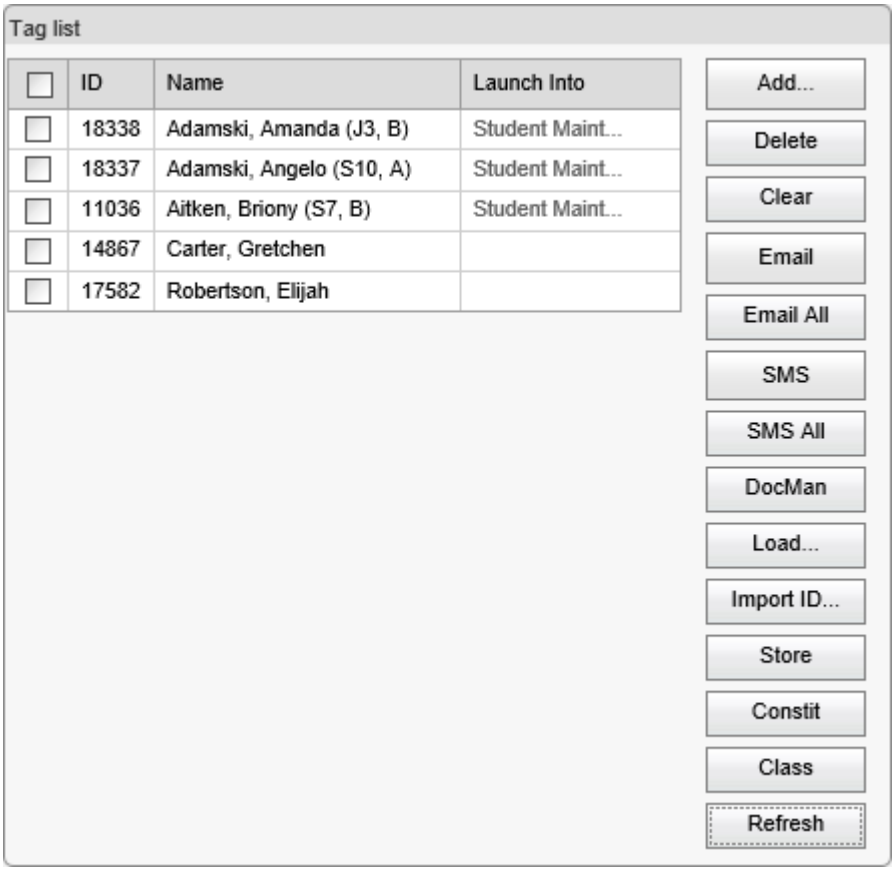
Private tag lists are set to expire after a configurable amount of time, such as 30 days. If you need to extend a private tag lifetime past its current expiry date the best way is to:

- load the tag list to the **Tag List** window
- store the tag list again, with its new expiry date.

To extend your private tag list's expiry date:

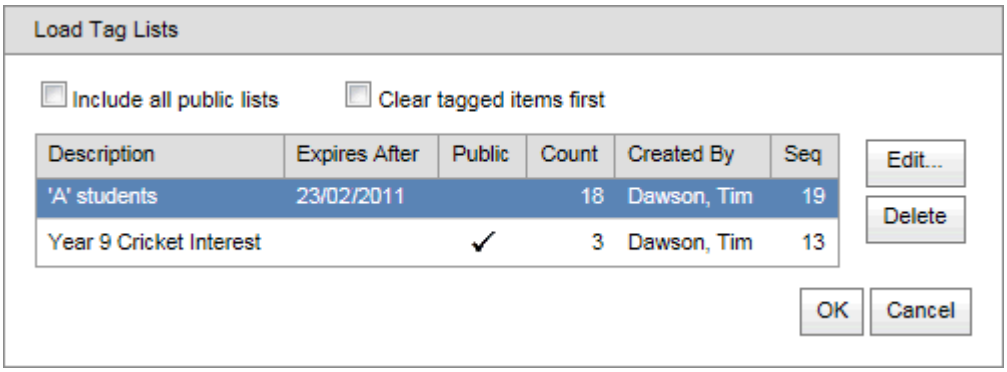
1. Select **Tags (n)** from the SynWeb main menu.

   The **Tag List** window is displayed.



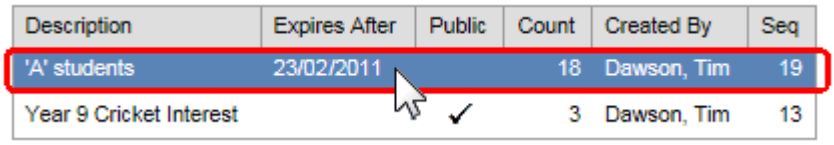
2. Click Load...

   The **Load Tag Lists** window is displayed.



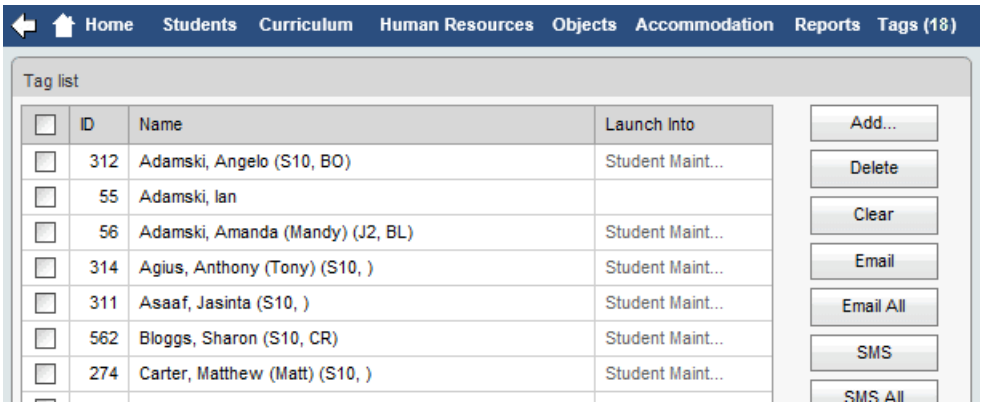

3. Select **Clear tagged items first**, if there are entries in the current tag list.


4. Select the tag list that you want to extend.




5. Click OK.

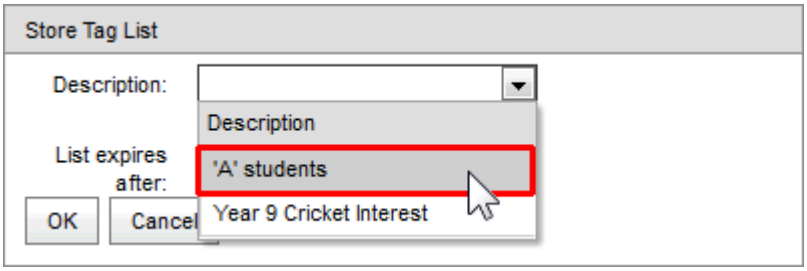
   The **Tag List** window is populated with the relevant community members.



6. Click Store...

   The **Store Tag List** window is displayed.


7. Select the tag list from the drop-down list.




8. Click OK.

   The tag list is re-saved with the new expiry date.

## Saving tag lists into constituencies

If the community members in the tag list are not already members, save the tag list into either a specific:

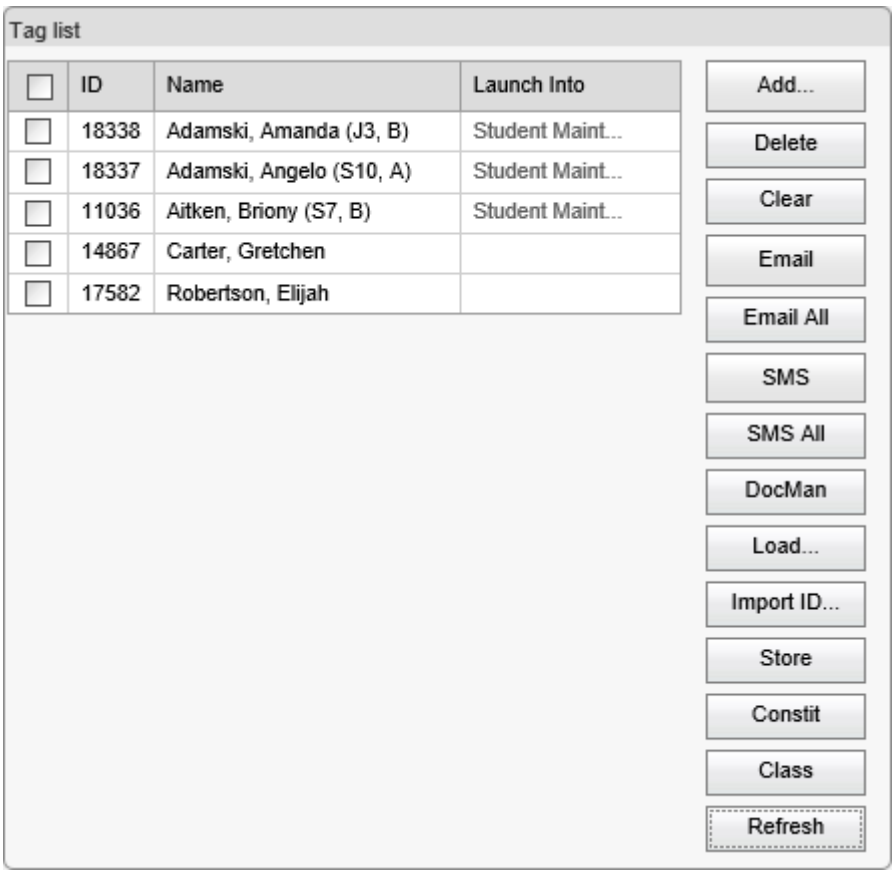
- Constituency, as described below.
- Class. See *Saving tag lists into classes* (on page 179).

This is the main method used to convert community members from a tag list to a more permanent group, either as a user-defined constituency or a class.

To add the community members in a tag list to a user-defined constituency:

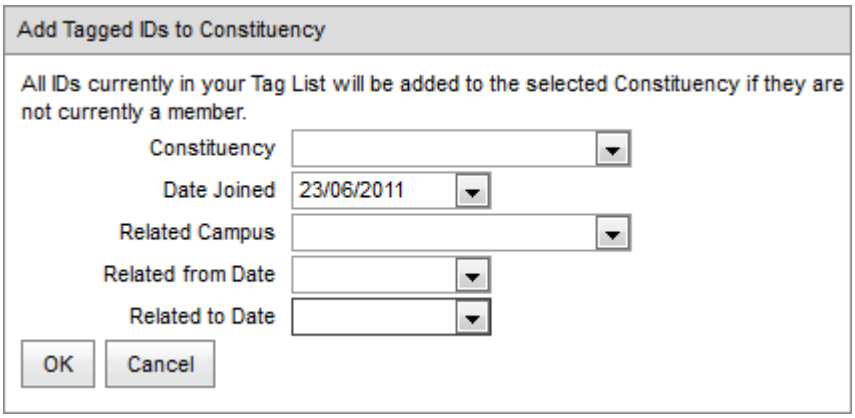
1. Create your tag list. See:
   - *Tagging community members from the Tag List window* (on page 139)
   - *Tagging individual community members from a grid* (on page 144)
   - *Tagging multiple community members from a grid* (on page 148).

   The **Tag List** window is displayed.

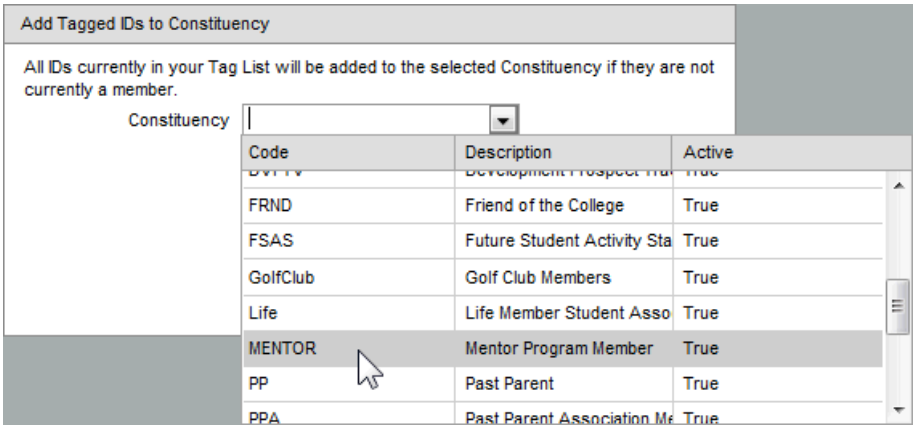


2. Click Constit.

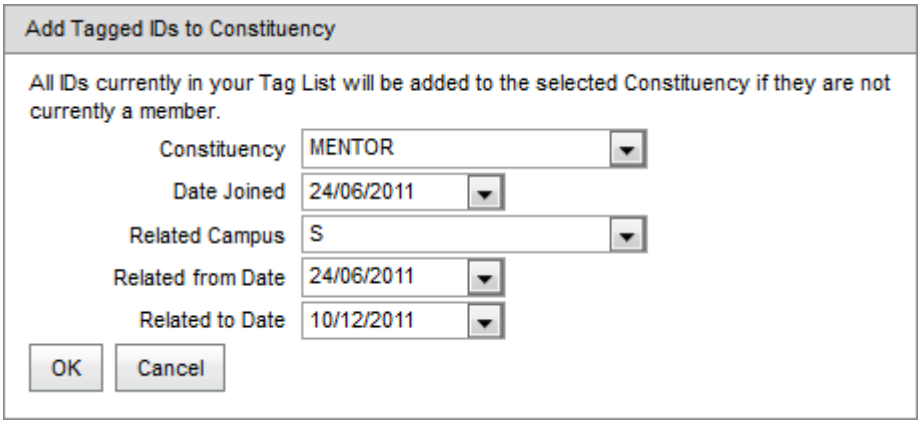
   The **Add Tagged IDs to Constituency** window is displayed.




3. Select the **Constituency** from the drop-down list.




4. Enter other details, as required. See the field descriptions below.




5. Click OK.

   The community members in the tag list are added to the selected constituency, if they are not already in the constituency.

## Add Tagged IDs to Constituency window key fields

| Field | Description |
|---|---|
| **Constituency** | Constituency code:<br>• Synergetic constituencies are prefixed with @<br>• user-defined constituencies generally do not have a prefix. |
| **Date Joined** | Date the community member(s) is added to the constituency. |
| **Related Campus** | Campus the community member(s) is a constituent of, if applicable.<br>For example, use this field when a new staff member is appointed and assigned to a campus. |
| **Related from Date** | Date the community member(s) started their involvement relating to the constituency. For example:<br>• a member of the **School Council** constituency has the date they started at the school in any capacity as the **From** date.<br>• a member of the **Past School Council** constituency has the date they started at the school council as the **From** date. |
| **Related to Date** | Date the community member(s) was removed from the constituency.<br>**Note:** Do not complete the field when adding community member(s) to a constituency. Some organisations may use this field when entering historical information or when they know the date that the community member's constituency membership ends. |

## Saving tag lists into classes

If the community members in the tag list are not already members, save the tag list into either a specific:

- Class, as described below.
- Constituency. See *Saving tag lists into constituencies* (on page 176).

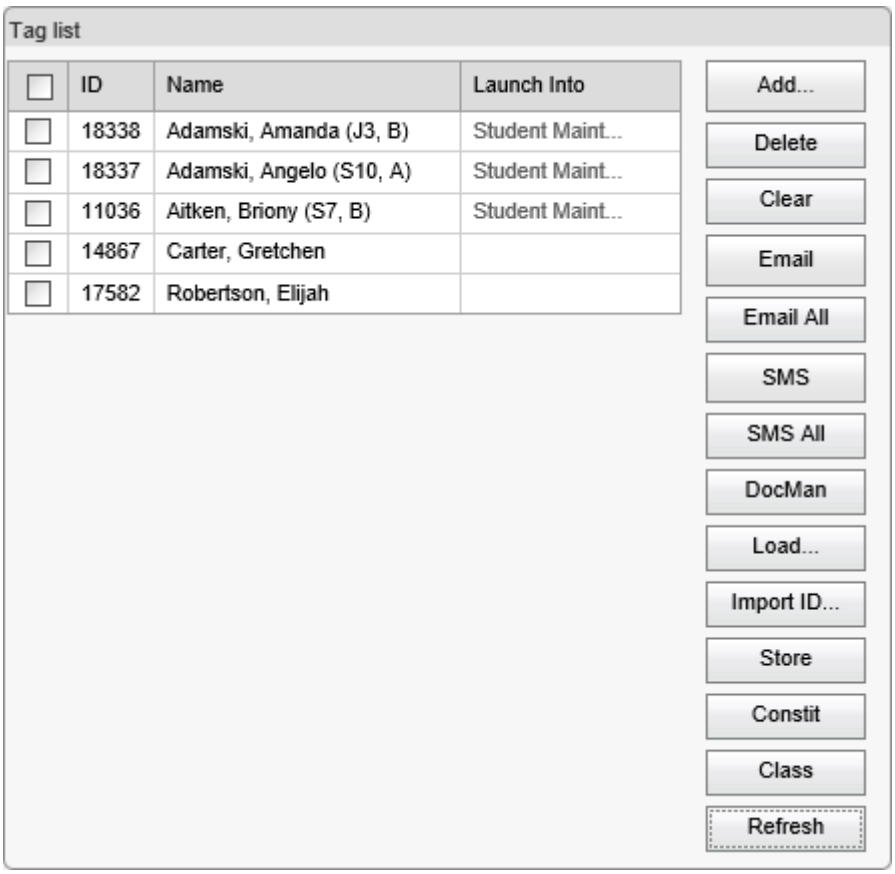
This is the main method used to convert community members from a tag list to a more permanent group, either as a user-defined constituency or a class.

To add the current students in a tag list to a class:

1. Create your tag list. See:

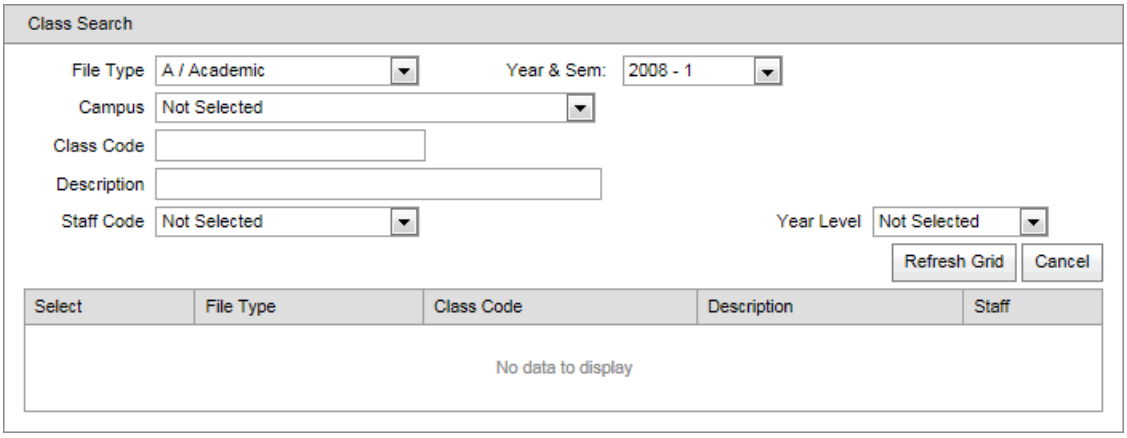
   - *Tagging community members from the Tag List window* (on page 139)
   - *Tagging individual community members from a grid* (on page 144)
   - *Tagging multiple community members from a grid* (on page 148).

   The **Tag List** window is displayed.



2. Click Class.

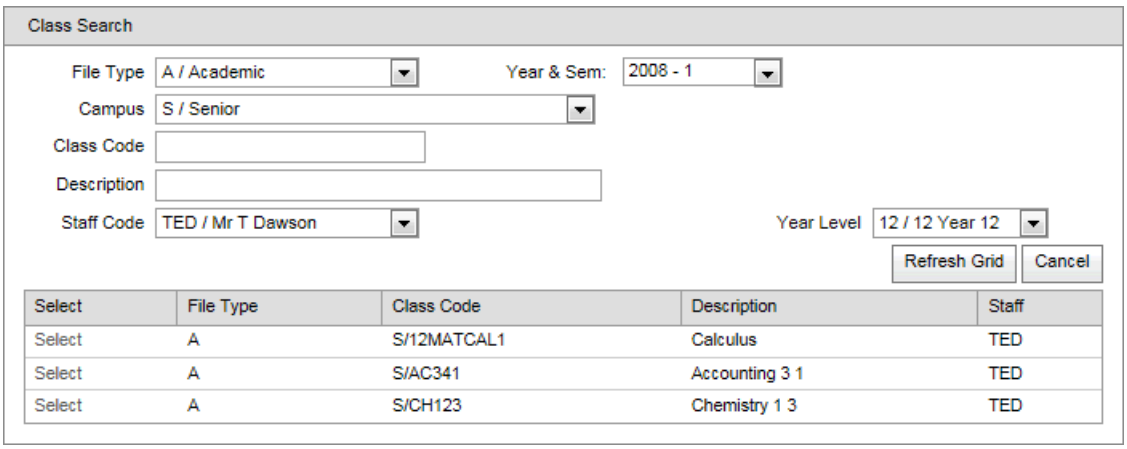
   The **Class Search** window is displayed.




3. Enter the search criteria. See the field descriptions below.

4. Click Refresh Grid.

   The **Class Search** window is redisplayed with the results of the search.



5. Click the **Select** command link next to the class to add the students to it.

| Select | File Type | Class Code | Description | Staff |
|---|---|---|---|---|
| Select | A | S/12MATCAL1 | Calculus | TED |
| Select | A | S/AC341 | Accounting 3 1 | TED |
| Se | A | S/CH123 | Chemistry 1 3 | TED |

The students in the tag list are added to the selected class, if they are not already in the class.

**Tip:** You can view the students in the class on the **Students** bar of **Class Maintenance**. See *Class Maintenance - Students bar* in the Assessments and Reports manual.

Class Maintenance: Accounting 3 1 (AC341/S)

| Code | Description (4) |
|---|---|
| 12MATCAL1 | Calculus |
| **AC341** | **Accounting 3 1** |
| CH123 | Chemistry 1 3 |
| 12KayakA | Yr 12 Kayak A |

General
Staff
Charges
Students

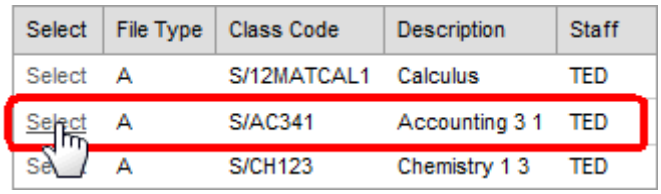
| Name | Class Status | Start Date | Stop Date | ID |
|---|---|---|---|---|
| Adamski, Amanda (J2, ) | | 24/06/2011 | | 56 |
| Adamski, Angelo (S10, BO) | Enrolled | 1/02/2007 | | 312 |
| Agius, Byron (S12, BL) | | 24/06/2011 | | 287 |
| Agius, Anthony (Tony) (S10, ) | | 24/06/2011 | | 314 |

## Class Search window key fields, links and buttons

### Fields

| Field | Description |
|---|---|
| **File Type** | Search for classes of a particular file type, either academic or co-curricular.<br>Defaults to **A / Academic**. Select an alternative from the **FileType** drop-down list if needed. |
| **Year & Sem** | Search for the year and semester when the class is offered.<br>Defaults to the current year and semester, term or reporting period. |
| **Campus** | Search for the campus that the class is taught at, if applicable. |
| **Class Code** | Search for the unique identifier of the class, if an individual class is required. |
| **Description** | Search using the class description. You can search on part of the description, or use the % character as a wildcard. |
| **Staff Code** | Search for the identifier of the staff member taking the class. |
| **Year Level** | Search for the year level that the class applies to. |

### Grid area fields and links

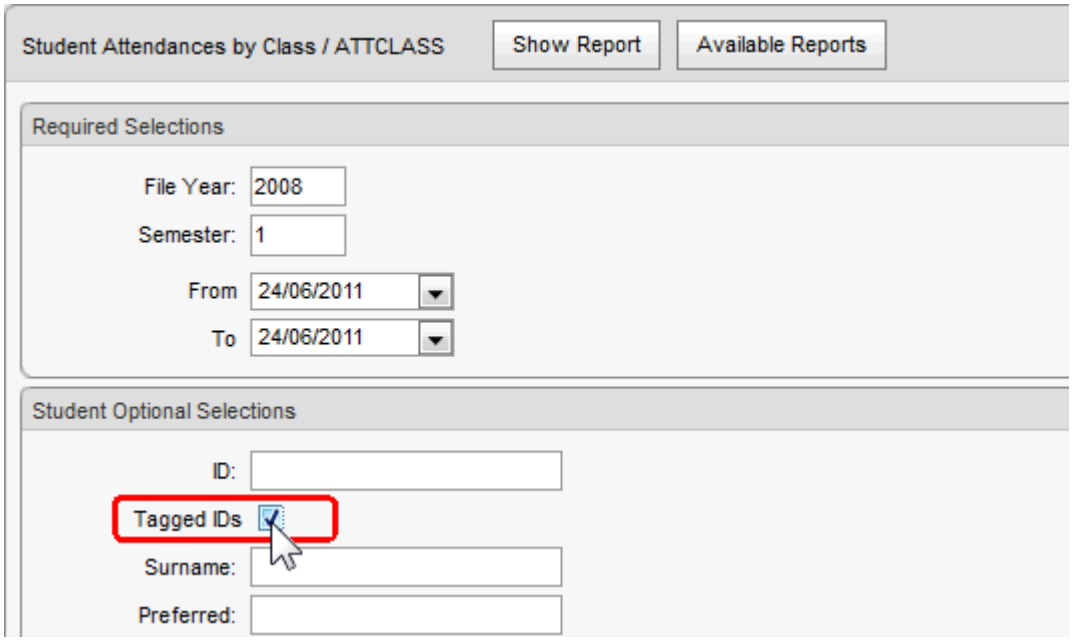
| Field / Link | Description |
|---|---|
| **Select** | Select the command link next to the class to add the students in the current tag list to the class.<br>  <br> |
| **File Type** | File type for the class. |
| **Class Code** | Unique identifier for the class. |
| **Description** | Description of the class. |

### Buttons

| Button | Description |
|---|---|
| Refresh Grid | Search for classes based on the search criteria you have entered. The results are returned in the grid area. |
| Cancel | Close the **Class Search** window without adding community members to a class. |

## Running reports on tag lists

The example below shows the selections available on a Crystal Report. If you select the **Tagged IDs** field, the report is generated for community members who are in your current tag list.



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# Managing tasks

You can manage a list of tasks for yourself or for other people from within Synergetic or SynWeb. Tasks can be created and allocated to you or another community member to complete. This is a very useful tool for managing your day-to-day work, and for allocating work to another person.

Tasks can have sub-tasks. You can create task templates including sub-tasks for common duties, such as setting up a new staff member. See *Using task templates* (on page 219).

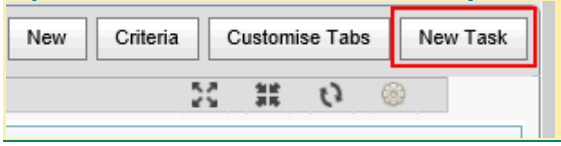
The **Task List** window is used to view:

- your tasks
- tasks originated by you, especially those that you have allocated to others
- all tasks, including sub-tasks of other tasks
- completed tasks.

You can display and manage tasks as another user. For example, a personal assistant can manage tasks on behalf of other staff members.

See *Managing Tasks* in the Synergetic Introduction manual.

**Tip:** You can click New Task from any maintenance window to create a new task.




## How to:

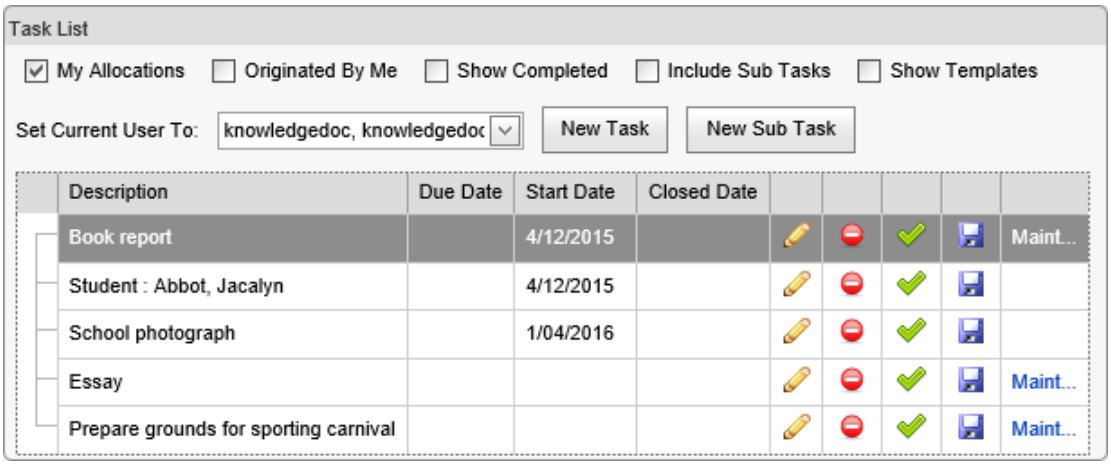
- Use the Add/Edit Tasks window. See *Using the Add/Edit Tasks window* (on page 193).
- Create new tasks. See *Creating tasks* (on page 189).
- Use task templates. See *Using task templates* (on page 219).

## Opening the Task List window

To open the **Task List** window:

1. Select **System > Task Maintenance** from the menu bar.

   The **Task List** window is displayed.




**Tip:** Select the checkboxes to display different types of tasks. Initially only parent tasks allocated to the current user are displayed.

## Task List window key fields and buttons

### Fields

| Field | Description |
|---|---|
| **My Allocations** | Select this field to display open tasks that have been allocated to you.<br>These may have been originated by you, or by someone else. |
| **Originated By Me** | Select this field to display all tasks that have been originated by you.<br>This includes all tasks that you have allocated to yourself and tasks that you have allocated to other people. |
| **Show Completed** | Select this field to display tasks that have been completed.<br>Use this field in conjunction with the **My Allocations** or **Originated by Me** fields to display completed tasks for the selected category. |
| **Include Sub Tasks** | Select this field to display sub-tasks of other tasks. |
| **Show Templates** | Select to display tasks originated from templates. |
| **Set Current User To** | Change to another Synergetic user and view the tasks as they would see them if they were logged in.<br>For example, this allows a personal assistant to manage the tasks for others. |

### Grid area fields

| Field | Description |
|---|---|
| **Description** | Brief task description. |
| **Due Date** | Date that the task is requested to be completed by. |
| **Start Date** | Date that the task is scheduled to be started. |
| **Closed Date** | Date that the task was completed. |

## Buttons and launch links

| Button | Description |
|---|---|
| New Task | Expand the grid area to add a new task. See *Creating tasks* (on page 189). |
| New Sub Task | Add a new sub-task to the selected task. See *Creating tasks* (on page 189). |
| | Click to edit the grid fields for the task. |
| | Click to delete the task. |
| | Either:<br>• update the details for a task if adding or editing the grid fields<br>• mark a task as closed. |
| | Save the task as a template. |
| # | Launch the relevant maintenance screen for the task. For example, the **Student Maintenance** window for a task related to a student.<br>  |

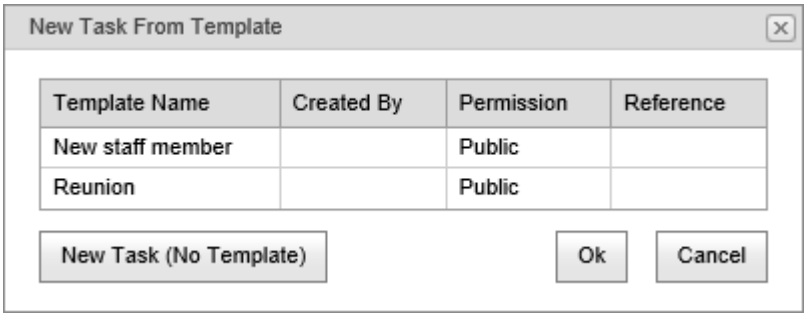
# Creating tasks

## Creating a new task

To create a new task without using a template:

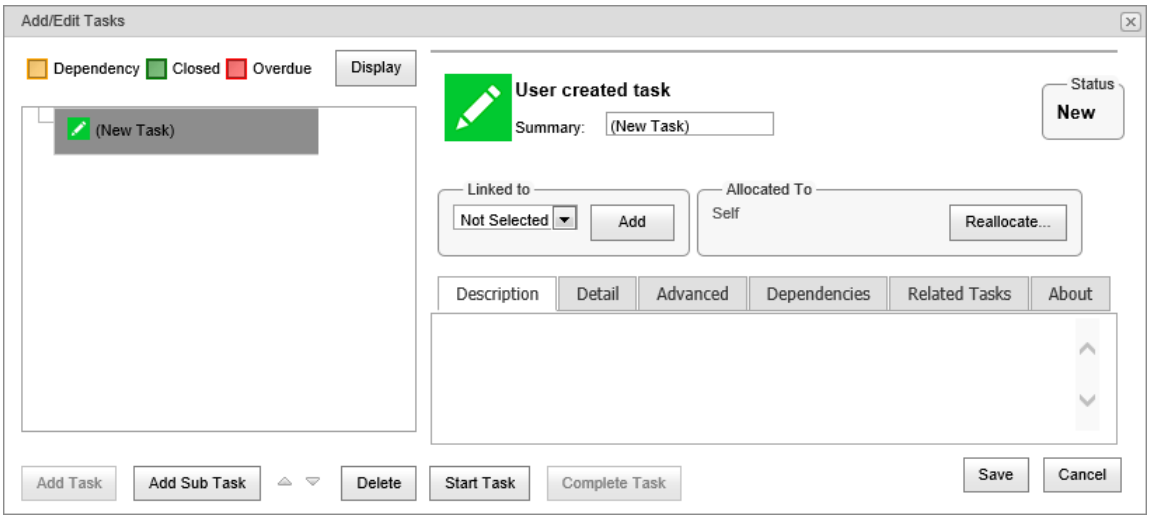
1. Open the **Task List** window. See *Managing tasks* (on page 185).
2. Click New Task.

   The **New Task From Template** window is displayed.




3. Click New Task (No Template).

   The **Add/Edit Tasks** window is displayed.



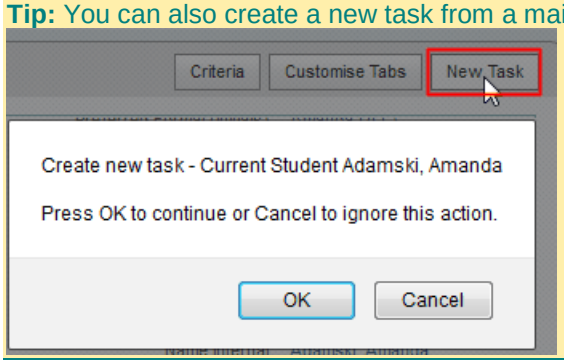

**Tip:** Do not enter a **Completed Date** unless you want to mark the task as already closed.

4. Enter information about the task. See *Using the Add/Edit Tasks window* (on page 193).

5. Click Save.

**Note:** If you have allocated the task to another community member or marked it as closed, you may need to select the fields at the top of the window to display the task.

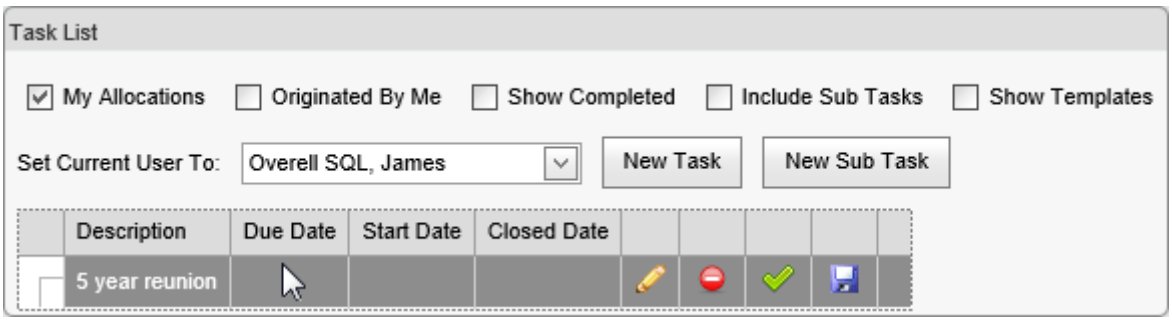
**Tip:** You can also create a new task from a maintenance screen by clicking New Task.



## Creating a new sub-task

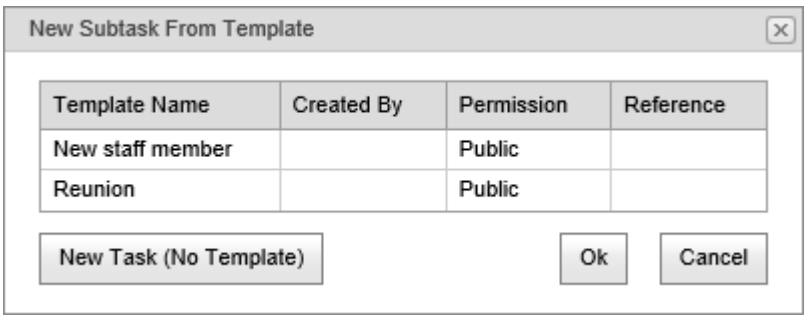
To create a new sub-task:

1. Open the **Task List** window. See *Managing tasks* (on page 185).
2. Select the parent task for the sub-task you want to create.



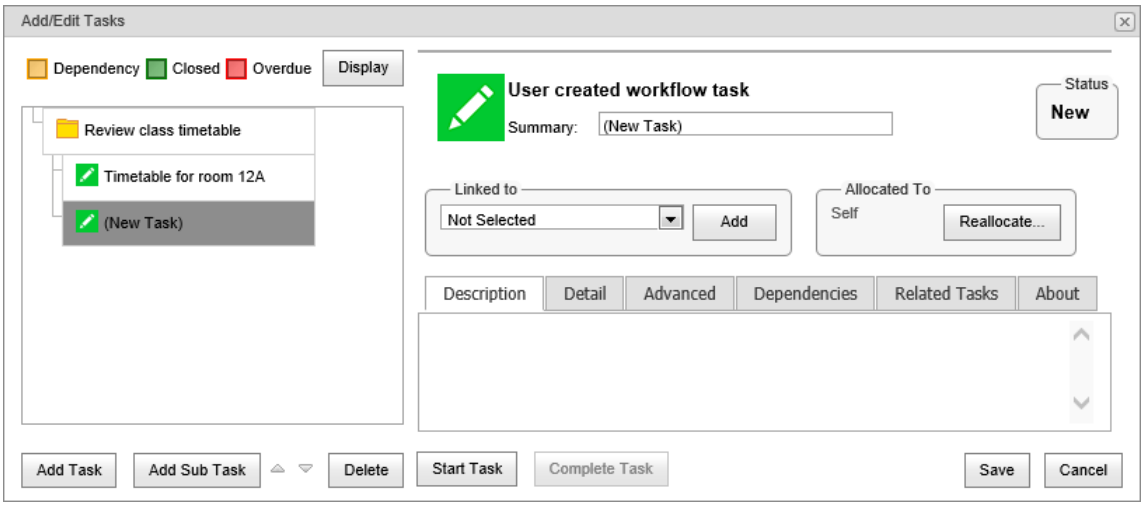

3. Click New Sub Task.

   The **New Subtask from Template** window is displayed.




**Tip**: You can also click the New Sub Task button on the **Add/Edit Tasks** window to create a new sub-task for the currently selected task.

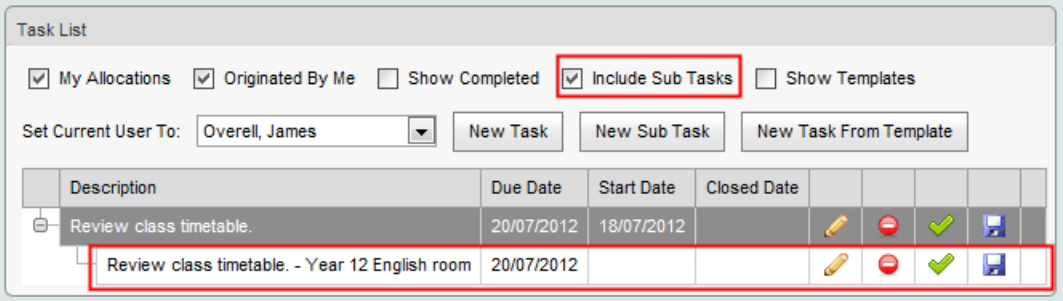
The **Add/Edit Tasks** window is displayed.




4. Enter information about the sub-task. See *Using the Add/Edit Tasks window* (on page 193).

5. Click Save.

**Tip:** Select **Include Sub Tasks** to display the sub-task.



## Using the Add/Edit Tasks window

Use the **Add/Edit Tasks** window to:

- add new tasks and sub-tasks for the selected task
- maintain existing tasks and sub-tasks.

### How to:

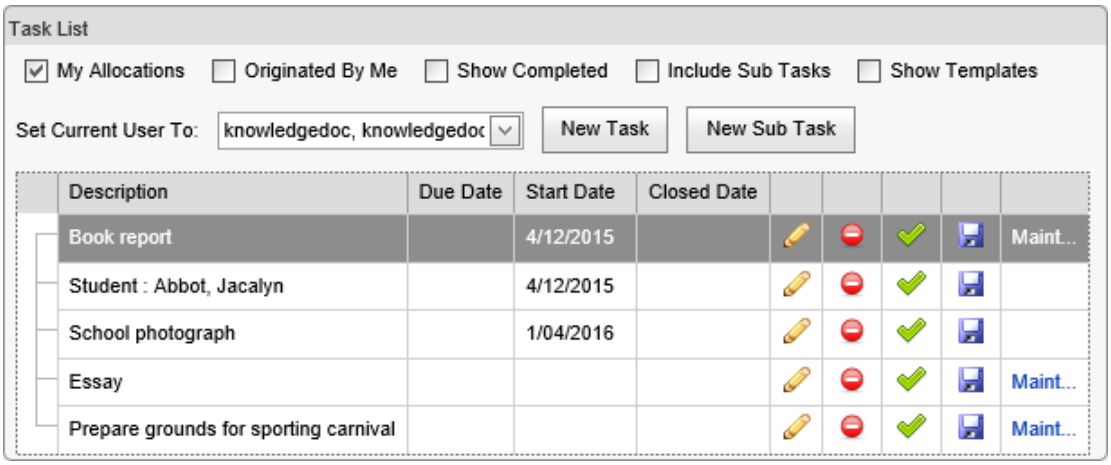
- Maintain task descriptions. See the *Add/Edit Tasks window - Description tab* (on page 198).
- Review task details. See the *Add/Edit Tasks window - Detail tab* (on page 199).
- Adjust advanced settings. See the *Add/Edit Tasks window - Advanced tab* (on page 202).
- Maintain task dependences. See the *Add/Edit Tasks window - Dependencies tab* (on page 205).
- Maintain related tasks. See the *Add/Edit Tasks window - Related Tasks tab* (on page 207).
- Maintain task workflows. See the *Add/Edit Tasks window - Workflow tab* (on page 210).
- Maintain task documents. See the *Add/Edit Tasks window - DocMan tab* (on page 213).
- Review general information about the task. See the *Add/Edit Tasks window - About tab* (on page 217).

## Opening the Add/Edit Tasks window

To open the **Add/Edit Tasks** window:

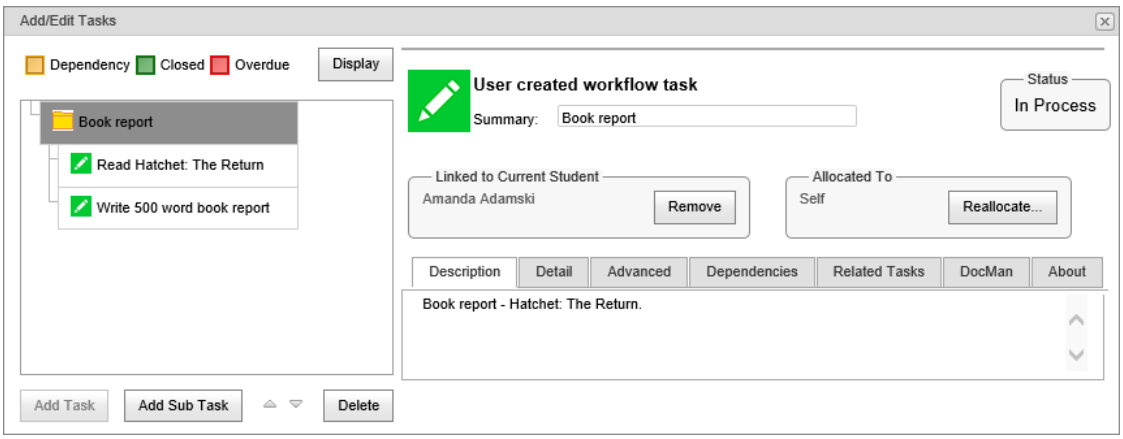
1. Select **System > Task Maintenance**.

   The **Task List** window is displayed.



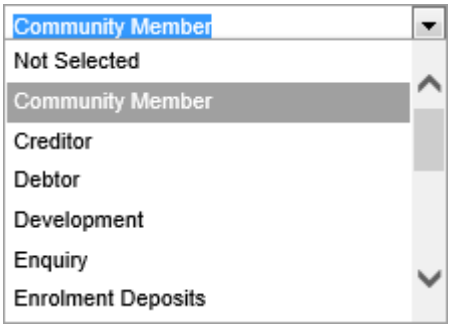

2. Click next to an existing task.

   The **Description** tab of the **Add/Edit Tasks** window is displayed.

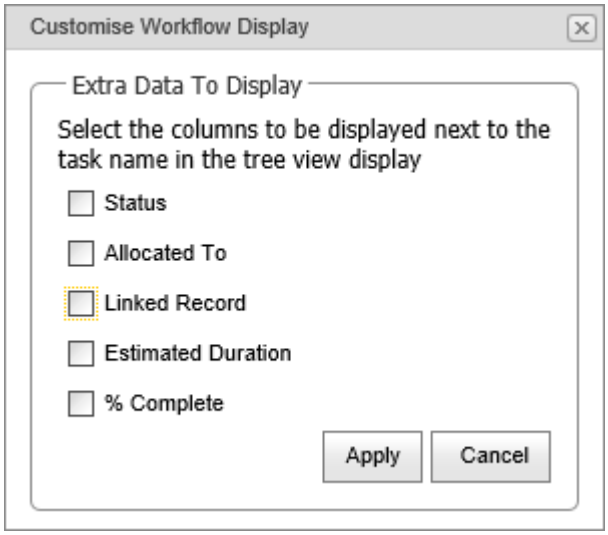


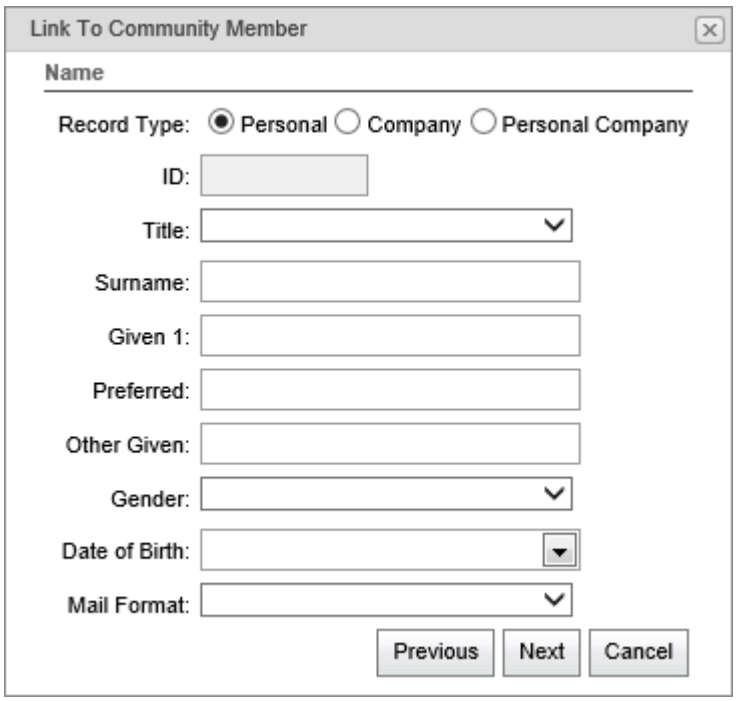
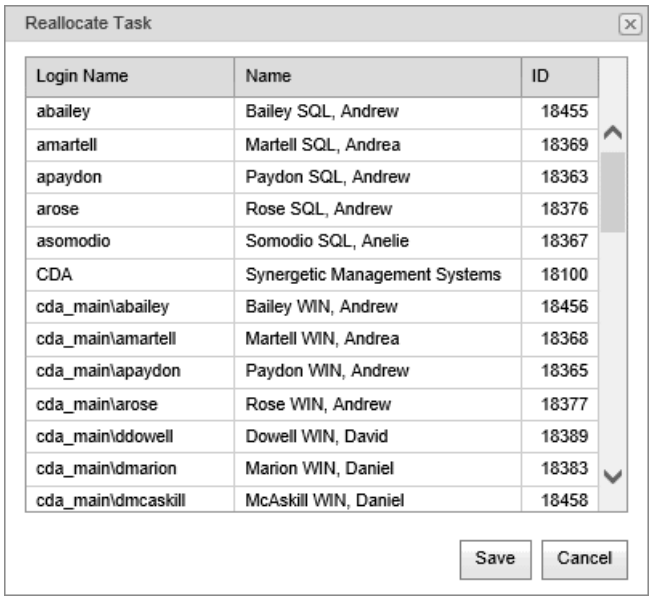
## Add/Edit Tasks window key fields and buttons

### Task details area fields

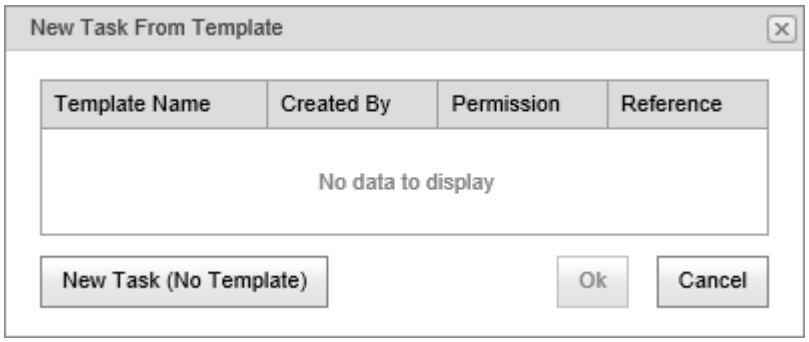
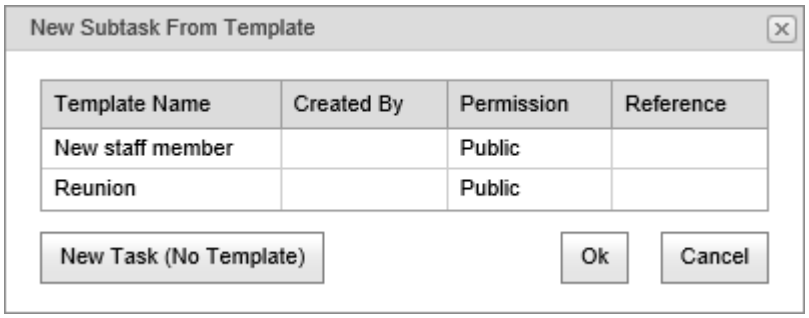
| Field | Description |
|---|---|
| **Summary** | Brief task description. |
| **Status** | Status of the task. |
| **Linked To** | Select a maintenance module from the drop-down menu to link the task to a maintenance record. Click the launch link to open the maintenance module.<br>  <br><br>**Note:** The maintenance modules displayed will depend on your security permissions. Contact your IT administrator. |
| **Allocated To** | Community member allocated to the task. Click the launch link to open **Community Maintenance**.<br>**Note:** This defaults to the community member who created the task. Use the Reallocate... button to allocate a different community member. |

### Task Details area buttons

| Button | Description |
|---|---|
| Display | Launch the **Customise Workflow Display** window to display additional information next to task names in the tree view.<br>  <br> |

| Button | Description |
|---|---|
| Add | Launch the **Link To** window of the selected maintenance module to link a record to the task.<br>  <br> |
| Remove | Remove the link to the displayed maintenance record. |
| Reallocate... | Launch the **Reallocate Task** window to reallocate the task to a different community member.<br>  <br> |

| Login Name | Name | ID |
|---|---|---|
| abailey | Bailey SQL, Andrew | 18455 |
| amartell | Martell SQL, Andrea | 18369 |
| apaydon | Paydon SQL, Andrew | 18363 |
| arose | Rose SQL, Andrew | 18376 |
| asomodio | Somodio SQL, Anelie | 18367 |
| CDA | Synergetic Management Systems | 18100 |
| cda_main\abailey | Bailey WIN, Andrew | 18456 |
| cda_main\amartell | Martell WIN, Andrea | 18368 |
| cda_main\apaydon | Paydon WIN, Andrew | 18365 |
| cda_main\arose | Rose WIN, Andrew | 18377 |
| cda_main\ddowell | Dowell WIN, David | 18389 |
| cda_main\dmarion | Marion WIN, Daniel | 18383 |
| cda_main\dmcaskill | McAskill WIN, Daniel | 18458 |

| Button | Description |
|---|---|
| Add Task | Launch the **New Task From Template** window. The task can be created either:<br>• from a template listed in the grid area<br>• without using a template.<br>  <br> |
| Add Sub Task | Launch the **New Subtask From Template** window. The sub-task can be created either:<br>• from a template listed in the grid area<br>• without using a template.<br>  <br> |
| | Move the selected task up or down the task tree. |
| Delete | Delete the selected task. |

# Add/Edit Tasks window - Description tab

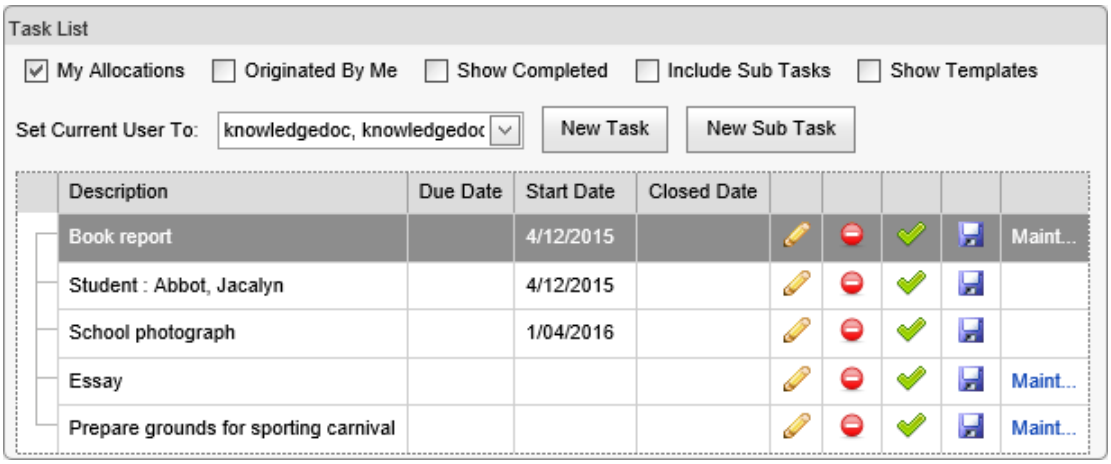
Use the text field on the **Description** tab to add a detailed description to the selected task.

## Opening the Description tab

To open the **Description** tab:

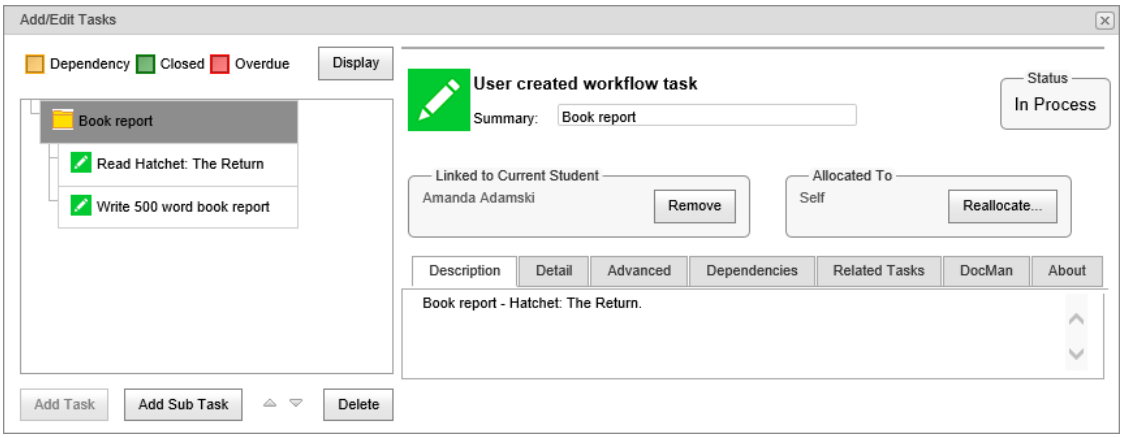
1. Select **System > Task Maintenance**.

   The **Task List** window is displayed.




2. Click  next to an existing task.

   The **Description** tab of the **Add/Edit Tasks** window is displayed.



# Add/Edit Tasks window - Detail tab

Use the **Detail** tab to review:

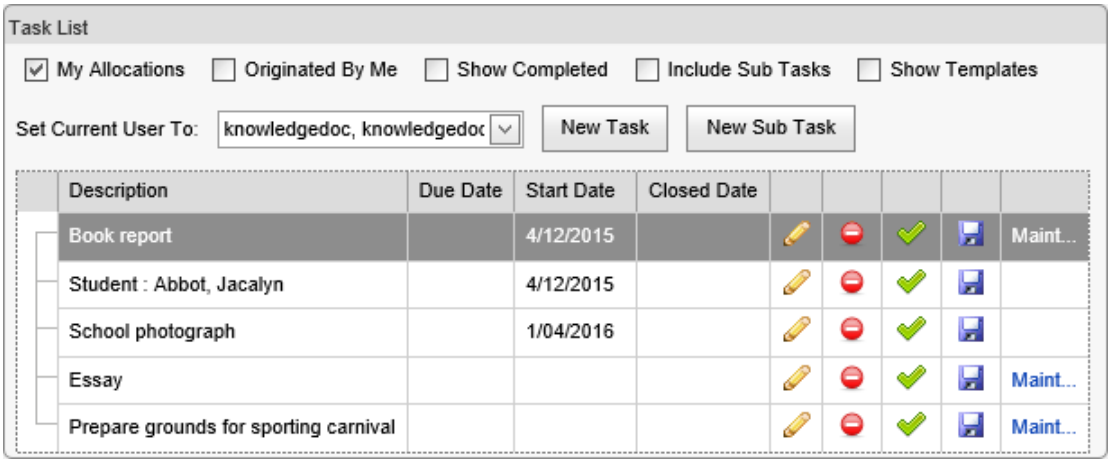
- message status
- task status
- task origination information
- current subscribers. See *Group/User Security Maintenance - Users view* in the **Synergetic** System Maintenance manual.

## Opening the Detail tab

To open the **Detail** tab:

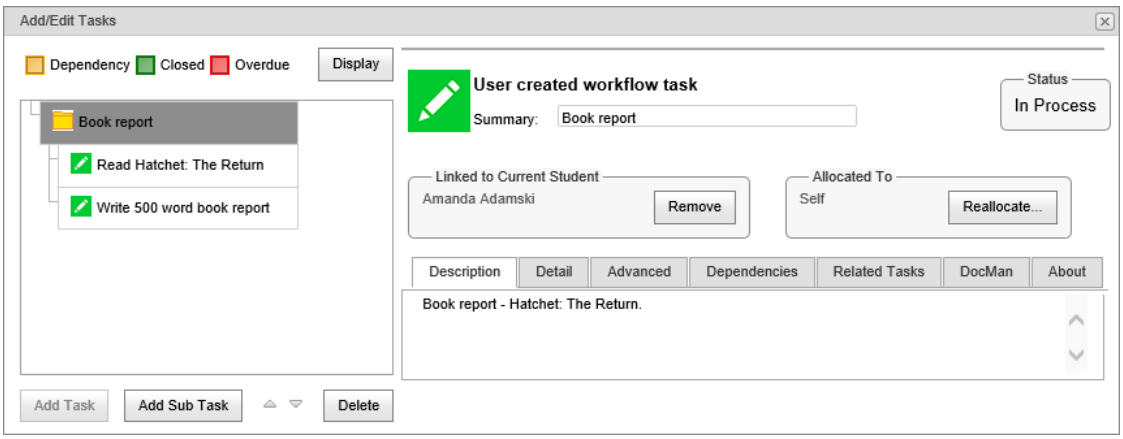
1. Select **System > Task Maintenance**.

   The **Task List** window is displayed.



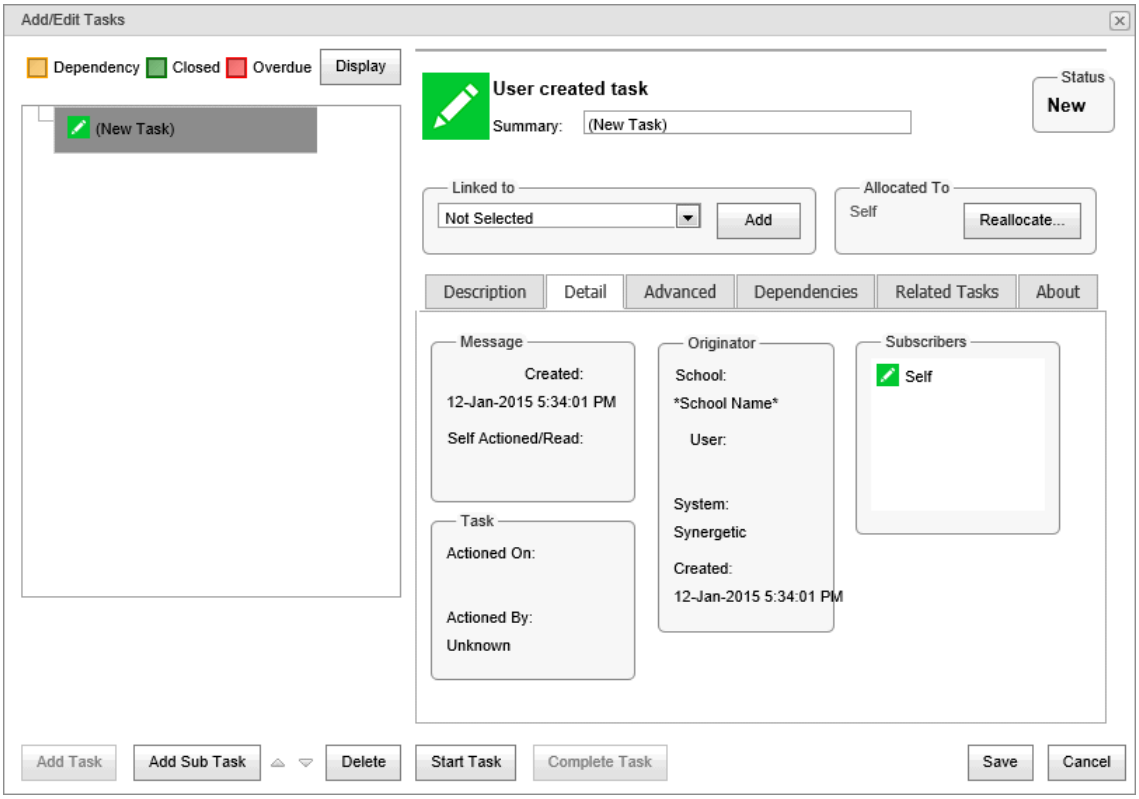

2. Click  next to an existing task.

   The **Description** tab of the **Add/Edit Tasks** window is displayed.




3. Click the **Detail** tab.

The **Detail** tab of the **Add/Edit Tasks** window is displayed.



## Detail tab key fields

| Field | Description |
|---|---|
| **Created** | Date the task was created. |
| **Self Actioned/Read** | Date the task has been self-actioned or read. |
| **Actioned On** | Whether the task has been actioned.<br>**Note**: This field is only visible for task messages. |
| **Actioned By** | Community member that actioned the task.<br>**Note**: This field is only visible for task messages. |
| **School** | Name of the originating organisation. |
| **User** | Synergetic user that created the task. |
| **System** | The system/program used to create the task. |
| **Created** | Date the task was created. |
| **Subscribers** | Subscribers to the task. See *Group/User Security Maintenance - Users view* in the **Synergetic** System maintenance manual. |

# Add/Edit Tasks window - Advanced tab

Use the **Advanced** tab to maintain:

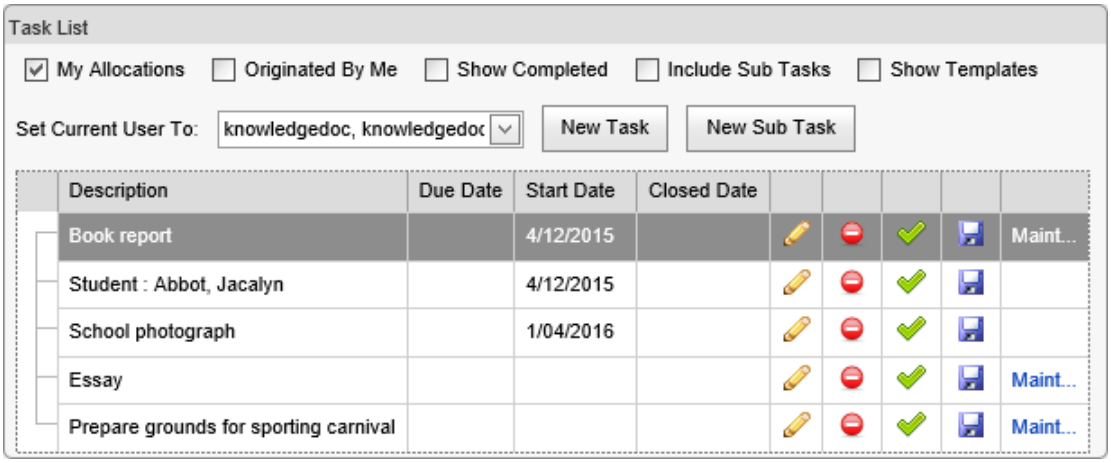
- key dates
- reminders
- current task status.

## Opening the Advanced tab

To open the **Advanced** tab:

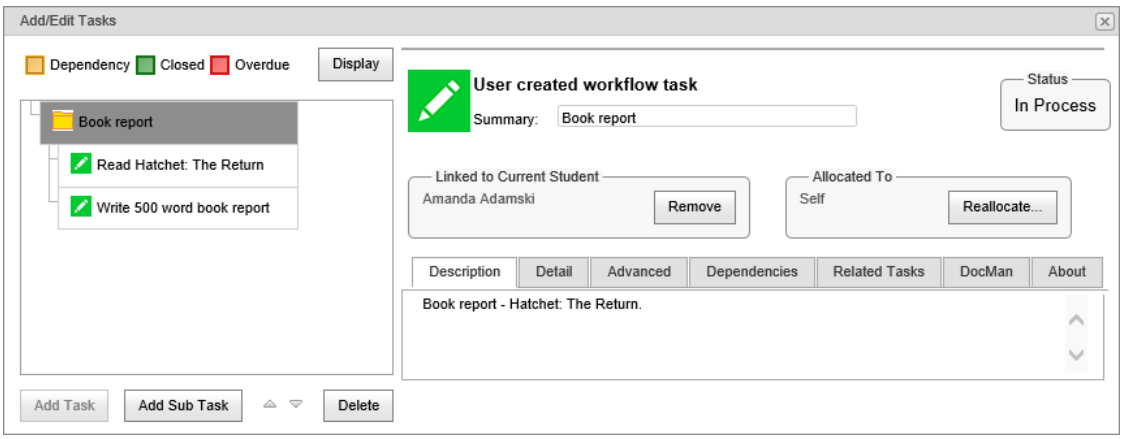
1. Select **System > Task Maintenance**.

   The **Task List** window is displayed.



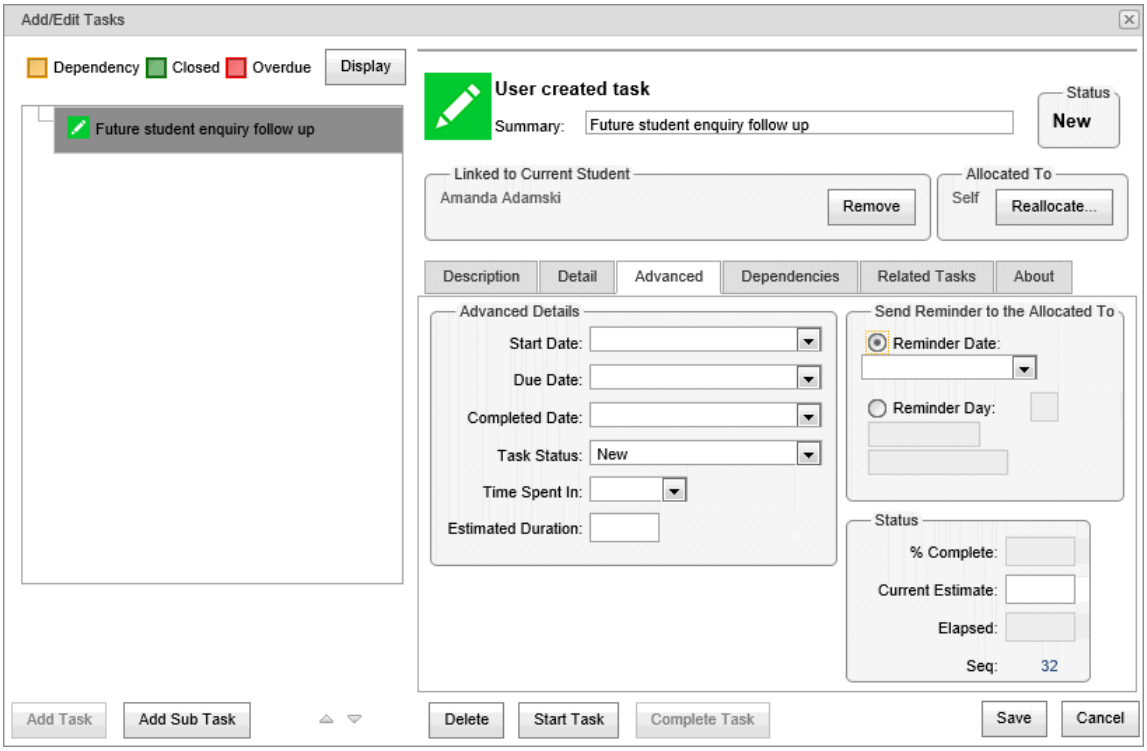

2. Click  next to an existing task.

   The **Description** tab of the **Add/Edit Tasks** window is displayed.




3. Click the **Advanced** tab.

The **Advanced** tab of the **Add/Edit Tasks** window is displayed.



## Advanced tab key fields

| Field | Description |
|---|---|
| **Start Date** | Start date for the task. |
| **Due Date** | Due date for the task. |
| **Completed Date** | Date the task was completed. |
| **Task Status** | Status of the task. |
| **Time Spent In** | Unit of time to be used for the task. |
| **Estimated Duration** | Estimated time required to complete the task.<br>**Note:** Use the **Time Spent In** field to determine the unit of time. |
| **Reminder Date** | Select a date for the Action Centre to display a reminder relating to the currently selected task. |
| **Reminder Day** | Select to set a task reminder to display the specified number of weekdays, days or weeks either:<br>• before the due date<br>• after the start date. |
| **% Complete** | Percentage of the task completed. |
| **Current Estimate** | Estimated time required to complete the task. |
| **Elapsed** | Units of time elapsed. |
| **Seq** | Unique identifier for the task. |

# Add/Edit Tasks window - Dependencies tab

Use the **Dependencies** tab to review tasks that must be completed before the currently selected task in the task tree can be started.

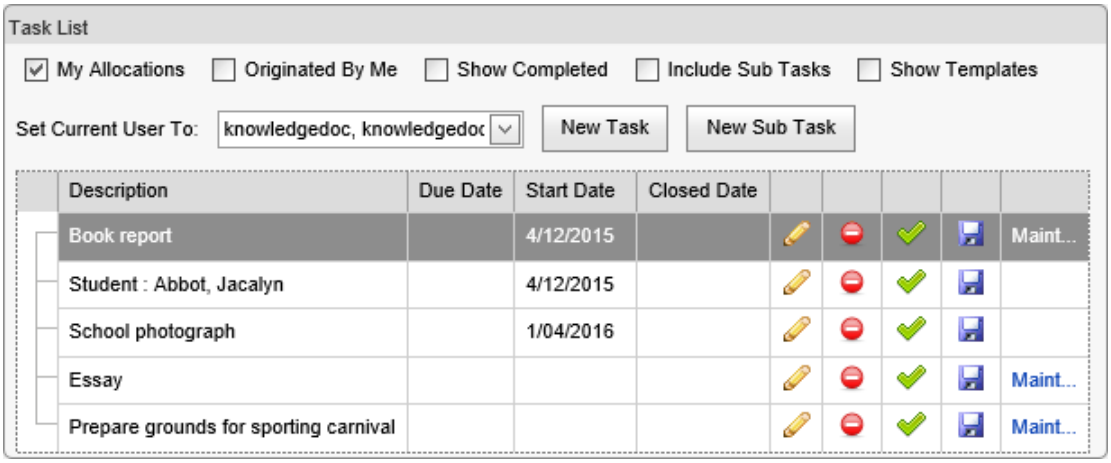
**Note:** The **Dependencies** tab displays the number of dependencies relating to the currently selected task.

## Opening the Dependencies tab

To open the **Dependencies** tab:

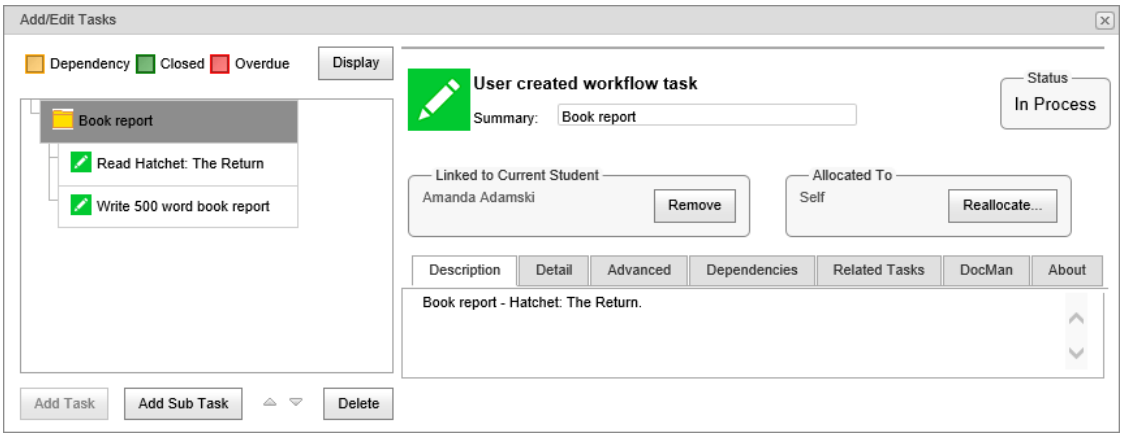
1. Select **System > Task Maintenance**.

   The **Task List** window is displayed.




2. Click next to an existing task.

   The **Description** tab of the **Add/Edit Tasks** window is displayed.




3. Click the **Dependencies** tab.

   The **Dependencies** tab of the **Add/Edit Tasks** window is displayed.

## Dependencies tab key fields and buttons

### Fields

| Field | Description |
|---|---|
| **Description** | Description of the task. |
| **Summary** | Summary of the task. |
| **Status** | Status of the task. |
| **Created** | Creation date of the task. |
| **Allocated To** | Community member allocated to complete the task. |

# Add/Edit Tasks window - Related Tasks tab

Use the **Related Tasks** tab to view tasks related to the task selected in the task tree.

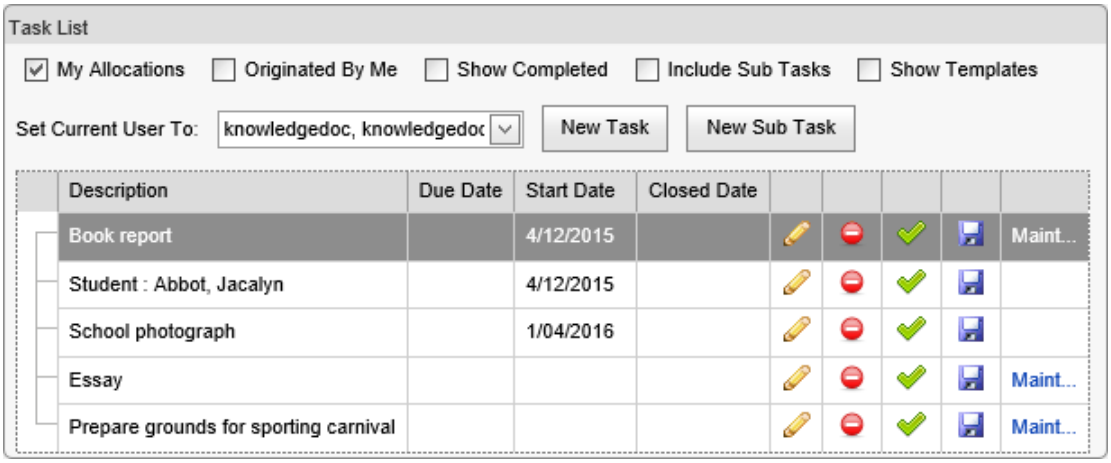
**Note:** The **Related Tasks** tab displays the number of tasks related to the currently selected task.

## Opening the Related Tasks tab

To open the **Related Tasks** tab:

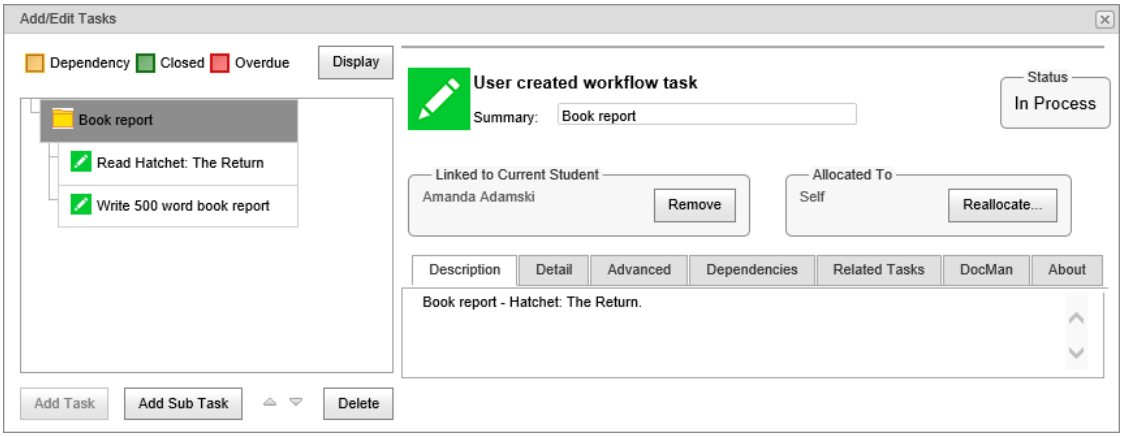
1. Select **System > Task Maintenance**.

   The **Task List** window is displayed.



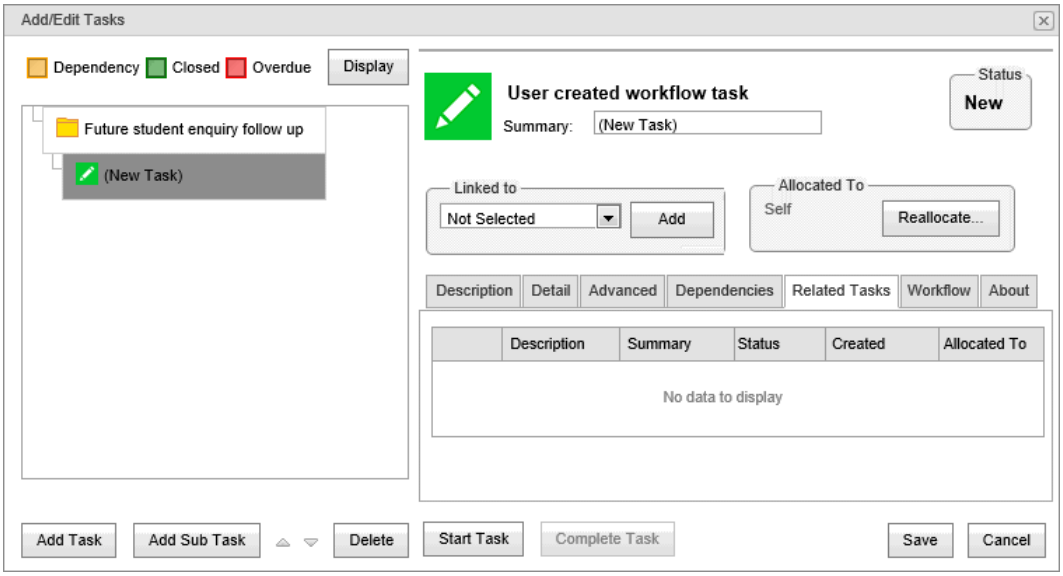

2. Click next to an existing task.

   The **Description** tab of the **Add/Edit Tasks** window is displayed.




3. Click the **Related Tasks** tab.

The **Related Tasks** tab of the **Add/Edit Tasks** window is displayed.



## Related Tasks tab key fields

| Field | Description |
|---|---|
| **Description** | Description of the task. |
| **Summary** | Summary of the task. |
| **Status** | Status of the task. |
| **Created** | Creation date of the task. |
| **Allocated To** | Community member allocated to complete the task. |

# Add/Edit Tasks window - Workflow tab

Use the **Workflow** tab to maintain task workflows. You can:

- view and filter the existing workflow
- start tasks
- complete tasks
- save workflow tasks as templates.

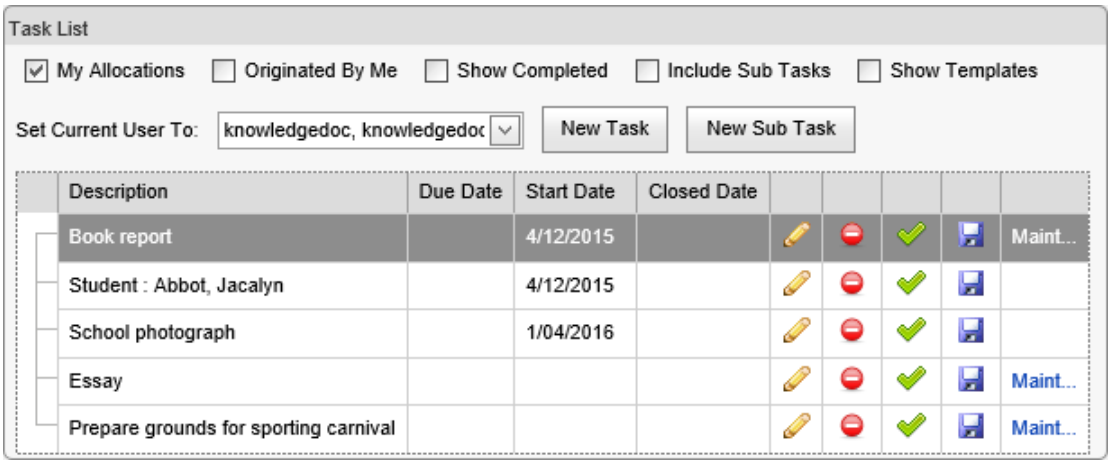
**Note**: The **Workflow** tab is only displayed when a workflow exists for the selected user task.

## Opening the Workflow tab

To open the **Workflow** tab:

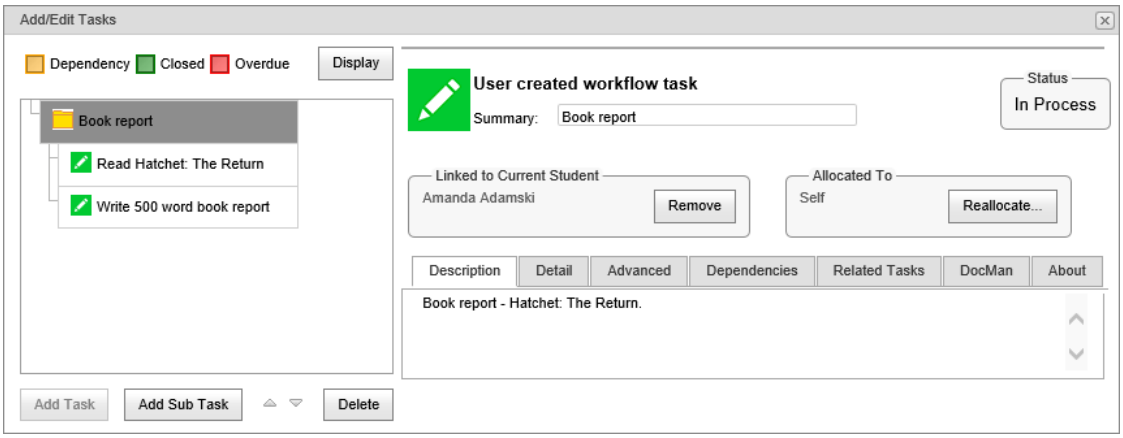
1. Select **System > Task Maintenance**.

   The **Task List** window is displayed.



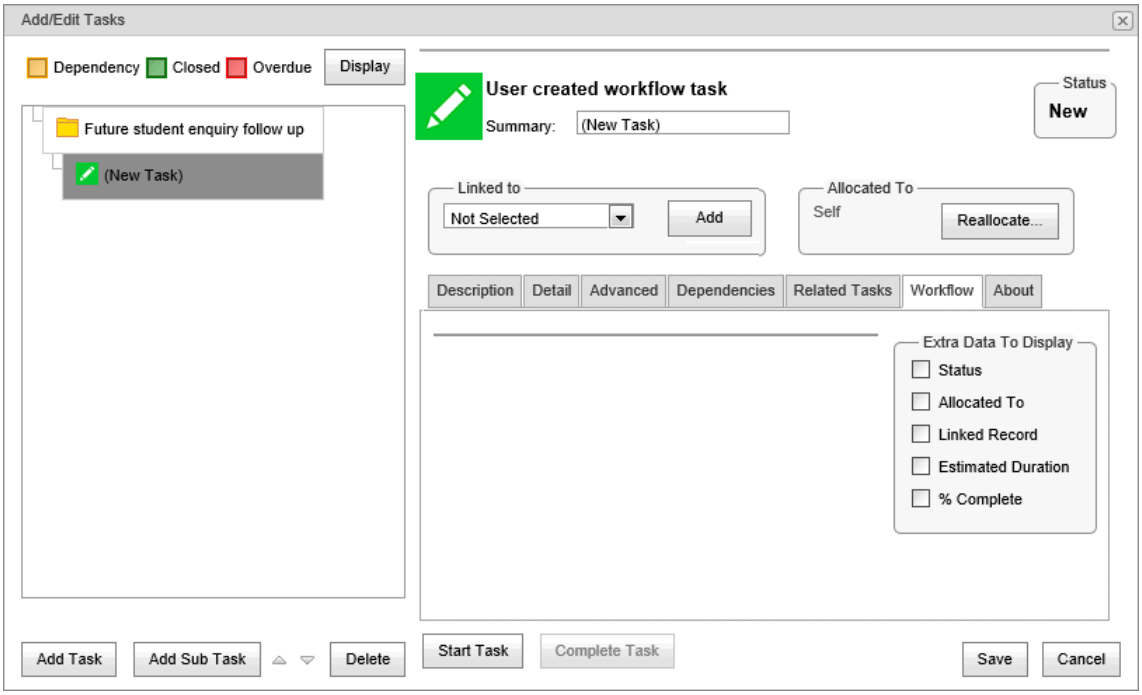

2. Click next to an existing task.

   The **Description** tab of the **Add/Edit Tasks** window is displayed.




3. Click the **Workflow** tab.

The **Workflow** tab of the **Add/Edit Tasks** window is displayed.



## Workflow tab key fields

| Field | Description |
|---|---|
| **Extra Data to Display** | Select fields in this area to display extra information on the workflow.<br>You can display:<br>• statuses<br>• allocations<br>• linked records<br>• estimated durations<br>• % complete figures. |

# Add/Edit Tasks window - DocMan tab

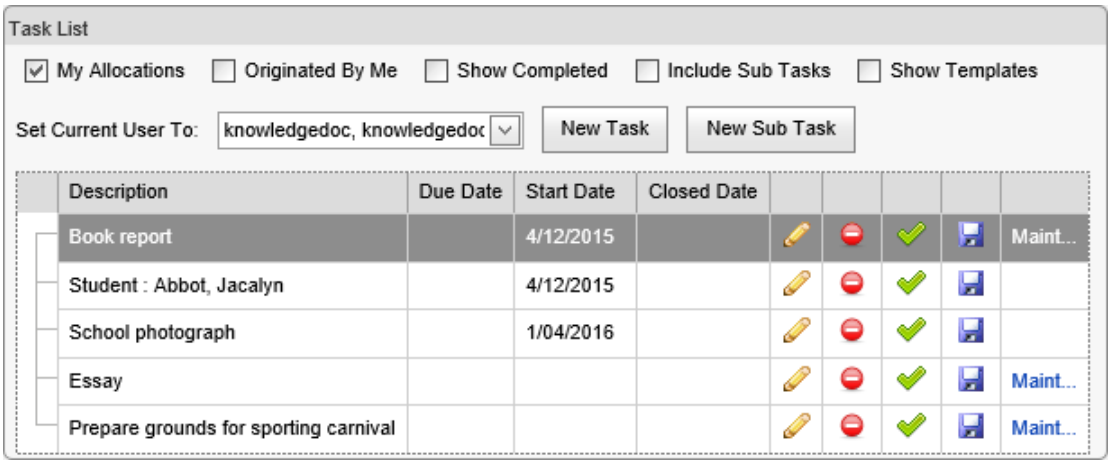
Use the **DocMan** tab to attach documents, spreadsheets or pictures to a task.

## Opening the DocMan tab

To open the **DocMan** tab:

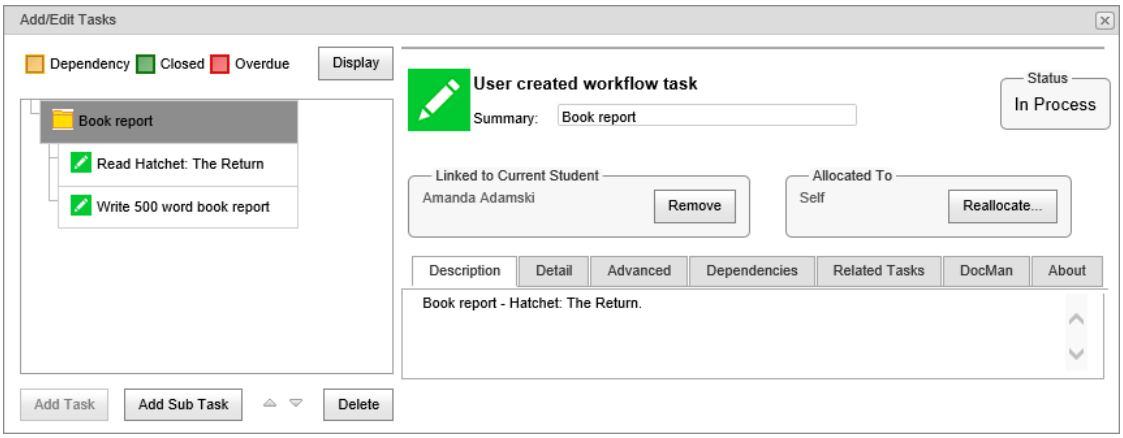
1. Select **System > Task Maintenance**.

   The **Task List** window is displayed.



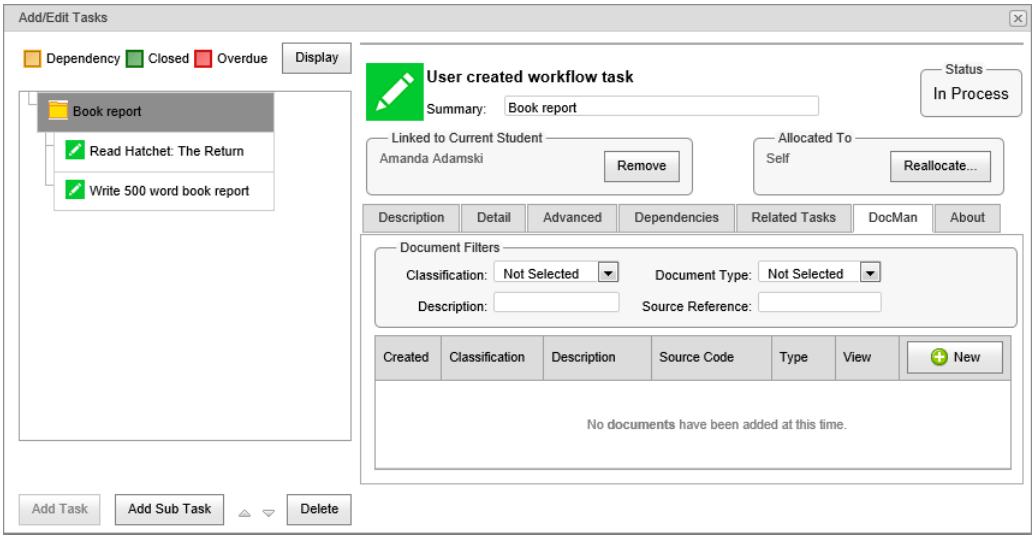

2. Click  next to an existing task.

   The **Description** tab of the **Add/Edit Tasks** window is displayed.




3. Click the **DocMan** tab.

The **DocMan** tab of the **Add/Edit Tasks** window is displayed.



## Add/Edit Tasks - DocMan tab key fields and buttons

### Fields

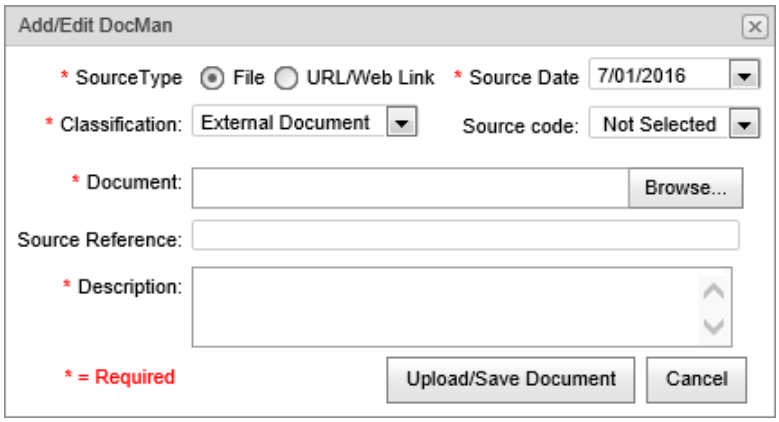
| Field | Description |
|---|---|
| **Classification** | Classification of the documents to be displayed. Access to documents can be restricted based on user security levels.<br>Select the classification from the drop-down list to filter the documents displayed. |
| **Document Type** | Type of document. For example:<br>• Microsoft Word Document<br>• JPG Photo<br>• Adobe Acrobat File<br>• Microsoft Excel Spreadsheet.<br>**Note:** The document types set up are those that are used at your organisation as defined in the luDocumentType lookup table. See luDocumentType lookup table in the Synergetic System maintenance manual.<br>Select the type of document from the drop-down list to filter the documents displayed. |
| **Description** | Type a description to filter the document on. |
| **Source Reference** | Select the document source reference to filter on. For example, Manual Load. |

### Grid area fields

| Field | Description |
|---|---|
| **Created** | Date and time the document, spreadsheet or picture was imported into SynWeb. |
| **Classification** | Classification of the item.<br>Classifications are maintained in the **luDocumentClassification** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **Description** | Meaningful description of the document. |
| **Source Code** | Source of the item. Typical examples include:<br>• Archive<br>• Magazine<br>• Newspaper<br>• School Photo<br>• Website.<br>Document sources are maintained in the **luDocumentSourceCode** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |

| Field | Description |
|---|---|
| **Source Reference** | Cross-reference to the source. For example the name, issue date and page of a newspaper where the staff member's photograph appeared. |
| **Type** | Type of document. Typical examples include:<br>• DOC, DOCX (Microsoft Word document)<br>• JPG (photo using the Joint Photographic Experts Group format)<br>• PDF (Adobe Acrobat file)<br>• XLS, XLSX (Microsoft Excel spreadsheet).<br>Document types are maintained in the **luDocumentType** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **View** | View the selected document. |

## Buttons

| Button | Description |
|---|---|
| New | Launch the **Add/Edit DocMan** window to add a new document, spreadsheet or picture.<br>  <br> |

# Add/Edit Tasks window - About tab

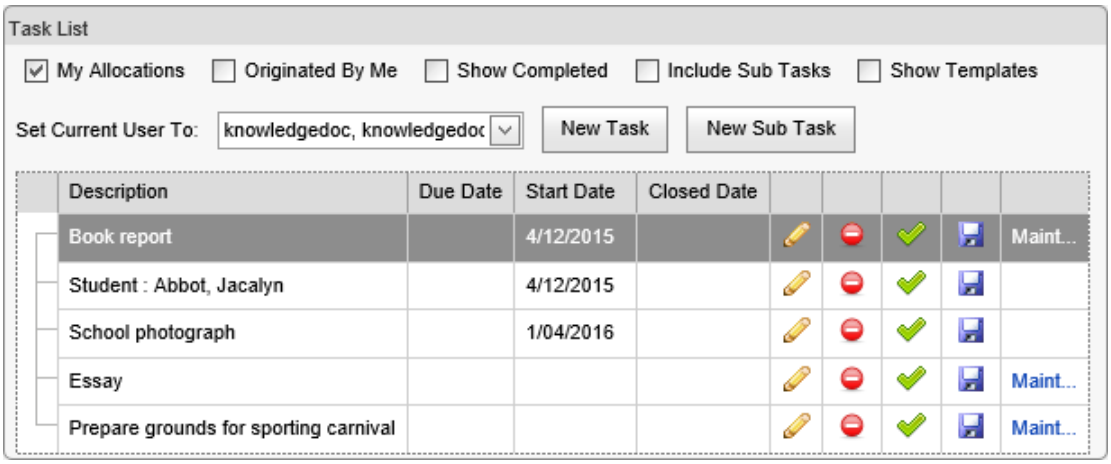
Use the **About** tab to view additional information about the currently selected task or sub-task.

## Opening the About tab

To open the **About** tab:

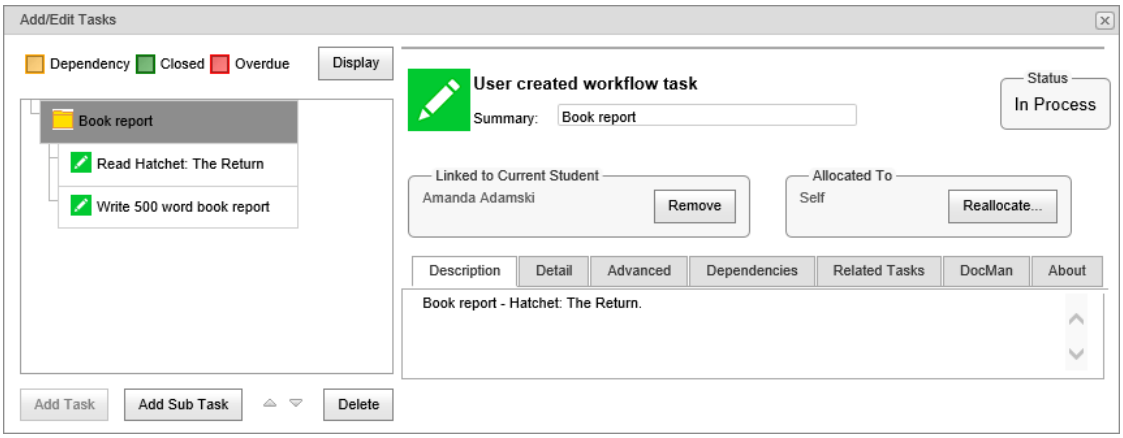
1. Select **System > Task Maintenance**.

   The **Task List** window is displayed.



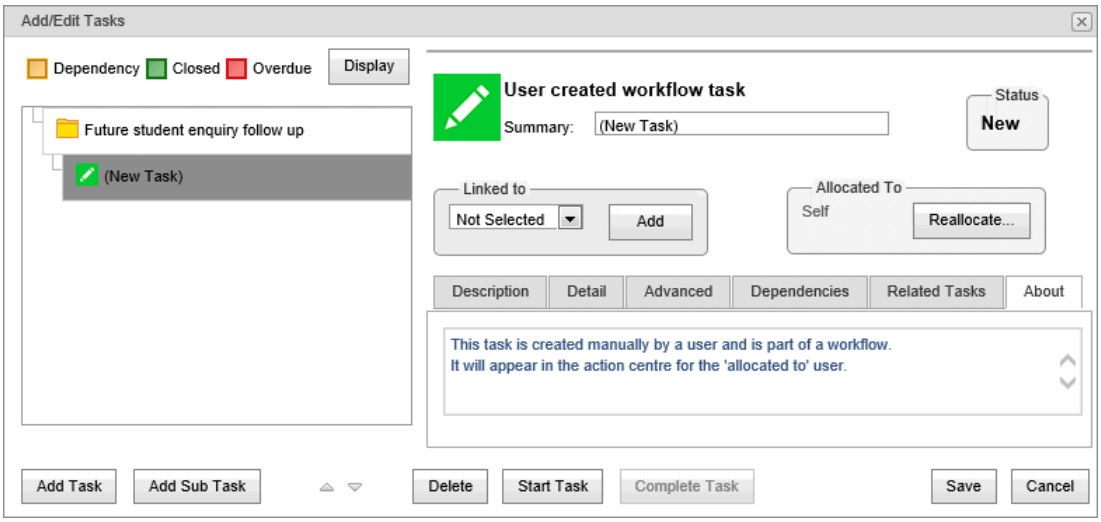

2. Click  next to an existing task.

   The **Description** tab of the **Add/Edit Tasks** window is displayed.



3. Click the **About** tab.

   The **About** tab of the **Add/Edit Tasks** window is displayed.



## Using task templates

Templates are useful for tasks that are repeated regularly, or have many sub-tasks.

In Synergetic you can use templates to:

- pre-set task fields to default settings that suit your organisation
- ensure a particular task is always sent to a specific staff member
- ensure a complex task is completed fully
- create small templates of common sub-tasks that can be combined with other tasks.

See *Using task templates* in the Synergetic Introduction manual.

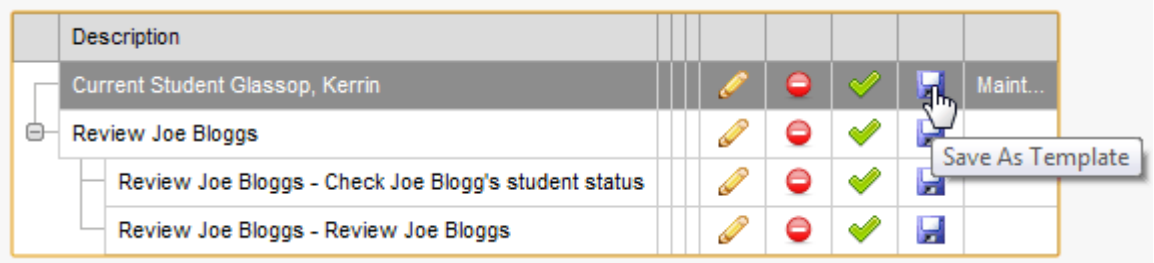
In SynWeb you can:

- create templates from current tasks
- create tasks from templates.

## Creating a template from a current task

1. Open the **Task List** window. See *Managing tasks* (on page 185).

2. Click for the task that you want to make into a template.




A confirmation dialog is displayed.

3. Click OK.

The **Save Task as Template** window is displayed.


4. Edit the **Template Name**, if required.

**Note:** This description identifies the template.

5. Select **Link to Module** to link a maintenance module to the template, if required.

6. Clear the **Always Allocate To** field if this task is not always allocated to you.

**Note:** The **Allocate To ID** field can be changed when the template is used. If many different people will have this task allocated to them, keep this field selected.

7. Click Reallocate... to allocate a different community member to the task, if necessary.

8. Edit the **Estimated Duration**.

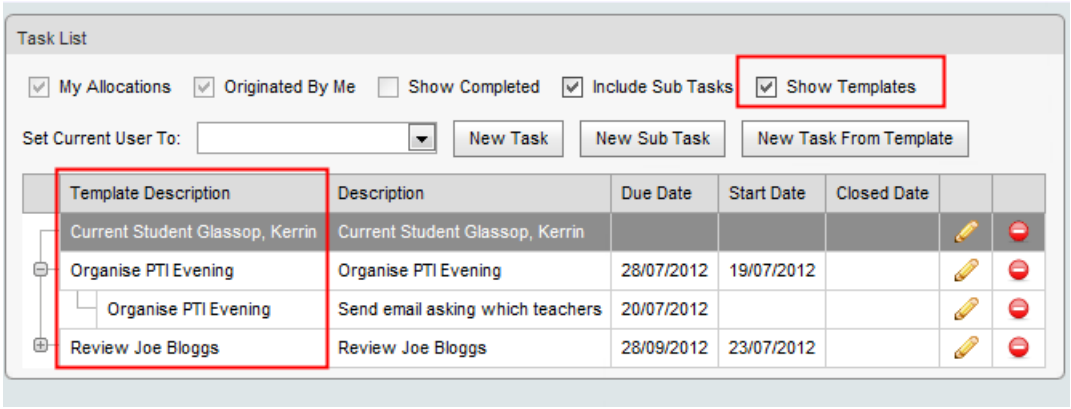
9. Select a **Template Availability** field.

   Either:

   - Private - only viewed by the originator
   - Public - all users can see the template.

10. Click OK.

    The task is saved as a template and displayed when the **Show Templates** field is selected.

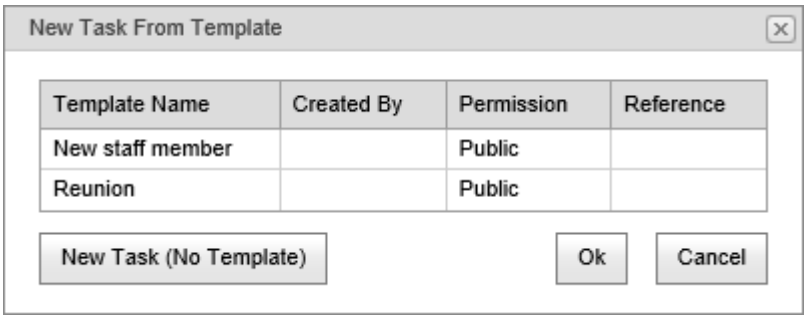


## Creating a task from a template

1. Open the **Task List** window. See *Managing tasks* (on page 185).

2. Click New Task.

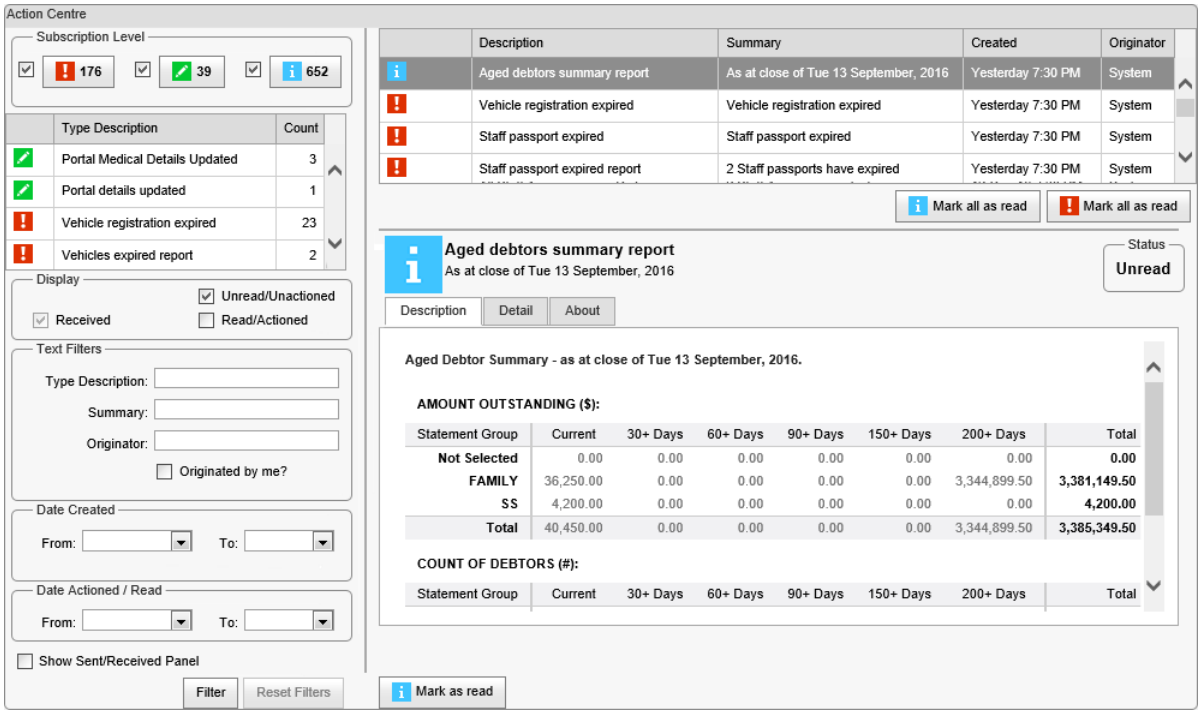
   The **New Task From Template** window is displayed.




3. Select a template.

4. Click OK.

# Action Centre




The Action Centre is the central hub for managing:

- messages.
- tasks.
- alerts.

See *Using the Action Centre window* (on page 224).

To manage messages and alerts see:

- Manage descriptions. See *Action Centre - Description tab* (on page 230).
- Review details. See *Action Centre - Detail tab* (on page 232).
- Adjust advanced settings. See *Action Centre - Advanced tab* (on page 236).
- Maintain task documents. See *Action Centre - DocMan tab* (on page 240).
- View additional information about the message. See *Action Centre - About tab* (on page 244).

To manage tasks see also:

- Manage task dependencies. See *Action Centre - Dependencies tab* (on page 247).
- Manage related tasks. See *Action Centre - Related Tasks tab* (on page 250).
- Manage task workflows. See *Action Centre - Workflow tab* (on page 253).
- View and maintain updated fields. See *Action Centre - Fields Changed tab* (on page 256).

# Using the Action Centre window

Use the **Action Centre** to review and manage:

- information messages
- task messages
- alert messages.

## Opening the Action Centre

To open the **Description** tab:

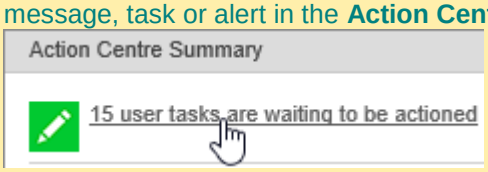
1. Click 76.

**Note:** The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

The **Action Centre Summary** window is displayed.

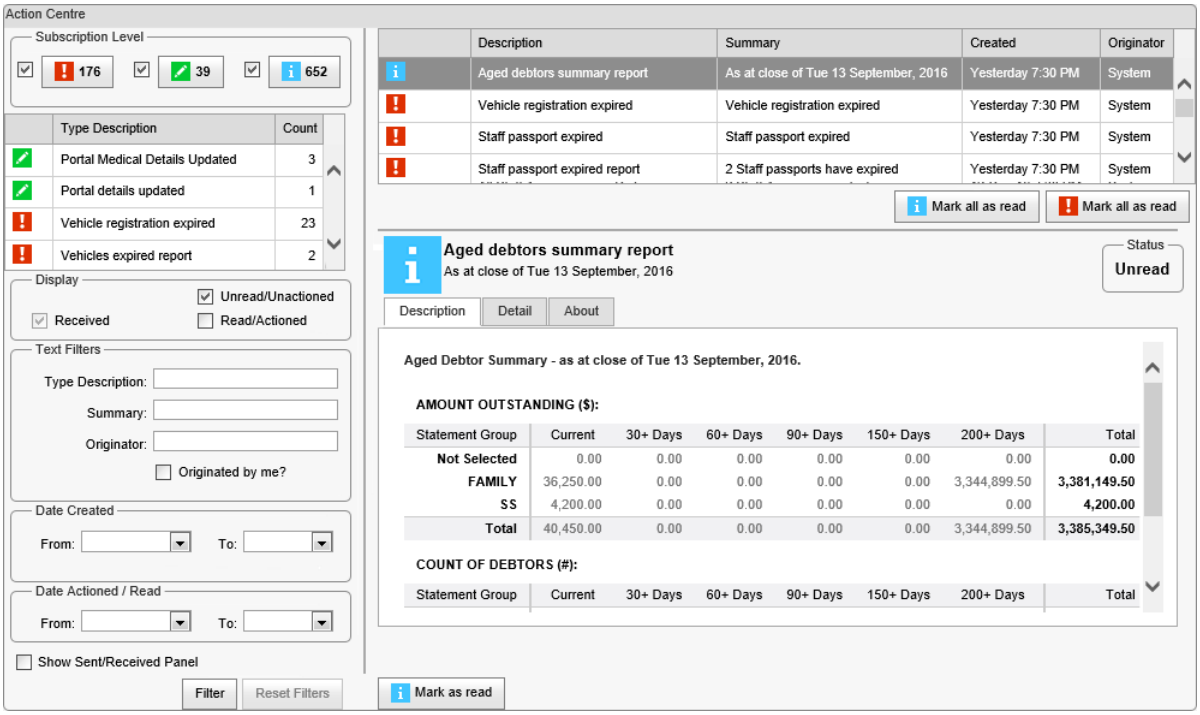
2. Click the Action Centre button.

**Tip:** You can also click a link in the **Action Centre Summary** window to launch a specific message, task or alert in the **Action Centre**.




**Tip:** The **Action Centre** window can also be accessed by clicking **System > Action Centre**.

The **Description** tab of the **Action Centre** window is displayed.



## Action Centre filters area key fields and buttons

### Subscription Level fields

| Field | Description |
|---|---|
| **Message Type** | Filter Action Centre messages by:<br>• information message<br>• task message<br>• alert message. |

### Filter grid area fields

| Field | Description |
|---|---|
| **Type** | Type of Action Centre message. Either<br>• information message<br>• task message<br>• alert message. |
| **Description** | Description of the Action Centre message. |
| **Count** | Number of Action Centre message with the same description. |

### Display fields

| Field | Description |
|---|---|
| **Display** | Filter by:<br>• received messages<br>• unread/unactioned messages<br>• read/actioned messages. |
| **Show Sent/Received panel** | Select to display the **Sent/Received** panel at the top of the window. |

### Text Filters fields

| Field | Description |
|---|---|
| **Type Description** | Type to filter by description text. |
| **Summary** | Type to filter by summary description text. |
| **Originator** | Type to filter by the originator name. |
| **Originated by me?** | Select to set the originator as the current user. |

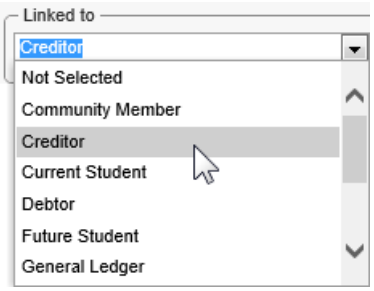
## Date Filter fields

| Field | Description |
|---|---|
| **Date Created From/To** | Search for messages created within a date range. |
| **Date Actioned/Read From/To** | Search for messages actioned or read within a date range. |

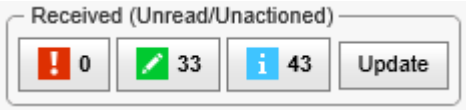
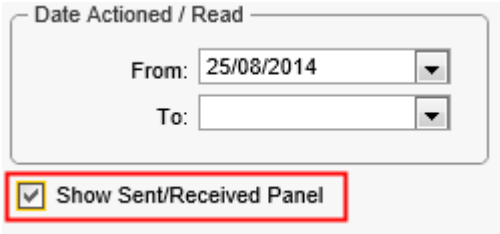
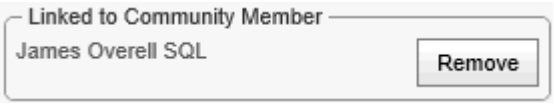
## Grid area fields

| Field | Description |
|---|---|
| **Type** | Type of Action Centre message. Either:<br>• information message<br>• task message<br>• error message. |
| **Description** | Description of the Action Centre message. |
| **Summary** | Summary of the Action Centre message. |
| **Created** | Date the Action Centre message was created. |
| **Originator** | Originator of the Action Centre messages. |

## User task fields

| Field | Description |
|---|---|
| **Summary** | Type a summary for the Action Centre message. |
| **Linked To** | Community member or constituency that the task is linked to. Select one of the available options and click Add.<br>  <br> |
| **Allocated To** | Community member allocated to Action Centre message.<br>**Note:** Clicking Start Task automatically allocates the community ID linked to the current Synergetic user. Click Reallocate... to assign to another community member. |

## Common buttons

| Button | Description |
|---|---|
| Update | Update the number of unread/unactioned messages in each category.<br>  <br><br>**Note:** Select the **Show Sent/Received Panel** field to display this button.<br>  <br> |
| Mark all as read | Mark all alerts as read. |
| Mark all as read | Mark all information messages as read. |
| Add | Link to the selected community member. |
| Remove | Remove the link to the selected community member.<br>  <br> |
| Reallocate... | Reallocate the task to a different community member. |
| Filter | Filter records using the selection criteria. |
| Reset Filters | Reset all filter fields. |
| Mark as read | Mark the selected information message as read. |
| Mark as read | Mark the selected alert message as read. |
| Mark as Read and Launch | Mark the selected message as read and launch the associated **Linked To** maintenance record. |
| Start Task | Start the selected task.<br>On the **Advanced** tab:<br>• the **Start Date** is set to the current date and time<br>• the **Task Status** field is set to **In Process**. |
| Start And Launch | Start the selected task and launch the associated **Linked To** maintenance record. |

| Button | Description |
|---|---|
| Complete Task | Complete the selected task.<br>On the **Advanced** tab:<br>• the **Completed Date** is set to the current date and time<br>• the **Task Status** field is set to **Completed**. |
| Complete And Launch | Complete the selected task and launch the associated **Linked To** maintenance record. |
| Save | Save the changes made to the selected task. |
| Cancel | Cancel the changes made to the selected task. |

# Action Centre - Description tab

Use the text field on the **Description** tab to add a detailed description to the selected task.

## Opening the Description tab

To open the **Description** tab:

1. Click 

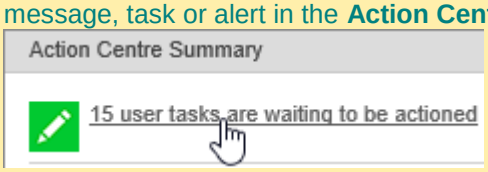
.

**Note:** The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

The **Action Centre Summary** window is displayed.

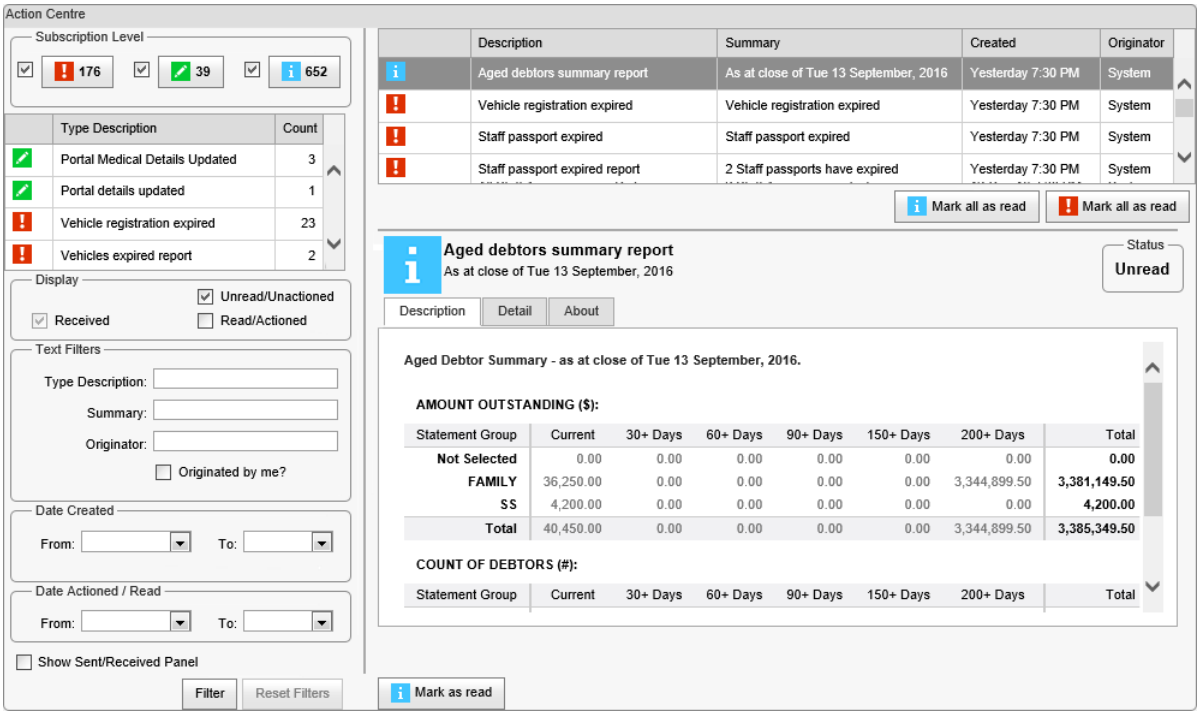
2. Click the Action Centre button.

**Tip:** You can also click a link in the **Action Centre Summary** window to launch a specific message, task or alert in the **Action Centre**.




**Tip:** The **Action Centre** window can also be accessed by clicking **System > Action Centre**.

The **Description** tab of the **Action Centre** window is displayed.



# Action Centre - Detail tab

Use the **Detail** tab to review:

- message status
- task status
- task origination information
- current subscribers. See *Group/User Security Maintenance - Users view* in the **Synergetic** System maintenance manual.

## Opening the Detail tab

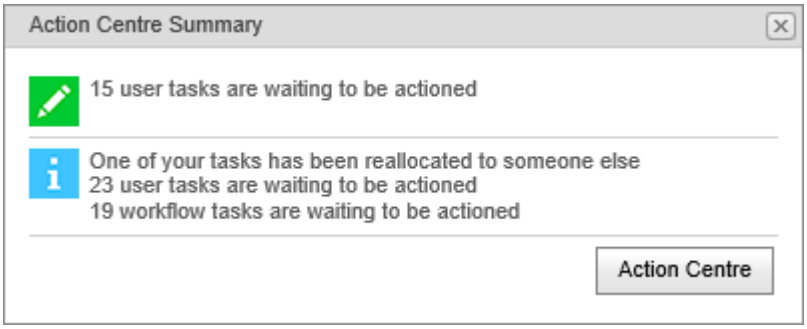
To open the **Detail** tab:

1. Click 

.

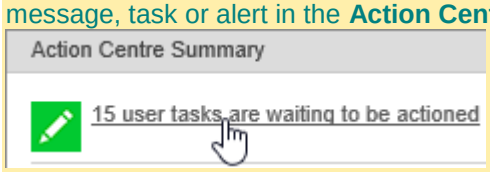
**Note:** The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

The **Action Centre Summary** window is displayed.



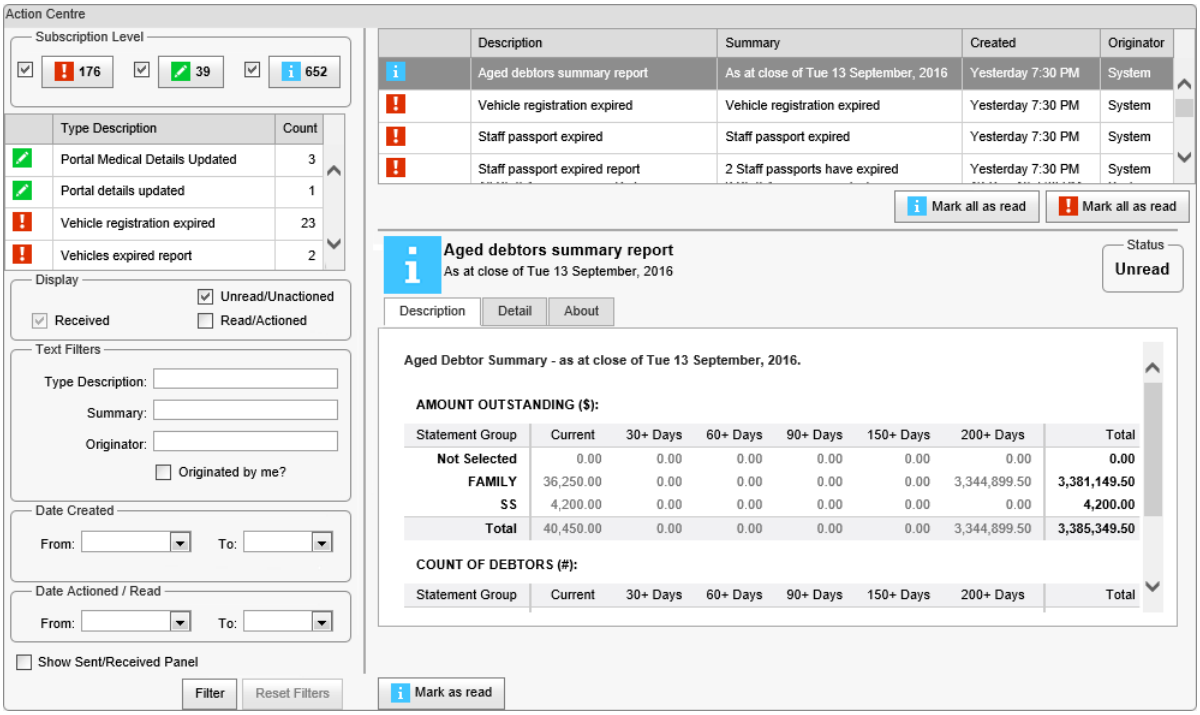
2. Click the Action Centre button.

**Tip:** You can also click a link in the **Action Centre Summary** window to launch a specific message, task or alert in the **Action Centre**.



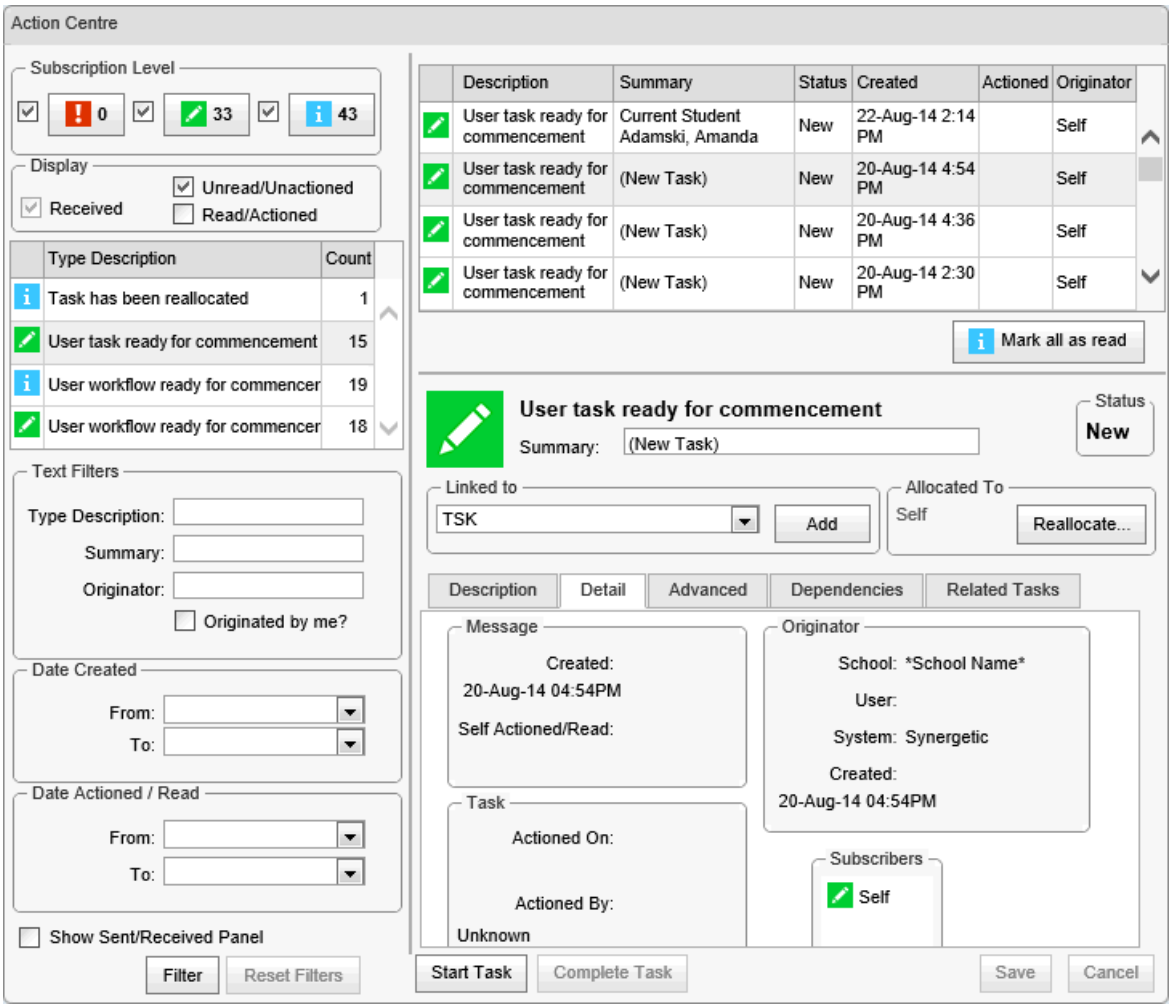

**Tip:** The **Action Centre** window can also be accessed by clicking **System > Action Centre**.

The **Description** tab of the **Action Centre** window is displayed.



3. Click the **Detail** tab.

   The **Detail** tab of the **Action Centre** window is displayed.



## Action Centre - Detail tab key fields

| Field | Description |
|---|---|
| **Created** | Date the task was created. |
| **Self Actioned/Read** | Date the task has been self-actioned or read. |
| **Actioned On** | Whether the task has been actioned.<br>**Note**: This field is only visible for task messages. |
| **Actioned By** | Community member that actioned the task.<br>**Note**: This field is only visible for task messages. |
| **School** | Name of the originating organisation. |
| **User** | Synergetic user that created the task. |
| **System** | The system/program used to create the task. |
| **Created** | Date the task was created. |
| **Subscribers** | Subscribers to the task. See *Group/User Security Maintenance - Groups View* in the **Synergetic** System maintenance manual. |

# Action Centre - Advanced tab

Use the **Advanced** tab to maintain:

- key dates
- reminders
- current task status.

## Opening the Advanced tab

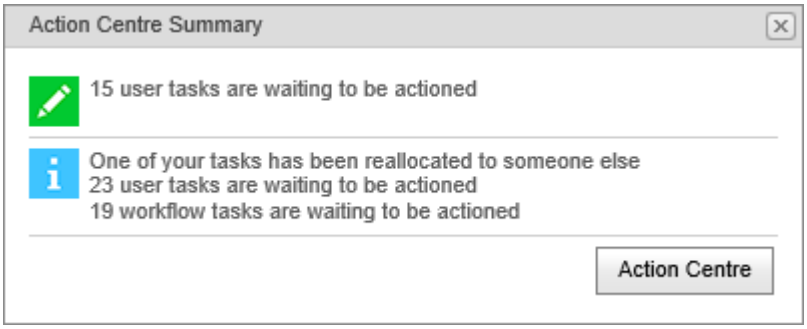
To open the **Advanced** tab:

1. Click 

.

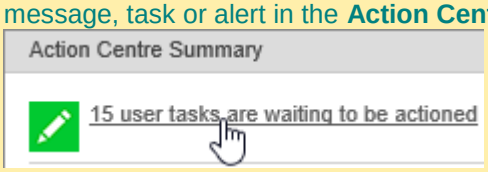
**Note:** The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

The **Action Centre Summary** window is displayed.



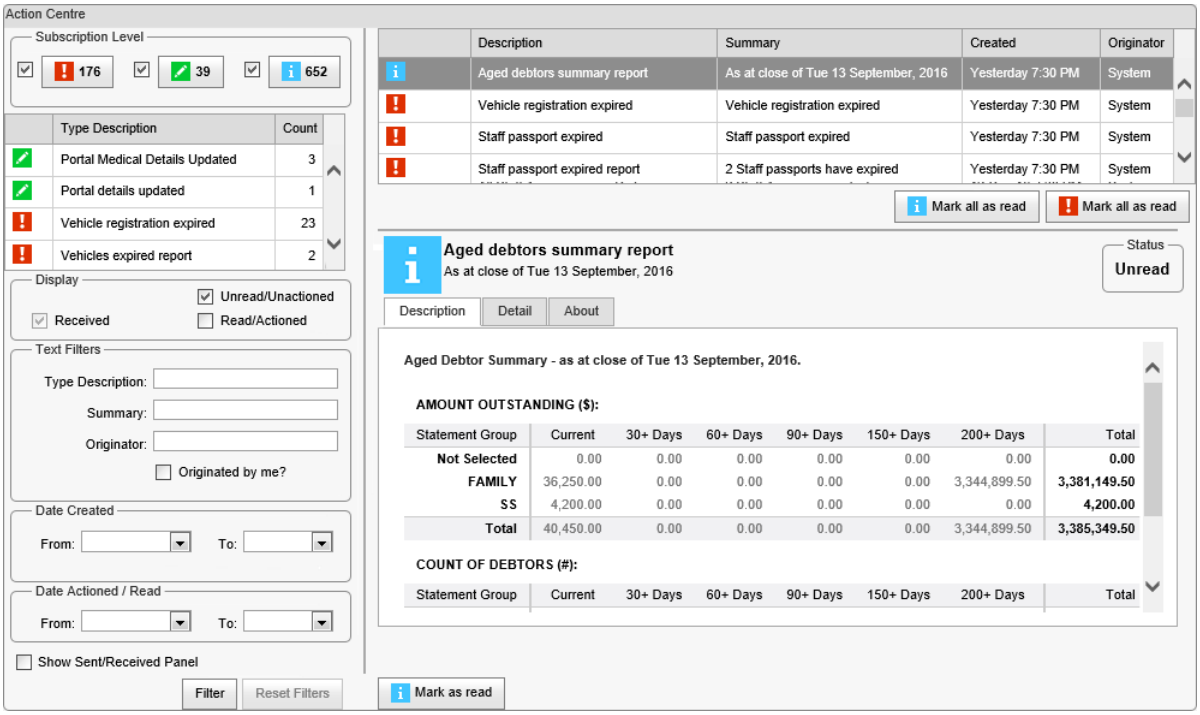
2. Click the Action Centre button.

**Tip:** You can also click a link in the **Action Centre Summary** window to launch a specific message, task or alert in the **Action Centre**.



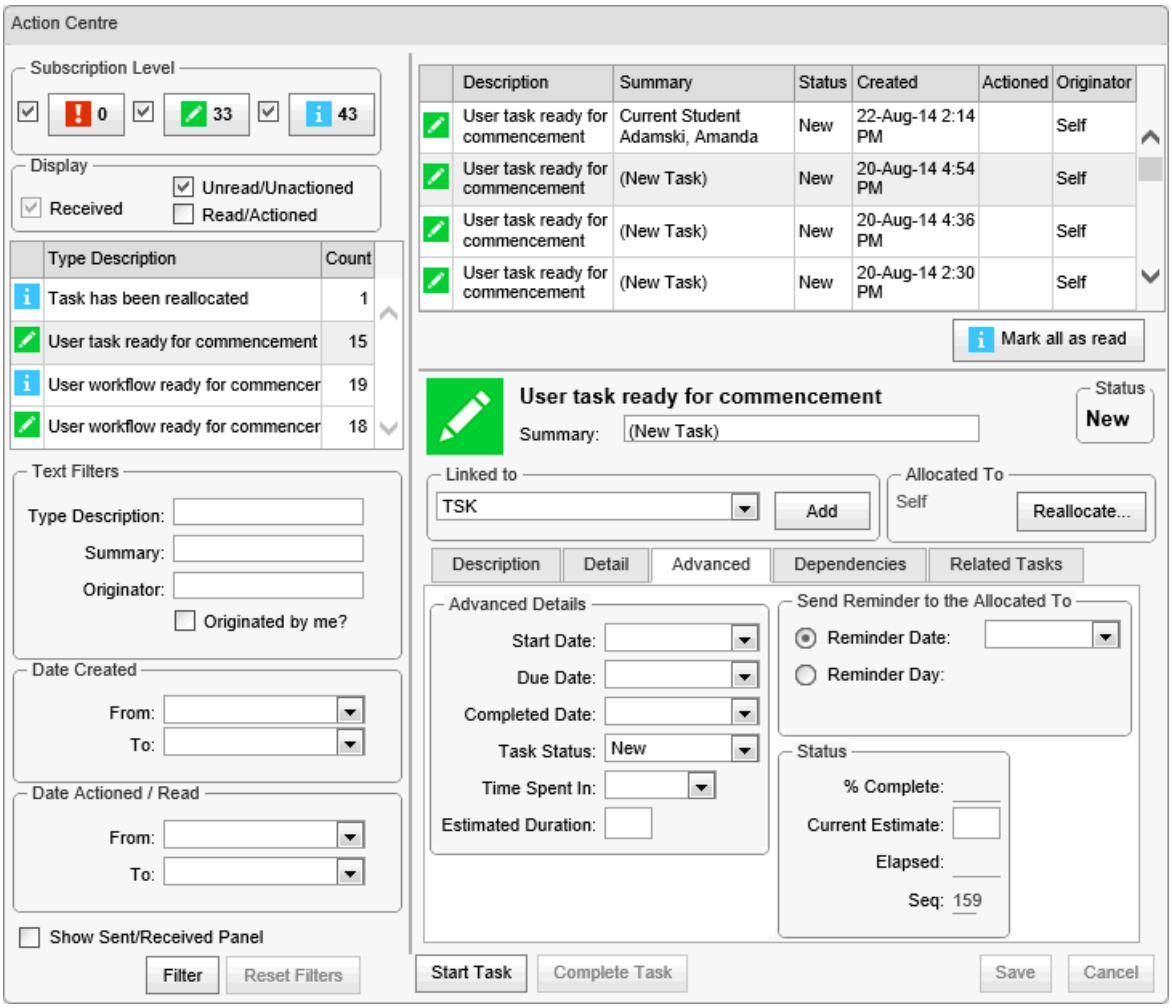

**Tip:** The **Action Centre** window can also be accessed by clicking **System > Action Centre**.

The **Description** tab of the **Action Centre** window is displayed.



3. Click the **Advanced** tab.

   The **Advanced** tab of the **Action Centre** window is displayed.



## Action Centre - Advanced tab key fields

| Field | Description |
|---|---|
| **Start Date** | Start date for the task. |
| **Due Date** | Due date for the task. |
| **Completed Date** | Date the task was completed. |
| **Task Status** | Status of the task. |
| **Time Spent In** | Unit of time to be used for the task. |
| **Estimated Duration** | Estimated time required to complete the task.<br>**Note:** Use the **Time Spent In** field to determine the unit of time. |
| **Reminder Date** | Select a date for the Action Centre to display a reminder relating to the currently selected task. |
| **Reminder Day** | Select to set a task reminder to display the specified number of weekdays, days or weeks either:<br>• before the due date<br>• after the start date. |
| **% Complete** | Percentage of the task completed. |
| **Current Estimate** | Estimated time required to complete the task. |
| **Elapsed** | Units of time elapsed. |
| **Seq** | Unique identifier for the task. |

# Action Centre - DocMan tab

Use the **DocMan** tab to attach documents, spreadsheets or pictures to task messages in the Action Centre.

## Opening the DocMan tab

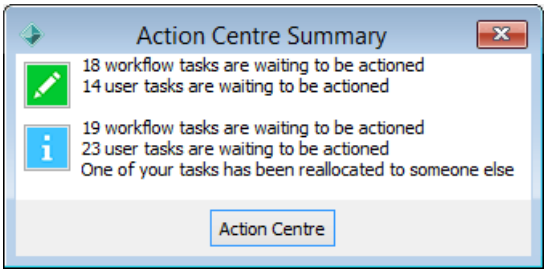
To open the DocMan tab:

1. Click 

.

**Note:** The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages.

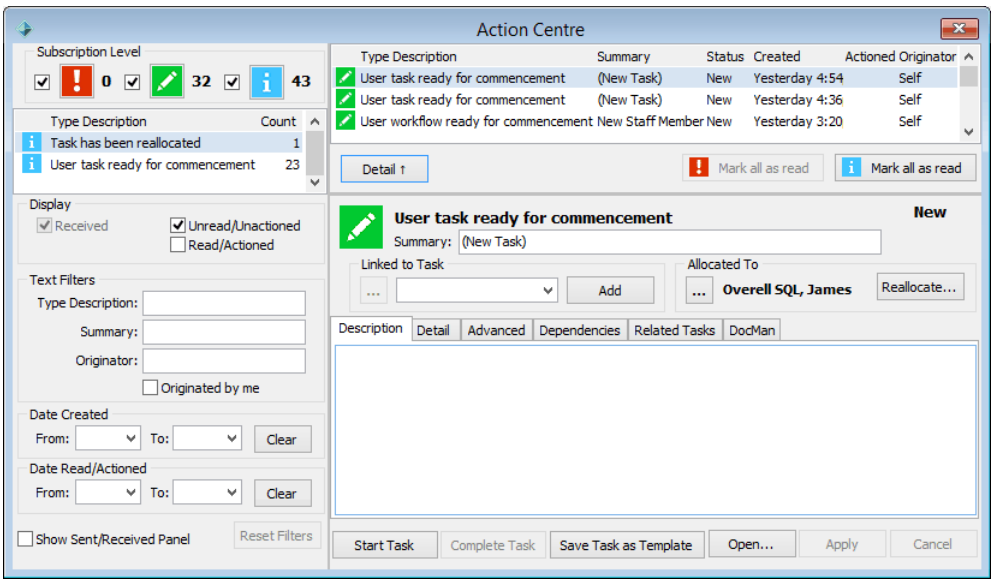
The **Action Centre Summary** window is displayed.



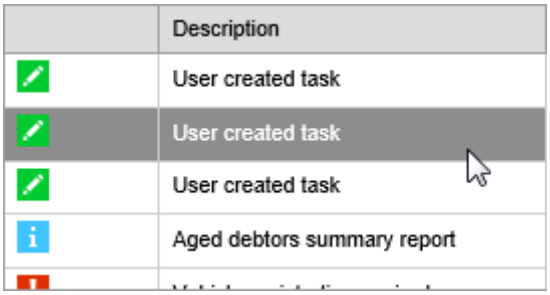

**Tip:** You can also click a link in the **Action Centre Summary** window to launch a specific message, task or alert in the **Action Centre**.

2. Click Action Centre.

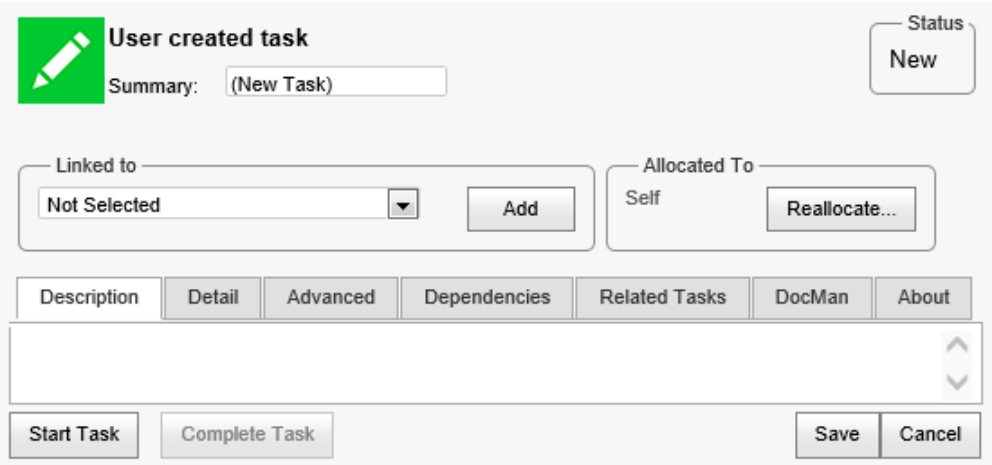
The **Description** tab of the **Action Centre** window is displayed.



3. Select a task message in the Action Centre grid area.

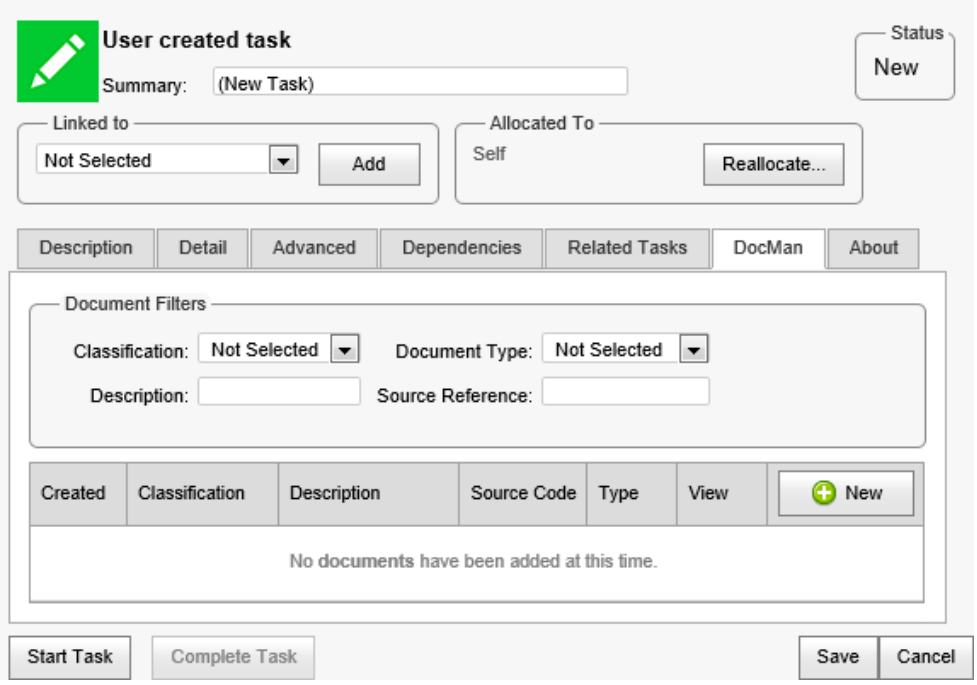



The **Description** tab of the **Action Centre** task message is displayed.




4. Click the **DocMan** tab.

The **DocMan** tab of the **Action Centre** task window is displayed.



## Action Centre - DocMan tab key fields and buttons

### Fields

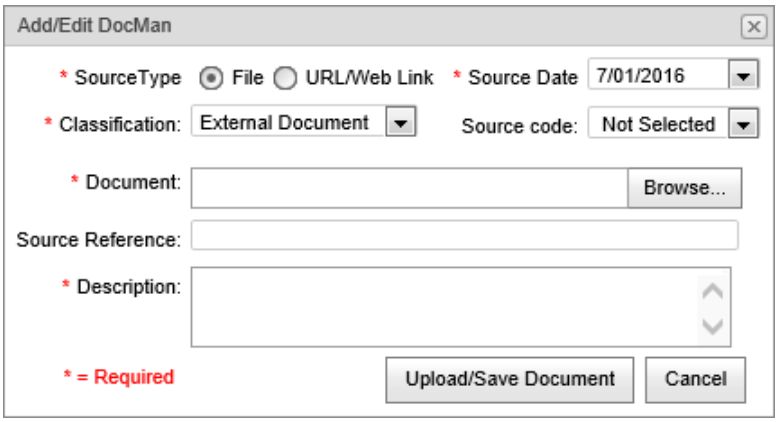
| Field | Description |
|---|---|
| **Classification** | Classification of the documents to be displayed. Access to documents can be restricted based on user security levels.<br>Select the classification from the drop-down list to filter the documents displayed. |
| **Document Type** | Type of document. For example:<br>• Microsoft Word Document<br>• JPG Photo<br>• Adobe Acrobat File<br>• Microsoft Excel Spreadsheet.<br>**Note:** The document types set up are those that are used at your organisation as defined in the luDocumentType lookup table. See luDocumentType lookup table in the Synergetic System maintenance manual.<br>Select the type of document from the drop-down list to filter the documents displayed. |
| **Description** | Type a description to filter the document on. |
| **Source Reference** | Select the document source reference to filter on. For example, Manual Load. |

### Grid area fields

| Field | Description |
|---|---|
| **Created** | Date and time the document, spreadsheet or picture was imported into SynWeb. |
| **Classification** | Classification of the item.<br>Classifications are maintained in the **luDocumentClassification** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **Description** | Meaningful description of the document. |
| **Source Code** | Source of the item. Typical examples include:<br>• Archive<br>• Magazine<br>• Newspaper<br>• School Photo<br>• Website.<br>Document sources are maintained in the **luDocumentSourceCode** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |

| Field | Description |
|---|---|
| **Type** | Type of document. Typical examples include:<br>• DOC, DOCX (Microsoft Word document)<br>• JPG (photo using the Joint Photographic Experts Group format)<br>• PDF (Adobe Acrobat file)<br>• XLS, XLSX (Microsoft Excel spreadsheet).<br>Document types are maintained in the **luDocumentType** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **View** | View the selected document. |

## Buttons

| Button | Description |
|---|---|
|  | Launch the **Add/Edit DocMan** window to add a new document, spreadsheet or picture.<br>  |

# Action Centre - About tab

Use the **About** tab to view additional information about the Action Centre message.

## Opening the About tab

To open the **About** tab:

1. Click 

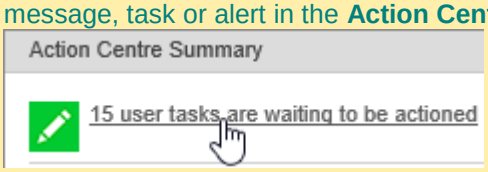
.

**Note:** The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

The **Action Centre Summary** window is displayed.

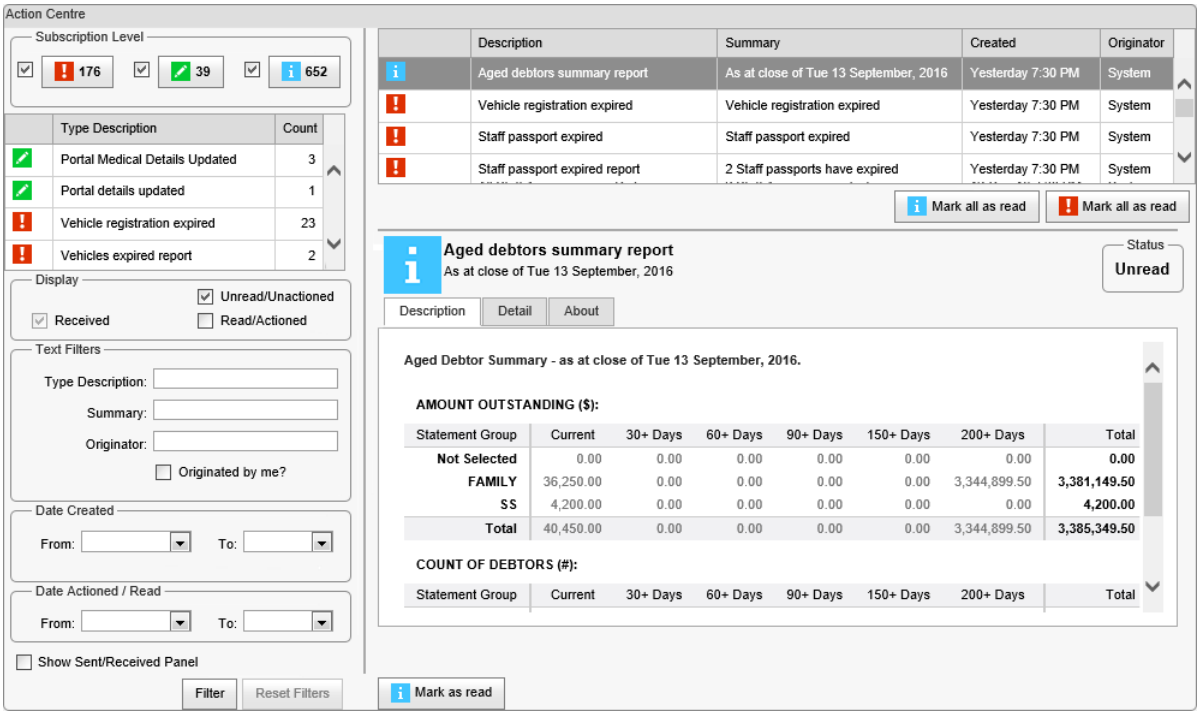
2. Click the Action Centre button.

**Tip:** You can also click a link in the **Action Centre Summary** window to launch a specific message, task or alert in the **Action Centre**.



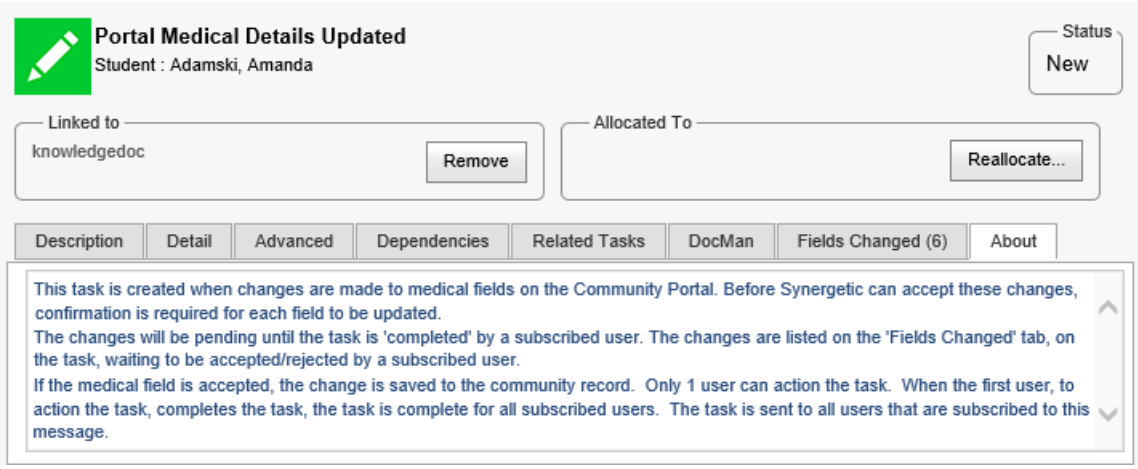

**Tip:** The **Action Centre** window can also be accessed by clicking **System > Action Centre**.

The **Description** tab of the **Action Centre** window is displayed.



3. Click the **About** tab.

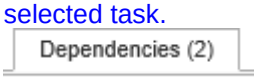
   The **About** tab of the **Action Centre** window is displayed.



# Action Centre - Dependencies tab

Use the **Dependencies** tab to review tasks that must be completed before the currently selected task in the task tree can be started.

**Note:** The **Dependencies** tab displays the number of dependencies relating to the currently selected task.




## Opening the Dependencies tab

To open the **Dependencies** tab:

1. Click 

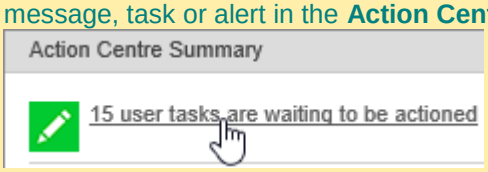
.

**Note:** The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

The **Action Centre Summary** window is displayed.

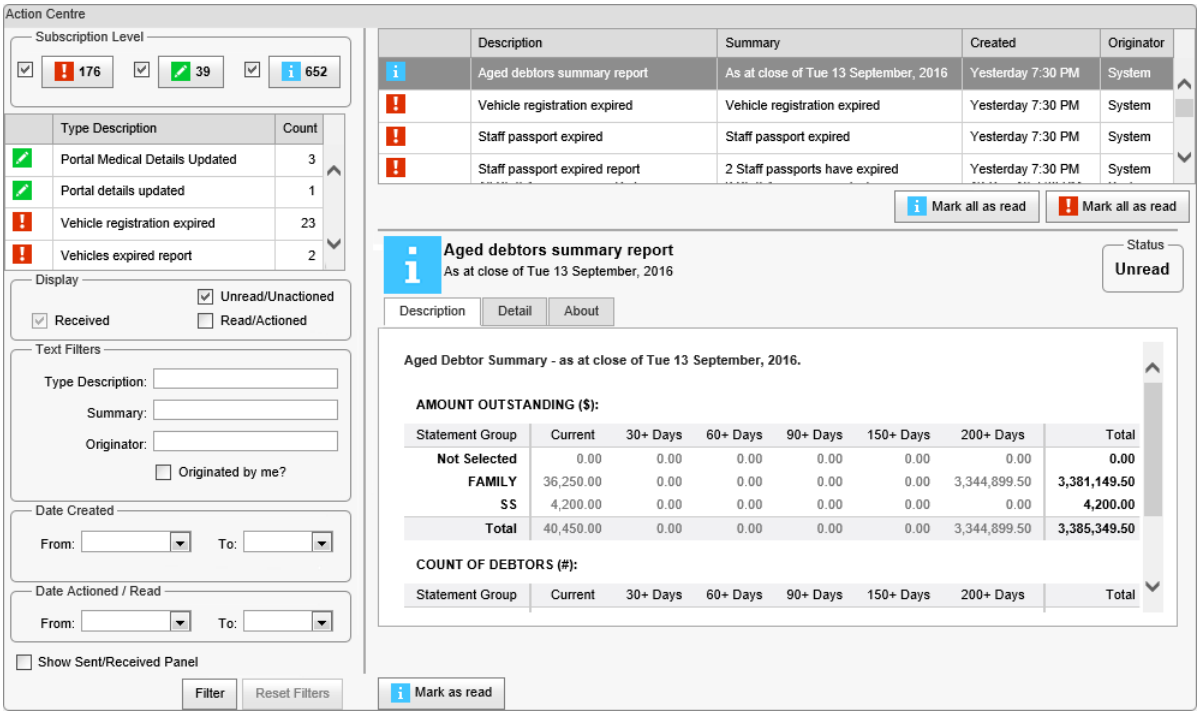
2. Click the Action Centre button.

**Tip:** You can also click a link in the **Action Centre Summary** window to launch a specific message, task or alert in the **Action Centre**.



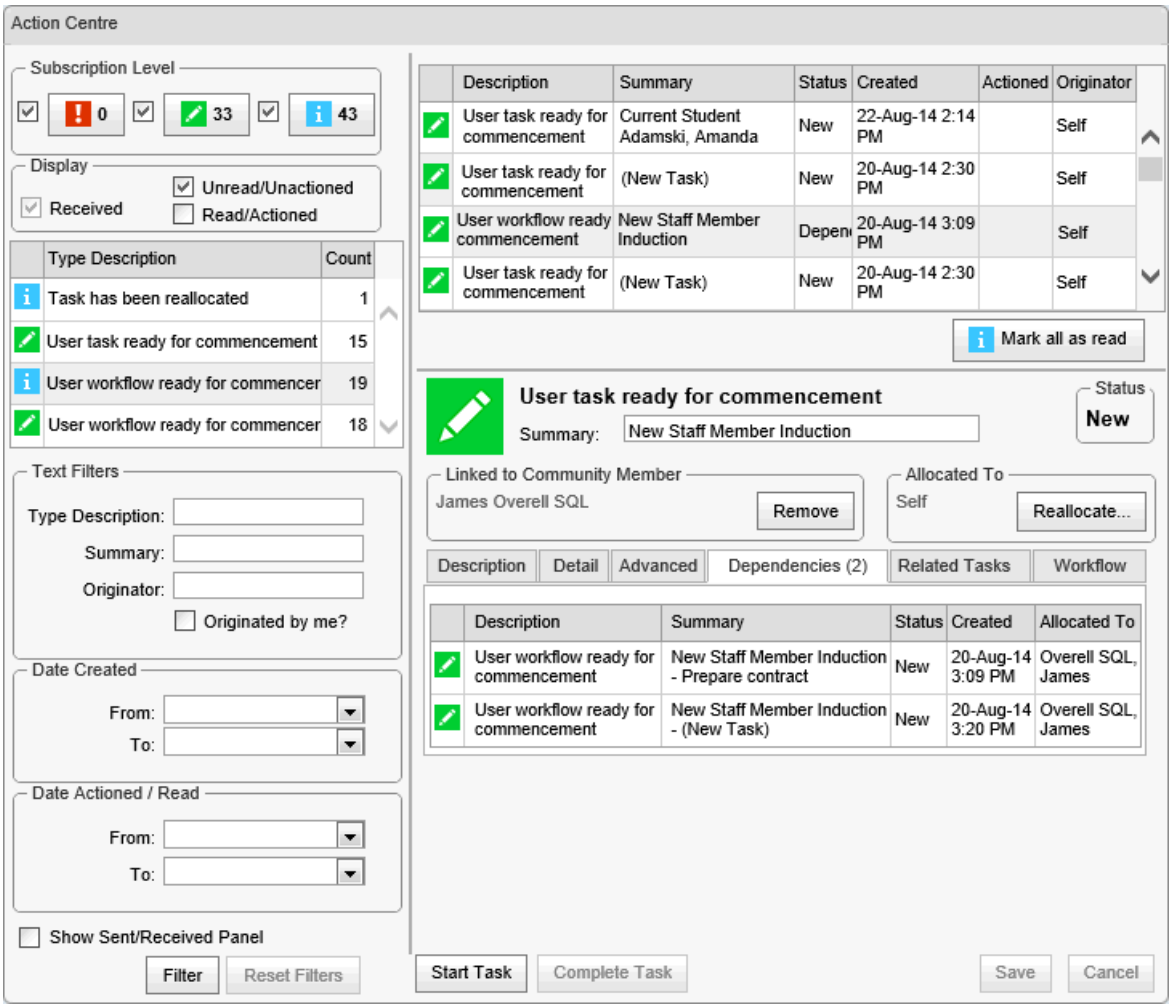

**Tip:** The **Action Centre** window can also be accessed by clicking **System > Action Centre**.

The **Description** tab of the **Action Centre** window is displayed.



3. Click the **Dependencies** tab.

   The **Dependencies** tab of the **Action Centre** window is displayed.




## Action Centre - Dependencies tab key fields and buttons

### Fields

| Field | Description |
|---|---|
| **Description** | Description of the task. |
| **Summary** | Summary of the task. |
| **Status** | Status of the task. |
| **Created** | Creation date of the task. |
| **Allocated To** | Community member allocated to complete the task. |

# Action Centre - Related Tasks tab

Use the **Related Tasks** tab to view tasks related to the task selected in the task tree.

**Note:** The **Related Tasks** tab displays the number of tasks related to the currently selected task.


## Opening the Related Tasks tab

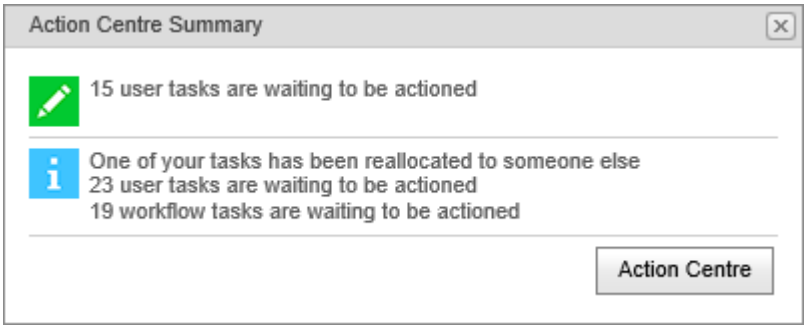
To open the **Related Tasks** tab:

1. Click 

.

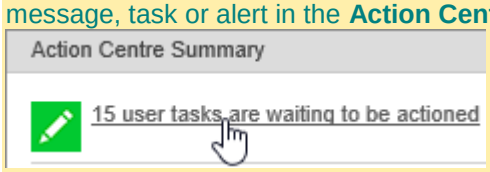
**Note:** The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

The **Action Centre Summary** window is displayed.



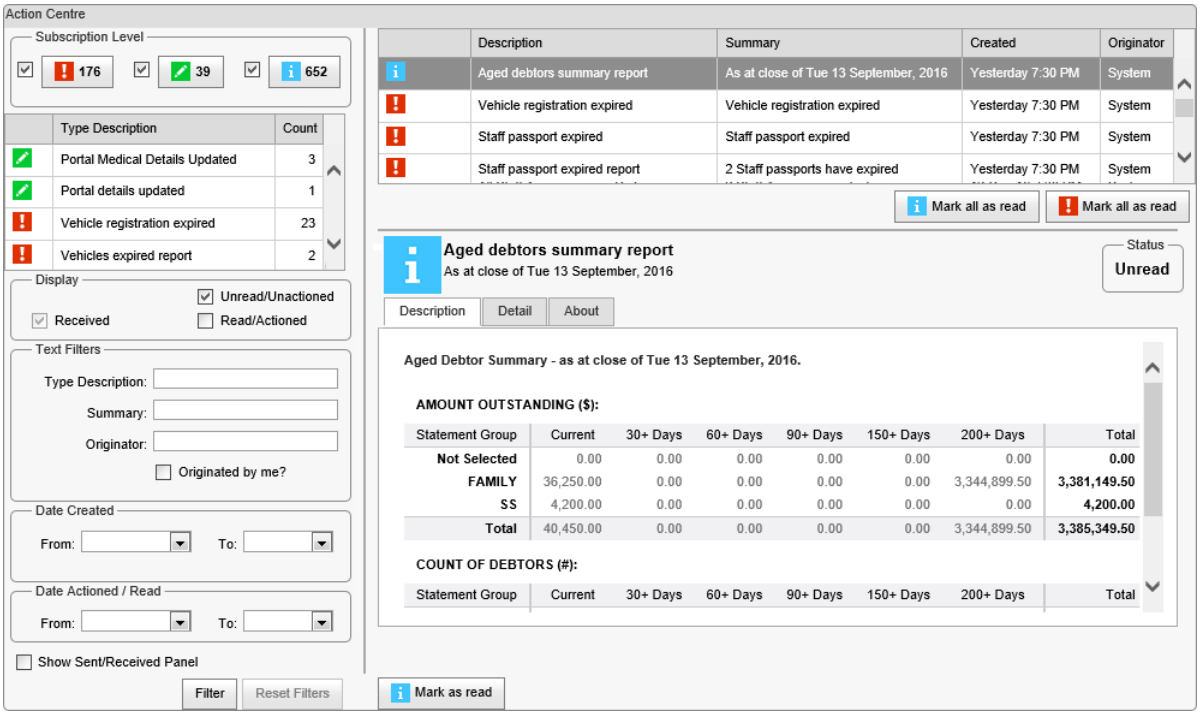
2. Click the Action Centre button.

**Tip:** You can also click a link in the **Action Centre Summary** window to launch a specific message, task or alert in the **Action Centre**.



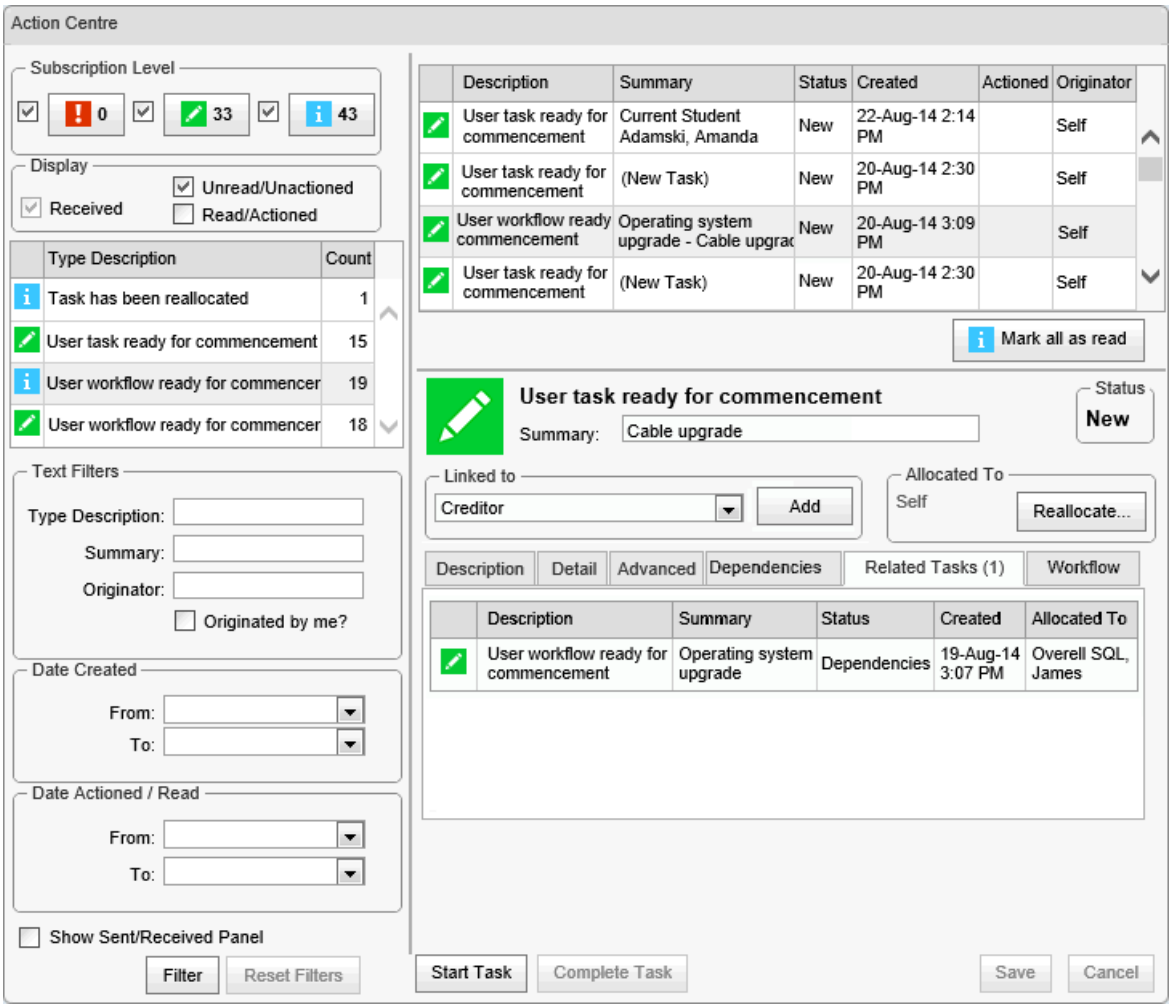

**Tip:** The **Action Centre** window can also be accessed by clicking **System > Action Centre**.

The **Description** tab of the **Action Centre** window is displayed.



3. Click the **Related Tasks** tab.

   The **Related Tasks** tab of the **Action Centre** window is displayed.




## Action Centre - Related Tasks tab key fields

| Field | Description |
|---|---|
| **Description** | Description of the task. |
| **Summary** | Summary of the task. |
| **Status** | Status of the task. |
| **Created** | Creation date of the task. |
| **Allocated To** | Community member allocated to complete the task. |

# Action Centre - Workflow tab

Use the **Workflow** tab to maintain task workflows. You can:

- view and filter the existing workflow
- start tasks
- complete tasks.

## Opening the Workflow tab

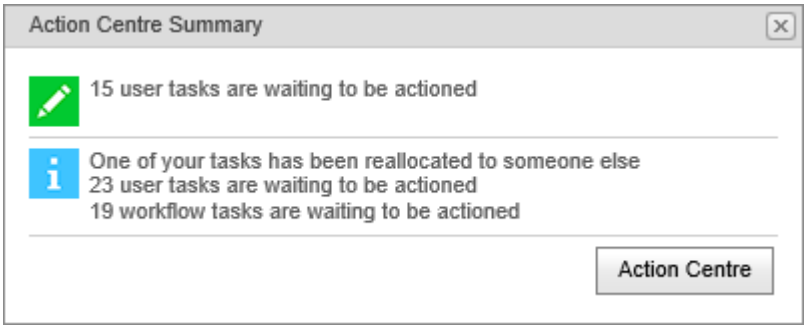
To open the **Workflow** tab:

1. Click 

.

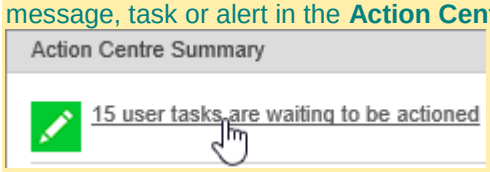
**Note:** The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

The **Action Centre Summary** window is displayed.



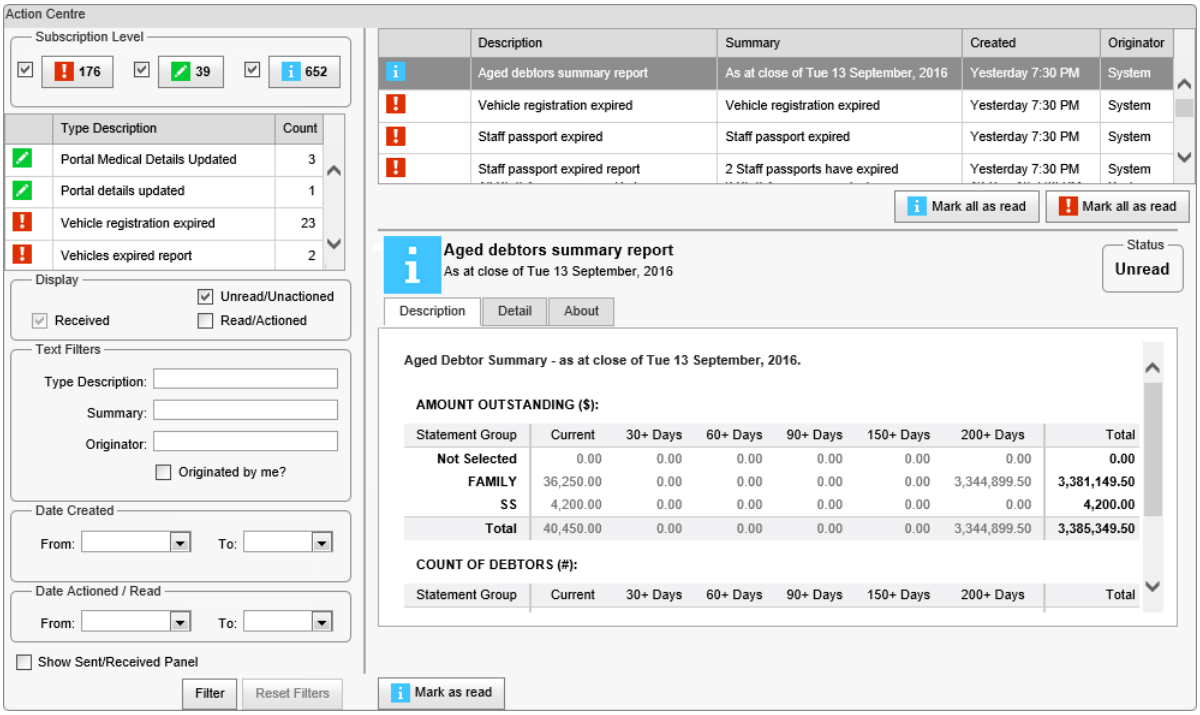
2. Click the Action Centre button.

**Tip:** You can also click a link in the **Action Centre Summary** window to launch a specific message, task or alert in the **Action Centre**.



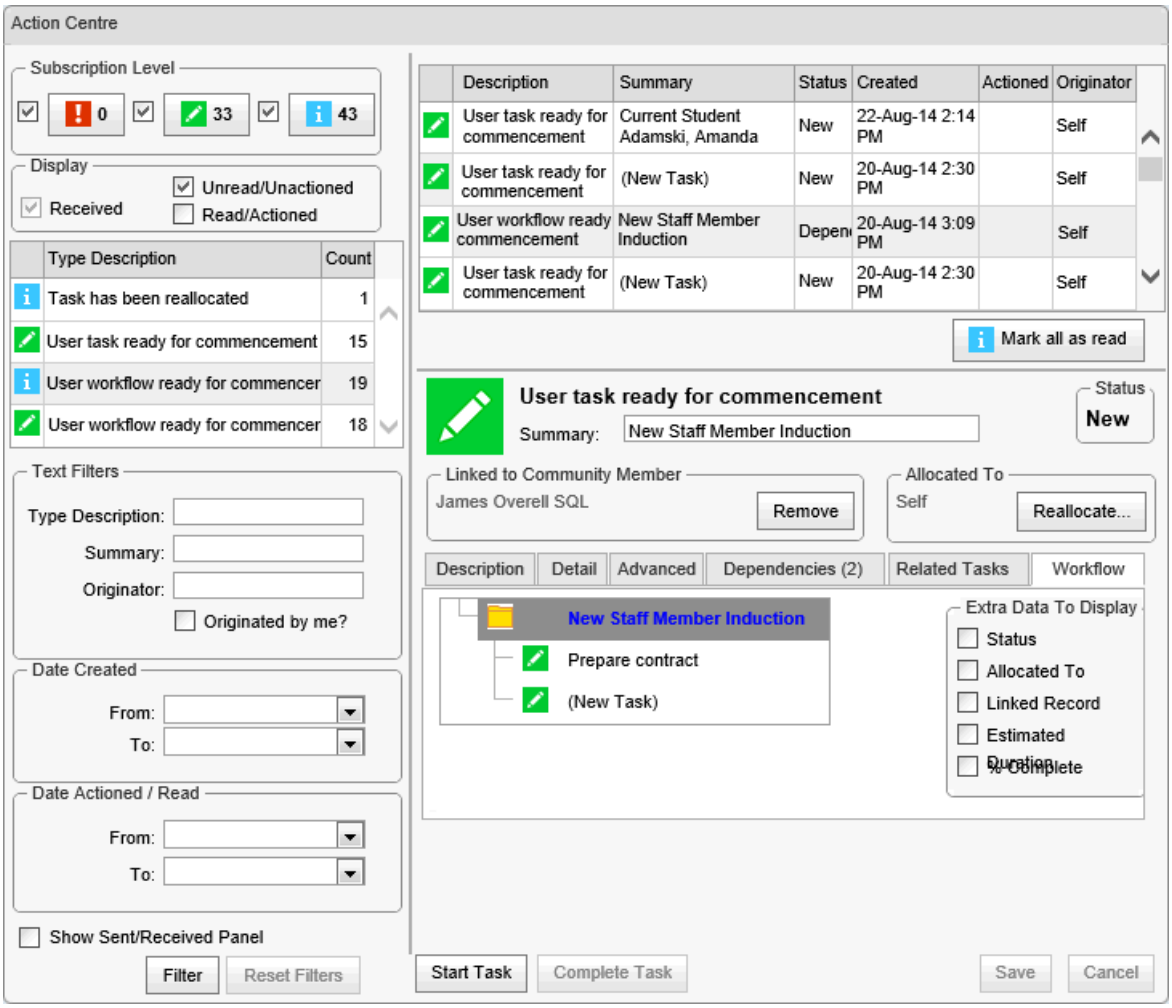

**Tip:** The **Action Centre** window can also be accessed by clicking **System > Action Centre**.

The **Description** tab of the **Action Centre** window is displayed.



3. Click the **Workflow** tab.

   The **Workflow** tab of the **Action Centre** window is displayed.




## Action Centre - Workflow tab key fields

| Field | Description |
|---|---|
| **Extra Data to Display** | Select fields in this area to display extra information on the workflow.<br>You can display:<br>• statuses<br>• allocations<br>• linked records<br>• estimated durations<br>• % complete figures. |

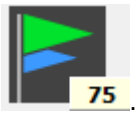
# Action Centre - Fields Changed tab

Use the **Fields Changed** tab to view fields that have been updated.

**Note:** The **Fields Changed** tab only appears when you select an Action Centre message indicating that changes have been to a community member's details.

## Opening the Fields Changed tab

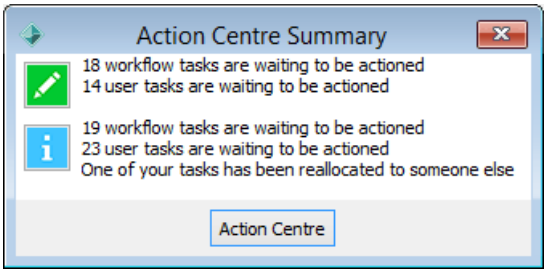
To open the **Fields Changed** tab:

1. Click 

.

**Note:** The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages.

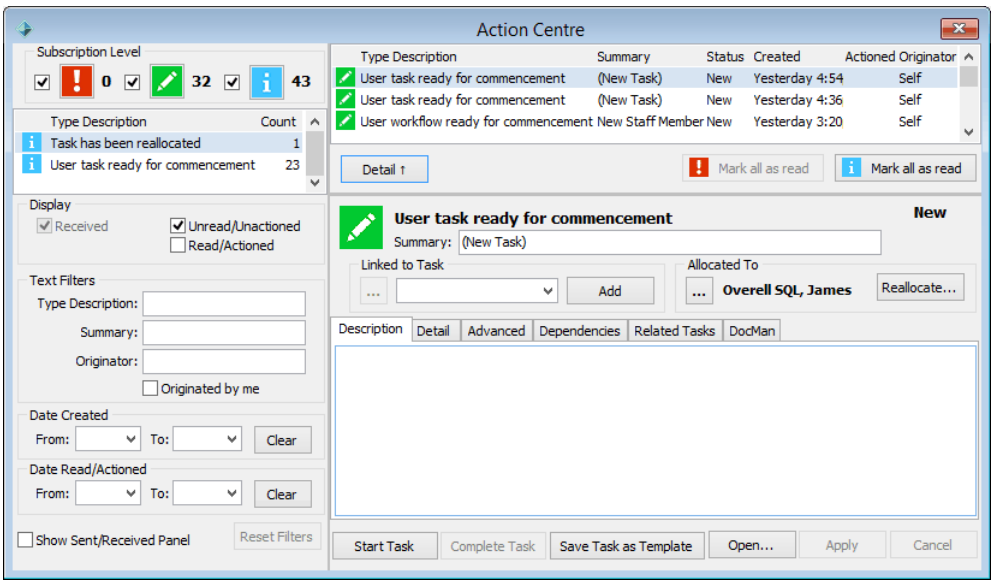
The **Action Centre Summary** window is displayed.



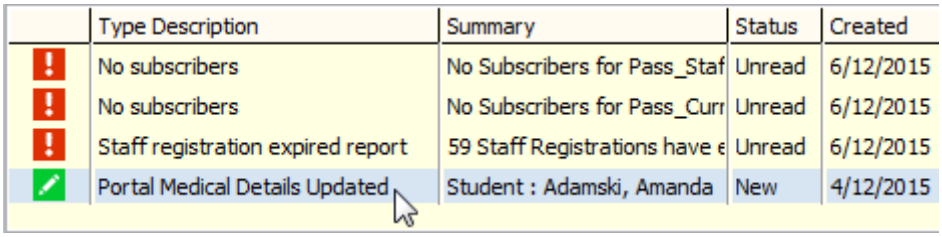

**Tip:** You can also click a link in the **Action Centre Summary** window to launch a specific message, task or alert in the **Action Centre**.

2. Click Action Centre.

The **Description** tab of the **Action Centre** window is displayed.

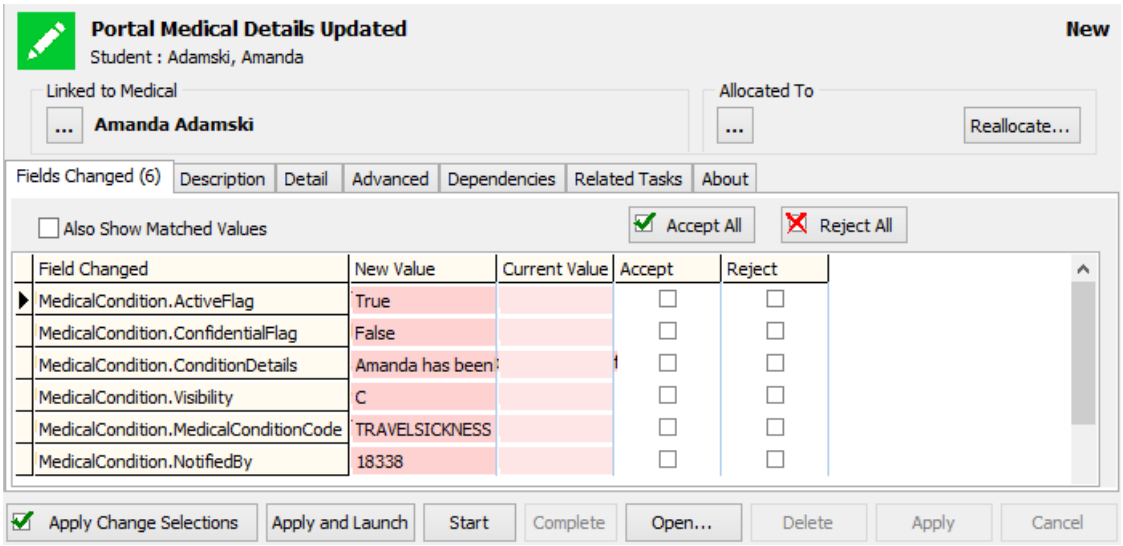


3. Select a message that indicates that fields have been changed.




4. Click the **Fields Changed** tab.

   The **Fields Changed** tab of the **Action Centre** is displayed.



## Action Centre - Fields Changed tab fields and buttons

### Fields

| Field | Description |
|---|---|
| **Also show matched values** | Select to also show unchanged values. That is, show values with the same value in the **New Value** and **Current Value** grid area fields. |
| **Others who share this address** | Other community members that share the same address as the linked community member. |

### Grid area fields

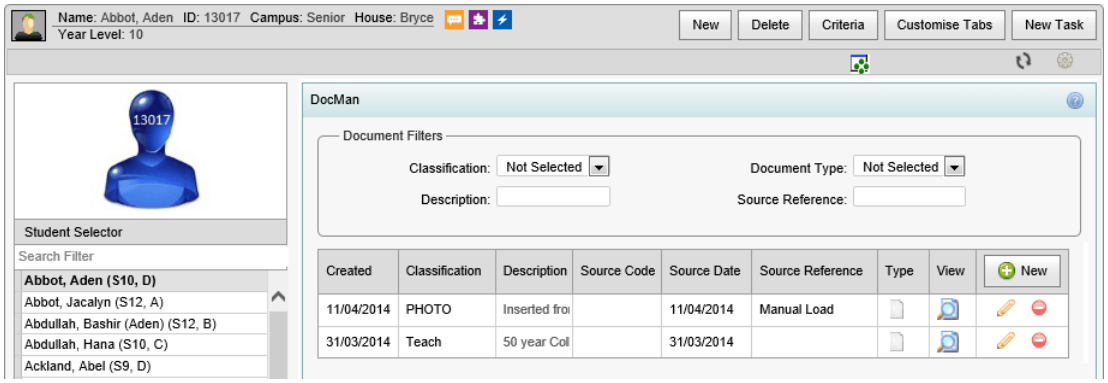
| Field | Description |
|---|---|
| **Field** | Description of the field changed on the Community Portal. |
| **Current value** | Current value of the field. |
| **New value** | New value entered by the community member on the Community Portal. |
| **Accept** | Select to accept the selected change. |
| **Reject** | Select to reject the selected change. |

### Buttons

| Button | Description |
|---|---|
| Accept All | Accept all changes. |
| Reject All | Reject all changes. |
| Apply Change Selections | Apply changes based on selections in the grid area. |
| Apply And Launch | Apply changes based on selections in the grid area and launch the linked maintenance window. |

# Using document management (DocMan)

Many of the SynWeb modules include a **DocMan** bar that allows you to attach useful documents or photos to the community member's record.



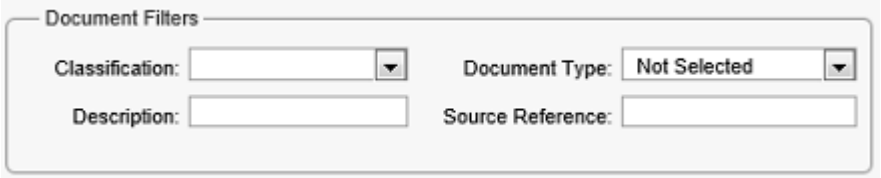

## How to:

- Import any document, spreadsheet or picture into Synergetic and link a community member to it. See *Importing one or more documents* (on page 263).
- Import any URL/web link and link a community member to it. See *Importing one or more URL/web links* (on page 269).
- Import a document, spreadsheet or photo to everyone in a group of community members using a tag list. See *Linking documents using tag lists* (on page 273).
- Modify the details of an imported document. See *Updating document details* (on page 277).

## DocMan bar key fields and buttons

### Document Filters area

The selection area consists of fields used to determine which documents are displayed.




### Fields

| Field | Description |
|---|---|
| **Classification** | Select the document classification to filter on. |
| **Document Type** | Select the document type to filter on. |
| **Description** | Type in a description to filter the documents on. |
| **Source Reference** | Select the document source reference to filter on. For example, Manual Load. |

## Grid area

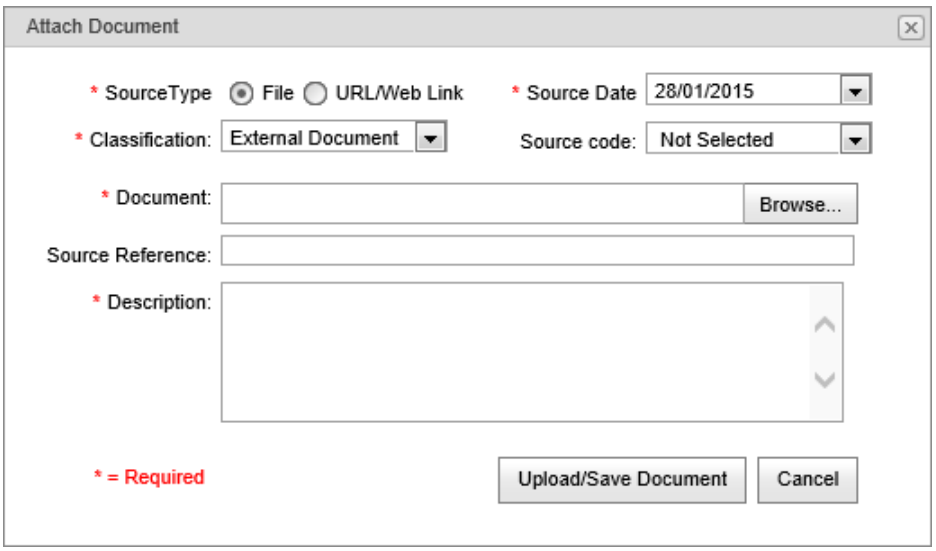
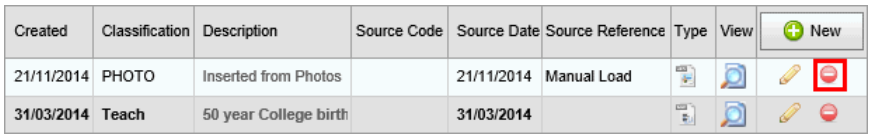
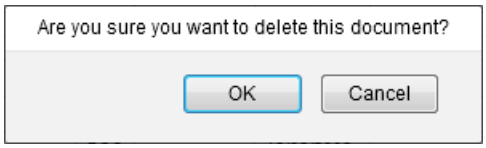
The grid area consists of:

- key fields for each of the documents
- command links for actions that can be performed for the document.

### Fields

| Field | Description |
|---|---|
| **Created** | Date the document, spreadsheet or picture is imported into Synergetic. |
| **Classification** | Classification of the document.<br>Document classifications are maintained in the **luDocumentClassification** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **Description** | Meaningful description for the document. |
| **Source code** | Source of the item. Typical examples include:<br>• Archive<br>• Magazine<br>• Newspaper<br>• School Photo.<br>Document sources are maintained in the **luDocumentSourceCode** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **Source date** | Date that the source document was created.<br>For example, if you are importing a historical picture you might specify the date when the picture was taken.<br>This defaults to the current date and time for new entries. |
| **Source reference** | Cross-reference to the source. For example the name, issue date and page of a newspaper where the photograph appeared. |
| **Type** | Type of document. Typical examples include:<br>• DOC (Word document)<br>• JPG (Photo using the Joint Photographic Experts Group format)<br>• PDF (Adobe Acrobat file)<br>• XLS (Excel spreadsheet).<br>Document types are maintained in the **luDocumentType** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **View** | View the selected document, photo or spreadsheet in a new browser window. |

## Buttons

| Button | Description |
|---|---|
| New | Launch the **Add Document** window to add a new document.<br>  <br> |
| | Download the selected document, photo or spreadsheet. |
| | Launch the selected document, photo or spreadsheet in a new window. |
| | Edit the details of the selected document, photo or spreadsheet in the **Attach Document** window. |
| | Delete the selected document, photo or spreadsheet from the list of documents. To do this:<br>1. Click the **Delete** icon.<br>  <br><br>The following window is displayed.<br>  <br><br>2. Click OK to confirm the deletion. |

## Importing one or more documents

You can import one or more documents and either:

- link to the documents on a file server
- embed them in the Synergetic database.

You can import the documents and attach them to either the:

- Selected community member, such as a student or a staff member, as described below.
- Community members who have been tagged earlier. See *Linking documents using tag lists* (on page 273).

To import one or more documents into Synergetic and attach them to the selected community member:

1. Search for the community member.

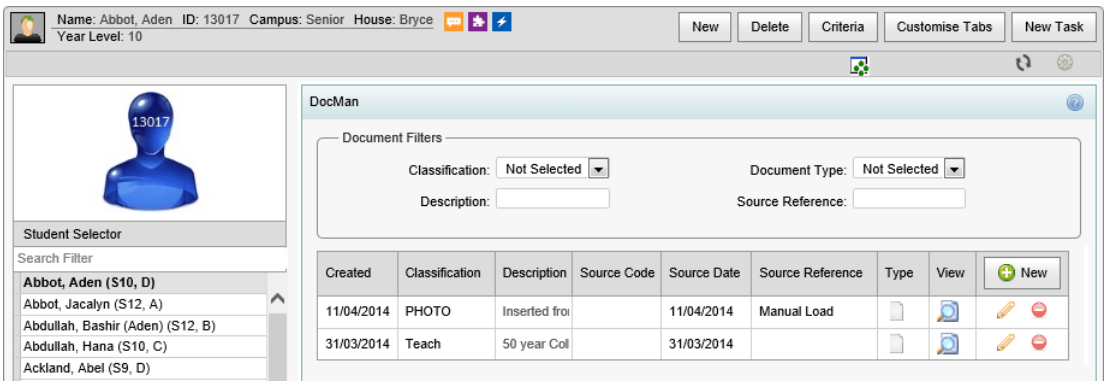
   For example, search for the student. See *Searching for students* in the Current students manual.

   The student's record is displayed on the **Student Maintenance** window.

2. Scroll down to the **DocMan** bar, if required.

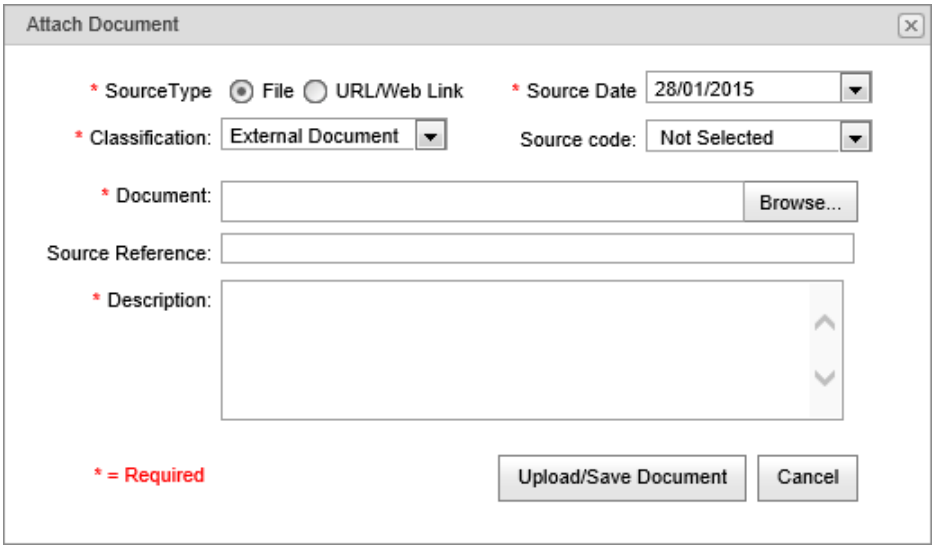
3. Click the **DocMan** bar. See *Current Student Maintenance - DocMan bar* in the Current students manual.

   The **DocMan** bar is expanded.



4. Click New.

   The **Attach Document** window is displayed.

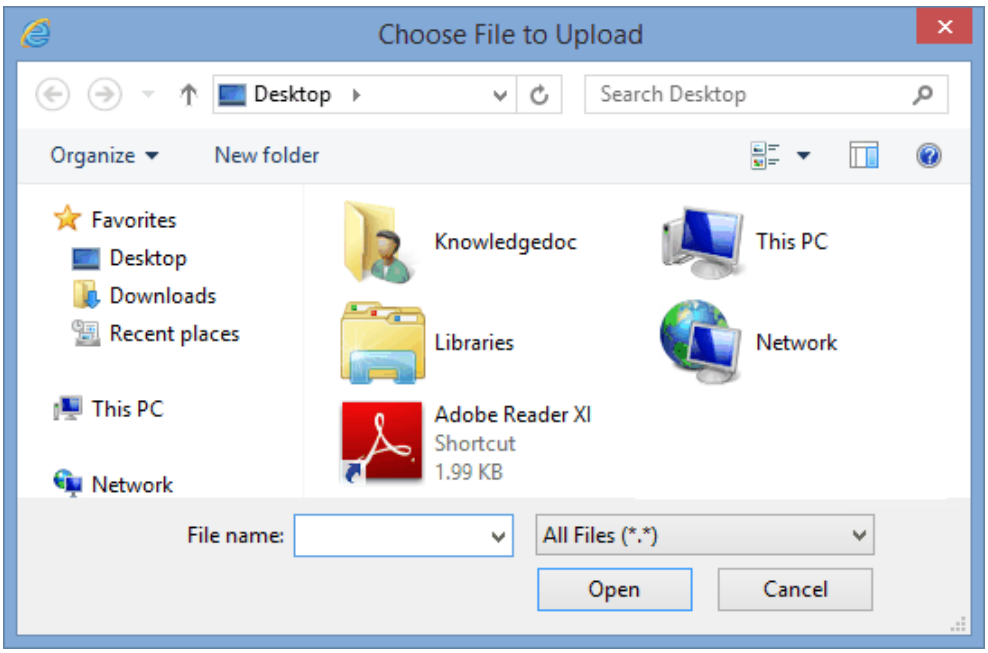



**Note**: The **Attach Document** window may appear slightly different depending on the browser that you are using.

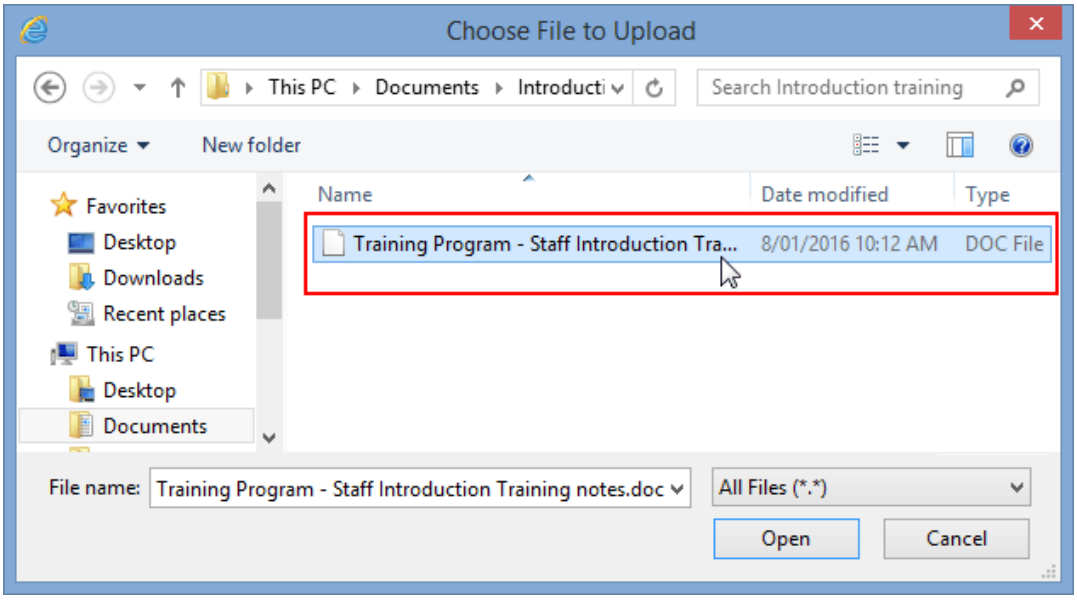
5. Select **File** in the **Source Type** field.

6. Click Browse...

   A window is displayed, similar to the example below.



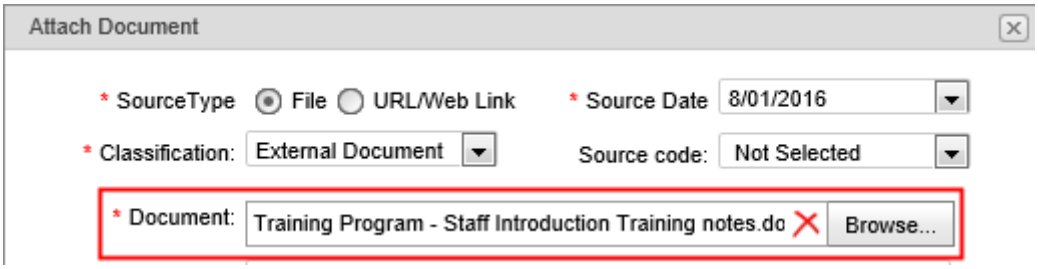
7. Locate and select the document, spreadsheet or photo you want to import.




8. Click Open.

   The selected file name appears next to the **Document** field.

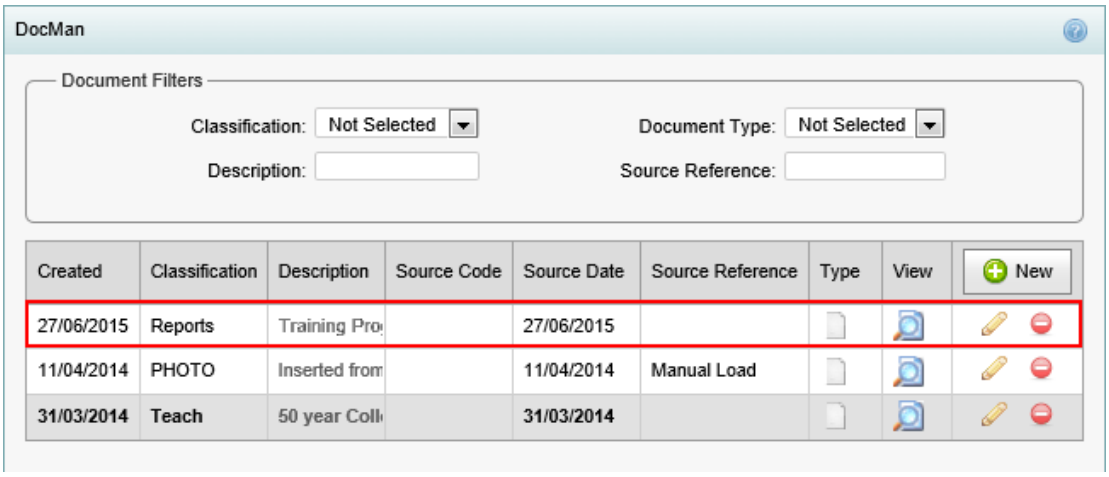
   The **Source Date** updates to the current day's date.




9. Select a **Classification**.
10. Select a **Source Code**.
11. Type in a **Source Reference**.
12. Type in a **Description**.

13. Click Upload/Save Document.

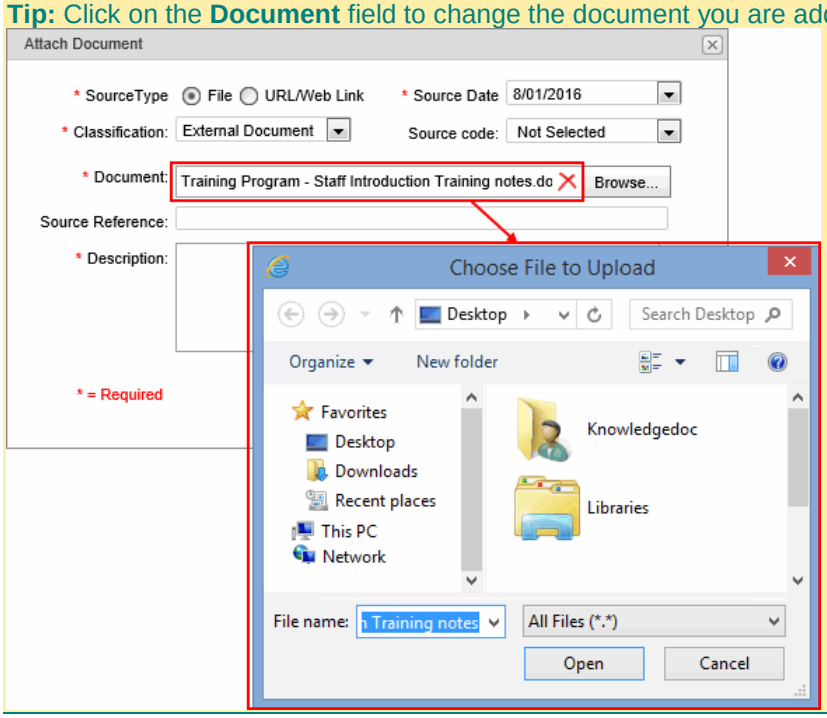
    The documents, or their links, are added to the community members' available documents.




14. Repeat steps **4** through **19** until there are no more documents to link, or embed, for the community member.

## Attach Document window key fields and buttons

### Fields

| Field | Description |
|---|---|
| **Source Type** | Source type of the document. Select either:<br>• **File** to import a file from your computer into the **Synergetic** database<br>• **URL** to link to a website. |
| **Document** | Directory path of the source document, the document name and its file extension if adding a document on a file server or PC.<br>This field is empty if the file has been embedded in the Synergetic database.<br>**Tip:** Click on the **Document** field to change the document you are adding.<br>  <br> |
| **Source Date** | Date that the source document was created.<br>For example, if you are importing a historical picture you might specify the date when the picture was taken.<br>This defaults to the current date and time for new entries. |
| **Classification** | Classification of the document.<br>Document classifications are maintained in the **luDocumentClassification** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |

| Field | Description |
|---|---|
| **Source Code** | Source of the item. Typical examples include:<br>• Archive<br>• Magazine<br>• Newspaper<br>• School Photo.<br>Document sources are maintained in the **luDocumentSourceCode** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **Source Reference** | Cross-reference to the source. For example the name, issue date and page of a newspaper where the photograph appeared. |
| **Description** | Meaningful description for the document. |

## Buttons

| Button | Description |
|---|---|
| Browse... | Locate and select the document, spreadsheet or photo you want to import. |
| Upload/Save Document | Upload the selected document, spreadsheet or photo. |
| Cancel | Cancel the document import. |

## Importing one or more URL/web links

You can import one or more documents and either:

- link to the documents on a file server
- embed them in the Synergetic database.

You can import the documents and attach them to either the:

- Selected community member, such as a student or a staff member, as described below.
- Community members who have been tagged earlier.

To import one or more URLs/web links into SynWeb and attach them to the selected community member:

1. Search for the community member.

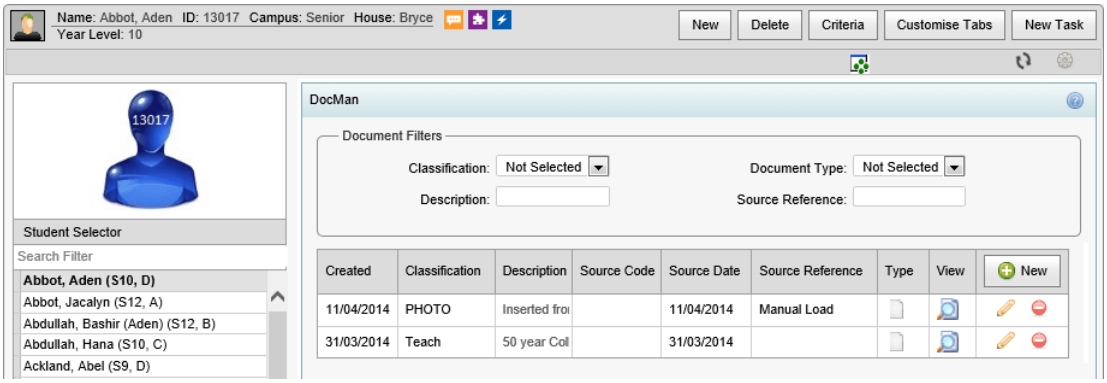
   For example, search for the student. See *Searching for students* in the Current students manual.

   The student's record is displayed on the **Student Maintenance** window.

2. Scroll down to the **DocMan** bar, if required.

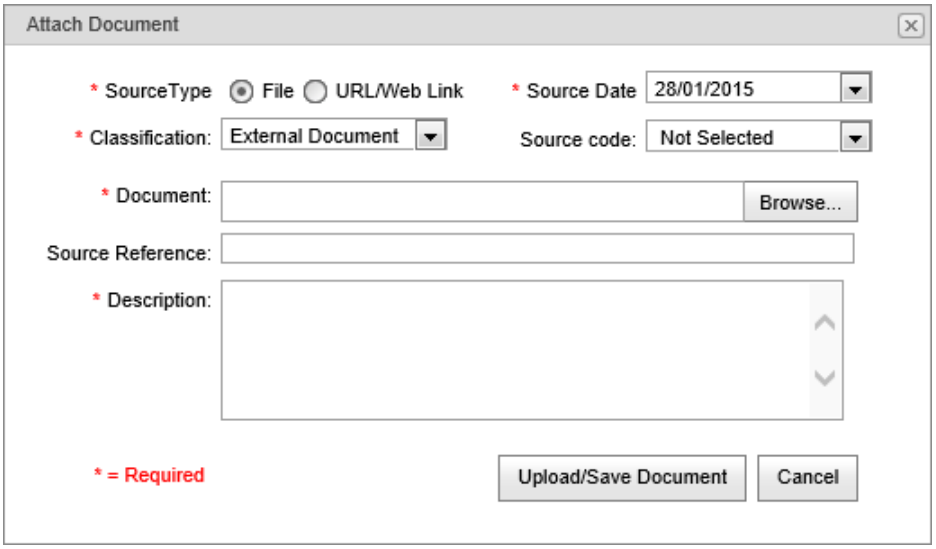
3. Click the **DocMan** bar. See *Current Student Maintenance - DocMan bar* in the Current students manual.

   The **DocMan** bar is expanded.



4. Click New.

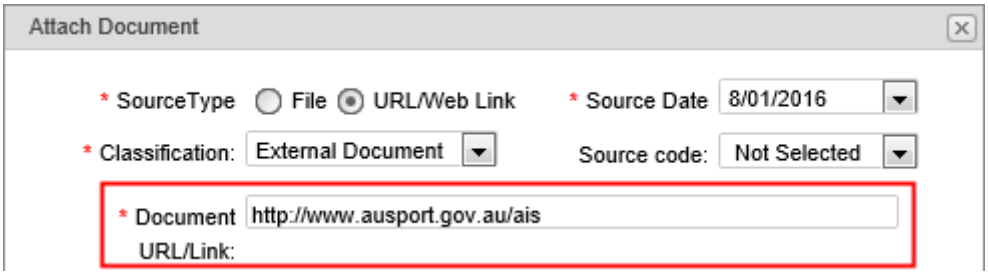
   The **Attach Document** window is displayed.




**Note**: The **Attach Document** window may appear slightly different depending on the browser that you are using.

5. Select **URL/Web Link** in the **Source type** field.

6. Type the URL into the **Document URL/Link** field.




7. Select a **Classification**.

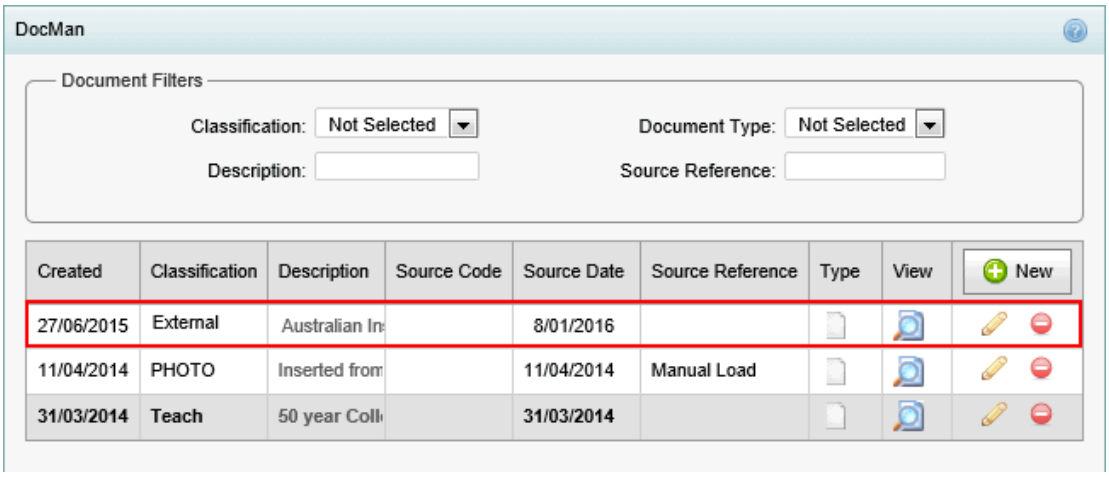
8. Select a **Source Code**.

9. Type in a **Source Reference**.

10. Type in a **Description**.

11. Click Upload/Save Document.

    The URL link is added to the community members' available documents.




12. Repeat steps **4** through **11** until there are no more URL links to record for the community member.

## Attach Document window key fields and buttons

### Fields

| Field | Description |
|---|---|
| **Source Type** | Source type of the document. Select either:<br>• **File** to import a file from your computer into the **Synergetic** database<br>• **URL** to link to a website. |
| **Document URL Link** | Website address of the URL/web link.<br>For example, http://www.ausport.gov.au/ais. |
| **Source Date** | Date that the source document was created.<br>For example, if you are importing a historical picture you might specify the date when the picture was taken.<br>This defaults to the current date and time for new entries. |
| **Classification** | Classification of the document.<br>Document classifications are maintained in the **luDocumentClassification** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **Source Code** | Source of the item. Typical examples include:<br>• Archive<br>• Magazine<br>• Newspaper<br>• School Photo.<br>Document sources are maintained in the **luDocumentSourceCode** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **Source Reference** | Cross-reference to the source. For example the name, issue date and page of a newspaper where the photograph appeared. |
| **Description** | Meaningful description for the document. |

### Buttons

| Button | Description |
|---|---|
| Browse... | Locate and select the document, spreadsheet or photo you want to import. |
| Upload/Save Document | Upload the selected document, spreadsheet or photo. |
| Cancel | Cancel the document import. |

## Linking documents using tag lists

You can import one or more documents and either:

- link to the documents on a file server
- embed them in the Synergetic database.

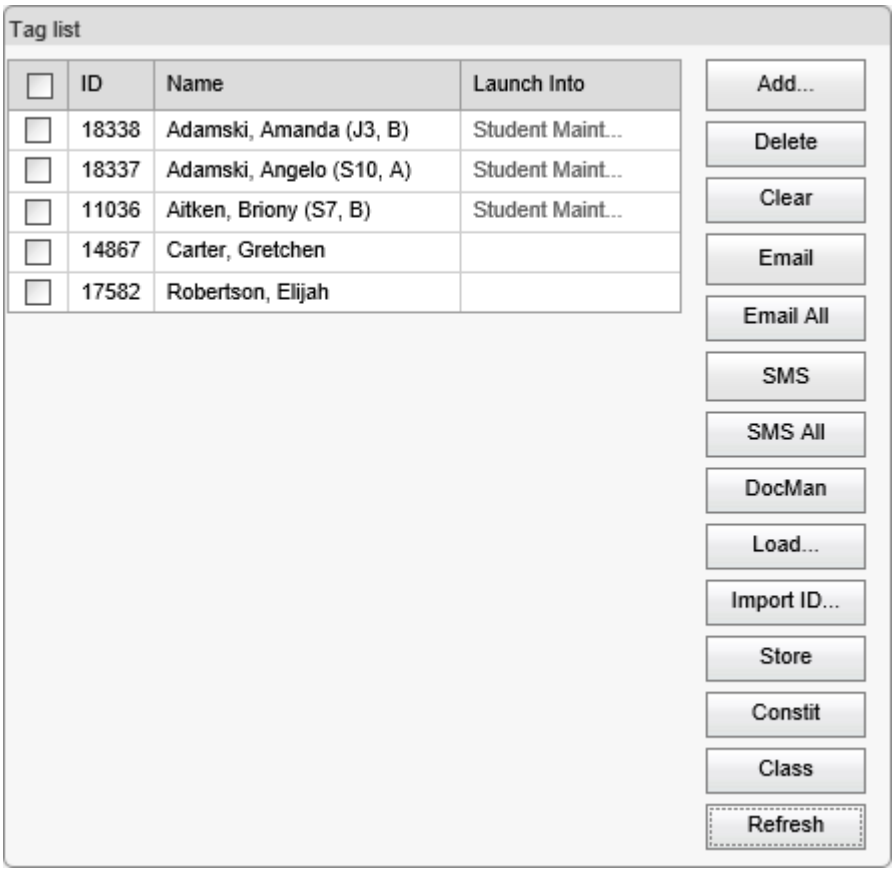
You can import the documents and attach them to either the:

- Community members who have been tagged earlier, as described below.
- Selected community member, such as a student or a staff member. See *Importing one or more documents* (on page 263).

To link a document, spreadsheet or picture to a number of different community members at once:

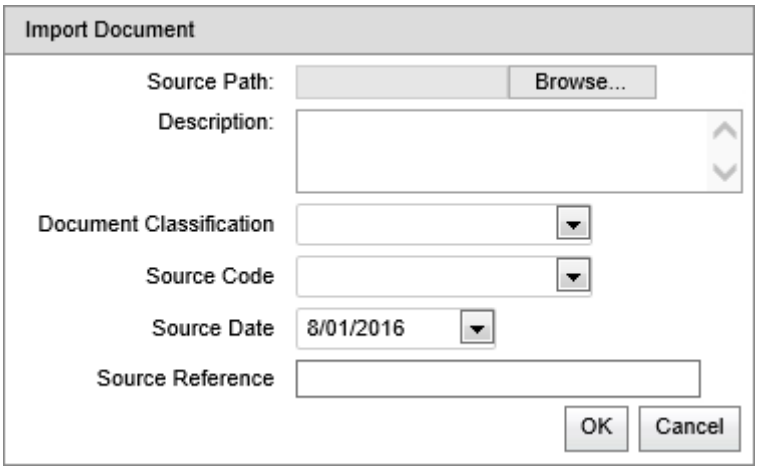
1. Create your tag list. See:
   - *Tagging community members from the Tag List window* (on page 139)
   - *Tagging individual community members from a grid* (on page 144)
   - *Tagging multiple community members from a grid* (on page 148).

   The **Tag List** window is displayed.



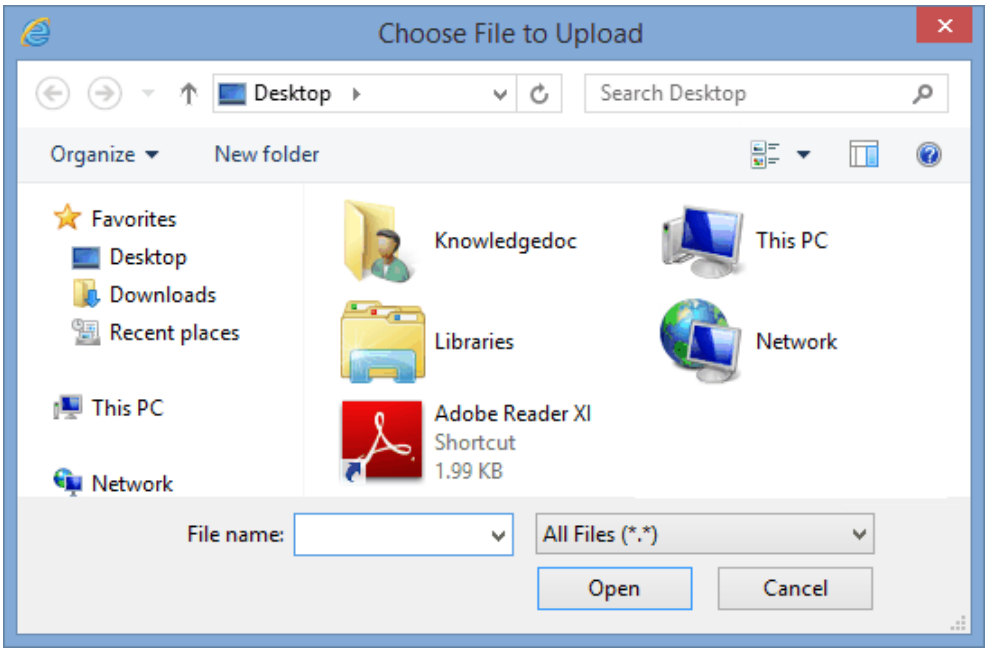
2. Click DocMan.

   The **Import Document** window is displayed.

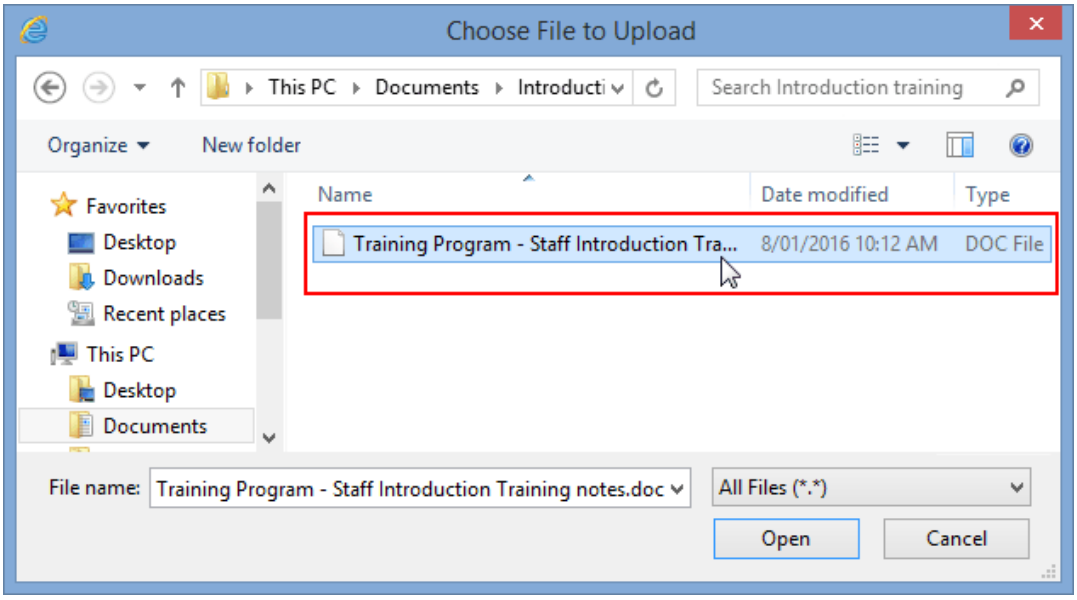



3. Click Browse...

   A window is displayed, similar to the example below.



4. Locate and select the document, spreadsheet or photo you want to import.




5. Click Open.

   The selected file name appears next to the **Source Path** field.

   The **Source Date** updates to the current day's date.

6. Select a **Document Classification**.

7. Select a **Source Code**.

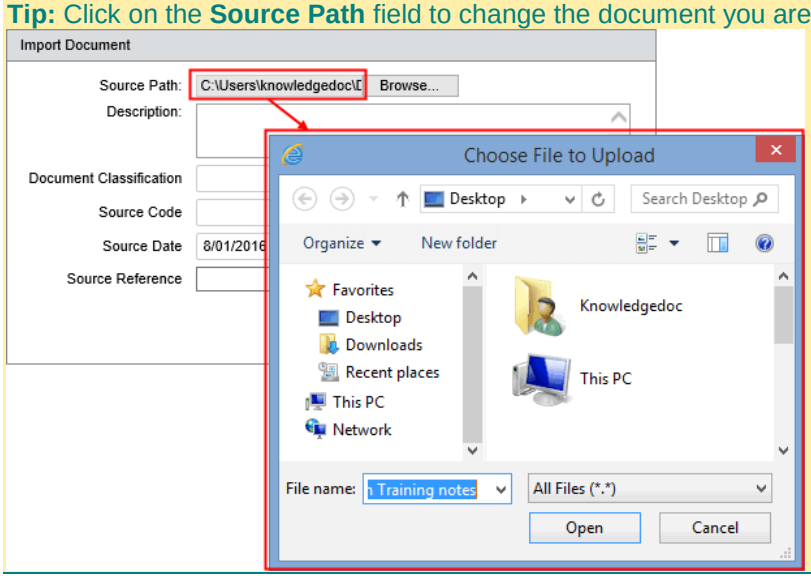
8. Type in a **Source Reference**.

9. Type in a **Description**.

10. Click OK.

11. Repeat steps **2** through **10** until there are no more documents to link, or embed, for the tagged community members.

## Import Document window key fields

| Field | Description |
|---|---|
| **Source Path** | Directory path of the source document, the document name and its file extension if adding a document on a file server or PC.<br><br>This field is empty if the file has been embedded in the Synergetic database.<br><br>**Tip:** Click on the **Source Path** field to change the document you are adding.<br>  <br> |
| **Source Date** | Date that the source document was created.<br><br>For example, if you are importing a historical picture you might specify the date when the picture was taken.<br><br>This defaults to the current date and time for new entries. |
| **Document Classification** | Classification of the document.<br><br>Document classifications are maintained in the **luDocumentClassification** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **Source Code** | Source of the item. Typical examples include:<br>• Archive<br>• Magazine<br>• Newspaper<br>• School Photo.<br><br>Document sources are maintained in the **luDocumentSourceCode** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **Source Reference** | Cross-reference to the source. For example the name, issue date and page of a newspaper where the photograph appeared. |
| **Description** | Meaningful description for the document. |

## Updating document details

To update the document details of the document, photo or spreadsheet:

1. Search for the community member.

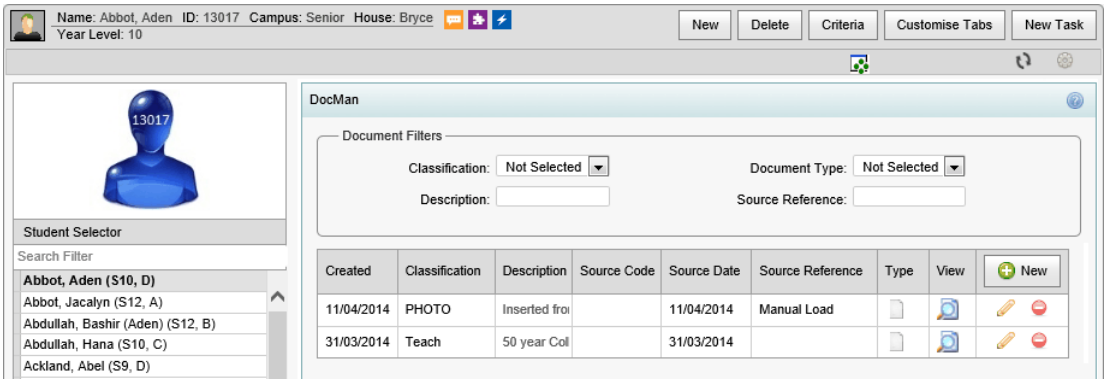
   For example, search for the student. See *Searching for students* in the Current students manual.

   The student's record is displayed on the **Student Maintenance** window.

2. Scroll down to the **DocMan** bar, if required.

3. Click the **DocMan** bar. See *Current Student Maintenance - DocMan bar* in the Current students manual.

   The **DocMan** bar is expanded.



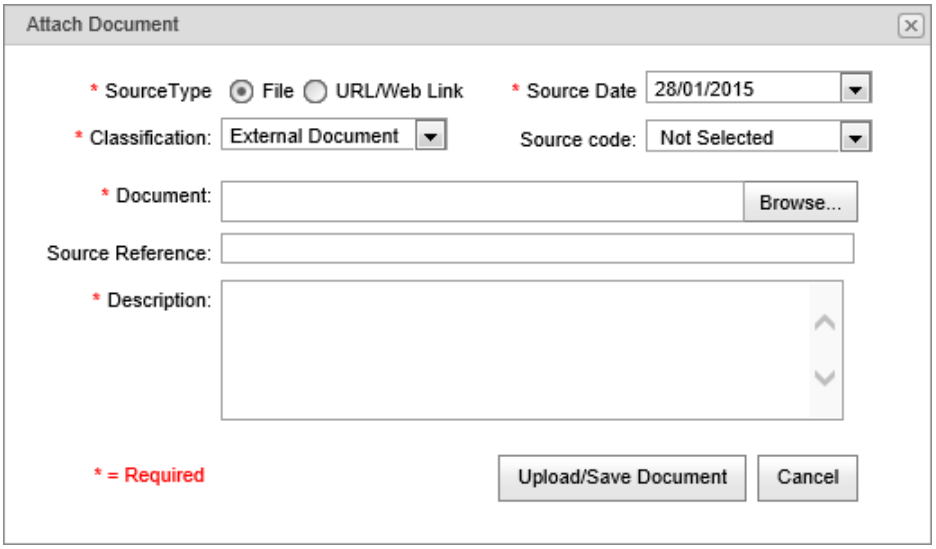

4. If required, filter the documents:

   - Select the:
     - **Classification** from the drop-down list.
     - **Document Type** from the drop-down list.
   - Click Refresh.

5. If required, scroll down to the required document.

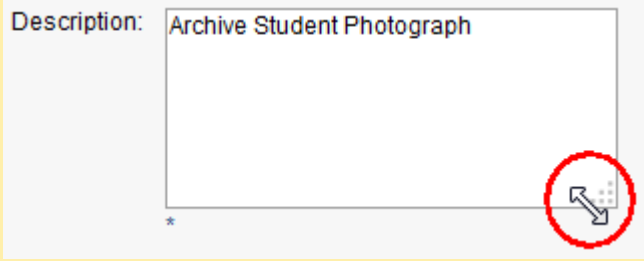
6. Click .

   The **Attach Document** window is displayed.



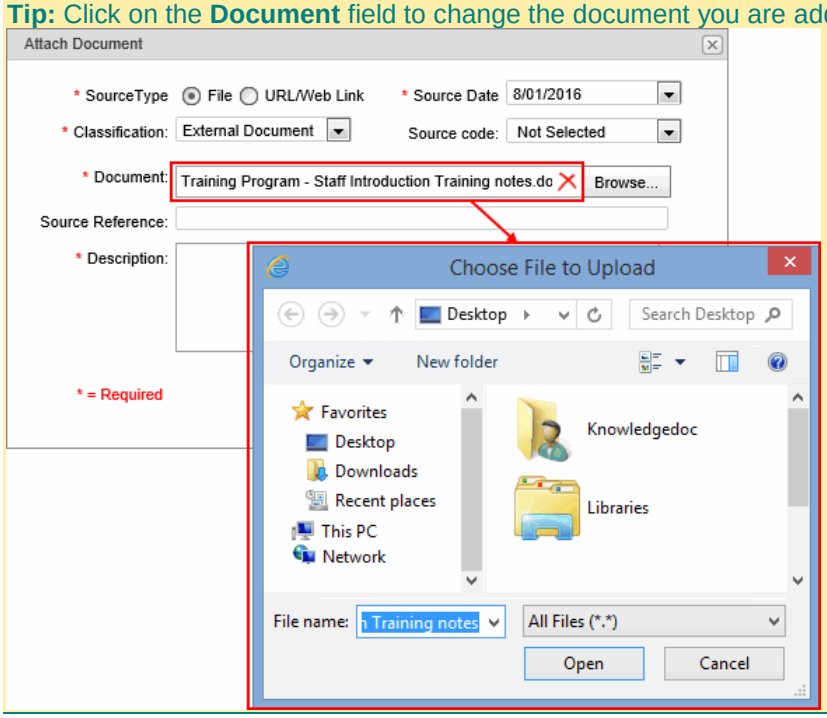

7. Update the fields, as required.

**Tip:** Some web browsers, such as Mozilla Firefox, have extra field editing features. You can drag the icon on the bottom right-hand corner of the **Description** to adjust the size of the field.



## Update Document Details window key fields and buttons

### Fields

| Field | Description |
|---|---|
| **Source Type** | Source type of the document. Select either:<br>• **File** to import a file from your computer into the **Synergetic** database<br>• **URL** to link to a website. |
| **Document** | Directory path of the source document, the document name and its file extension if adding a document on a file server or PC.<br>This field is empty if the file has been embedded in the Synergetic database.<br>**Tip:** Click on the **Document** field to change the document you are adding.<br>  <br> |
| **Source Date** | Date that the source document was created.<br>For example, if you are importing a historical picture you might specify the date when the picture was taken.<br>This defaults to the current date and time for new entries. |
| **Classification** | Classification of the document.<br>Document classifications are maintained in the **luDocumentClassification** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |

| Field | Description |
|---|---|
| **Source Code** | Source of the item. Typical examples include:<br>• Archive<br>• Magazine<br>• Newspaper<br>• School Photo.<br>Document sources are maintained in the **luDocumentSourceCode** lookup table. See *Maintaining lookup tables* in the **Synergetic** System maintenance manual. |
| **Source Reference** | Cross-reference to the source. For example the name, issue date and page of a newspaper where the photograph appeared. |
| **Description** | Meaningful description for the document. |

## Buttons

| Button | Description |
|---|---|
| Browse... | Locate and select the document, spreadsheet or photo you want to import. |
| Upload/Save Document | Upload the selected document, spreadsheet or photo. |
| Cancel | Cancel the update. |

# Maintaining reports

Use the **Available Reports** window to maintain your reports.

You can:

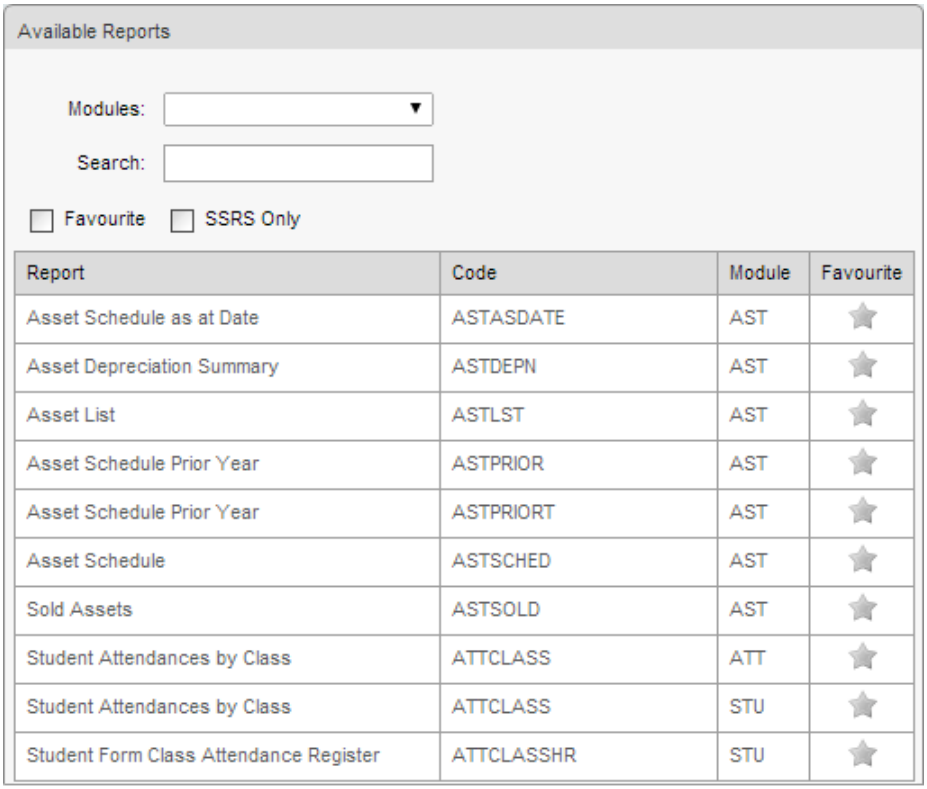
- Run reports. See *Running reports* (on page 283).
- Add reports to your favourites list.
- Restrict report search parameters.

## Opening the Available Reports window

To open the **Available Reports** page:

1. Select **Reports > Available Reports** from the SynWeb main menu.

   The **Available Reports** page is displayed.




| Report | Code | Module | Favourite |
|---|---|---|---|
| Asset Schedule as at Date | ASTASDATE | AST | |
| Asset Depreciation Summary | ASTDEPN | AST | |
| Asset List | ASTLST | AST | |
| Asset Schedule Prior Year | ASTPRIOR | AST | |
| Asset Schedule Prior Year | ASTPRIORT | AST | |
| Asset Schedule | ASTSCHED | AST | |
| Sold Assets | ASTSOLD | AST | |
| Student Attendances by Class | ATTCLASS | ATT | |
| Student Attendances by Class | ATTCLASS | STU | |
| Student Form Class Attendance Register | ATTCLASSHR | STU | |

## Available Reports window key fields and buttons

### Fields

| Field | Description |
|---|---|
| **Modules** | Select a module to refine the list of available reports. |
| **Search** | Enter text to search for a specific word or phrase. |
| **Favourite** | Select to display only reports marked as **Favourites**. |
| **SSRS Only** | Select to display only SSRS reports. |

### Grid Area Fields

| Field | Description |
|---|---|
| **Report** | Name of the report. |
| **Code** | Code of the report. |
| **Module** | Module code of the report. |
| **Favourite** | Displays reports marked as **Favourites**.<br>**Note:** Marked reports have yellow icons. |

### Buttons

| Button | Description |
|---|---|
|  | Select to mark a report as a Favourite. |

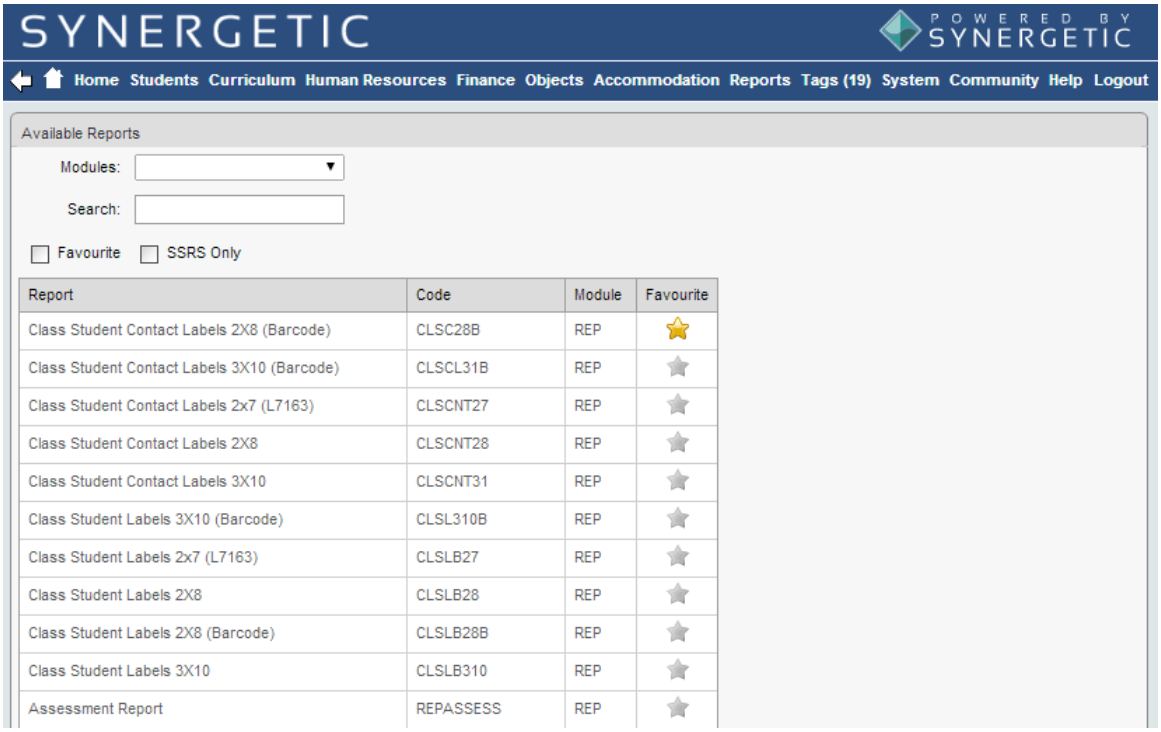
## Running reports

There are a number of reports available in SynWeb.

To run a report:

1. Select **Reports > Available Reports**.

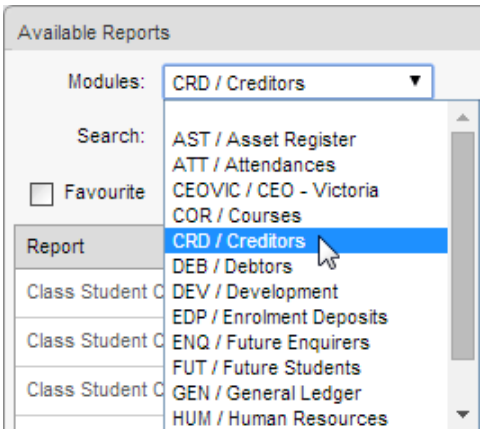
   The list of reports is displayed.




**Note:** You can display the available reports for the Students module using **Students > Student Reports Available** as well as selecting the **Students** module on the **Available Reports** window.

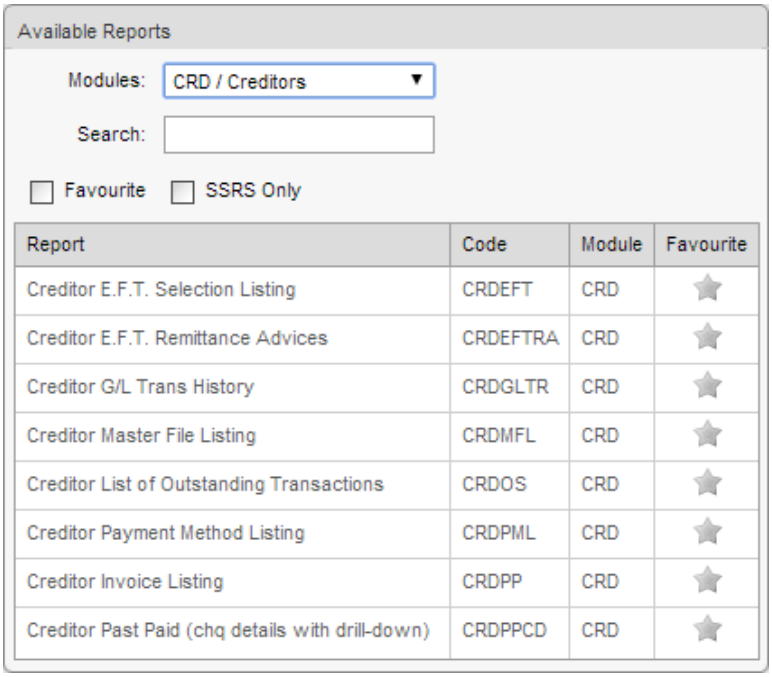
**Tip:** Use the scroll bar to search for the report if it is not displayed.

2. Select a module from the **Modules** drop-down list.




**Tip:** You can search for a report by typing part of the name or description in the **Search** field.

The list of reports is displayed for the module.

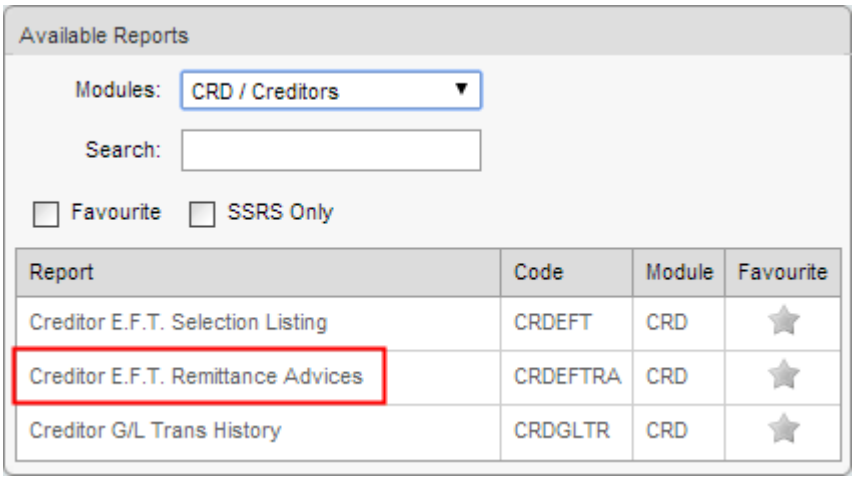



3. Select the **Favourite** field to view your favourites.

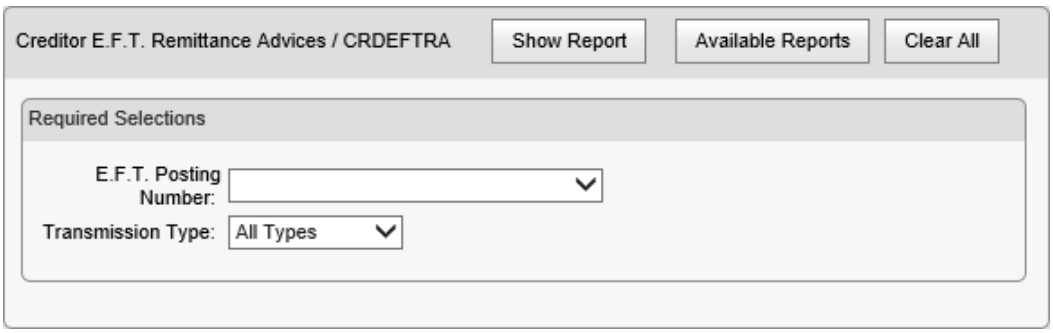
**Tip:** Click the button to add a report to your list of favourites.


4. Select the **SSRS Only** field to prioritise the Synergetic reports over the site reports for the current session if this option is installed.

5. Click on the launch link of the report.




The selection screen is displayed for the report.

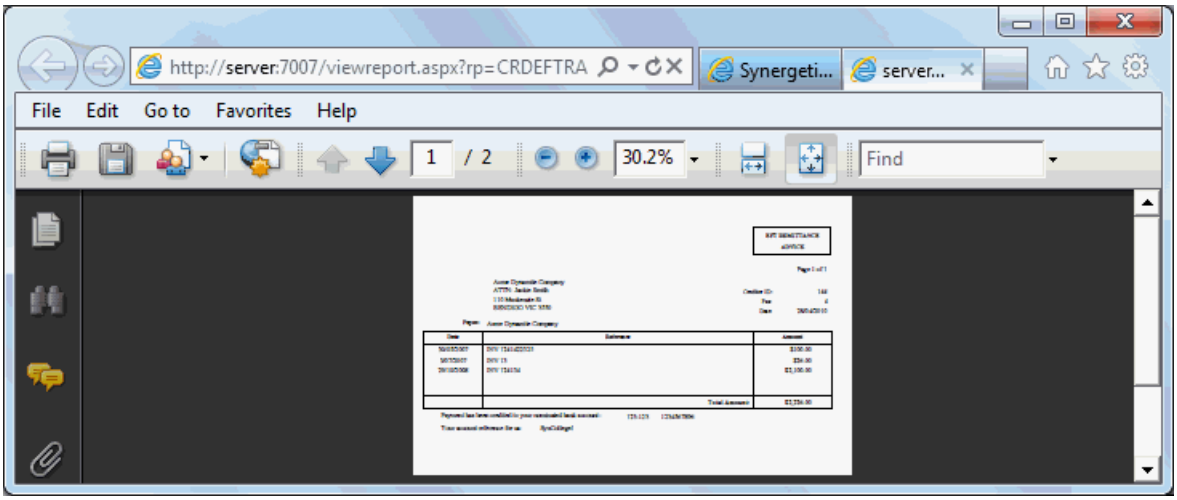



6. Enter any required selections.

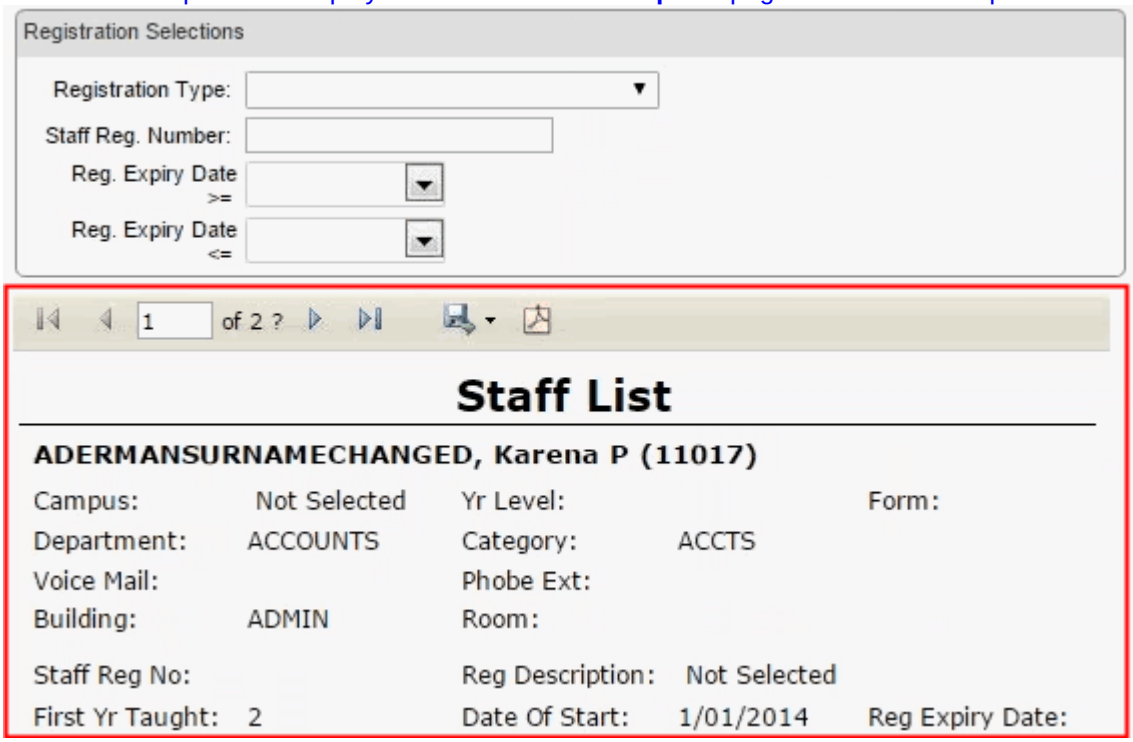
7. Enter any other selections, as needed.

8. Click Show Report.

The report is displayed in a new browser window.




**Note:** SSRS reports are displayed on the **Available Reports** page as embedded reports.




**Note:** The first time you display a SynWeb report, select **Always allow** pop-ups (or similar) for the server from your web browser, if pop-ups are blocked.

# Contact Synergetic Management Systems

## Web site

*www.synergetic.net.au* (*http://www.synergetic.net.au*).

## Email

For more information about Synergetic, email: *info@synergetic.net.au* (*mailto:info@synergetic.net.au*).

For specific help with any aspects of using Synergetic, email your queries to the support desk - *Synergetic Support* (*mailto:support@synergetic.net.au*).

## Office

(03) 9803 8000

## Support

(03) 9803 8111

Support hours are Monday to Friday, 7am - 6pm AEST (excluding public holidays).

## Facsimile

(03) 9803 8844

## Post

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303-313 Burwood Highway
Burwood East Victoria 3151
Australia

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