



SYNERGETIC
Management Systems

SynWeb User Manual

Introduction

Version 7

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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).

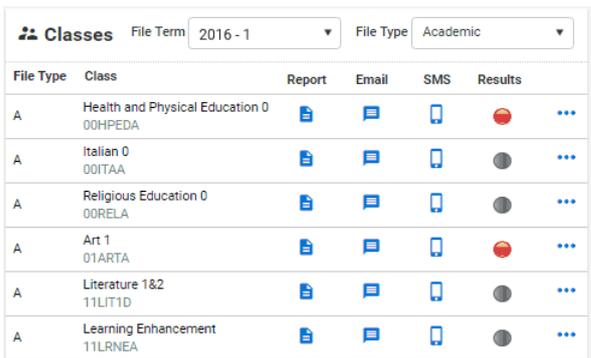
You can also:

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

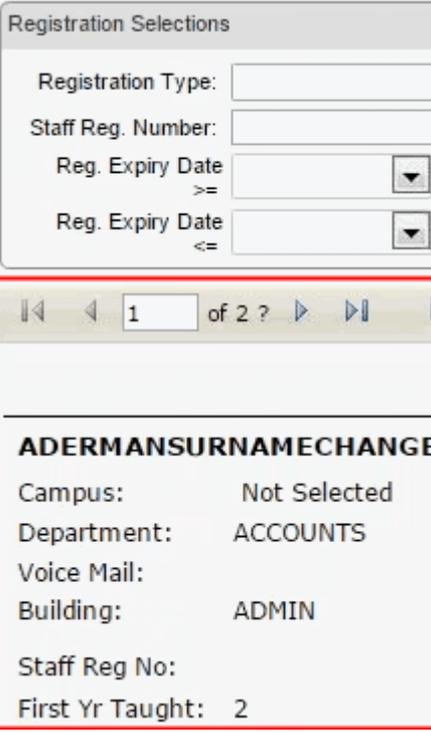
What's new to the Introduction

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.	<p>The Dashboard has replaced the Home window as the SynWeb homepage. You can use the Dashboard to access key information and functions such as:</p> <ul style="list-style-type: none"> class lists class timetables map locations. 	<p><i>Using the Dashboard</i> (on page 23)</p> <p><i>luDashboardTile lookup table</i> in the System maintenance manual.</p>
Replaceable email fields updated.	The list of replaceable email fields has been updated.	<i>Using replaceable fields in the body of emails</i> (on page 96)
Edit Email Template window has been updated.	<p>The Edit Email Template window has been updated. You can select:</p> <ul style="list-style-type: none"> Template is Private field to create a private template for the current user Classification drop-down to select a document classification for email templates Owner to select the owner of the email template. 	<i>Maintaining email templates</i> (on page 100)
New tag icon for tagging individual community records.	<p>You can use the tag icon to quickly tag individual community records in maintenance windows.</p> 	<i>Tagging individual community members from a grid</i> (on page 144)

Change	More information	See...
<p>Add/Edit Tasks window buttons updated.</p>	<p>The following buttons have been added:</p> <ul style="list-style-type: none"> •  •  <p>The following buttons have been removed:</p> <ul style="list-style-type: none"> •  •  	<p><i>Using the Add/Edit Tasks window (on page 193)</i></p>
<p>New DocMan tab added to Task Maintenance.</p>	<p>You can use the DocMan tab of the Add/Edit Tasks window to link documents, spreadsheets and photos to tasks.</p>	<p><i>Add/Edit Tasks window - DocMan tab (on page 213)</i></p>
<p>New buttons added to the Action Centre.</p>	<p>The following buttons have been added to the Action Centre:</p> <ul style="list-style-type: none"> •  •  •  •  •  	<p><i>Using the Action Centre window (on page 224)</i></p>
<p>New DocMan tab added to the Action Centre.</p>	<p>You can use the DocMan tab of the Action Centre to link documents, spreadsheets and photos to task messages.</p>	<p><i>Action Centre - DocMan tab (on page 240)</i></p>
<p>New fields added to the Fields Changed tab.</p>	<p>You can use the Fields Changed tab of the Action Centre to view and approve changes.</p>	<p><i>Action Centre - Fields Changed tab (on page 256)</i></p>
<p>DocMan processes updated.</p>	<p>The following DocMan processes have been updated:</p> <ul style="list-style-type: none"> • Importing one or more documents • Linking documents using tag lists • Updating document details. 	<p><i>Importing one or more documents (on page 263)</i></p> <p><i>Linking documents using tag lists (on page 273)</i></p> <p><i>Updating document details (on page 277)</i></p>
<p>New process for importing URL/web links documented.</p>	<p>You can import URL/web links using the document management windows to import URL/web links.</p>	<p><i>Importing one or more URL/web links (on page 269)</i></p>

Change	More information	See...
<p>Embedded SSRS reports.</p>	<p>SSRS reports are now embedded into the Available Reports window after creation.</p> 	<p><i>Running reports</i> (on page 283)</p>

Using the online help

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

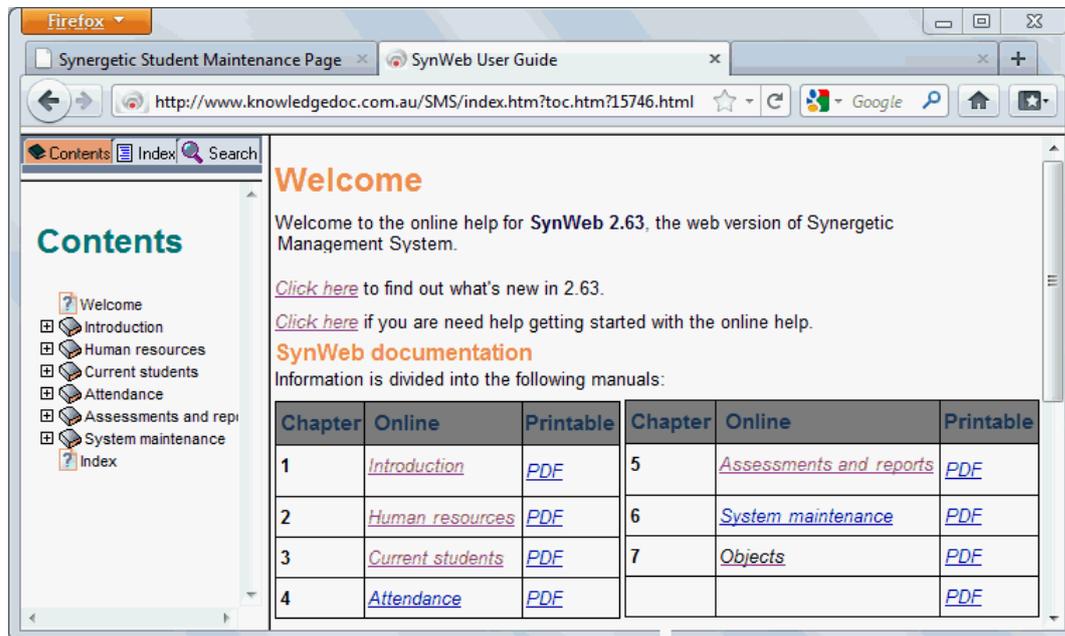
- use search tools to quickly locate the information
- jump between related topics using the links.

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

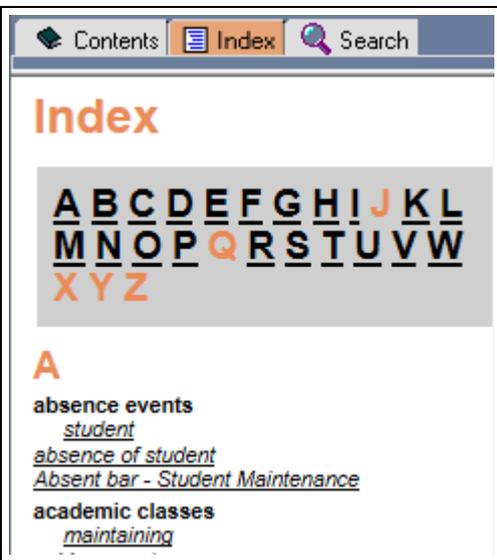
There are a several ways to navigate around the online help. Use the:

- **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.

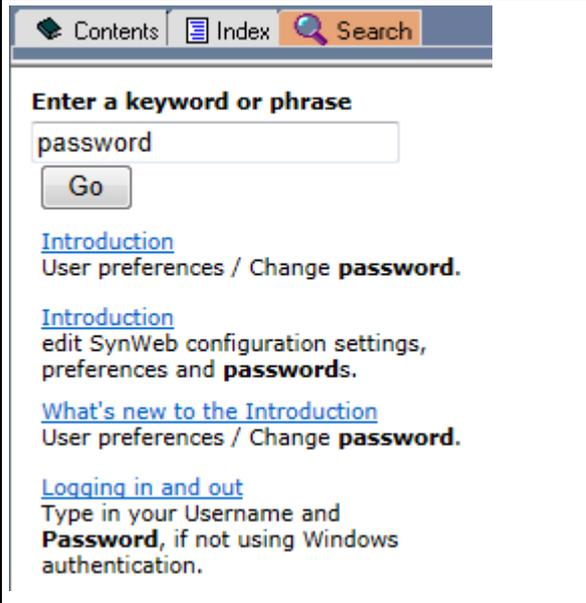
Contents tab

	<p>The Contents tab displays all of the contents of the help in a structured way.</p> <p>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.</p> <p>To expand the chapter, click on the plus symbol next to the chapter name. The main chapter topics are expanded.</p> <p>Some of the main chapter headings need to be expanded further to reach the topic of interest.</p> <p>Click on the topic name to display the topic's contents in the right-hand pane.</p> <p>To collapse the chapter or main chapter, click on the minus symbol.</p>
--	---

Index tab

	<p>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.</p> <p>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.</p> <p>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.</p>
---	--

Search tab

 <p>Enter a keyword or phrase</p> <p>password</p> <p>Go</p> <p>Introduction User preferences / Change password.</p> <p>Introduction edit SynWeb configuration settings, preferences and passwords.</p> <p>What's new to the Introduction User preferences / Change password.</p> <p>Logging in and out Type in your Username and Password, if not using Windows authentication.</p>	<p>To search for a word or phrase in the online help:</p> <ul style="list-style-type: none"> • type it into the Enter a keyword or phrase field • click Go. <p>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.</p>
---	--

See Also links

<p>See Also</p> <p>Current students</p> <p>Maintaining students</p> <p>Key current students reports</p>	<p>Each topic has a list of related topics displayed at the end. This See Also list contains hyperlinks to other topics of interest.</p>
--	---

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

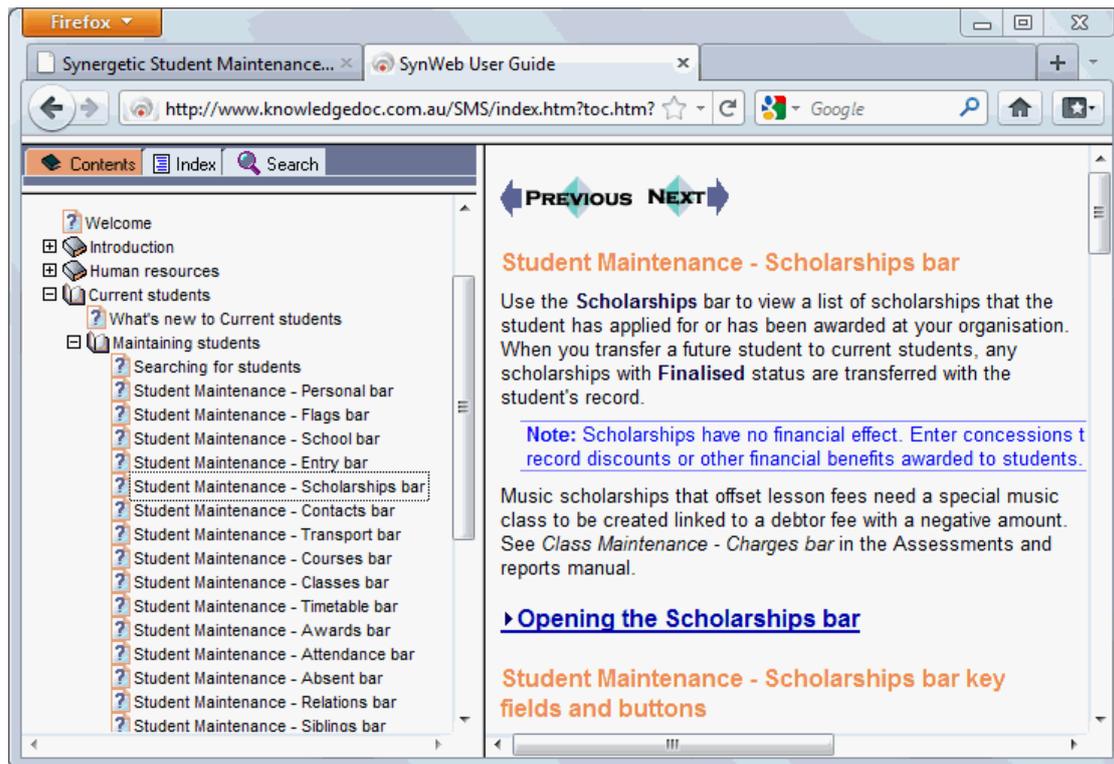
You can link directly to a help topic from some functions. In the following example:

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

Scholarship	Year	Status	Enquiry Date	Test Date	Finalised Date	Comment	Seq
Full	2004	CON		30/03/2003			4

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. 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. See Click above.
Select	Indicates that you choose a menu or menu option by: <ul style="list-style-type: none">• moving the mouse pointer to the desired selection• then clicking.
Bold print & Arial font	Indicates: <ul style="list-style-type: none">• A menu or list item that you choose or select. For example, File Type drop-down list• Text that needs to be typed. For example, Surname field.
<u>Note:</u>	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
- Safari version 4 or later
- Internet Explorer version 7 and 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:

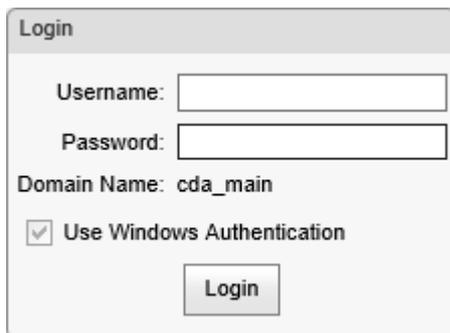
1. Start your Internet browser.

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



2. Type the URL of SynWeb.

The SynWeb **Login** window is displayed.

A screenshot of a "Login" dialog box. It has a title bar "Login". Inside, there are two text input fields: "Username:" and "Password:". Below these is a label "Domain Name: cda_main". There is a checked checkbox labeled "Use Windows Authentication". At the bottom center is a "Login" button.

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

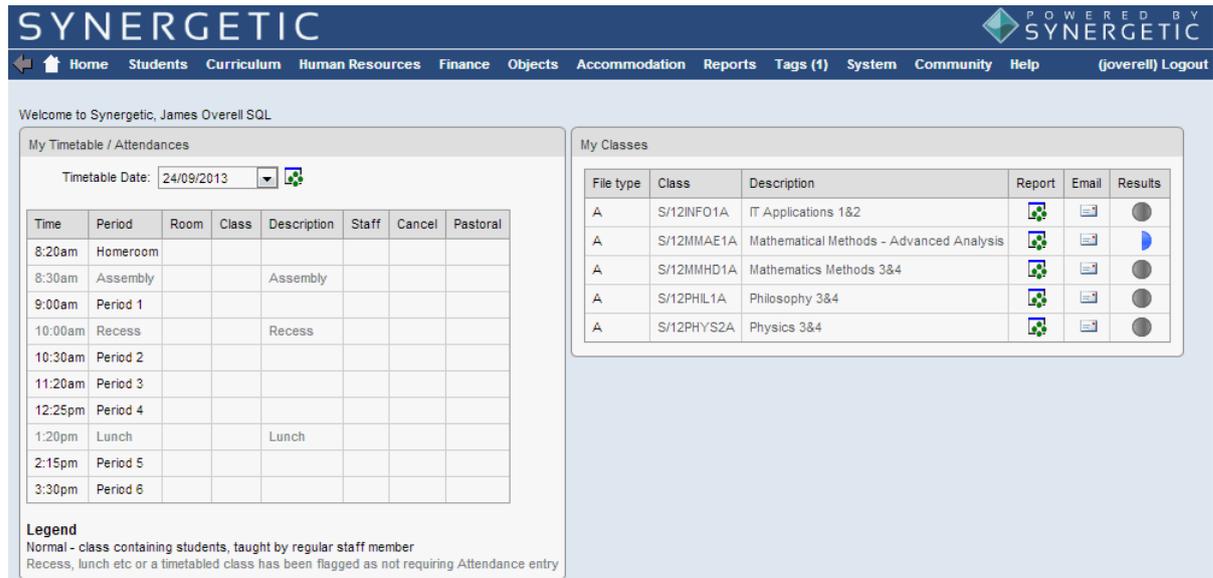
- Type in your **Username** and **Password**, if **not** using Windows authentication.

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 .

The **Home** window is displayed.



Welcome to Synergetic, James Overall SQL

My Timetable / Attendances

Timetable Date: 24/09/2013

Time	Period	Room	Class	Description	Staff	Cancel	Pastoral
8:20am	Homeroom						
8:30am	Assembly			Assembly			
9:00am	Period 1						
10:00am	Recess			Recess			
10:30am	Period 2						
11:20am	Period 3						
12:25pm	Period 4						
1:20pm	Lunch			Lunch			
2:15pm	Period 5						
3:30pm	Period 6						

Legend
 Normal - class containing students, taught by regular staff member
 Recess, lunch etc or a timetabled class has been flagged as not requiring Attendance entry

My Classes

File type	Class	Description	Report	Email	Results
A	S/12INFO1A	IT Applications 1&2			
A	S/12MMAE1A	Mathematical Methods - Advanced Analysis			
A	S/12MMHD1A	Mathematics Methods 3&4			
A	S/12PHIL1A	Philosophy 3&4			
A	S/12PHYS2A	Physics 3&4			

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.

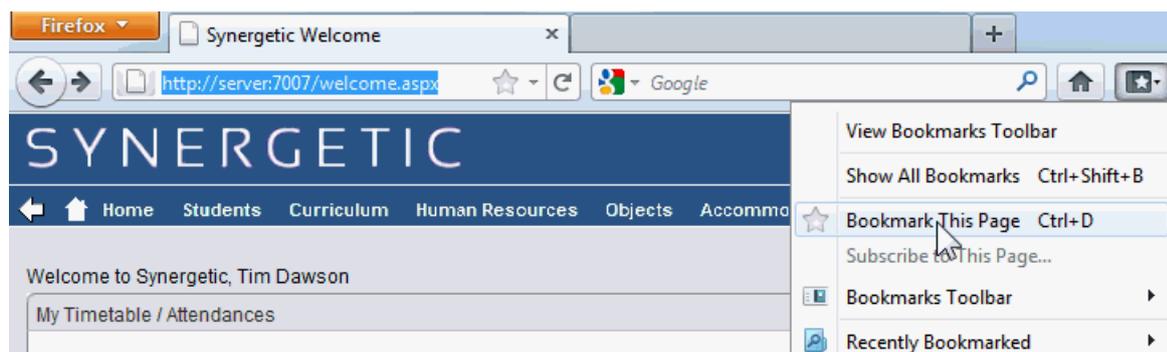


SYNERGETIC POWERED BY SYNERGETIC

Home Students Curriculum Human Resources Finance Objects Accommodation Reports Tags (18) System Community Help **Logout**

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.



Firefox Synergetic Welcome

http://server:7007/welcome.aspx

SYNERGETIC

Home Students Curriculum Human Resources Objects Accommodation

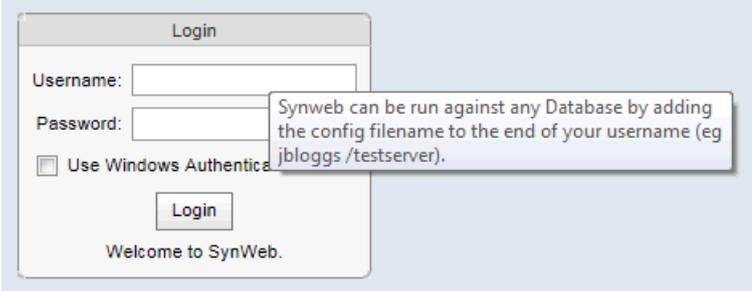
Welcome to Synergetic, Tim Dawson

My Timetable / Attendances

- View Bookmarks Toolbar
- Show All Bookmarks Ctrl+Shift+B
- Bookmark This Page Ctrl+D**
- Subscribe to This Page...
- Bookmarks Toolbar
- Recently Bookmarked

Login window key fields and buttons

Fields

Field	Description
Username	<p>Synergetic user name.</p> <p>Not required when using Windows authentication. Either:</p> <ul style="list-style-type: none"> • you select Use Windows Authentication below • Windows authentication is used by all users at your organisation. <p>To use a different database, add a suffix to your username:</p> <ul style="list-style-type: none"> • Backslash character (<i>/</i>) • Synergetic database name.  <p>For example, this might be a test database use to test new features without impacting on your production data.</p>
Password	<p>Synergetic password.</p> <p>Tip: Contact your system administrator if you have forgotten your password. They can reset it in Synergetic.</p> <p>Not required when using Windows authentication.</p>
Use Windows Authentication	<p>Select to use Windows authentication if your organisation offers a choice between:</p> <ul style="list-style-type: none"> • Windows authentication • SQL Server authentication. SQL Server is the database management system used by Synergetic.

Buttons

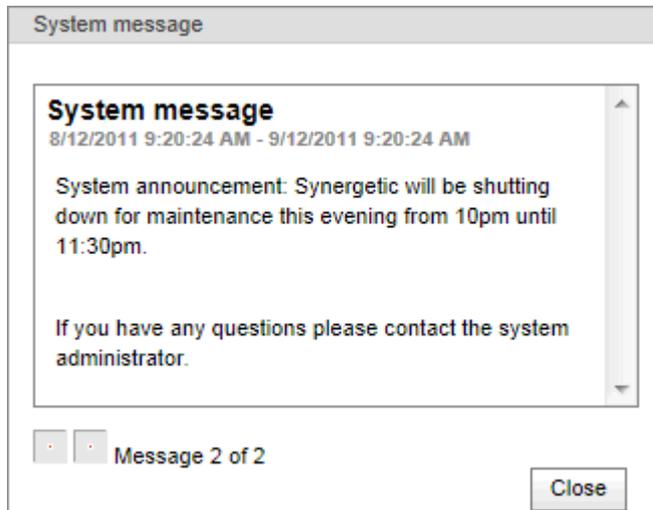
Button	Description
	<p>If:</p> <ul style="list-style-type: none">• using Windows authentication<ul style="list-style-type: none">– type your Username and Password– click .• not using Windows authentication, click . <p>Tip: Press the Enter key instead of clicking the  button.</p>

Synergetic system messages

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

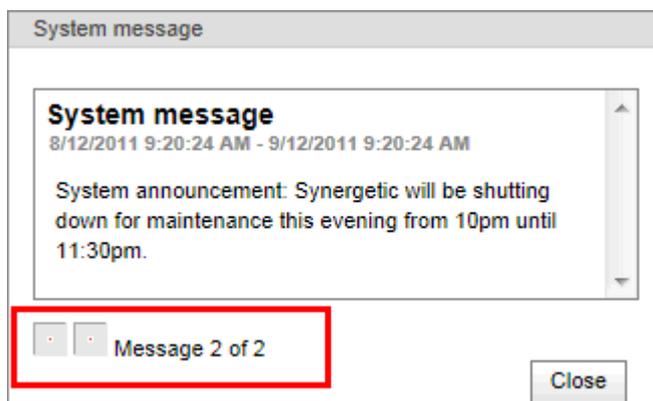
- announcements about system shutdowns
- announcements about new policies or procedures
- other important information.

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



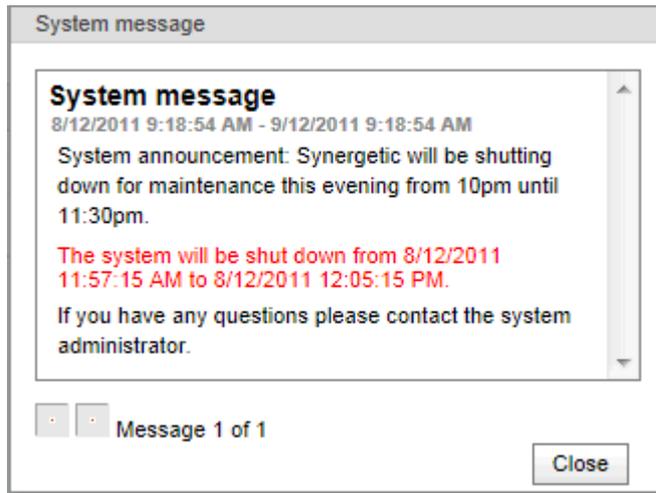
Reading multiple messages

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.

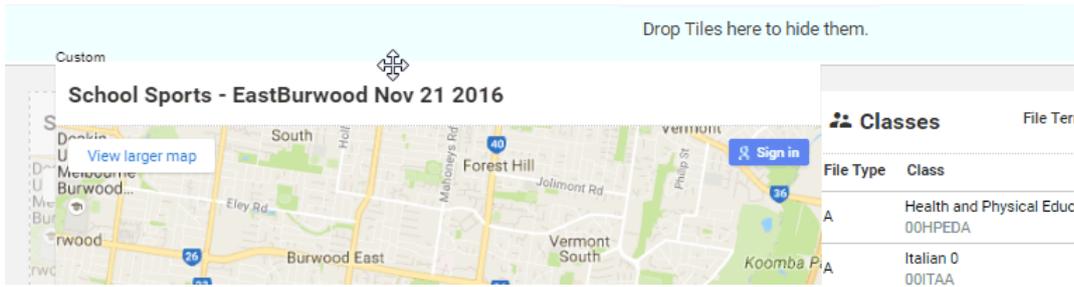
File Type	Class	Report	Email	SMS	Results	
A	Health and Physical Education 0 00HPEDA					
A	Italian 0 00ITAA					
A	Religious Education 0 00RELA					
A	Art 1 01ARTA					
A	Literature 1&2 11LIT1D					
A	Learning Enhancement 11LRNEA					

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

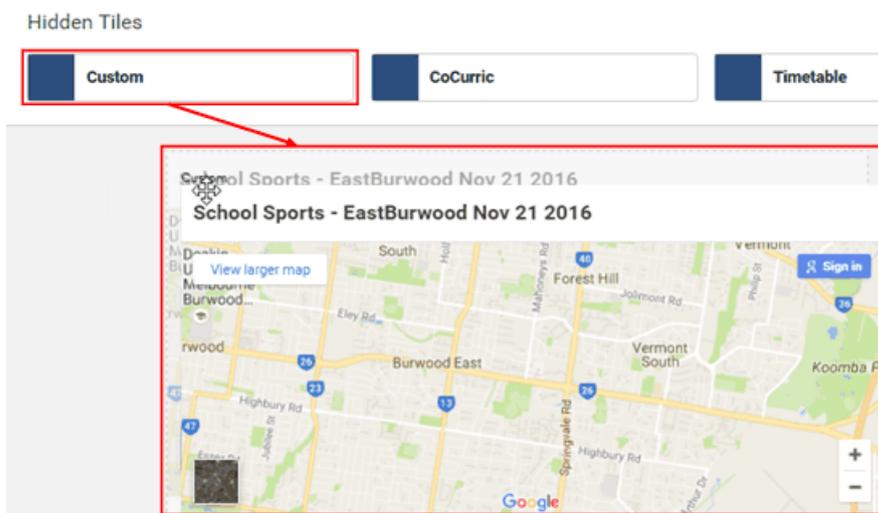
Hiding tiles

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



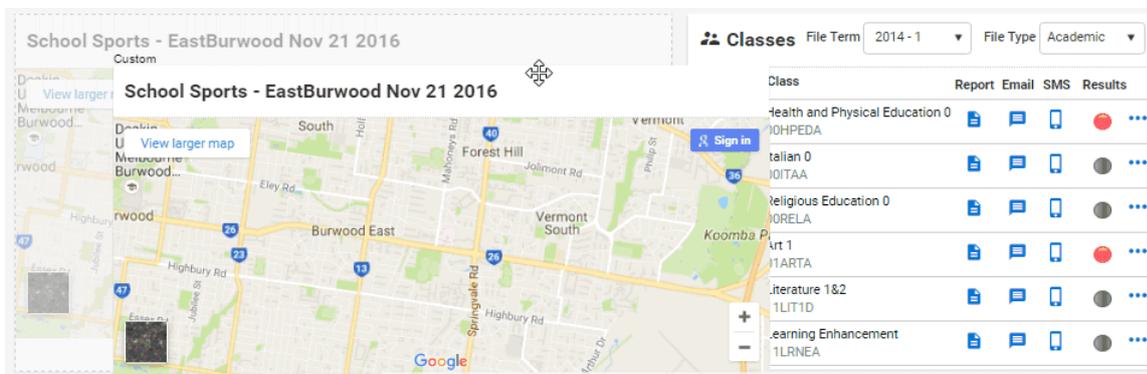
Adding hidden tiles

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

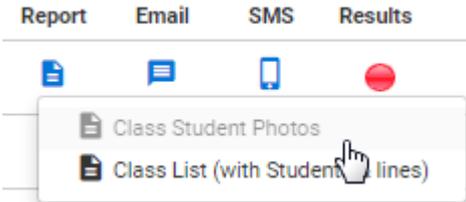
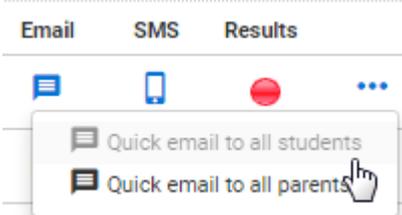
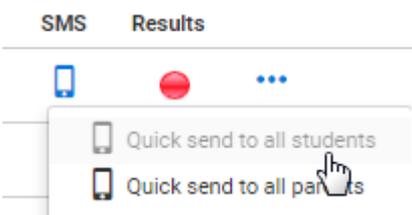
Classes		File Term	2016 - 1		File Type	Academic	
File Type	Class	Report	Email	SMS	Results		
A	Health and Physical Education 0 00HPEDA						
A	Italian 0 00ITAA						
A	Religious Education 0 00RELA						
A	Art 1 01ARTA						
A	Literature 1&2 11LIT1D						
A	Learning Enhancement 11LRNEA						

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. For example Academic, Music, Sport. See <i>File types</i> (on page 69).
Class	Class description and unique class code used to identify the class. <div style="border: 1px solid blue; padding: 5px;"> <p>Note: You can click to launch into Class Maintenance for that class.</p> </div>

Field	Description
<p>Report</p>	<p>Click  to launch a hot report for the class.</p>  <p>Hot reports can be viewed in:</p> <ul style="list-style-type: none"> • PDF • Microsoft Word • Microsoft Excel. <p>See <i>Configuring attendance hot reports</i> in the System maintenance manual.</p>
<p>Email</p>	<p>Click  to send an email to either:</p> <ul style="list-style-type: none"> • all students in the class • all parents of students in the class. 
<p>SMS</p>	<p>Click  to send an SMS to either:</p> <ul style="list-style-type: none"> • all students in the class • all parents of students in the class. 

Field	Description	
Results	Progress made in entering student results.	
	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. See <i>Entering dates and times</i> (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. Tip: You can click the class code launch link to open the selected class in Class Maintenance .

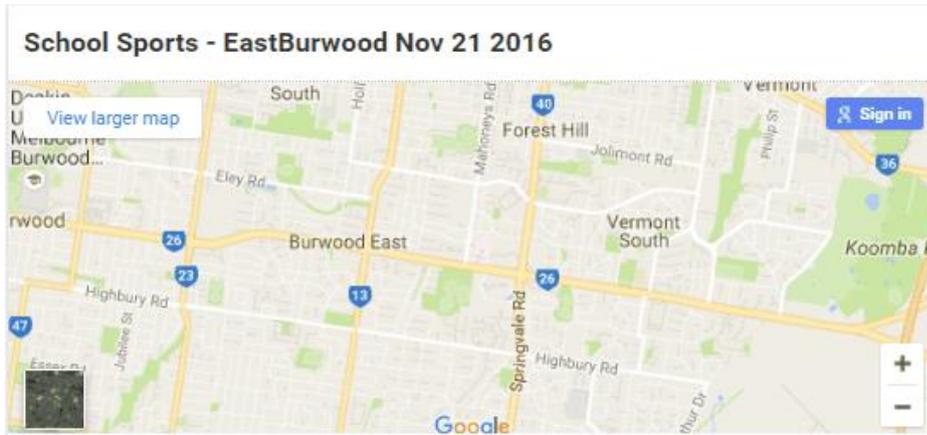
Buttons

Button	Description
	<p>SynWeb allows you to cancel an entire class to maintain accurate records.</p> <p>For example, you cancel classes when the regular timetable is disrupted due to:</p> <ul style="list-style-type: none">• a sports day• a school camp• another event. <p>See <i>Cancelling a class</i> in the Attendance manual.</p>
	<p>Create a pastoral care item relating to a student in this class.</p>
 Mark	<p>Click to launch Attendance Maintenance for the selected class. Once attendance is marked the icon changes to .</p>

Dashboard - Custom tile

You can use custom tiles to 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

Action Centre Messages

- ! 22 vehicle registrations have expired
- 2 vehicle registration expired reports have been received
- 8 debtor arrangement follow-ups are now overdue
- A debtor comms follow-up is now overdue
- 22 enquiry inactivity reports have been received
- 22 current student passports have expired reports have been received
- 22 staff passports have expired
- 22 staff passports have expired reports have been received
- 22 staff registrations have expired reports have been received
- 22 staff working with children checks have expired reports have been received
- 4 messages have been created with no subscribers

- i 618 debtors have reached level 5 outstanding with no arrangement in place
- 21 aged debtors summary reports have been received
- 3 excursion consent reports have been received
- 6 Daily All Staff Anniversary reports have been received
- A Monthly All Staff Anniversary report has been received
- 3 staff registrations are expiring reports have been received

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 and .

On the SynWeb main menu, click:

-  to return to the previous window, except for some transactions
-  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/00FN1	English	TED	⊖	📄
10:30am	Per 3	Q008	S/AC341	Accounting 3 1	TED	⊖	📄
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**.

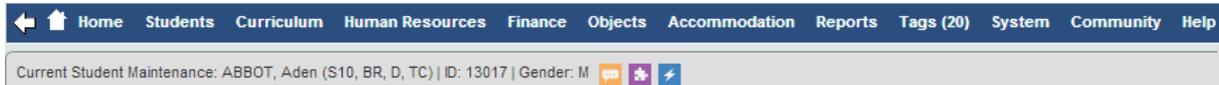


Click on the icons as you would any button.

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. 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.

Year Level:

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

Year Level:

- 0 / Prep
- 1 / Year 1
- 2 / Year 2
- 3 / Year 3
- 4 / Year 4
- 5 / Year 5
- 6 / Year 6
- 7 / Year 7
- 8 / Year 8
- 9 / Year 9
- 10 / Year 10
- 11 / Year 11
- 12 / Year 12

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.

Condition	Severity	Details	Emergency Treatment
Allergy-Other	Not Selected	Suffers from Hay fever	Takes Zyrtec tablets at home

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.

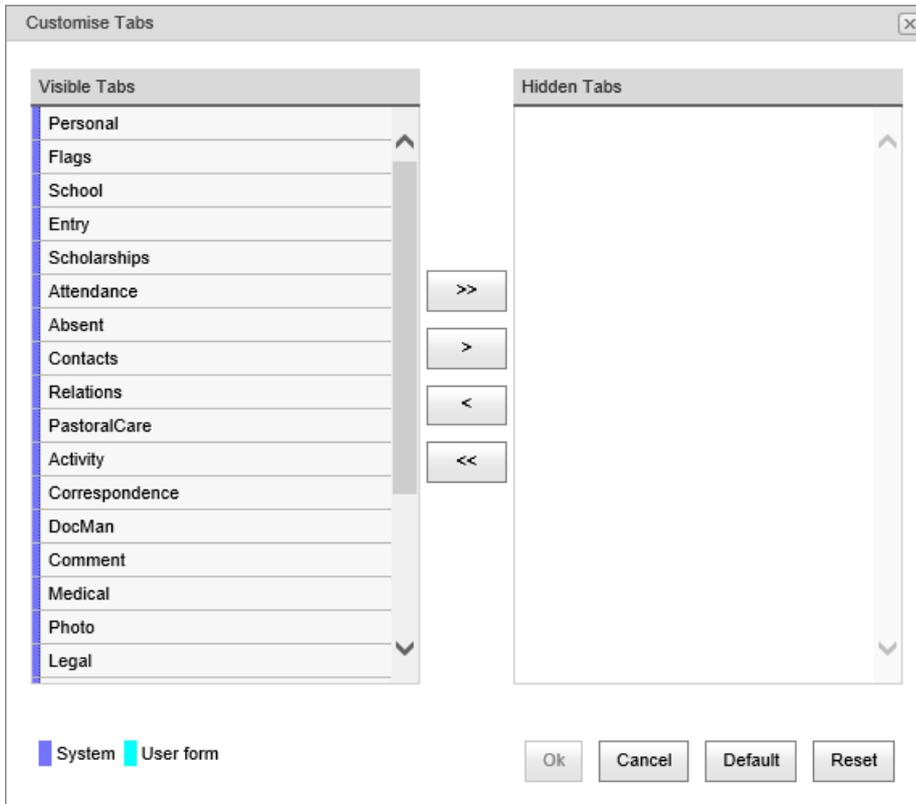
Customising navigation bars

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  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. Note: Bars appear on the maintenance window in the order they are listed in this field. 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

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.

Attendee Type	Name	Constituencies	Status
Not Selected ▾	<input type="text"/>	<input type="text"/>	Not Selected ▾
Attendee	Master A Abbot	kura, SC (S11/NOR)	
Attendee	Miss H Abdullah	bus-1, SC (S11/NOR)	
Assistant	Mr B Adams	SP (2013py)	

Page 1 of 9 (87 items) < [1] 2 3 4 5 6 7 8 9 >

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.

Attendee Type
Not Selected ▾
Not Selected
Assistant
Attendee
Staff
Attendee
Attendee

All entries with the specified value are displayed.

Attendee Type	Name	Constituencies	Status
Assistant ▾	<input type="text"/>	<input type="text"/>	Not Selected ▾
Assistant	Mr B Adams	SP (2013py)	

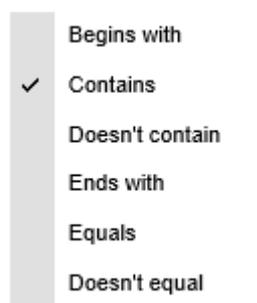
Filtering grids with a text filter

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).

Timetable Date: 5/02/2015 × 

Time	Period	Mon	Tue	Wed	Thu	Fri	Sat	Sun
08am	Period 1	05	26	27	28	29	30	31
09am	Period 2	06	2	3	4	5	6	7
10am	Recess	07	9	10	11	12	13	14
11am	Period 3	08	16	17	18	19	20	21
12pm	Homeroom	09	23	24	25	26	27	28
01pm	Period 4	10	2	3	4	5	6	7
02pm	Period 5							
03pm	Period 6							

Today

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

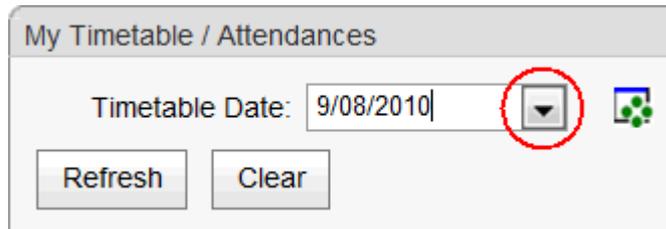
My Timetable / Attendances

Timetable Date: 12/02/2015 × 

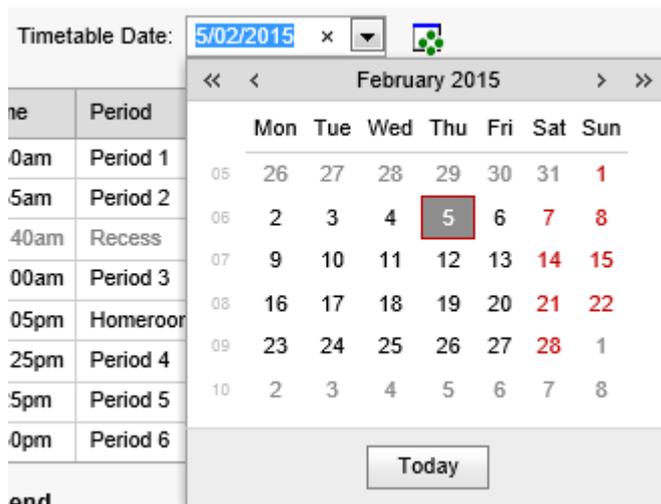
Using the graphical calendar

To use the graphical calendar:

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



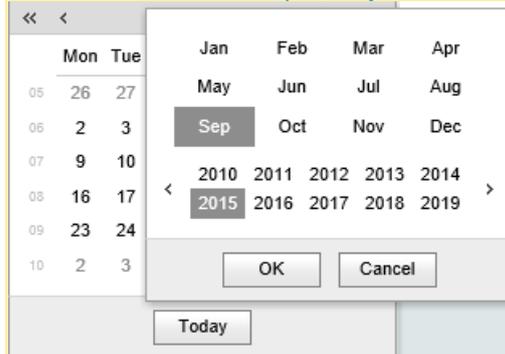
The calendar dialog window is displayed, with the current date bordered in red and the selected day highlighted in grey.



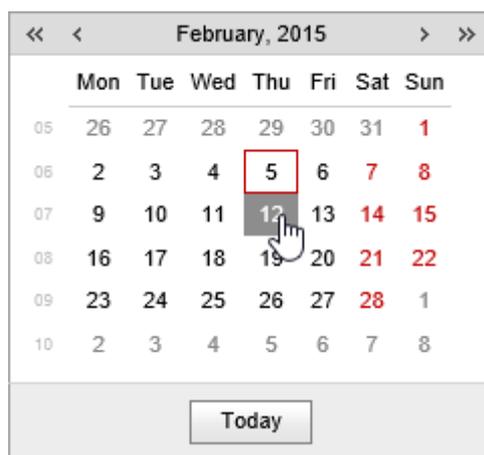
2. To change the year, either click:
 - << to go to the same month in the previous year
 - >> to go to the same month in the next year.
3. Repeat step 2 until you reach the required year.
4. To change the month, either click:
 - < to go to the previous month
 - > to go to the next month.

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**.

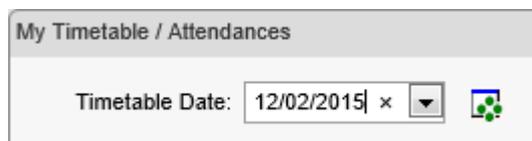


6. Select the required day.

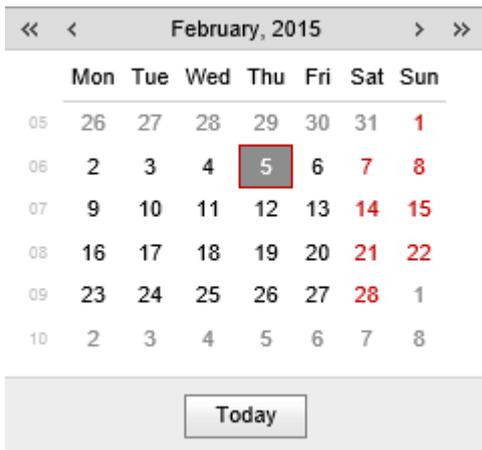


Tip: You can use the cursor keys to move about the days and weeks, and then press **Enter**.

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	<p>Selected month and year.</p> <p>In the example, this is February 2015.</p> <p>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.</p>
Week	<p>Week from the start of the selected year. Six weeks are displayed.</p> <p>In the example, the first full week is week 06, from the 2 to 8 February 2015.</p>
Day of week	<p>Abbreviation for the day of the week. For example, Mon for Monday and so on.</p>

Field	Description	
Day	<p>Day of the selected month and year. These are:</p> <ul style="list-style-type: none"> • all days of the selected month and year • some days from the previous or next week. <p>26 27 28 29 30 31 1</p> <p>2 3 4 5 6 7 8</p> <p>9 10 11 12 13 14 15</p> <p>16 17 18 19 20 21 22</p> <p>23 24 25 26 27 28 29</p> <p>30 31 1 2 3 4 5</p> <p>The font, border and highlighting is used to indicate the type of day:</p>	
	Treatment	Description
	Black font	Weekdays. That is, Mondays through Fridays.
	Grey box	Selected day for the current month and year. For example, 13.
	Red border	Today's date. For example, 9.
	Red font	Weekend days. That is, Saturdays and Sundays.
	Grey font	<p>Days in previous or next month. In the example:</p> <ul style="list-style-type: none"> • 26 - 31 July 2010 • 1 - 5 September 2010. <p>26 27 28 29 30 31 1</p> <p>2 3 4 5 6 7 8</p> <p>9 10 11 12 13 14 15</p> <p>16 17 18 19 20 21 22</p> <p>23 24 25 26 27 28 29</p> <p>30 31 1 2 3 4 5</p>

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.

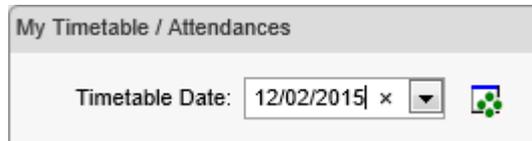
Editing date fields directly

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

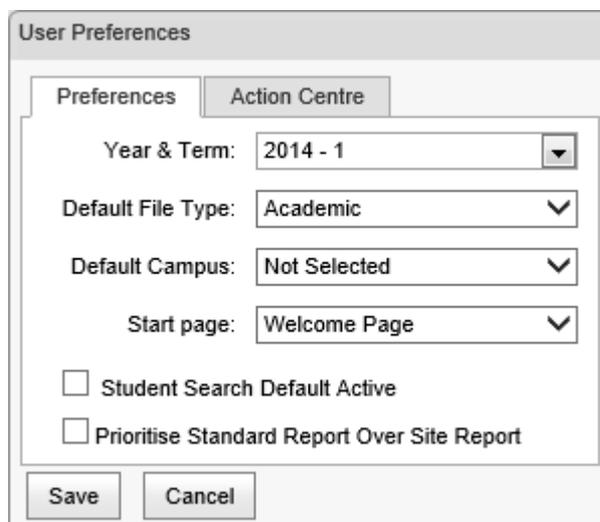
- **General** preferences including:
 - year and semester, term or reporting period
 - default file type
 - campus, if applicable
 - set whether the **Active Student** field is set to default to **Yes** on the **Current Student Search Criteria** window
- **Action Centre** preferences.

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.



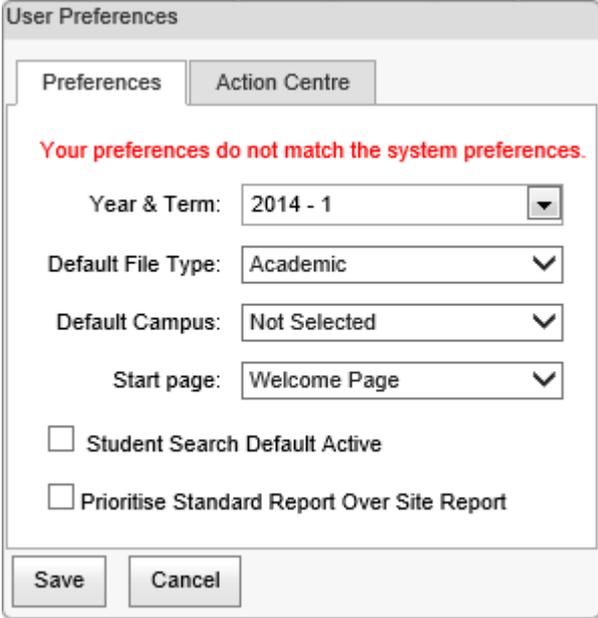
The screenshot shows the 'User Preferences' dialog box with the 'Preferences' tab selected. The 'Action Centre' tab is also visible. The 'Preferences' tab contains the following settings:

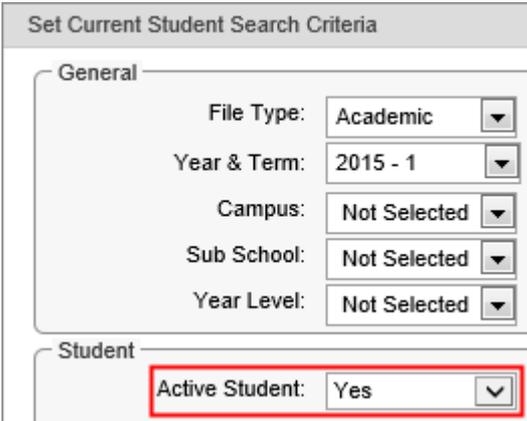
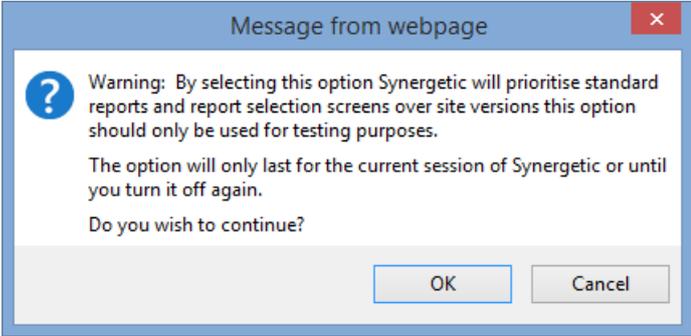
- Year & Term: 2014 - 1
- Default File Type: Academic
- Default Campus: Not Selected
- Start page: Welcome Page
- Student Search Default Active
- Prioritise Standard Report Over Site Report

At the bottom of the dialog box are 'Save' and 'Cancel' buttons.

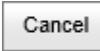
User Preferences tab key fields and buttons

Fields

Field	Description
SemYear & Sem	<p>Select the year and semester, term or reporting that you want to work from.</p> <p>Note: You are notified if the selected Year and Semester are different to the system setting that applies at your organisation.</p> 
Default File Type	Select the file type that SynWeb uses by default. See <i>File types</i> (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
<p>Student Search Default Active</p>	<p>Select to set the Active Student field to default to Yes on the Current Student Search Criteria window. See <i>Searching for students</i> in the Current students manual.</p>  <p>Clear the field to not set the Active Student field to a default value.</p> 
<p>Prioritise Standard Report Over Site Report</p>	<p>Select to prioritise standard reports and report selection screens over site versions.</p>  <p>Note: This field is only used for testing purposes and lasts for the duration of the current session.</p>

Buttons

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

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.

User Preferences

Preferences | **Action Centre**

Year & Term: 2014 - 1

Default File Type: Academic

Default Campus: Not Selected

Start page: Welcome Page

Student Search Default Active

Prioritise Standard Report Over Site Report

Save Cancel

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

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

User Preferences

Preferences | **Action Centre**

My Subscriptions

Message Type	Group/User	Email	Unactioned Task/Read Only	Actioned Task/Read
Online application rec	Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Applications	Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Finalised application z	Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community	Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Portal Medical Details	Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Portal details updated	Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Spouse link broken ta	Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Update community de	Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community member (Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community member (Group	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Page 1 of 10 (98 items) < [1] 2 3 4 5 >

Action Centre Reminders

Create Reminder Messages in Action Centre for Tasks
Days before the Due Date for Reminder: 0

Create Overdue Message in Action Centre for Tasks

General

Receive emails for non-subscribed messages

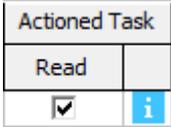
Save Cancel

User Preferences - Action Centre tab key fields

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

Grid area fields

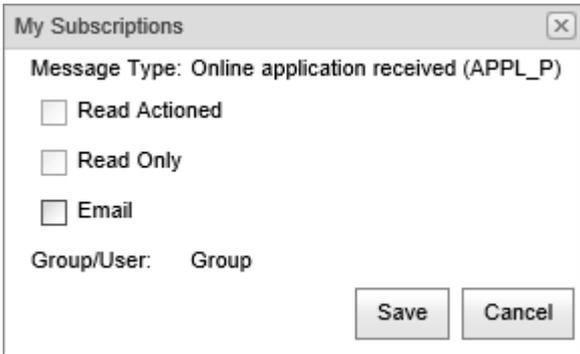
Field	Description												
Type	Type of Action Centre notification. Either: <ul style="list-style-type: none">  message  task  error. 												
Message Type	Description of the Action Centre notification.												
Group/User	Level of subscription. You can be subscribed as either: <ul style="list-style-type: none"> user group. <p>Note: Groups of users can be subscribed to Action Centre messages using the Action Centre Types group security resource. See <i>Group/User Security Maintenance - Groups View</i> in the Synergetic System Maintenance manual.</p>												
Email	Whether the current user receives email notifications for the currently selected Action Centre message type. <p>Note: Groups of users can be subscribed to Action Centre email notifications using the Action Centre Types group security resource. See <i>Group/User Security Maintenance - Groups View</i> in the Synergetic System Maintenance manual.</p>												
Unactioned Task/Read Only	Status of unactioned Action Centre tasks. You can either: <ul style="list-style-type: none"> Select the Unactioned Task/Read Only field: The Action Centre task is marked as a message and the message icon is displayed. <table border="1" data-bbox="584 1608 823 1733"> <tr> <td colspan="2">Unactioned Task</td> </tr> <tr> <td>Read Only</td> <td></td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td></td> </tr> </table> Leave the Unactioned Task/Read Only field blank: The Action Centre task is marked as a task and the task icon is displayed. <table border="1" data-bbox="584 1883 823 2009"> <tr> <td colspan="2">Unactioned Task</td> </tr> <tr> <td>Read Only</td> <td></td> </tr> <tr> <td><input type="checkbox"/></td> <td></td> </tr> </table> 	Unactioned Task		Read Only		<input checked="" type="checkbox"/>		Unactioned Task		Read Only		<input type="checkbox"/>	
Unactioned Task													
Read Only													
<input checked="" type="checkbox"/>													
Unactioned Task													
Read Only													
<input type="checkbox"/>													

Field	Description
Actioned Task/Read	<p>Status of actioned Action Centre tasks.</p> <p>You can either:</p> <ul style="list-style-type: none"> Select the Read field: The Action Centre task is marked as a message and the message icon is displayed when the task is actioned.  <ul style="list-style-type: none"> Leave the Read field blank: 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
	<p>Launch the My Subscriptions window to manage your subscriptions for the selected Action Centre message type.</p> 

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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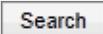
Searching

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  to reset all the settings to their default values.

How to use the Search Criteria window

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

- Click , 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 . 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

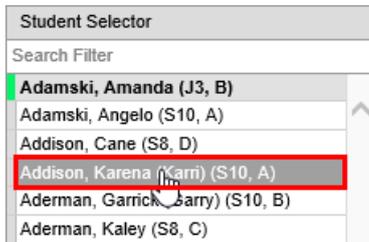
At any stage you can change your selections. To do this, click  and then make your new selections.

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

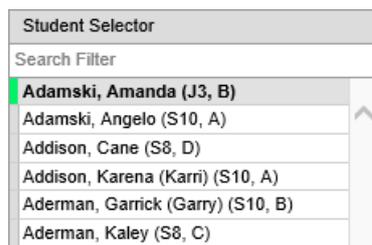
You can easily choose a different record when the records are displayed on the search results window. To display a different record click the launch link on the selector grid for the required record, as described below.



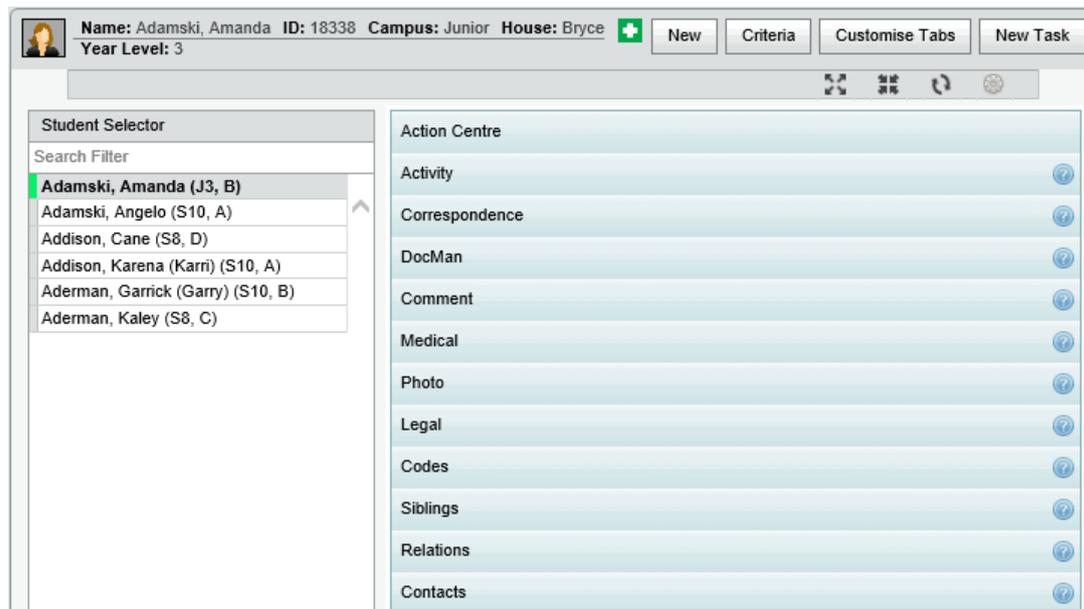
To choose a selection using the selector grid:

1. Search for the records.

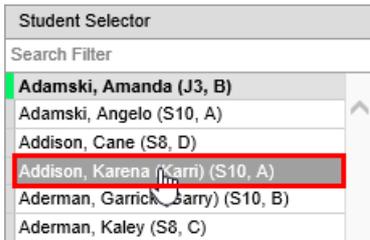
In this example, several records are returned when we search for students; these are listed on the **Student Selector** grid.



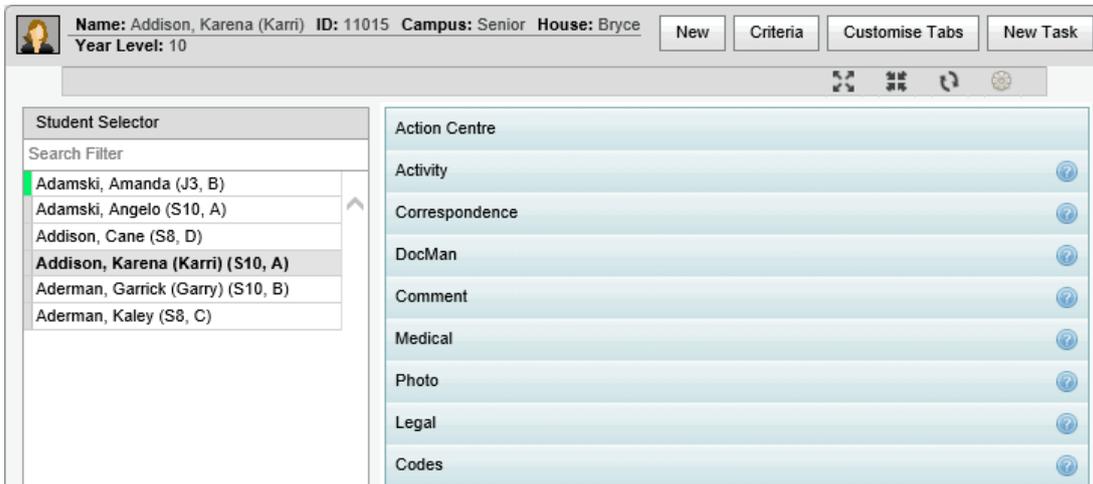
The first record is displayed by default. In this case, Amanda Adamski.



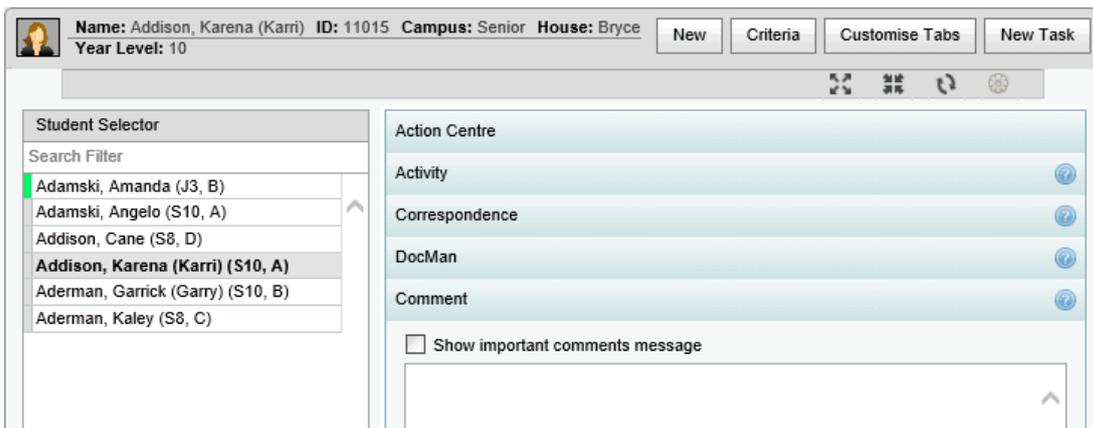
2. Click on the **Name** launch link of the required student on the **Student Selector** grid. In this case, Karena Addison.



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.

The screenshot shows a web interface titled "Set Current Student Search Criteria". It is divided into two sections: "General" and "Student".

- General:** Contains five dropdown menus: "File Type" (Academic), "Year & Term" (2015 - 1), "Campus" (Not Selected), "Sub School" (Not Selected), and "Year Level" (Not Selected).
- Student:** Contains an "Active Student" dropdown, an "ID:" text input field, a "Tagged IDs" checkbox, and a "Surname:" text input field. The "Surname:" field contains the text "Li" and is highlighted with a red rectangular border.

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:

- **Barnes**, Domenic
- **Bates**, Adele
- **Best**, Amy
- **Bowes**, Charles
- **Weston**, Julie
- **Weekes**, 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

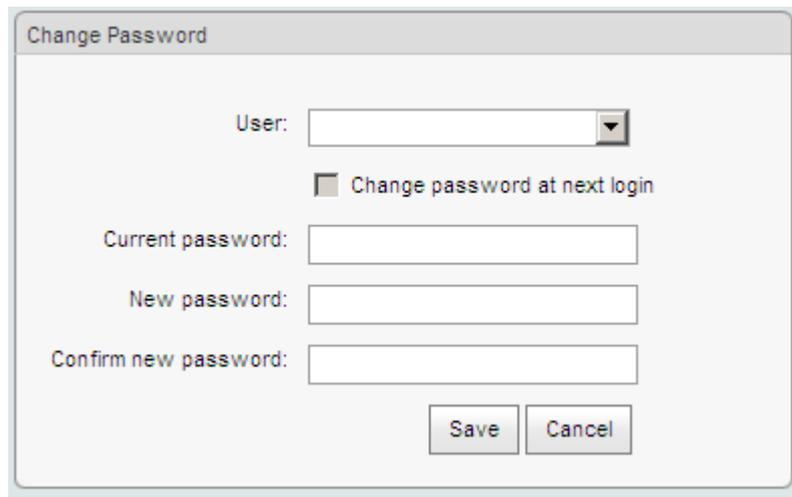
Use the **Change Password** window to change your password.

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.



The screenshot shows a dialog box titled "Change Password". It contains the following elements:

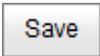
- A "User:" label followed by a text input field and a dropdown arrow.
- A checkbox labeled "Change password at next login".
- A "Current password:" label followed by a text input field.
- A "New password:" label followed by a text input field.
- A "Confirm new password:" label followed by a text input field.
- At the bottom, there are two buttons: "Save" and "Cancel".

Change Password window key fields and buttons

Fields

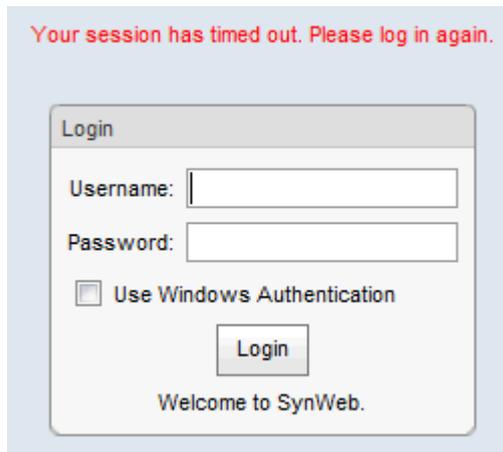
Field	Description
User	If you leave this blank, it is assumed that you are changing your own password. If you are a system administrator, select the user whose password you want to change.
Change password next login	If you are a system administrator, select this if you want to prompt the user to change their password the next time they log in. 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. If you are a system administrator, type the new password that you are assigning to the user into both fields.

Buttons

Button	Description
	Save the new password for either: <ul style="list-style-type: none">• yourself• another user you are administering.
	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).

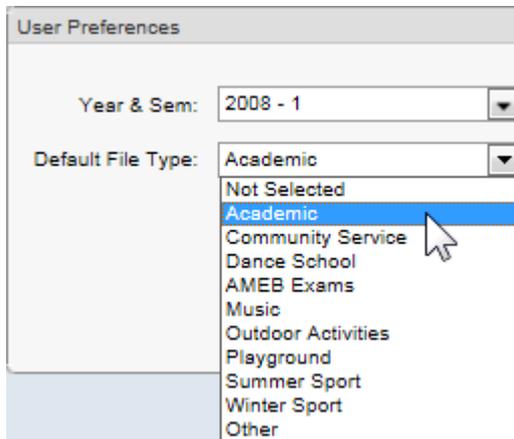
The default inactivity period is 30 minutes. This period is set for your organisation as a whole, when SynWeb is installed. *Contact Synergetic Management Systems* (on page 287) if you want to change the setting.

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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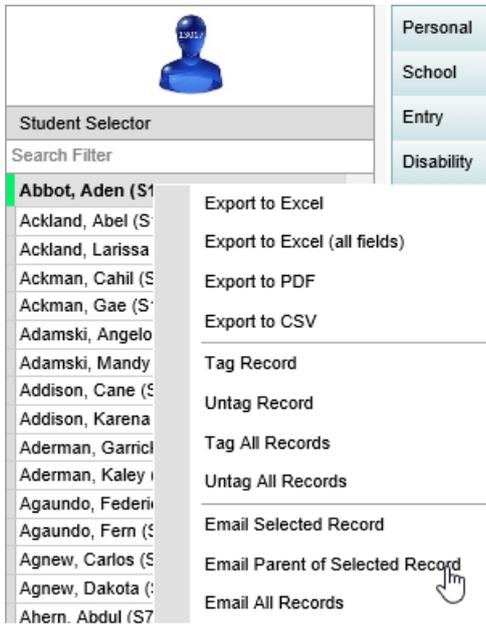
Sending emails and SMS messages from grids

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

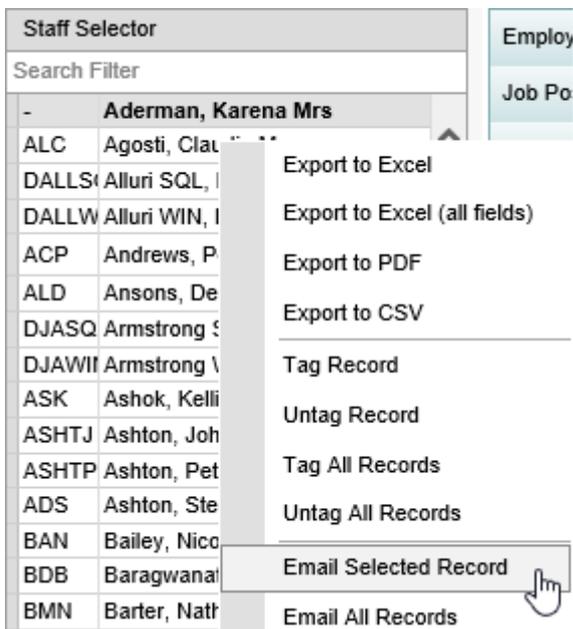
Examples

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).

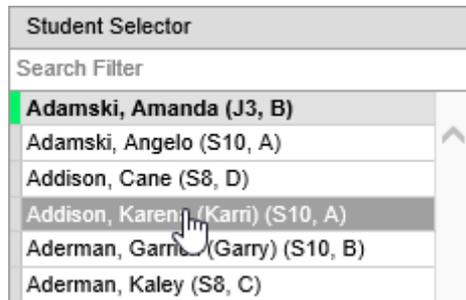
Sending emails or SMS messages to a community member selected from a grid

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 \(on page 81\)](#).

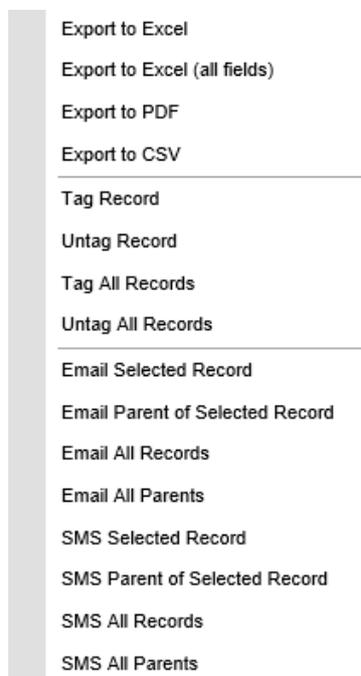
To select an individual community member from a grid and send an email or SMS to them:

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).

Message:

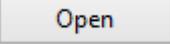
```
Dear {NameExternal},
Can you please confirm that the following details are correct:
Default mobile phone number: {DefaultMobilePhone}
{SpouseGiven1}'s mobile phone number:
{SpouseDefaultMobilePhone}

Thank you very much.
Yours sincerely,
Simon Welsh
Head of Synergetic Junior Campus|
```

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 
- search for and select the attachment
- click 

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



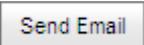
Tip: Click in the **Attachments** field to search and select a different attachment.

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 

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



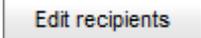
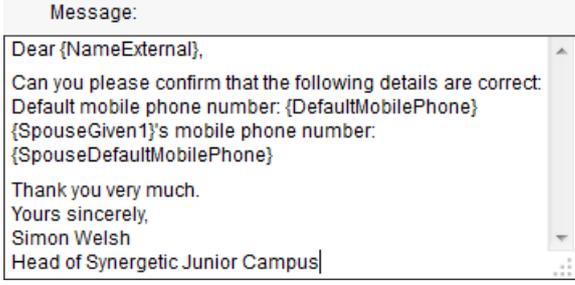
Note: If you have sent an SMS, the **SMS messages sent** window is displayed.

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	<p>Recipients of the email or SMS. This is either:</p> <ul style="list-style-type: none"> the email address or mobile phone number of the community member or staff member <Multiple Recipients> if there are several currently selected. <p>Note: You cannot edit this field manually. You must use the  button to add or remove recipients from the list.</p>  <p>Use the  button to remove a contact from the list of recipients and click  to add a contact to the list. Tick Hide Empty Email addresses to remove contacts without an email address from the recipient list.</p>
Subject	<p>Summarise the reason for sending the email.</p> <p>Note: This field does not appear if you are sending an SMS.</p>
Attachments	<p>Records the directory structure and file name of any additional attachments.</p> <p>Note: This field does not appear if you are sending an SMS.</p>
Message	<p>Enter your detailed message in the body of the email or SMS.</p> <p>You can use replaceable fields in the body of email messages. This uses data about the community members to generate the email.</p> <p>See <i>Using replaceable fields in the body of emails</i> (on page 96).</p> 
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	<p>Whether the message is sent as:</p> <ul style="list-style-type: none"> • Plain Text - that is, without formatting • HTML Raw (including tags) - that is, text with HTML formatting. See <i>Sending emails using HTML Raw format</i> (on page 90). <hr/> <p>Note: These options do not appear if you are sending an SMS.</p>

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	<p>Select to send the email or SMS to the parents or guardian instead, if the recipient is either a:</p> <ul style="list-style-type: none"> • current student • future student. <hr/> <p>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. Only one email is sent, unless the contacts are separate Lives With contacts, in which case they will both receive an email.</p> <hr/> <p>Note: This field is not displayed if you have edited the recipient list.</p>
Paste into subject field	Select to include merge fields in the subject of the email. See <i>Using replaceable fields in the body of emails</i> (on page 96).

Field	Description
<input type="button" value="Paste"/>	Paste the merge field into the subject or body of the email at the position of the cursor. <div style="border: 1px solid black; background-color: #ffffcc; padding: 5px;"> <p>Tip: You can use the check boxes fields under the <input type="button" value="Paste"/> button to insert a space before or after the merge field.</p> </div>

Settings area fields

Field	Description
Use default email client	Select to use the default email client to send the email. <u>Note: this field is not displayed if you are sending an SMS.</u>
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

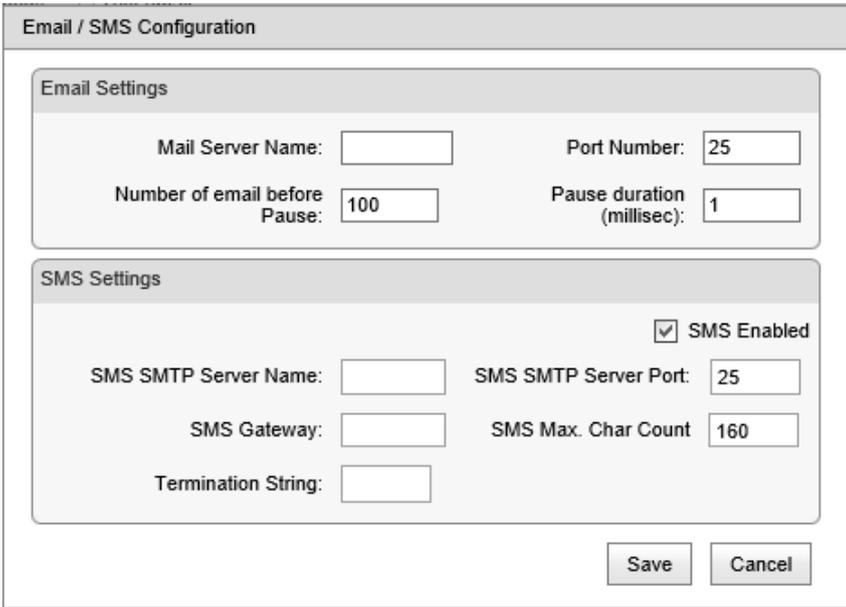
This area appears after selecting the **Show Settings** field.

Field	Description
Authentication Type	You can select to use: <ul style="list-style-type: none"> • login authentication, where you must provide a valid username and password before sending the email • 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. <u>Note: If you select a different sender, text may be added to the email to indicate this. See <i>OverrideSenderText configuration setting</i> in the Synergetic System maintenance manual.</u>
Sender Email Address	Email address of the person the recipients receive as the sender's email address. This defaults to your email address.

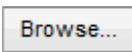
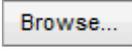
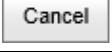
Grid area fields

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	<p>Configure the email and SMS authentication settings.</p>  <p>See <i>Using the Email / SMS Configuration window</i> in the System maintenance manual.</p>

Buttons

Button	Description
	Search for a file to attach. Once a file is selected, the directory and file details are displayed in the Attachments field, on the same line as the  button.
	Click to add an extra line with: <ul style="list-style-type: none"> an Attachments field a  button.  <p>Tip: Click  each time you need to add another line.</p>
	Click next to the attachment entry to remove the: <ul style="list-style-type: none"> Attachments field and any associated attachment  button  button. <p>Tip: Click  if you need to add back an Attachments line.</p>
	Click next to the attachment entry to remove the attached file.
 (Signature)	Launch the Edit Email Signature window to create or edit email signatures. See <i>Maintaining email signatures</i> (on page 98).
 (Template)	Launch the Edit Email Template window to create or edit email templates. See <i>Maintaining email templates</i> (on page 100).
	Load an HTML file into the email body.
	Send the email to the recipients. Note: This button is not active if there are no valid recipients.
	Send the SMS to the recipients.
	Cancel the email or SMS and return to the previous page.

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

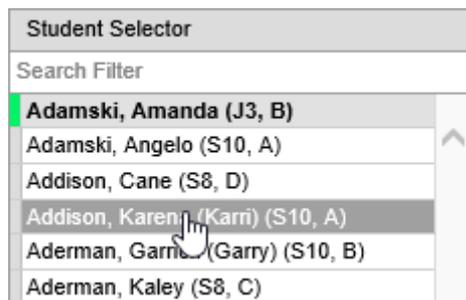
You can send an email or an SMS message to:

- 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).

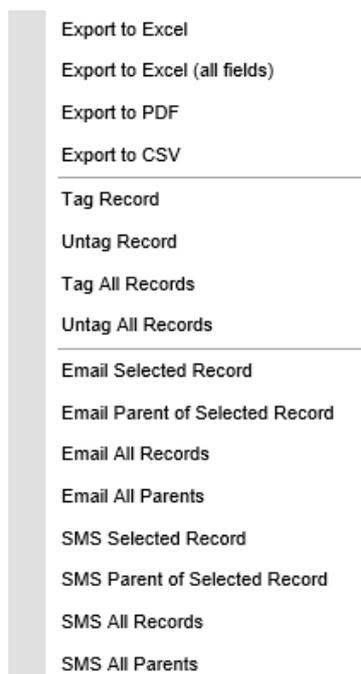
To send an email or an SMS message to several community members listed in the grid:

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.

The screenshot shows the 'Send Emails' window with the following details:

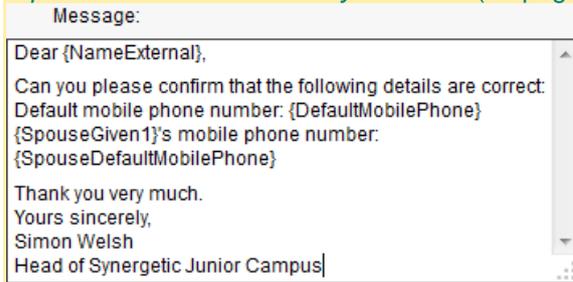
- Message Type:** HTML
- Classification:** External Document
- Email a copy to yourself:** Message only (selected)
- Field merging:** Send to parents (unchecked), Paste into subject field (unchecked)
- Field merging list:** NameInternal, NameExternal, LegalFullName, Surname, Preferred, PreferredFormal, Title, MailNamePrimary, MailNameJoint
- Field merging options:** Include leading space (unchecked), Include trailing space (checked)
- To:** < 1139 Recipients >
- Subject:** (empty)
- Attachments:** (empty)
- Select Signature:** Default Signature
- Select Template:** Not Selected
- Rich text editor:** Normal, Arial, (Font Size), B, I, U, link, unlink, list, text color
- Buttons:** Design, HTML, Preview, Load HTML File, Cancel, Send Emails
- Settings:** Use default email client (unchecked), Show settings (unchecked), Hide email options (unchecked)

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.

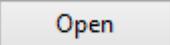
Tip: You can use replaceable fields using Synergetic data about the recipients. See *Using replaceable fields in the body of emails* (on page 96).



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 
- search for and select the attachment
- click 

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 

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	[REDACTED]	
18337	Adamski, Angelo	[REDACTED]	
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	[REDACTED]	 (highlighted with a red box)
18337	Adamski, Angelo	[REDACTED]	
18450	Educata, Leonie	leonie_occupation_email@syngergetic.com	

Hide empty Email addresses

11. Update other fields as required.

12. Click or .

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



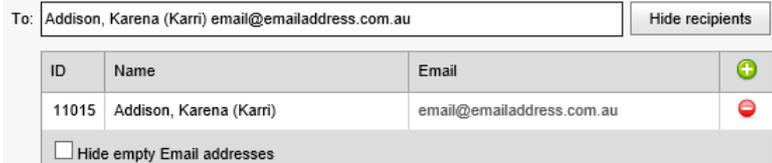
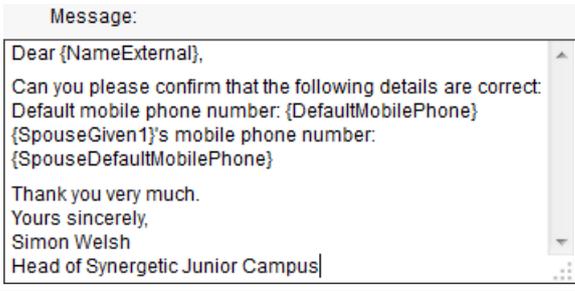
13. Select the **Back** navigation link.

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	<p>Recipients of the email or SMS. This is either:</p> <ul style="list-style-type: none"> the email address or mobile phone number of the community member or staff member <Multiple Recipients> if there are several currently selected. <p>Note: You cannot edit this field manually. You must use the  button to add or remove recipients from the list.</p>  <p>Use the  button to remove a contact from the list of recipients and click  to add a contact to the list. Tick Hide Empty Email addresses to remove contacts without an email address from the recipient list.</p>
Subject	<p>Summarise the reason for sending the email.</p> <p>Note: This field does not appear if you are sending an SMS.</p>
Attachments	<p>Records the directory structure and file name of any additional attachments.</p> <p>Note: This field does not appear if you are sending an SMS.</p>
Message	<p>Enter your detailed message in the body of the email or SMS.</p> <p>You can use replaceable fields in the body of email messages. This uses data about the community members to generate the email.</p> <p>See <i>Using replaceable fields in the body of emails</i> (on page 96).</p> 
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	<p>Whether the message is sent as:</p> <ul style="list-style-type: none"> • Plain Text - that is, without formatting • HTML Raw (including tags) - that is, text with HTML formatting. See <i>Sending emails using HTML Raw format</i> (on page 90). <hr/> <p>Note: These options do not appear if you are sending an SMS.</p>

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	<p>Select to send the email or SMS to the parents or guardian instead, if the recipient is either a:</p> <ul style="list-style-type: none"> • current student • future student. <hr/> <p>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. Only one email is sent, unless the contacts are separate Lives With contacts, in which case they will both receive an email.</p> <hr/> <p>Note: This field is not displayed if you have edited the recipient list.</p>
Paste into subject field	Select to include merge fields in the subject of the email. See <i>Using replaceable fields in the body of emails</i> (on page 96).

Field	Description
<div style="border: 1px solid gray; padding: 2px; display: inline-block;">Paste</div>	Paste the merge field into the subject or body of the email at the position of the cursor. <div style="border: 1px solid gray; background-color: #ffffcc; padding: 5px; margin-top: 10px;"> Tip: You can use the check boxes fields under the <div style="border: 1px solid gray; padding: 2px; display: inline-block;">Paste</div> button to insert a space before or after the merge field. </div>

Settings area fields

Field	Description
Use default email client	Select to use the default email client to send the email. <p style="color: blue; text-decoration: underline;">Note: this field is not displayed if you are sending an SMS.</p>
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

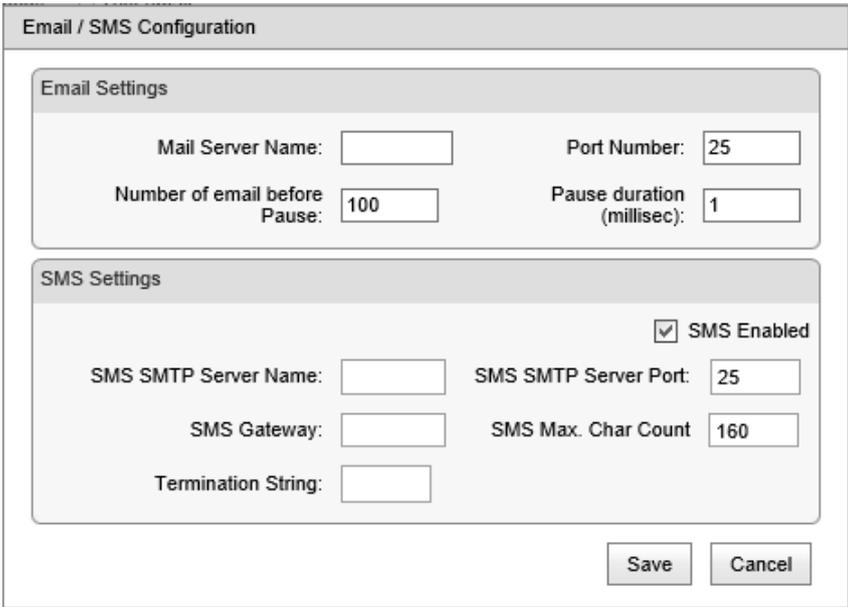
This area appears after selecting the **Show Settings** field.

Field	Description
Authentication Type	You can select to use: <ul style="list-style-type: none"> login authentication, where you must provide a valid username and password before sending the email 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. <p style="color: blue; text-decoration: underline;">Note: If you select a different sender, text may be added to the email to indicate this. See <i>OverrideSenderText configuration setting</i> in the Synergetic System maintenance manual.</p>
Sender Email Address	Email address of the person the recipients receive as the sender's email address. This defaults to your email address.

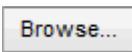
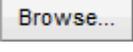
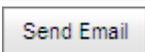
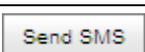
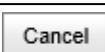
Grid area fields

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	<p>Configure the email and SMS authentication settings.</p>  <p>See <i>Using the Email / SMS Configuration window</i> in the System maintenance manual.</p>

Buttons

Button	Description
	Search for a file to attach. Once a file is selected, the directory and file details are displayed in the Attachments field, on the same line as the  button.
	Click to add an extra line with: <ul style="list-style-type: none"> • an Attachments field • a  button.  <p>Tip: Click  each time you need to add another line.</p>
	Click next to the attachment entry to remove the: <ul style="list-style-type: none"> • Attachments field and any associated attachment •  button •  button. <p>Tip: Click  if you need to add back an Attachments line.</p>
	Click next to the attachment entry to remove the attached file.
	Launch the Edit Email Signature window to create or edit email signatures. See <i>Maintaining email signatures</i> (on page 98).
	Launch the Edit Email Template window to create or edit email templates. See <i>Maintaining email templates</i> (on page 100).
	Load an HTML file into the email body.
	Send the email to the recipients. Note: This button is not active if there are no valid recipients.
	Send the SMS to the recipients.
	Cancel the email or SMS and return to the previous page.

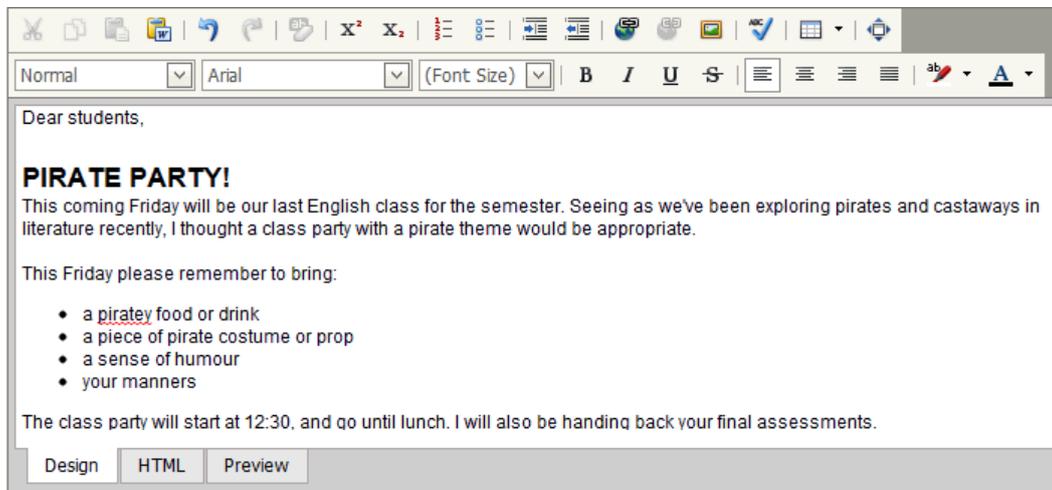
Sending emails using HTML format

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

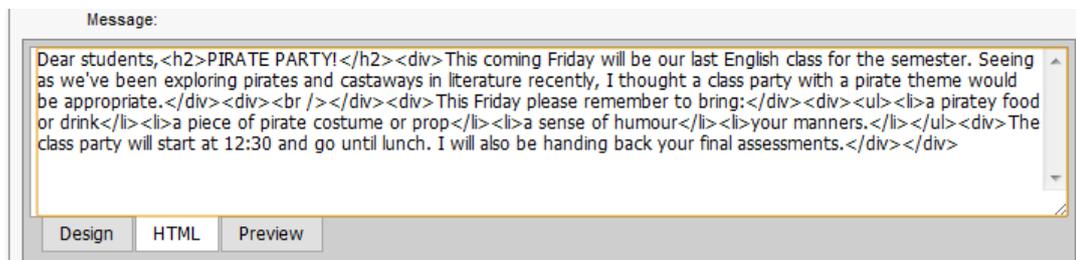
- text formatting such as bold, italic, strikethrough and underline
- different fonts, sizes and colours
- superscript and subscript text
- justification and indentation
- bullets and numbering
- tables
- hyperlinks
- images.

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

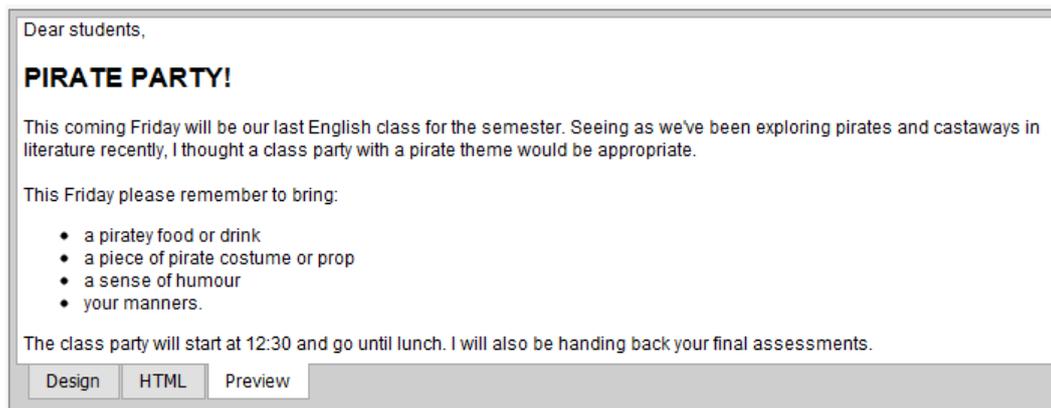
- **Design** tab to format the email in a "what you see is what you get" editor



- **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.

Student Selector (16)
Adamski, Angelo (S10, BO)
Adamski-Smyth, Israel (S7,)
<u>Agius, Anthony</u> (Tony) (2, BO)

2. Right click.

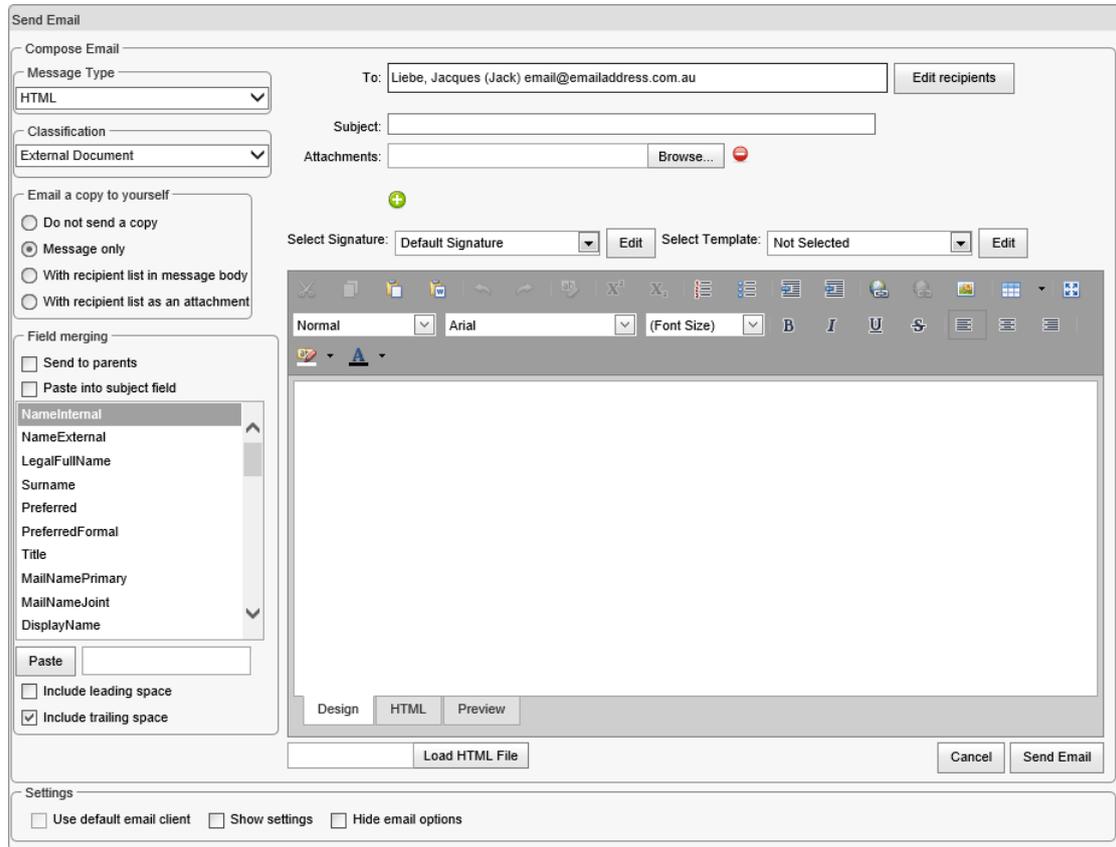
The following menu is displayed.

Export to Excel	
Export to Excel (all fields)	
Export to PDF	
Export to CSV	
<hr/>	
Tag Record	
Untag Record	
Tag All Records	
Untag All Records	
<hr/>	
Email Selected Record	
Email Parent of Selected Record	
Email All Records	
Email All Parents	
SMS Selected Record	
SMS Parent of Selected Record	
SMS All Records	
SMS All Parents	

3. Select **Email Selected Record**.

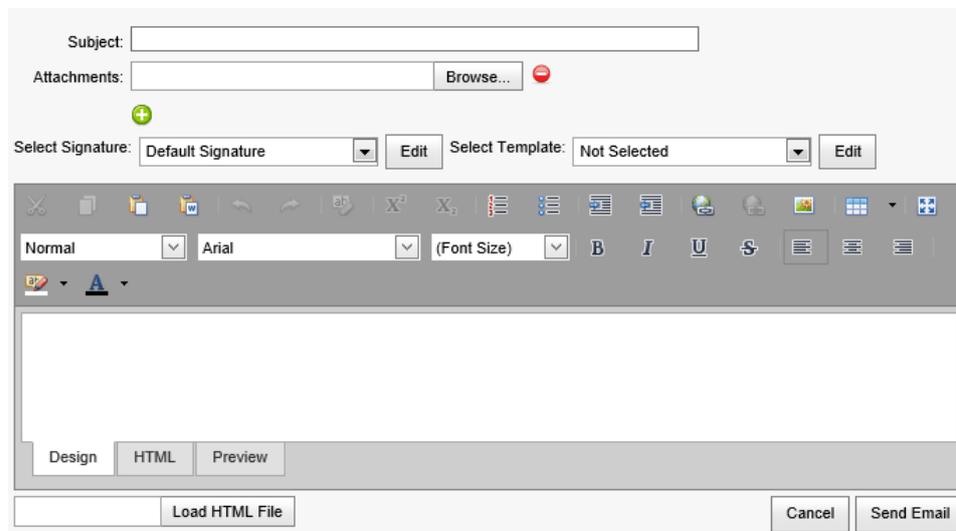
Note: If you want to send the email to everyone in the list, select **Email All Records**.

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>I</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}**.

The screenshot shows a 'Send Emails' dialog box with the following fields and content:

- To:** [Multiple Recipients] (with an 'Edit recipients' button)
- Subject:** [Empty text box]
- Attachments:** [Empty text box] (with 'Browse...' and 'Remove' buttons)
- Body:**

Dear {NameExternal},

Can you please confirm that the following details are correct:

Default mobile phone number: {DefaultMobilePhone}

{SpouseGiven1}'s mobile phone number: {SpouseDefaultMobilePhone}

Thank you very much.

Yours sincerely,

Simon Welsh
Head of Synergetic Junior Campus
- Buttons:** 'Cancel' and 'Send Emails' at the bottom right.

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

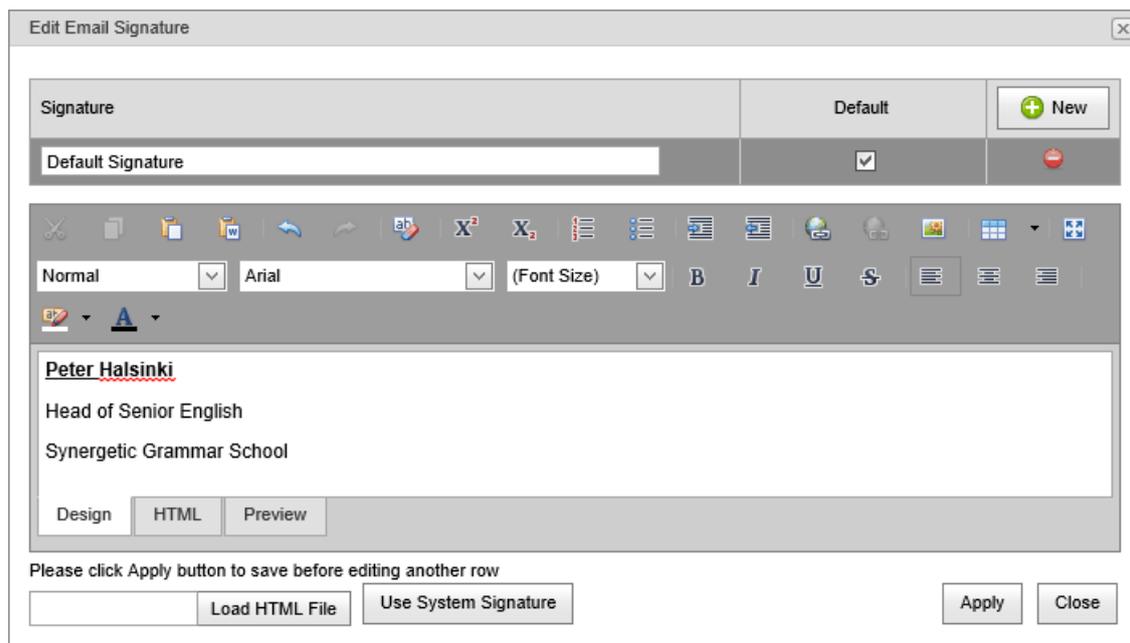
You can edit email signatures using the **Edit Email Signature** window.

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  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. <div style="border: 1px solid black; padding: 5px; width: fit-content; margin: 10px auto;"> Note: Save any changes you have made by clicking  before you select another signature to edit. </div>
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: <ul style="list-style-type: none"> • Design view, which lets you use text formatting similar to Microsoft Word. • HTML view, which lets you see the HTML-tagged text. • Preview view, which shows you how the signature appears on emails.

Buttons

Button	Description
	Create a new signature.
	Delete this signature.
	Load an HTML file into the signature body.
	Load the default signature. See <i>DefaultSignature configuration setting</i> in the Synergetic System maintenance manual.
	Save the changes you have made to this signature.
	Close the Edit Email Signature window.

Maintaining email templates

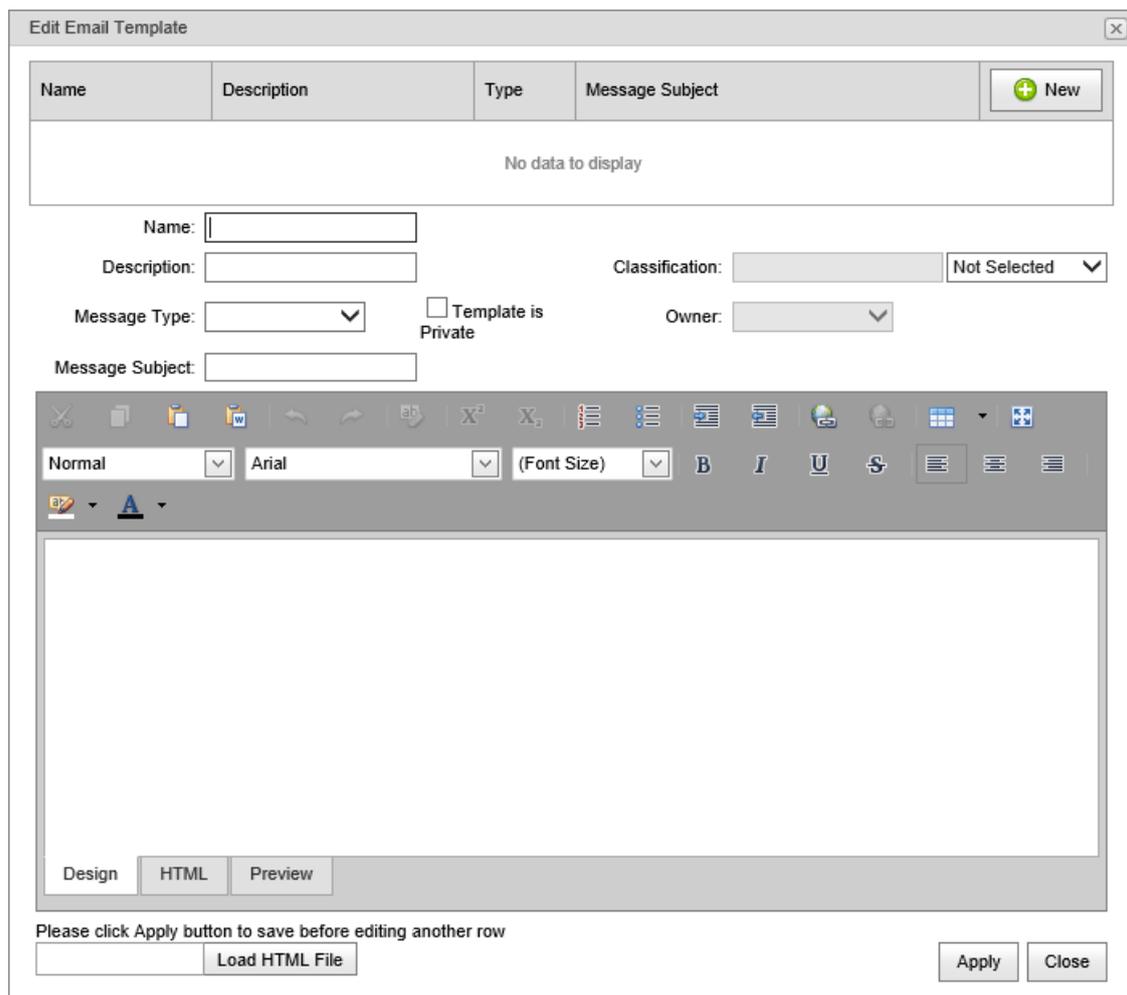
You can maintain email templates for certain types of emails in the **Edit Email Template** window.

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  next to the **Select Template** field.

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



The screenshot shows the 'Edit Email Template' window. At the top, there is a table with columns: Name, Description, Type, Message Subject, and a '+ New' button. Below the table, the text 'No data to display' is centered. The form below the table includes the following fields and controls:

- Name:
- Description:
- Classification: Not Selected
- Message Type:
- Template is Private
- Owner:
- Message Subject:

Below the form is a rich text editor toolbar with icons for Cut, Copy, Paste, Undo, Redo, Bold, Italic, Underline, and other text formatting options. The toolbar also includes a font face dropdown (set to Arial) and a font size dropdown (set to Normal). Below the toolbar is a large text area for editing the template content. At the bottom of the window, there are three tabs: Design, HTML, and Preview. Below the tabs, there is a message: 'Please click Apply button to save before editing another row'. At the bottom right, there are two buttons: 'Apply' and 'Close'. At the bottom left, there is a 'Load HTML File' button.

Edit Email Template window key fields and buttons

Fields

Field	Description
Name	Name of the template. Select a template to edit. <div style="border: 1px solid #ccc; padding: 5px; width: fit-content;"> Apply </div> <p>Note: Save any changes you have made by clicking Apply before you select another template to edit.</p>
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: <ul style="list-style-type: none"> • Design view, which lets you use text formatting similar to Microsoft Word. • HTML view, which lets you see the HTML-tagged text. • Preview view, which shows you how the signature appears on emails.

Buttons

Button	Description
	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.

This page intentionally left blank

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.

Group/User Security Maintenance							
Rights	Resource: Programs		Module:				
<input type="text" value="sms"/> <input type="button" value="x"/> <input type="button" value="use Pipe () to search"/>							
	Module	Resource 1	Resource 2	Select	Update	Insert	Delete
	SYS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	SYS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	SYS			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	SYS	NotificationsMaint	SMSProcessed	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	SYS	NotificationsMaint	SMSProviders	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	SYS	NotificationsMaint	SMSReplies	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

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: <ul style="list-style-type: none"> • rules from which notifications are generated • the schedule for each notification rule. 	<i>Notifications Maintenance - Rules Maintenance tab</i> (on page 108)
View notifications before they are sent to recipients and: <ul style="list-style-type: none"> • edit the notification • send the notification to the recipient • delete the notification. 	<i>Notifications Maintenance - Queued Notifications tab</i> (on page 113)
View and delete notifications that have been sent to recipients.	<i>Notifications Maintenance - Processed Notifications tab</i> (on page 115)
Process SMS replies for two-way SMS messaging.	<i>Notifications Maintenance - SMS Replies tab</i> (on page 117)
Display deleted notifications for two-way SMS messaging.	<i>Notifications Maintenance - SMS Processed tab</i> (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).

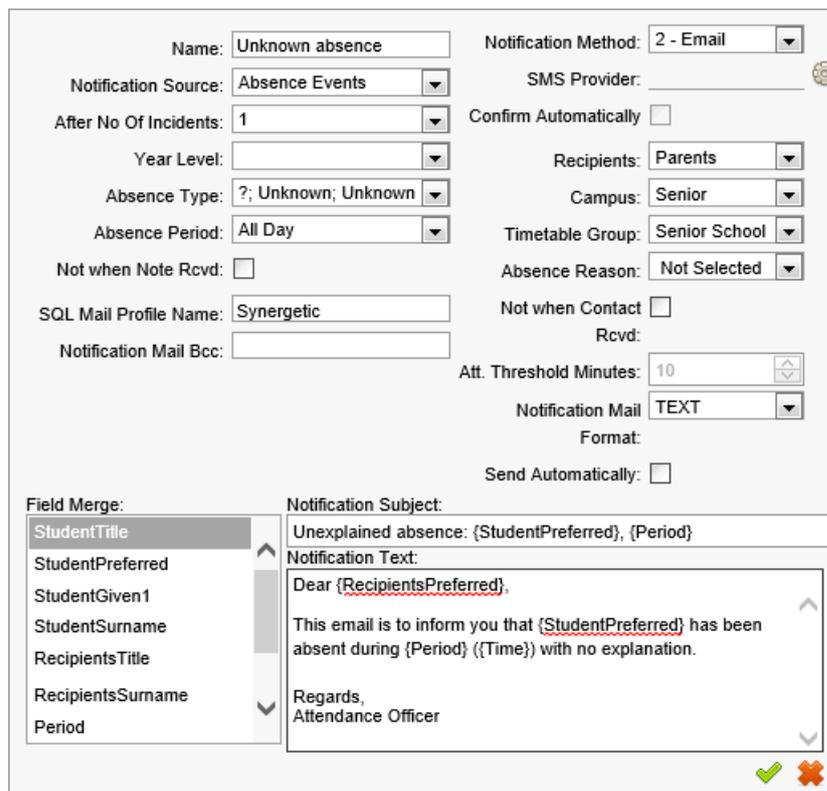
To create a notification rule:

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

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

2. Click .

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: <ul style="list-style-type: none"> • student is absent from • teacher has not marked attendance for.
ClassDescription	Description of the class that the: <ul style="list-style-type: none"> • student is absent from • 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: <ul style="list-style-type: none"> • student is absent from • teacher has not marked attendance for.
SchoolStaffCode	Staff code of the teacher who: <ul style="list-style-type: none"> • reported the student's absence • has not marked attendance.
StaffGiven1	Given name of the teacher who: <ul style="list-style-type: none"> • reported the student's absence • has not marked attendance.

Field	Description
StaffPreferred	Preferred name of the teacher who: <ul style="list-style-type: none"> • reported the student's absence • has not marked attendance.
StaffSurname	Surname of the teacher who: <ul style="list-style-type: none"> • reported the student's absence • has not marked attendance.
StaffTitle	Title of the teacher who: <ul style="list-style-type: none"> • reported the student's absence • 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 Queued Notifications Processed Notification SMS Replies SMS Processed

[Create New Notification Rule](#)

Seq	Name	Method	Recipients	Incidents	Campus	Absence Types	Profile	Subject	Format	Scheduled				
1	Notification Rule 1	SMS	Parents	1	S	L	Synergetic	Absence reminder	TEXT					

Notification Text: We are sorry to inform you that your child was late for school this morning.

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: <ul style="list-style-type: none"> • SMS • Email.
Recipients	Type of community members the notification is sent to. Options include: <ul style="list-style-type: none"> • Parents • Form Teacher • Tutor • House Teacher • 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: <ul style="list-style-type: none"> • Text • HTML.
Scheduled	When the notification process is next scheduled to run.

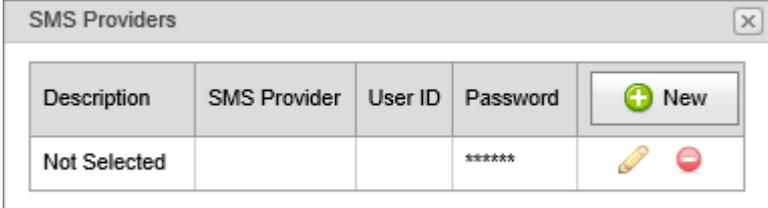
Fields

Name:	Notification Rule 1	Notification Method:	1 - SMS
Notification Source:	Absence Events	SMS Provider:	
After No Of Incidents:	1	Confirm Automatically:	<input type="checkbox"/>
Year Level:	11	Recipients:	Parents
Absence Type:	L; Late; Late	Campus:	Senior
Absence Period:	AM	Timetable Group:	Senior School
Not when Note Rcvd:	<input type="checkbox"/>	Absence Reason:	No Reason Given
SQL Mail Profile Name:	Synergetic	Not when Contact:	<input type="checkbox"/>
Notification Mail Bcc:		Rcvd:	
		Att. Threshold Minutes:	10
		Notification Mail:	TEXT
		Format:	
		Send Automatically:	<input type="checkbox"/>
Field Merge:	Notification Subject:	Absence reminder	
StudentTitle	Notification Text:	We are sorry to inform you that your child was late for school this morning.	
StudentPreferred			
StudentGiven1			
RecipientsSurname			
Period			

Tip: Click  to reveal the fields for editing.

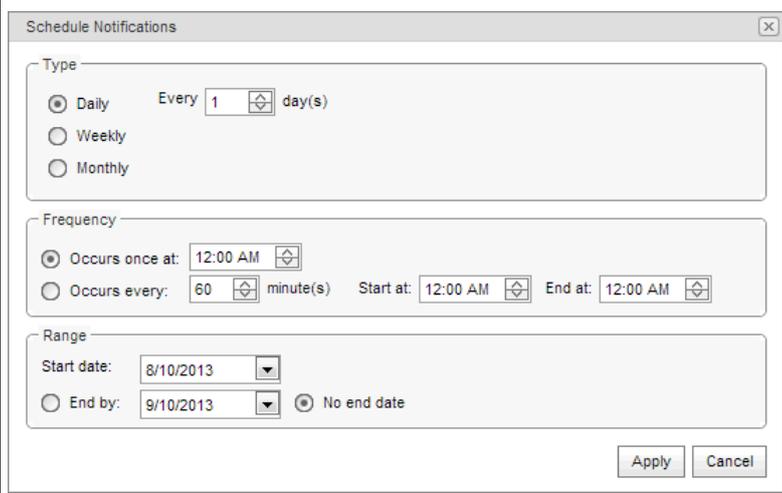
The files are identical to the grid area fields, except for some additional fields.

Fields	Description
Name	Unique name for the notification rule.
Notification Method	Method of notification used, as per the Method field above. Options include: <ul style="list-style-type: none"> SMS Email.
Notification Source	Whether the notification is triggered by: <ul style="list-style-type: none"> student Absence Events unsubmitted Attendance records.

Fields	Description
<p>SMS Provider</p>	<p>SMS provider used for the notification rule.</p> <p>Click  to maintain the SMS providers on the SMS Providers window.</p> 
<p>After No. of Incidents</p>	<p>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.</p>
<p>Confirm Automatically</p>	<p>Automatically confirm two-way SMS MessageMedia messages.</p> <p><u>Note: Can only confirm if SMS content matches code in luAbsenceNotificationReply.</u></p>
<p>Year Level</p>	<p>Restrict this notification rule to a year level, if applicable.</p>
<p>Recipients</p>	<p>Type of community members the notification is sent to.</p>
<p>Absence Type</p>	<p>Restrict this notification rule to absences of this Absence Type.</p>
<p>Campus</p>	<p>Restrict this notification rule to a campus, if applicable.</p>
<p>Absence Period</p>	<p>Restrict this notification rule to absences that occur during this time period.</p>
<p>Timetable Group</p>	<p>Timetable group the notification rule applies to.</p>
<p>Not when Note Rcvd</p>	<p>Select to only generate notifications if a note has not been received.</p>
<p>Absence Reason</p>	<p>Restrict this notification rule to absences of this Absence Reason.</p>
<p>SQL Mail Profile Name</p>	<p>Name of the profile used to send mail, as per the Profile field above.</p>
<p>Not when Contact Rcvd</p>	<p>Select to only generate notifications if no contact has been made.</p>
<p>Notification Mail BCC</p>	<p>Additional recipients who receive blind carbon copies of the notification.</p>
<p>Attendance Threshold Minutes</p>	<p>Number of minutes after the start of each attendance period after which attendance records are considered late.</p> <p>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.</p>
<p>Notification Mail Format</p>	<p>Format of the notification, as per the Format field above. Options include:</p> <ul style="list-style-type: none"> • Text • HTML.
<p>Send Notifications Automatically</p>	<p>Either:</p> <ul style="list-style-type: none"> • select to send notifications as they are generated • 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. <u>Note: You can use replaceable fields to personalise the notification messages. See <i>Creating notifications</i>.</u>

Buttons

Button	Description
	Create a new notification rule. See <i>Creating notifications</i> (on page 104).
	Edit the notification rule. See <i>Creating notifications</i> (on page 104).
	Delete the notification rule.
	Schedule when the notification rule should be run.  The screenshot shows a 'Schedule Notifications' dialog box with three sections: 'Type' (radio buttons for Daily, Weekly, Monthly; 'Every 1 day(s)'), 'Frequency' (radio buttons for 'Occurs once at: 12:00 AM' and 'Occurs every: 60 minute(s)'; 'Start at: 12:00 AM' and 'End at: 12:00 AM'), and 'Range' (radio buttons for 'Start date: 8/10/2013', 'End by: 9/10/2013', and 'No end date'). 'Apply' and 'Cancel' buttons are at the bottom right.
	Send a test notification to yourself to test settings. <u>Note: Merge fields will not be replaced from the notification subject and text.</u>
	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.

The screenshot shows the 'Notifications Maintenance' window with the 'Queued Notifications' tab selected. The window has a header with five tabs: 'Rules Maintenance', 'Queued Notifications', 'Processed Notification', 'SMS Replies', and 'SMS Processed'. Below the tabs are several filters: 'Date' (26/08/2014), 'Method' (All), 'Rules' (empty), 'Process Date' (All), and 'Name / ID' (empty). A table with columns 'Created Date', 'Recipient ID', 'Recipient Name', 'To', 'Student ID', 'Student Name', and 'Method' is shown, but it contains no data. At the bottom of the window, there are four buttons: 'Send Notifications', 'Send All Notifications', 'Delete Notifications', and 'Delete All Notifications'.

<input type="checkbox"/>	Created Date	Recipient ID	Recipient Name	To	Student ID	Student Name	Method
No data to display							

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
<input type="button" value="Send Notifications"/>	Send the selected notifications to the recipients.
<input type="button" value="Send All Notifications"/>	Send all notifications.
<input type="button" value="Delete Notifications"/>	Delete the selected notifications without sending to recipients.
<input type="button" value="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

Rules Maintenance
Queued Notifications
Processed Notifications
SMS Replies
SMS Processed

Date: Method: Sent: Replied:

Rules: Process Date: Name / ID:

<input type="checkbox"/>	Process Date	Recipient ID	Recipient Name	To	Student ID	Student Name	Method	Sent	Replied
No data to display									

Send Notifications
Send All Notifications

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. <u>Note: Deleted notifications will be displayed in the sent status column as 'Deleted'.</u>
Replied	Whether or not the notification has been replied to.

Buttons

Button	Description
	Send the selected notifications to the recipients.
	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.

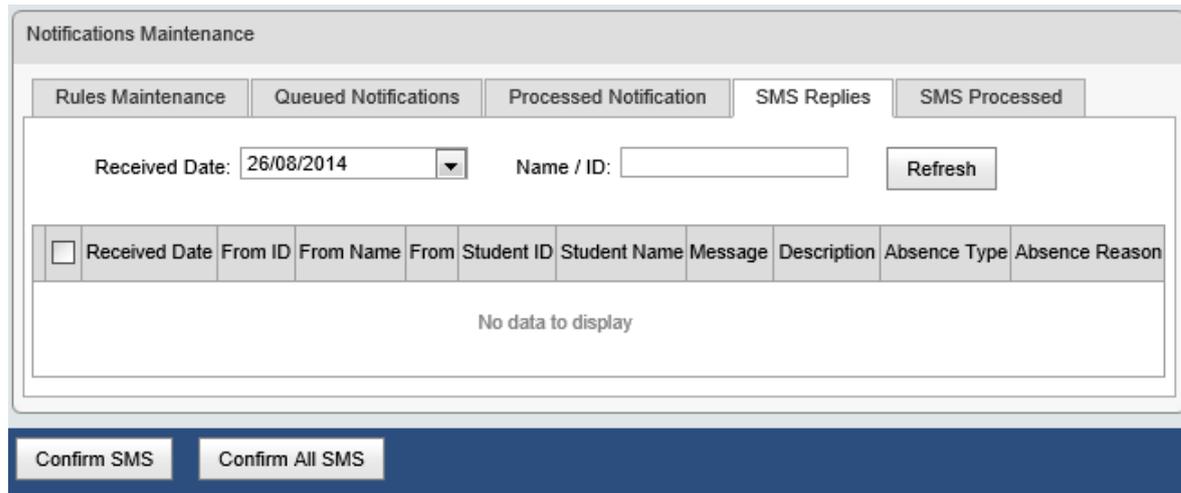
Opening the SMS Replies tab

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.



The screenshot shows the 'Notifications Maintenance' window with the 'SMS Replies' tab selected. The window has a header with the title 'Notifications Maintenance' and a sub-header with five tabs: 'Rules Maintenance', 'Queued Notifications', 'Processed Notification', 'SMS Replies', and 'SMS Processed'. Below the tabs, there is a search area with a 'Received Date' dropdown menu set to '26/08/2014', a 'Name / ID' text input field, and a 'Refresh' button. Below the search area is a table with the following columns: 'Received Date', 'From ID', 'From Name', 'From', 'Student ID', 'Student Name', 'Message', 'Description', 'Absence Type', and 'Absence Reason'. The table is currently empty, displaying 'No data to display'. At the bottom of the window, there are two buttons: 'Confirm SMS' and 'Confirm All SMS'.

<input type="checkbox"/>	Received Date	From ID	From Name	From	Student ID	Student Name	Message	Description	Absence Type	Absence Reason
No data to display										

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 the SMS replies data based on the input fields.
	Confirm the selected SMS message has been sent.
	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											
Rules Maintenance Queued Notifications Processed Notification SMS Replies SMS Processed											
Received Date: 26/08/2014		Name / ID:									
<input type="checkbox"/>	Received Date	From ID	From Name	From	Student ID	Student Name	Message	Description	Absence Type	Absence Reason	Processed Time
No data to display											

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.

AM/PM	Seq	Code	Description	Factor	Stop	Distance	Extra Description	Accompanied By Adult	Start Date	Stop Date	+ New
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:



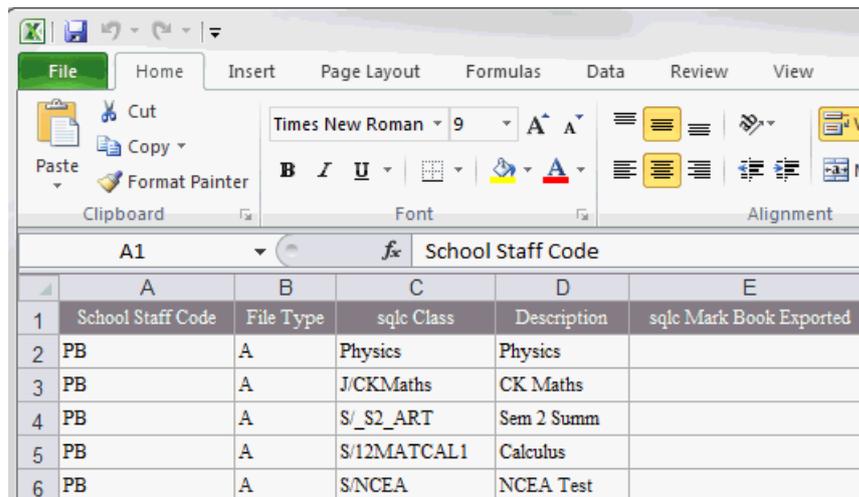
3. Select **Export to Excel**.

The **File Download** window is displayed.



4. Click .

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

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.

Transport											
<input checked="" type="checkbox"/> Active Only											
AM/PM	Seq	Code	Description	Factor	Stop	Distance	Extra Description	Accompanied By Adult	Start Date	Stop Date	+ New
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:

Export to Excel
Export to Excel (all fields)
Export to PDF
Export to CSV

Email
Email All Records
SMS
SMS All Records

RecordCount: 1

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

The **File Download** window is displayed.



4. Click .

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

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.

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:

Export to Excel	
Export to Excel (all fields)	
Export to PDF	
Export to CSV	

Email	
Email All Records	
SMS	
SMS All Records	

RecordCount: 1	

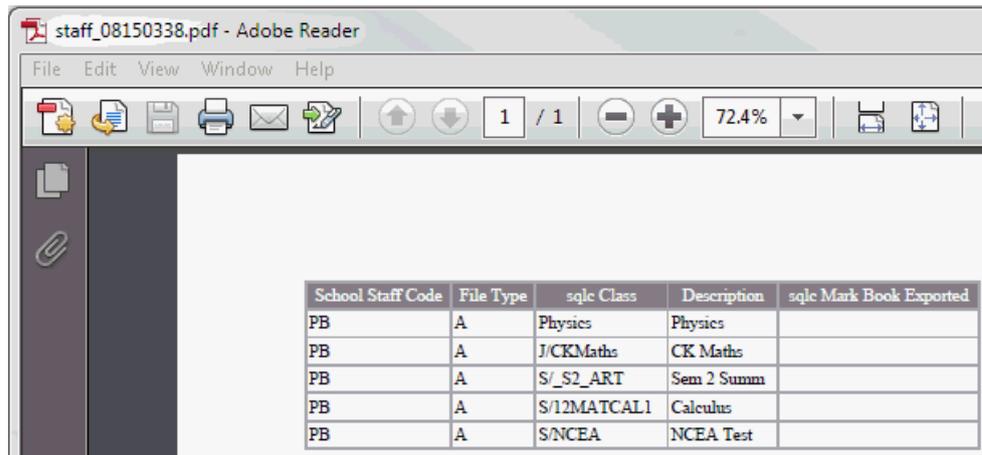
3. Select **Export to PDF**.

The **File Download** window is displayed.



4. Click .

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



5. You can then save or print the PDF.

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

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	+ New
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:

Export to Excel	
Export to Excel (all fields)	
Export to PDF	
Export to CSV	
Email	
Email All Records	
SMS	
SMS All Records	
RecordCount: 1	

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.

	A	B	C	D	E	F
1	School Sta	File Type	sqlc Class	Descriptio	sqlc Mark	Book E:
2	PB	A	Physics	Physics		
3	PB	A	J/CKMath:	CK Maths		
4	PB	A	S/_S2_AR	Sem 2 Summ		
5	PB	A	S/12MATC	Calculus		
6	PB	A	S/NCEA	NCEA Test		

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
<p>Create groups of community members that are otherwise unrelated. Tag lists can be:</p> <ul style="list-style-type: none">• stored• loaded• added to a class• added to a constituency• linked to an uploaded document• reported to• emailed to.	<p><i>Using the Tag List window</i> (on page 134)</p>

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.

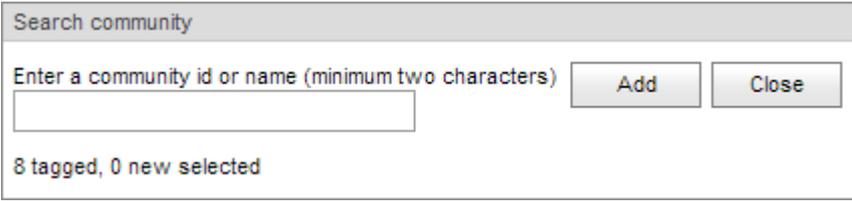
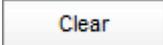
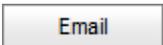
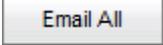
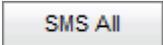


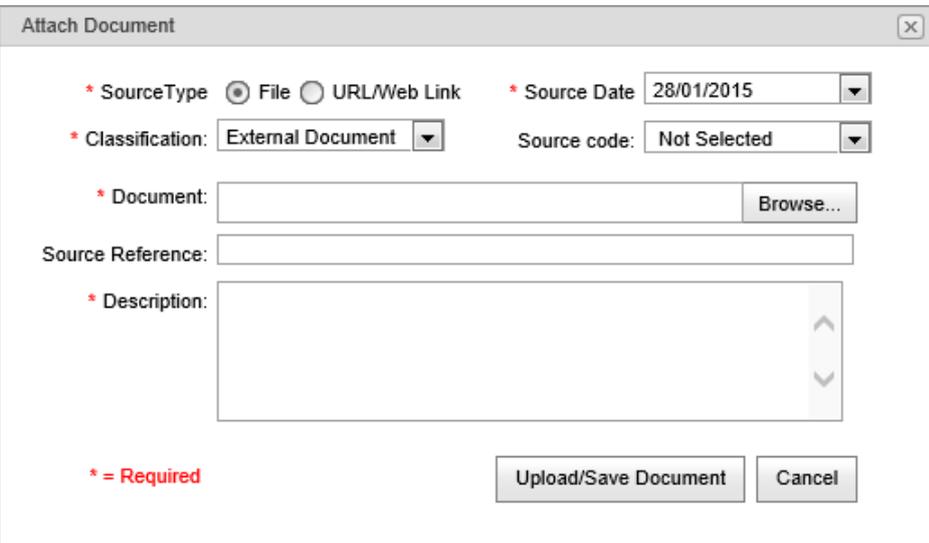
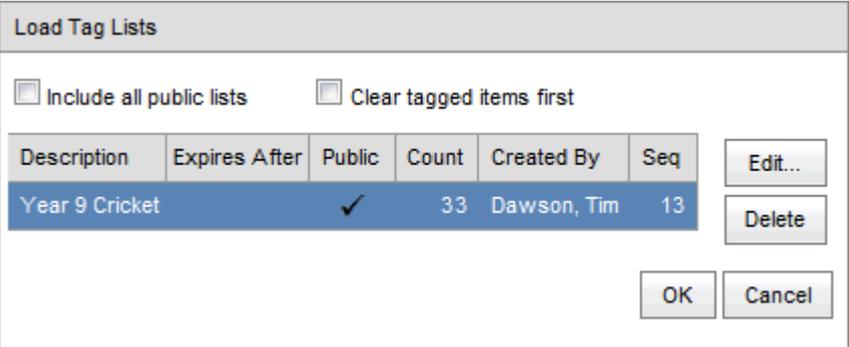
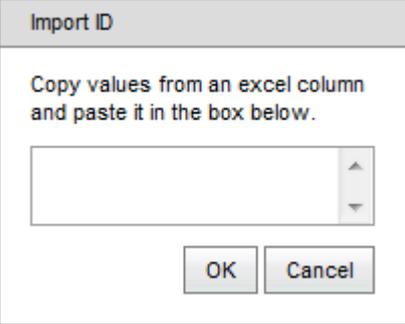
Tag List window key fields, links and buttons

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  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. <u>Note: Click the link to open a new window with the community member's record in the maintenance program.</u>

Buttons

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

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

Button	Description										
<div style="border: 1px solid gray; padding: 2px; width: fit-content; margin: 5px;">Store</div>	<p>Save the tag list for future use. See <i>Storing tag lists</i> (on page 170).</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p style="margin: 0;">Store Tag List</p> <p>Description: <input style="width: 150px;" type="text"/> ▼</p> <p><input type="checkbox"/> Make this a public list.</p> <p>List expires after: <input style="width: 100px;" type="text" value="15/07/2011"/></p> <p style="text-align: right;"><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>										
<div style="border: 1px solid gray; padding: 2px; width: fit-content; margin: 5px;">Constit</div>	<p>Add the tagged community members to a constituency. See <i>Saving tag lists into constituencies</i> (on page 176).</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p style="margin: 0;">Add Tagged IDs to Constituency</p> <p>All IDs currently in your Tag List will be added to the selected Constituency if they are not currently a member.</p> <p>Constituency <input style="width: 150px;" type="text"/> ▼</p> <p>Date Joined <input style="width: 100px;" type="text" value="23/06/2011"/> ▼</p> <p>Related Campus <input style="width: 150px;" type="text"/> ▼</p> <p>Related from Date <input style="width: 100px;" type="text"/> ▼</p> <p>Related to Date <input style="width: 100px;" type="text"/> ▼</p> <p style="text-align: right;"><input type="button" value="OK"/> <input type="button" value="Cancel"/></p> </div>										
<div style="border: 1px solid gray; padding: 2px; width: fit-content; margin: 5px;">Class</div>	<p>Add the tagged community members into a class. See <i>Saving tag lists into classes</i> (on page 179).</p> <div style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p style="margin: 0;">Class Search</p> <p>File Type <input style="width: 100px;" type="text" value="A / Academic"/> ▼ Year & Sem: <input style="width: 100px;" type="text" value="2008 - 1"/> ▼</p> <p>Campus <input style="width: 100px;" type="text" value="Not Selected"/> ▼</p> <p>Class Code <input style="width: 100px;" type="text"/></p> <p>Description <input style="width: 100px;" type="text"/></p> <p>Staff Code <input style="width: 100px;" type="text" value="Not Selected"/> ▼ Year Level <input style="width: 100px;" type="text" value="Not Selected"/> ▼</p> <p style="text-align: right;"><input type="button" value="Refresh Grid"/> <input type="button" value="Cancel"/></p> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th style="width: 10%;">Select</th> <th style="width: 20%;">File Type</th> <th style="width: 20%;">Class Code</th> <th style="width: 30%;">Description</th> <th style="width: 10%;">Staff</th> </tr> </thead> <tbody> <tr> <td colspan="5" style="text-align: center; height: 40px;">No data to display</td> </tr> </tbody> </table> </div>	Select	File Type	Class Code	Description	Staff	No data to display				
Select	File Type	Class Code	Description	Staff							
No data to display											
<div style="border: 1px solid gray; padding: 2px; width: fit-content; margin: 5px;">Refresh</div>	<p>Display records that have recently been tagged.</p>										

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. 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. 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:

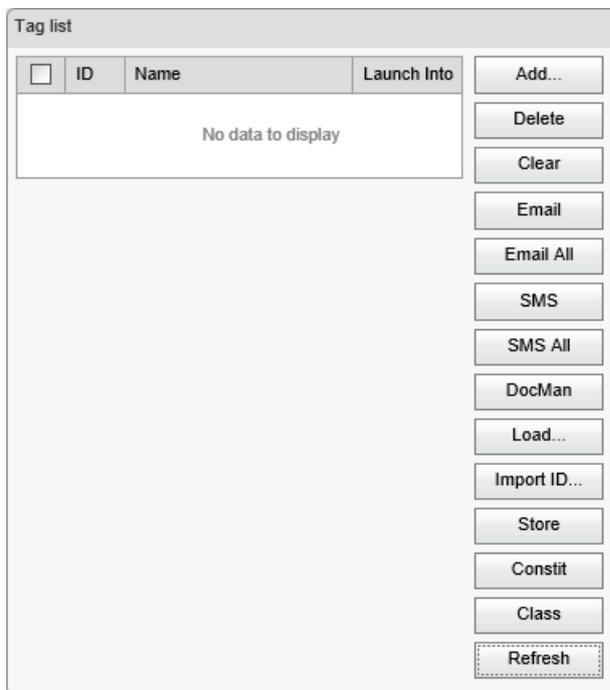
- *Deleting community members from the Tag List window* (on page 156)
- *Tagging individual community members from a grid* (on page 144)
- *Tagging multiple community members from a grid* (on page 148)
- *Deleting community members from the current tag list from a grid* (on page 152).

To add individual community members to your current tag list:

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

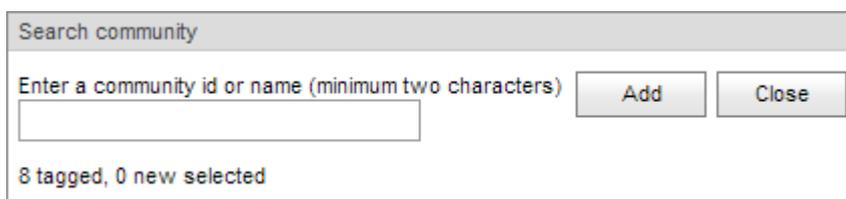


The **Tag List** window is displayed.



2. Click .

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.

Search community

Enter search criteria Add Close

adam

0 tagged, 0 new selected Showing 10 of 13 results

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

Search community

Enter search criteria

%lucy

5 tagged, 0 new selected

Select	Name	Constituencies
<input type="checkbox"/>	Miss L Smith (Lucy)	SF (2007/J3/F), golfclub

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.

Search community

Enter search criteria

0 tagged, 4 new selected Showing 5 of 5 results

Select	Name	Constituencies	Address	ID
<input type="checkbox"/>	Miss A Adamski (Amanda)	SC (J3/D/NEW), gateway, peng	Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151	18338
<input type="checkbox"/>	Mr A Adamski (Angelo)	SC (S10/D/NEW), kura	Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151	18337
<input type="checkbox"/>	Mr G Adamski (Guy)	DEB, PC, PF, SP (1980py), ZDN, bm, friend	Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151	18335
<input type="checkbox"/>	Mrs P Adamski (Pauline)	PC, PF, ZDN	Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151	18336
<input type="checkbox"/>	Miss S Adamski (Sarah)	SF (2012/S7/A)	Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151	18339

5. Select the community members you want to add.

Search community

Enter search criteria

0 tagged, 6 new selected Showing 5 of 5 results

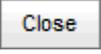
Select	Name	Constituencies	Address	ID
<input checked="" type="checkbox"/>	Miss A Adamski (Amanda)	SC (J3/D/NEW), gateway, peng	Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151	18338
<input type="checkbox"/>	Mr A Adamski (Angelo)	SC (S10/D/NEW), kura	Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151	18337
<input checked="" type="checkbox"/>	Mr G Adamski (Guy)	DEB, PC, PF, SP (1980py), ZDN, bm, friend	Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151	18335
<input type="checkbox"/>	Mrs P Adamski (Pauline)	PC, PF, ZDN	Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151	18336
<input checked="" type="checkbox"/>	Miss S Adamski (Sarah)	SF (2012/S7/A)	Unit 1 303 Burwood Hwy, BURWOOD EAST VIC 3151	18339

6. Click .

The community members are added to the tag list.

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

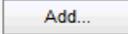
7. Repeat steps 2 through 6 until there are no more community members to tag.

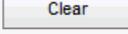
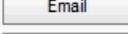
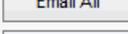
8. Click .

The added community members are displayed in the tag list.

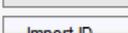
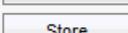
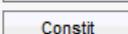
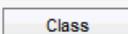
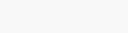
Tag list

<input type="checkbox"/>	ID	Name	Launch Into
<input type="checkbox"/>	16624	Adams, Bryant	
<input type="checkbox"/>	15203	Adams, Cherilyn	
<input type="checkbox"/>	16934	Adams, Jacob	
<input type="checkbox"/>	18337	Adamski, Angelo (S10, A)	Student Maint...
<input type="checkbox"/>	18335	Adamski, Guy	
<input type="checkbox"/>	18336	Adamski, Pauline	





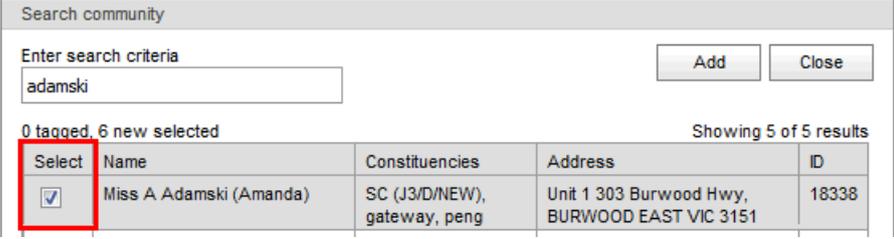






Search Community Member window key fields and buttons

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	<p>Select the field next to the community member to add them to the current tag list.</p> 
Constituencies	Lists membership of user-defined constituencies.
ID	Synergetic ID of the community member.

Buttons

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

The screenshot shows a window titled 'Contacts' with a table of contact information. The table has columns for Type, Contact Description, Contact Name, Lives with, Parent, Mail, Reports, Primary, and ID. Below the table, two contact details are shown: 'Bashir (Father)' and 'Kenneth (No Relation)'. Each detail includes fields for Ph BH, Default Mob, Fax BH, Email, Ph AH, AH Alt, Fax AH, and Mailing Address.

Type	Contact Description	Contact Name	Lives with	Parent	Mail	Reports	Primary	ID
SC1	Contact 1	Mr B Abbot	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11001
SC2	Contact 2	Master K Packard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13499

Bashir (Father)

Ph BH: Ph AH: 03 9803 7001

Default Mob: 0401 100 001 AH Alt:

Fax BH: Fax AH: 03 9804 7001

Email: email@emailaddress.com.au Mailing Address: PO Box 1, Burwood East VIC 3151

Kenneth (No Relation)

Ph BH: Ph AH: 03 9803 7016

Default Mob: AH Alt:

Fax BH: Fax AH: 03 9804 7016

Email: email@emailaddress.com.au Mailing Address: PO Box 16, Burwood East VIC 3151

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

Student Selector (18)
Adamski, Amanda (J2,)
Adamski, Angelo (S10, BO)
Agius, Anthony (Tony) (S10,)
Agius, Byron (S12, BL)

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

Student Selector (16)

Adamski, Angelo
(S10, BO)

Adamski-Smyth,
Israel (S7,)

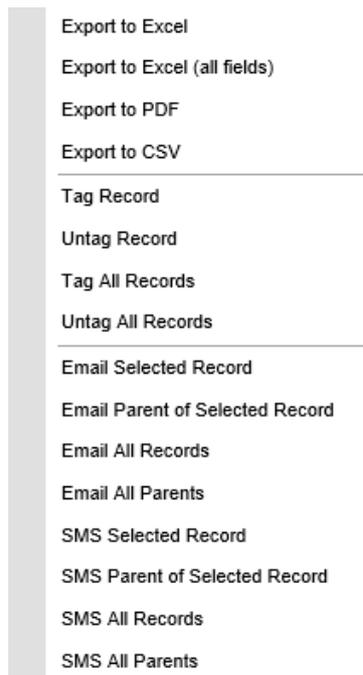
Agius, Anthony
(Tony) (S12, BO)

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.

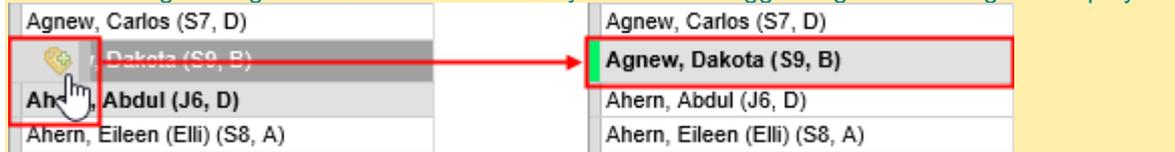
Type	Contact Description	Contact Name	Lives with	Parent	Mail	Reports	Primary	ID	
SC1	Contact 1	Mr B Abbot	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11001	
<p>Bashir (Father)</p> <p>Ph BH: <input type="text"/> Ph AH: <input type="text" value="03 9803 7001"/></p> <p>Default Mob: <input type="text" value="0401 100 001"/> AH Alt: <input type="text"/></p> <p>Fax BH: <input type="text"/> Fax AH: <input type="text" value="03 9804 7001"/></p> <p>Email: <input type="text" value="email@emailaddress.com.au"/> Mailing Address: <input type="text" value="PO Box 1, Burwood East VIC 3151"/></p>									
SC2	Contact 2	Master K Packard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13499	
<p>Kenneth (No Relation)</p> <p>Ph BH: <input type="text"/> Ph AH: <input type="text" value="03 9803 7016"/></p> <p>Default Mob: <input type="text"/> AH Alt: <input type="text"/></p> <p>Fax BH: <input type="text"/> Fax AH: <input type="text" value="03 9804 7016"/></p> <p>Email: <input type="text" value="email@emailaddress.com.au"/> Mailing Address: <input type="text" value="PO Box 16, Burwood East VIC 3151"/></p>									

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.



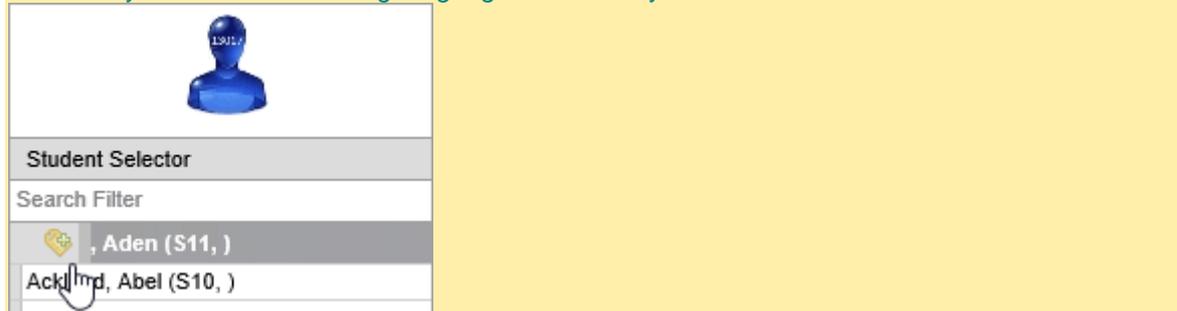
4. Select **Tag Record**.



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**.

Type	Contact Description	Contact Name	Lives with	Parent	Mail	Reports	Primary	ID	
SC1	Contact 1	Mr B Abbot	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11001	  
Bashir (Father)									
Ph BH:				Ph AH:		03 9803 7001			
Default Mob:		0401 100 001		AH Alt:					
Fax BH:				Fax AH:		03 9804 7001			
Email:		email@emailaddress.com.au		Mailing Address:		PO Box 1, Burwood East VIC 3151			
SC2	Contact 2	Master K Packard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13499	  
Kenneth (No Relation)									
Ph BH:				Ph AH:		03 9803 7016			
Default Mob:				AH Alt:					
Fax BH:				Fax AH:		03 9804 7016			
Email:		email@emailaddress.com.au		Mailing Address:		PO Box 16, Burwood East VIC 3151			

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

Student Selector (18)
Adamski, Amanda (J2,)
Adamski, Angelo (S10, BO)
Agius, Anthony (Tony) (S10,)
Agius, Byron (S12, BL)

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

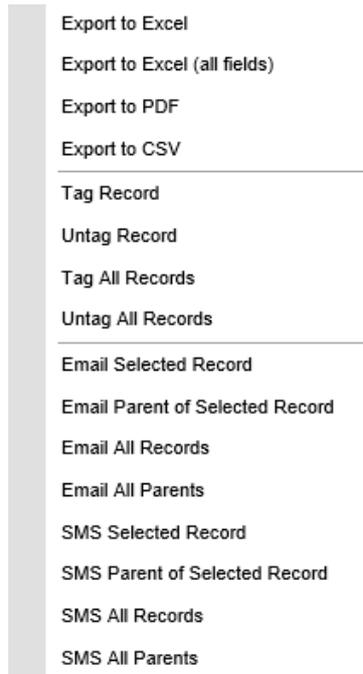
Student Selector (16)
Adamski, Angelo (S10, BO)
Adamski-Smyth, Israel (S7,)
Agius, Anthony (Tony) (S12, BO)

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.

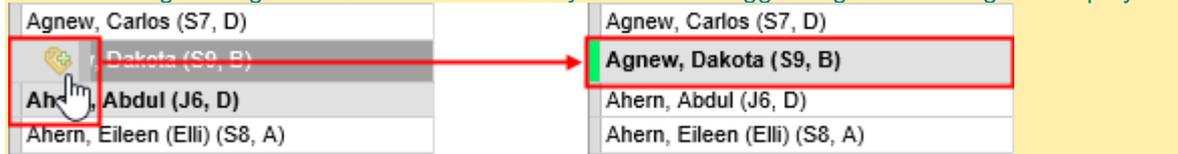
Type	Contact Description	Contact Name	Lives with	Parent	Mail	Reports	Primary	ID	
SC1	Contact 1	Mr B Abbot	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11001	  
Bashir (Father)									
Ph BH:		Ph AH: 03 9803 7001		Default Mob: 0401 100 001		AH Alt:		Fax BH:	
Fax AH: 03 9804 7001		Email: email@emailaddress.com.au		Mailing Address: PO Box 1, Burwood East VIC 3151					
SC2	Contact 2	Master K Packard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13499	  
Kenneth (No Relation)									
Ph BH:		Ph AH: 03 9803 7016		Default Mob:		AH Alt:		Fax BH:	
Fax AH: 03 9804 7016		Email: email@emailaddress.com.au		Mailing Address: PO Box 16, Burwood East VIC 3151					

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.

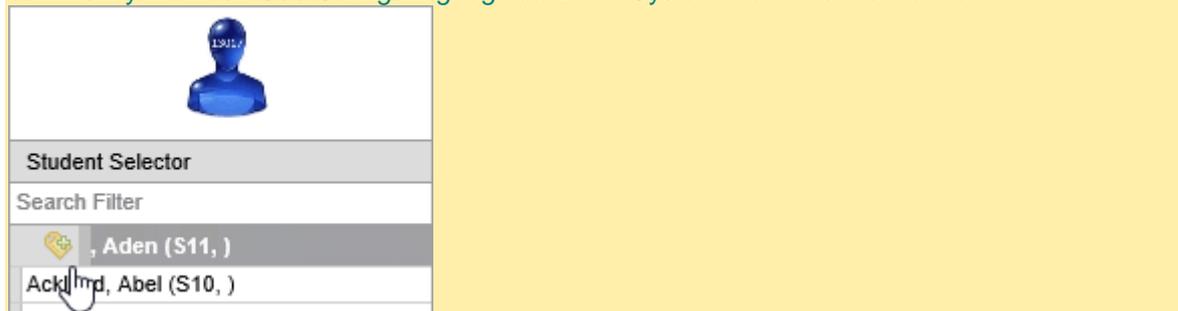


4. Select **Tag All Records**.



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**.

The screenshot shows a window titled 'Contacts' with a grid of contact information. The grid has columns for Type, Contact Description, Contact Name, Lives with, Parent, Mail, Reports, Primary, and ID. There are also icons for '+ New', edit, and delete.

Type	Contact Description	Contact Name	Lives with	Parent	Mail	Reports	Primary	ID
SC1	Contact 1	Mr B Abbot	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11001
Bashir (Father) Ph BH: <input type="text"/> Ph AH: <input type="text" value="03 9803 7001"/> Default Mob: <input type="text" value="0401 100 001"/> AH Alt: <input type="text"/> Fax BH: <input type="text"/> Fax AH: <input type="text" value="03 9804 7001"/> Email: <input type="text" value="email@emailaddress.com.au"/> Mailing Address: <input type="text" value="PO Box 1, Burwood East VIC 3151"/>								
SC2	Contact 2	Master K Packard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13499
Kenneth (No Relation) Ph BH: <input type="text"/> Ph AH: <input type="text" value="03 9803 7016"/> Default Mob: <input type="text"/> AH Alt: <input type="text"/> Fax BH: <input type="text"/> Fax AH: <input type="text" value="03 9804 7016"/> Email: <input type="text" value="email@emailaddress.com.au"/> Mailing Address: <input type="text" value="PO Box 16, Burwood East VIC 3151"/>								

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

Student Selector (18)
Adamski, Amanda (J2,)
Adamski, Angelo (S10, BO)
Agius, Anthony (Tony) (S10,)
Agius, Byron (S12, BL)

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

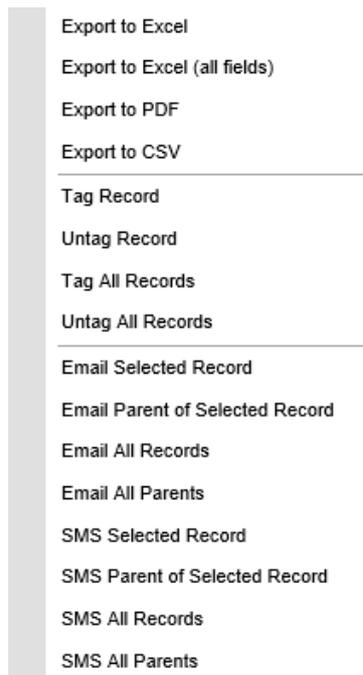
Student Selector (16)
Adamski, Angelo (S10, BO)
Adamski-Smyth, Israel (S7,)
<u>Agius, Anthony</u> (Tony) (S12, BO)

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.

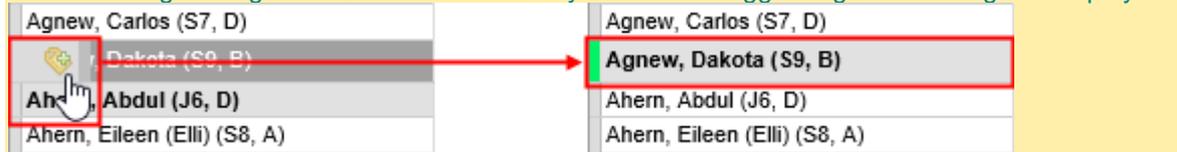
Type	Contact Description	Contact Name	Lives with	Parent	Mail	Reports	Primary	ID	
SC1	Contact 1	Mr B Abbot	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11001	
Bashir (Father)									
Ph BH:				Ph AH:		03 9803 7001			
Default Mob:		0401 100 001		AH Alt:					
Fax BH:				Fax AH:		03 9804 7001			
Email:		email@emailaddress.com.au		Mailing Address:		PO Box 1, Burwood East VIC 3151			
SC2	Contact 2	Master K Packard	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	13499	
Kenneth (No Relation)									
Ph BH:				Ph AH:		03 9803 7016			
Default Mob:				AH Alt:					
Fax BH:				Fax AH:		03 9804 7016			
Email:		email@emailaddress.com.au		Mailing Address:		PO Box 16, Burwood East VIC 3151			

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**.

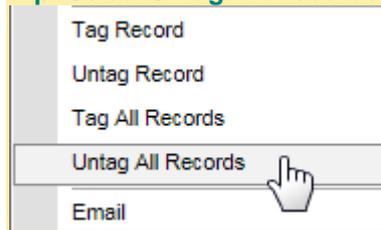
The community member is deleted from the tag list, the count on the **Tags (n)** menu option is reduced by 1, and the green tag indicator is cleared.

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.



- 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:

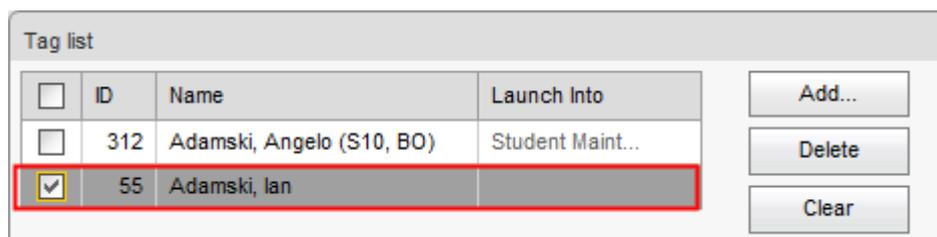
1. Select **Tags (n)** from the SynWeb main menu.

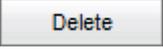


The **Tag List** window is displayed.

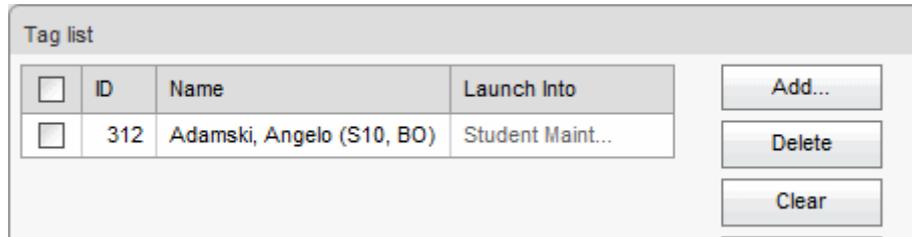


2. Select the community member you want to delete.

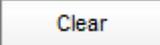
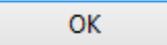


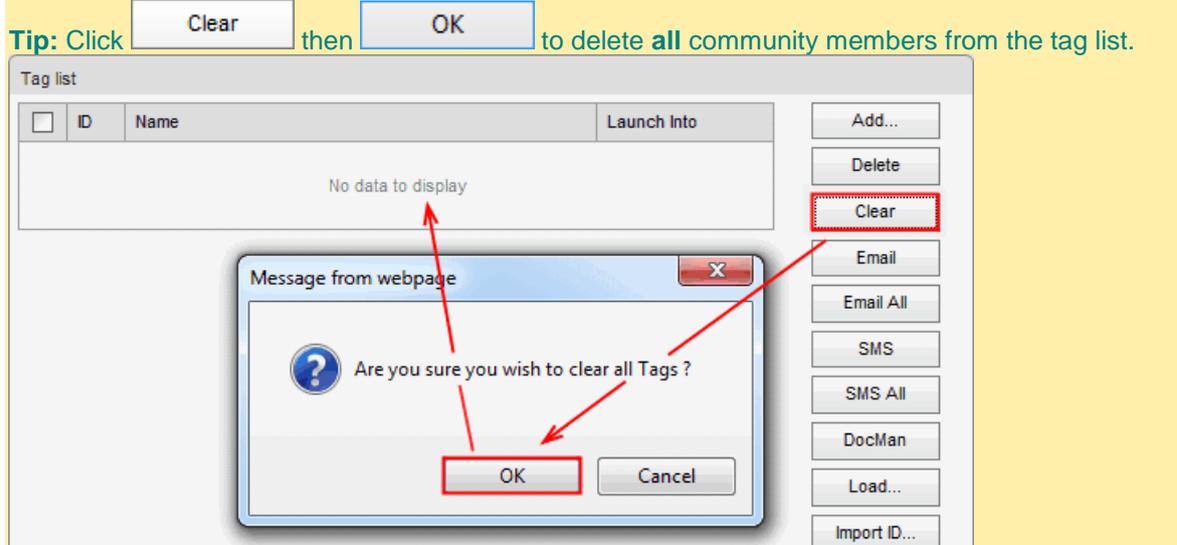
3. Click .

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  then  to delete **all** community members from the tag list.



The screenshot shows the "Tag list" window with the table empty and the text "No data to display" centered. A confirmation dialog box titled "Message from webpage" is overlaid on the window, asking "Are you sure you wish to clear all Tags?". The dialog has "OK" and "Cancel" buttons. Red arrows indicate the sequence of actions: clicking the "Clear" button in the Tag list window, then clicking the "OK" button in the confirmation dialog, which results in the table being empty.

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:

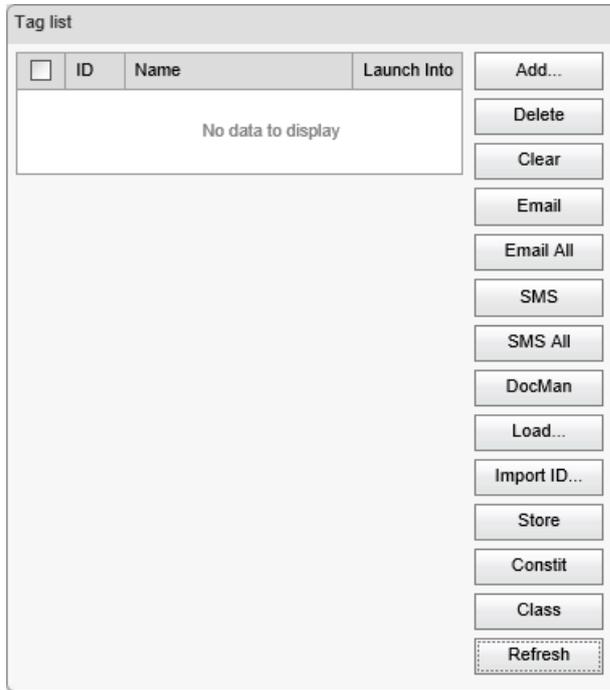
- An Excel spreadsheet. See *Loading community members from an Excel spreadsheet* in the **Synergetic** Introduction manual.
- A text file. See *Loading community members from a file* in the **Synergetic** Introduction manual.

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

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



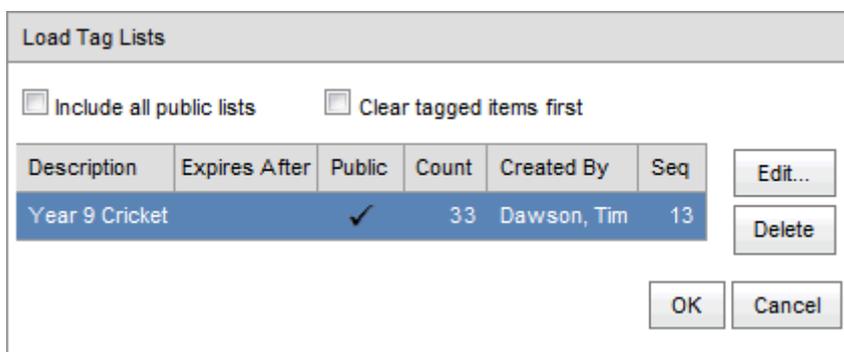
The **Tag List** window is displayed.



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.

Description	Expires After	Public	Count	Created By	Seq
Year 9 Cricket Interest		✓	3	Dawson, Tim	13
school leaders		✓	3	Clemmons, David	14
school leaders and staff		✓	6	Clemmons, David	15
school leaders		✓	0	Clemmons, David	16

- 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.

Description	Expires After	Public	Count	Created By	Seq
Year 9 Cricket Interest		✓	3	Dawson, Tim	13
school leaders		✓	3	Clemmons, David	14
school leaders and staff		✓	6	Clemmons, David	15
school leaders		✓	0	Clemmons, David	16

6. Click .

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

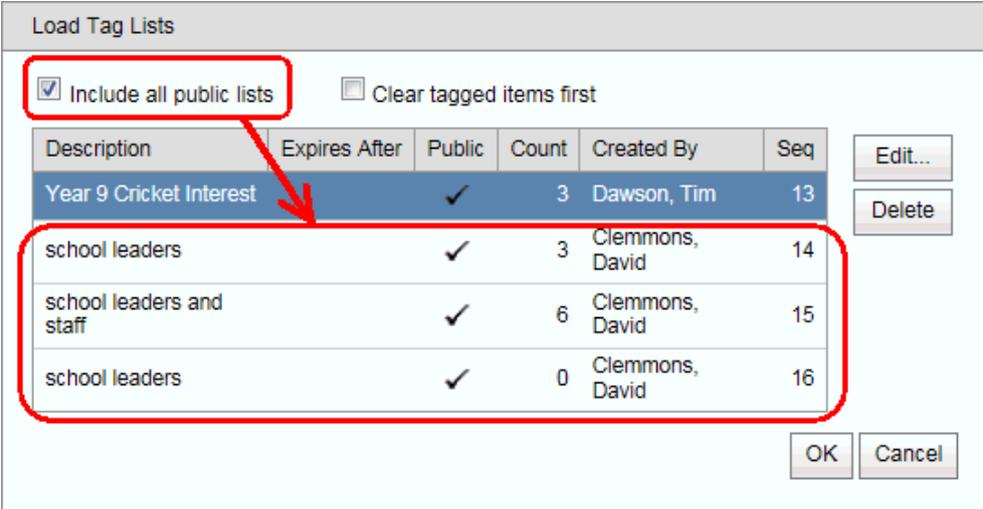
The screenshot shows a software interface with a navigation bar at the top containing the following items: Home, Students, Curriculum, Future, Develop, Human Resources, Finance, Reports, and Tags (5). The 'Tags (5)' item is highlighted with a red box. Below the navigation bar is a window titled 'Tag list'. Inside this window, there is a table with the following data:

<input type="checkbox"/>	ID	Name	Launch Info
<input type="checkbox"/>	18338	Adamski, Amanda (J3, B)	Student Maint...
<input type="checkbox"/>	18337	Adamski, Angelo (S10, A)	Student Maint...
<input type="checkbox"/>	11036	Aitken, Briony (S7, B)	Student Maint...
<input type="checkbox"/>	14867	Carter, Gretchen	
<input type="checkbox"/>	17582	Robertson, Elijah	

To the right of the table is a vertical stack of buttons: Add..., Delete, Clear, Email, Email All, SMS, SMS All, DocMan, Load..., Import ID..., Store, Constit, Class, and Refresh.

Load Tag Lists window key fields and buttons

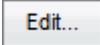
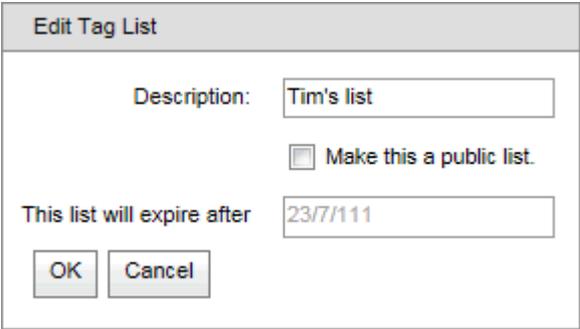
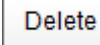
Fields

Field	Description
Include all public lists	<p>Select the field to display any public tag lists that you have not created yourself.</p>  <p>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.</p> <p>Clear the Include all public lists field to display only tag lists that you have created.</p> <p>Note: If you have created any public lists yourself these are displayed even if the Include all public lists field is cleared.</p>
Clear tagged items first	<p>Select this field to clear the current tag list before you load new community members.</p> <p>Tip: Save any existing tagged records on the Tag List window, if required, so that they these are available at a later date.</p> <p>Clear this field to append the new community members to the current tag list.</p>

Grid area fields

Field	Description
Description	Meaningful description of the tag list.
Expires After	Date that the tag list is due to expire. 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. The field is cleared if the tag list is private to you alone.
Count	Number of community members included in the tag list.

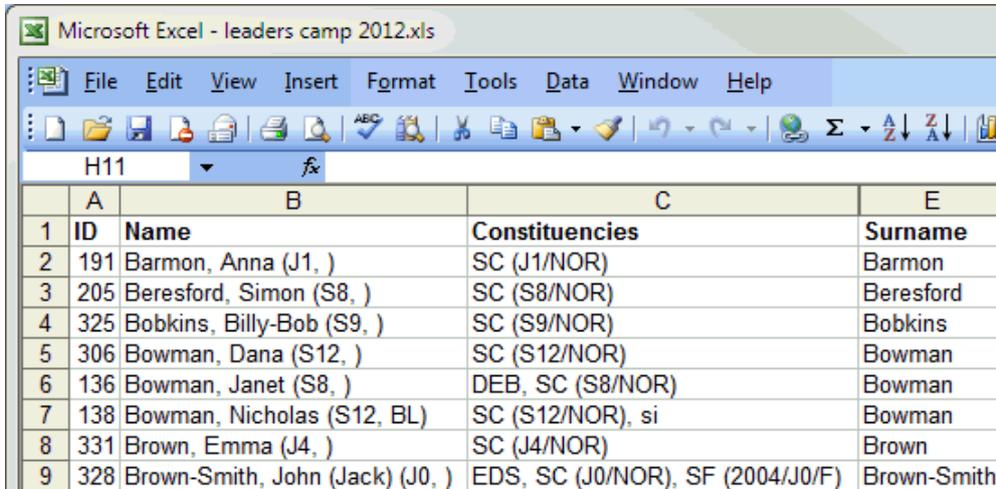
Buttons

Button	Description
	<p>Edit the following tag list details:</p> <ul style="list-style-type: none"> the description of the tag list whether to make the list public to other users or not. 
	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.



The screenshot shows a Microsoft Excel spreadsheet titled 'leaders camp 2012.xls'. The spreadsheet has four columns: A (ID), B (Name), C (Constituencies), and E (Surname). The data is as follows:

	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.



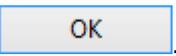
The Tag List window displays a table with the following data:

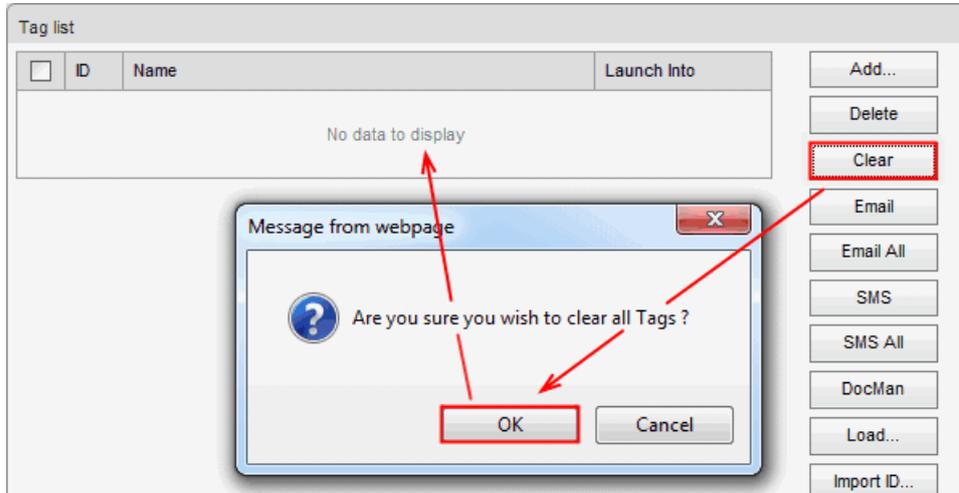
<input type="checkbox"/>	ID	Name	Launch Into
<input type="checkbox"/>	17824	3d Drafting Service,	
<input type="checkbox"/>	11012	Ackman, Cahil (S11, A)	Student Maint...
<input type="checkbox"/>	18337	Adamski, Angelo (S10, A)	Student Maint...

Below the table is a vertical list of action buttons:

- Add...
- Delete
- Clear
- Email
- Email All
- SMS
- SMS All
- DocMan
- Load...
- Import ID...
- Store
- Constit
- Class
- Refresh

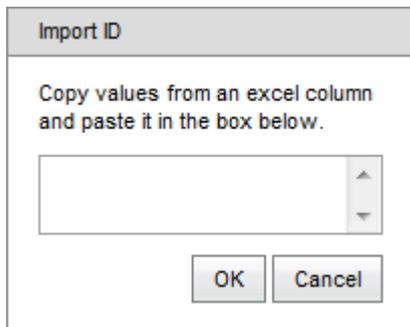
2. Delete **all** community members from the tag list, if needed. To do this:

- click 
- click 



3. Click .

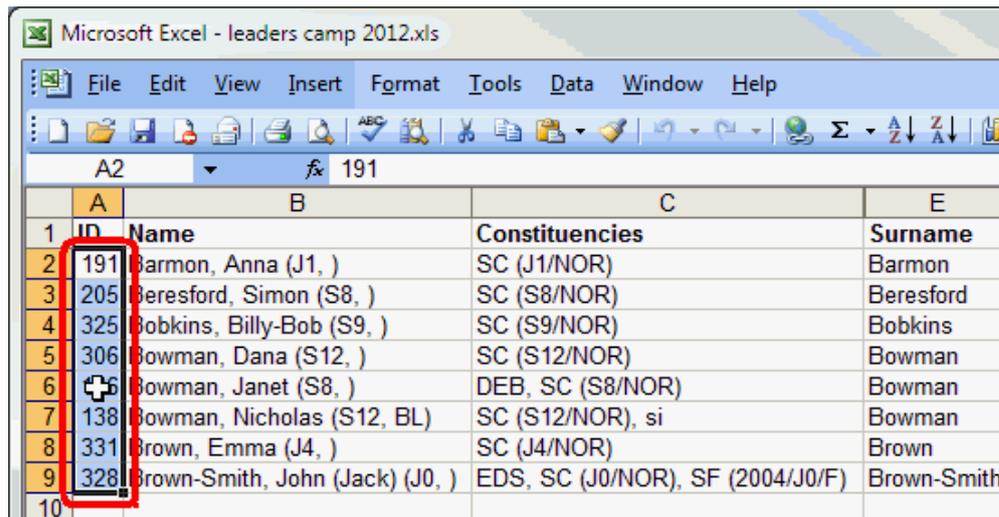
The **Import ID** window is displayed.



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.



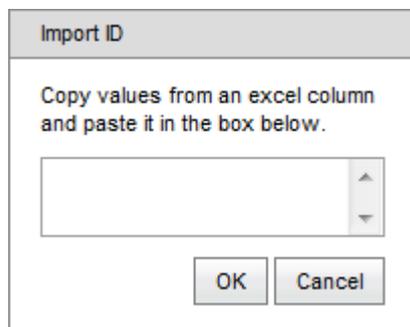
Microsoft Excel - leaders camp 2012.xls

	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	+	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.

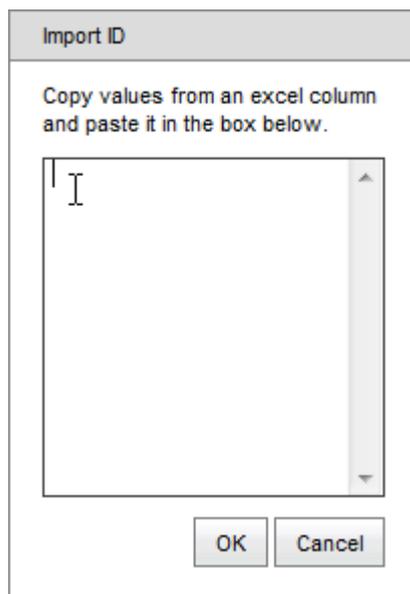


Import ID

Copy values from an excel column and paste it in the box below.

OK Cancel

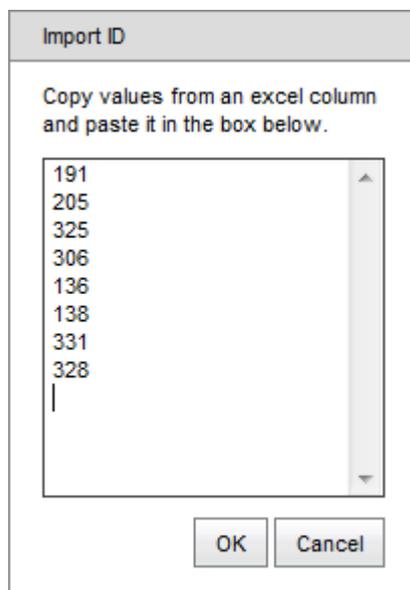
- Click in the field.



The screenshot shows a dialog box titled "Import ID". Inside the dialog, there is a text area with a vertical scrollbar and a cursor at the top left. Below the text area are two buttons: "OK" and "Cancel".

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

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



The screenshot shows the same "Import ID" dialog box, but now the text area contains a list of numbers: 191, 205, 325, 306, 136, 138, 331, and 328. The cursor is at the bottom of the list. The "OK" and "Cancel" buttons are still present at the bottom.

10. Click .

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

The screenshot shows a web application interface. At the top, there is a navigation menu with the following items: Home, Students, Curriculum, Human Resources, Objects, Reports, and Tags (0). Below the navigation menu, there is a window titled "Tag List". Inside this window, there is a table with three columns: "Name", "ID", and "Launch Into". To the right of the table, there is a vertical stack of buttons: "Add...", "Delete", "Clear", "Email...", "DocMan...", "Load...", "Import ID...", "Store...", "Constit...", and "Class...".

Name	ID	Launch Into
Barmon, Anna (J1,)	191	Student Maint...
Beresford, Simon (S8,)	205	Student Maint...
Bobkins, Billy-Bob (S9,)	325	Student Maint...
Bowman, Dana (S12,)	306	Student Maint...
Bowman, Janet (S8,)	136	Student Maint...
Bowman, Nicholas (S12, BL)	138	Student Maint...
Brown, Emma (J4,)	331	Student Maint...
Brown-Smith, John (Jack) (J0,)	328	Student Maint...

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.

Tag list

<input type="checkbox"/>	ID	Name	Launch Into
<input type="checkbox"/>	18338	Adamski, Amanda (J3, B)	Student Maint...
<input type="checkbox"/>	18337	Adamski, Angelo (S10, A)	Student Maint...
<input type="checkbox"/>	11036	Aitken, Briony (S7, B)	Student Maint...
<input type="checkbox"/>	14867	Carter, Gretchen	
<input type="checkbox"/>	17582	Robertson, Elijah	

Add...

Delete

Clear

Email

Email All

SMS

SMS All

DocMan

Load...

Import ID...

Store

Constit

Class

Refresh

- Click .

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



Store Tag List

Description: ▼

Make this a public list.

List expires after:

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

- Click .

The tag list is stored for later use.

Store Tag List window key fields

Field	Description
Description	<p>Meaningful description for the tag list.</p> <p>The Description field is a drop-down list showing existing tag lists that you own, either:</p> <ul style="list-style-type: none"> • private tag lists • public tag lists that you maintain on behalf of others.
Make this a public list	<p>Select this field to make the tag list available to other users at your organisation as well.</p> <p>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.</p>
List expires after	<p>The expiry date is set based on the settings in Configuration File Maintenance. There are two expiry settings available:</p> <ul style="list-style-type: none"> • PrivateList:ExpiryDays which defaults to 30 days. See PrivateList:ExpiryDays configuration setting in the Synergetic System maintenance manual. • PublicList:ExpiryDays which defaults to never to expire. See PublicList:ExpiryDays configuration setting in the Synergetic System maintenance manual. <p>The tag list is marked as deleted once it passes its expiry date but the tag list is still present in the Synergetic database. <i>Contact Synergetic Management Systems</i> (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.</p> <p>This shows Never if public lists are set not to expire.</p>

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.

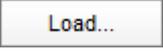
To extend your private tag list's expiry date:

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

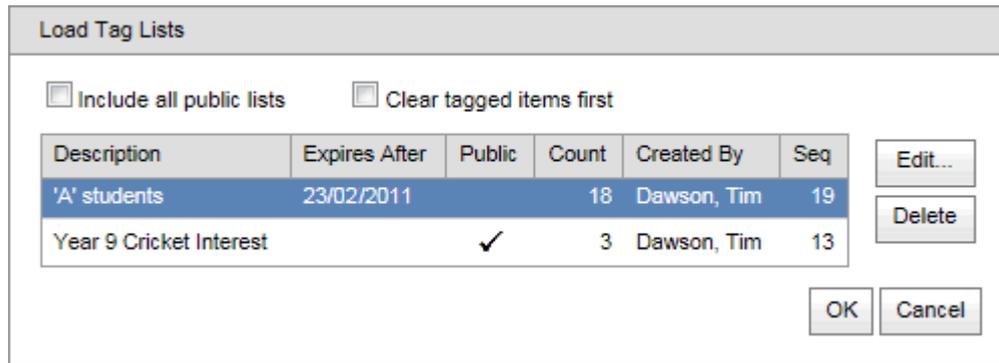
The **Tag List** window is displayed.

Tag list

<input type="checkbox"/>	ID	Name	Launch Info
<input type="checkbox"/>	18338	Adamski, Amanda (J3, B)	Student Maint...
<input type="checkbox"/>	18337	Adamski, Angelo (S10, A)	Student Maint...
<input type="checkbox"/>	11036	Aitken, Briony (S7, B)	Student Maint...
<input type="checkbox"/>	14867	Carter, Gretchen	
<input type="checkbox"/>	17582	Robertson, Elijah	

2. Click .

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



Description	Expires After	Public	Count	Created By	Seq
'A' students	23/02/2011		18	Dawson, Tim	19
Year 9 Cricket Interest		✓	3	Dawson, Tim	13

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

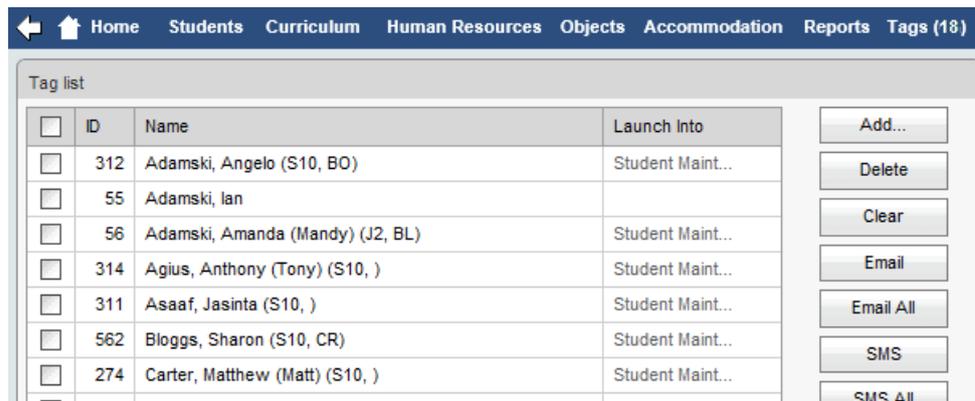


4. Select the tag list that you want to extend.

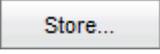
Description	Expires After	Public	Count	Created By	Seq
'A' students	23/02/2011		18	Dawson, Tim	19
Year 9 Cricket Interest		✓	3	Dawson, Tim	13

5. Click .

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



ID	Name	Launch Into
312	Adamski, Angelo (S10, BO)	Student Maint...
55	Adamski, Ian	
56	Adamski, Amanda (Mandy) (J2, BL)	Student Maint...
314	Agius, Anthony (Tony) (S10,)	Student Maint...
311	Asaaf, Jasinta (S10,)	Student Maint...
562	Bloggs, Sharon (S10, CR)	Student Maint...
274	Carter, Matthew (Matt) (S10,)	Student Maint...

6. Click .

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



Store Tag List

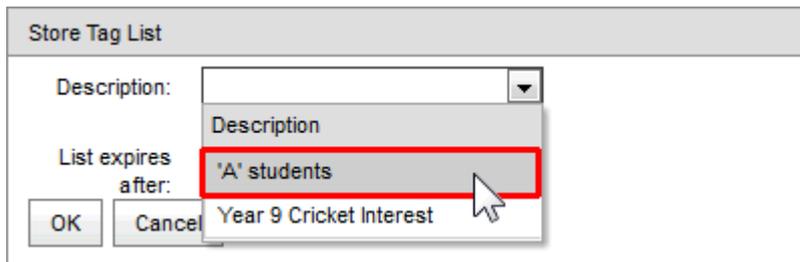
Description:

Make this a public list.

List expires after: 23/03/2011

OK Cancel

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



Store Tag List

Description:

List expires after:

OK Cancel

Description

'A' students

Year 9 Cricket Interest

8. Click .

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.

Tag list

<input type="checkbox"/>	ID	Name	Launch Info
<input type="checkbox"/>	18338	Adamski, Amanda (J3, B)	Student Maint...
<input type="checkbox"/>	18337	Adamski, Angelo (S10, A)	Student Maint...
<input type="checkbox"/>	11036	Aitken, Briony (S7, B)	Student Maint...
<input type="checkbox"/>	14867	Carter, Gretchen	
<input type="checkbox"/>	17582	Robertson, Elijah	

Add...

Delete

Clear

Email

Email All

SMS

SMS All

DocMan

Load...

Import ID...

Store

Constit

Class

Refresh

- Click .

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

Add Tagged IDs to Constituency

All IDs currently in your Tag List will be added to the selected Constituency if they are not currently a member.

Constituency

Date Joined

Related Campus

Related from Date

Related to Date

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

Add Tagged IDs to Constituency

All IDs currently in your Tag List will be added to the selected Constituency if they are not currently a member.

Constituency

Code	Description	Active
DEV	Development Prospect	True
FRND	Friend of the College	True
FSAS	Future Student Activity Sta	True
GolfClub	Golf Club Members	True
Life	Life Member Student Asso	True
MENTOR	Mentor Program Member	True
PP	Past Parent	True
PPA	Past Parent Association Me	True

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

Add Tagged IDs to Constituency

All IDs currently in your Tag List will be added to the selected Constituency if they are not currently a member.

Constituency

Date Joined

Related Campus

Related from Date

Related to Date

- Click .

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: <ul style="list-style-type: none"> • Synergetic constituencies are prefixed with @ • 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. 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: <ul style="list-style-type: none"> • a member of the School Council constituency has the date they started at the school in any capacity as the From date. • 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. <u>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.</u>

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.

Tag list

<input type="checkbox"/>	ID	Name	Launch Info
<input type="checkbox"/>	18338	Adamski, Amanda (J3, B)	Student Maint...
<input type="checkbox"/>	18337	Adamski, Angelo (S10, A)	Student Maint...
<input type="checkbox"/>	11036	Aitken, Briony (S7, B)	Student Maint...
<input type="checkbox"/>	14867	Carter, Gretchen	
<input type="checkbox"/>	17582	Robertson, Elijah	

- Click **Class**.

The **Class Search** window is displayed.

Class Search

File Type: Year & Sem:

Campus:

Class Code:

Description:

Staff Code: Year Level:

Select	File Type	Class Code	Description	Staff
No data to display				

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

- Click **Refresh Grid**.

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

Class Search

File Type: Year & Sem:

Campus:

Class Code:

Description:

Staff Code: Year Level:

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

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
Select	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)																															
<table border="1"> <thead> <tr> <th>Code</th> <th>Description (4)</th> </tr> </thead> <tbody> <tr> <td>12MATCAL1</td> <td>Calculus</td> </tr> <tr> <td>AC341</td> <td>Accounting 3 1</td> </tr> <tr> <td>CH123</td> <td>Chemistry 1 3</td> </tr> <tr> <td>12KayakA</td> <td>Yr 12 Kayak A</td> </tr> </tbody> </table>		Code	Description (4)	12MATCAL1	Calculus	AC341	Accounting 3 1	CH123	Chemistry 1 3	12KayakA	Yr 12 Kayak A																				
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Students																															
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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. 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. 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	<p>Select the command link next to the class to add the students in the current tag list to the class.</p> <table border="1"> <thead> <tr> <th>Select</th> <th>File Type</th> <th>Class Code</th> <th>Description</th> <th>Staff</th> </tr> </thead> <tbody> <tr> <td>Select</td> <td>A</td> <td>S/12MATCAL1</td> <td>Calculus</td> <td>TED</td> </tr> <tr> <td>Select</td> <td>A</td> <td>S/AC341</td> <td>Accounting 3 1</td> <td>TED</td> </tr> <tr> <td>Select</td> <td>A</td> <td>S/CH123</td> <td>Chemistry 1 3</td> <td>TED</td> </tr> </tbody> </table>	Select	File Type	Class Code	Description	Staff	Select	A	S/12MATCAL1	Calculus	TED	Select	A	S/AC341	Accounting 3 1	TED	Select	A	S/CH123	Chemistry 1 3	TED
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Select	A	S/AC341	Accounting 3 1	TED																	
Select	A	S/CH123	Chemistry 1 3	TED																	
File Type	File type for the class.																				
Class Code	Unique identifier for the class.																				
Description	Description of the class.																				

Buttons

Button	Description
	Search for classes based on the search criteria you have entered. The results are returned in the grid area.
	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.

The screenshot shows a web interface for generating a report. At the top, the title is "Student Attendances by Class / ATTCLASS". To the right of the title are two buttons: "Show Report" and "Available Reports". Below the title is a section titled "Required Selections" which contains the following fields:

- File Year: 2008
- Semester: 1
- From: 24/06/2011 (with a dropdown arrow)
- To: 24/06/2011 (with a dropdown arrow)

Below the "Required Selections" section is a section titled "Student Optional Selections" which contains the following fields:

- ID: [text input field]
- Tagged IDs: (This checkbox is highlighted with a red rectangle and a mouse cursor is pointing at it.)
- Surname: [text input field]
- Preferred: [text input field]

This page intentionally left blank

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.

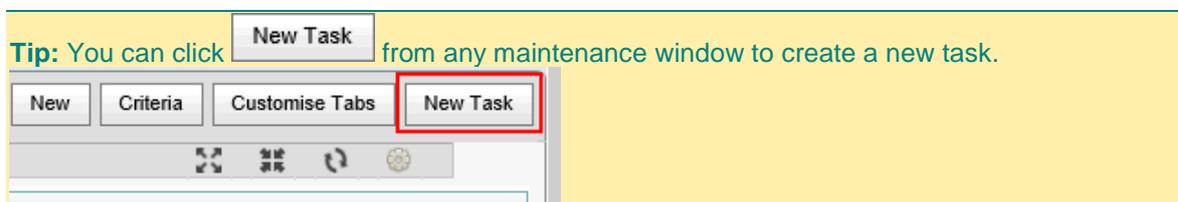
Tasks can have sub-tasks. You can create task templates including sub-tasks for common duties, such as setting up a new staff member. See *Using task templates* (on page 219).

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.



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.

Task List

My Allocations
 Originated By Me
 Show Completed
 Include Sub Tasks
 Show Templates

Set Current User To:

Description	Due Date	Start Date	Closed Date					
Book report		4/12/2015						Maint...
Student : Abbot, Jacalyn		4/12/2015						
School photograph		1/04/2016						
Essay								Maint...
Prepare grounds for sporting carnival								Maint...

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. 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. 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. 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. 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
	Expand the grid area to add a new task. See <i>Creating tasks</i> (on page 189).
	Add a new sub-task to the selected task. See <i>Creating tasks</i> (on page 189).
	Click to edit the grid fields for the task.
	Click to delete the task.
	Either: <ul style="list-style-type: none"> • update the details for a task if adding or editing the grid fields • mark a task as closed.
	Save the task as a template.
#	<p>Launch the relevant maintenance screen for the task. For example, the Student Maintenance window for a task related to a student.</p> 

Creating tasks

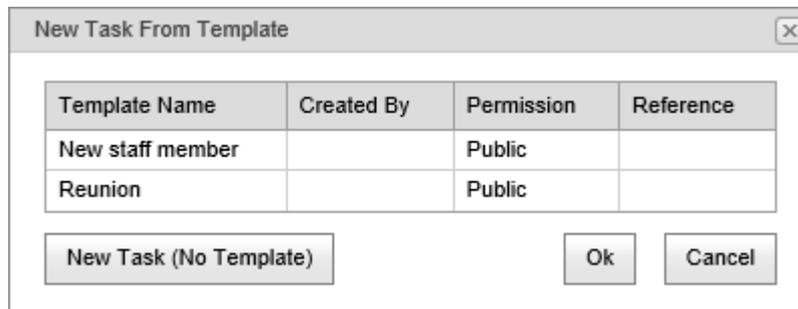
Creating a new task

To create a new task without using a template:

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

2. Click .

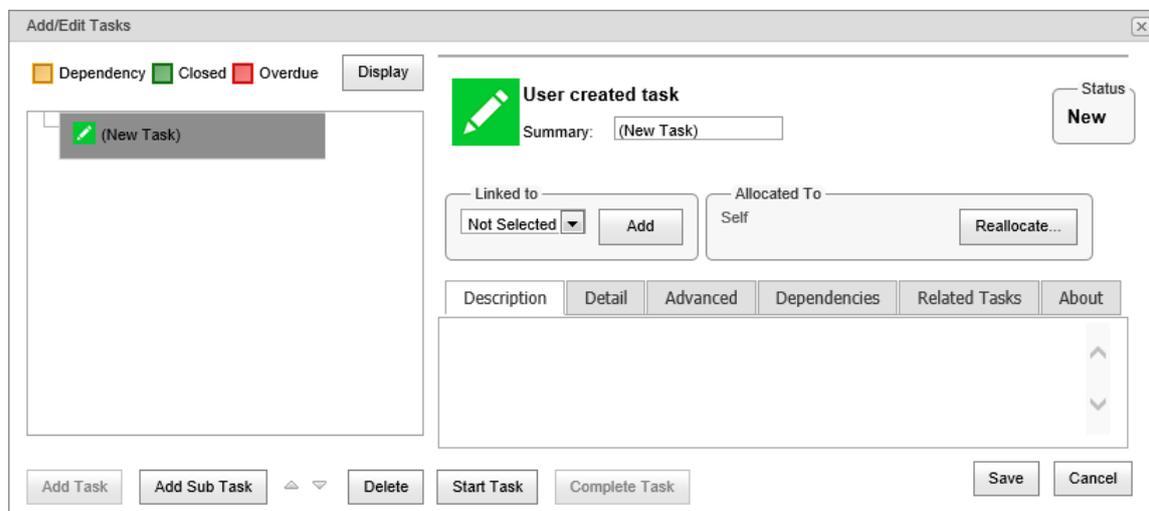
The **New Task From Template** window is displayed.



Template Name	Created By	Permission	Reference
New staff member		Public	
Reunion		Public	

3. Click .

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



Dependency Closed Overdue

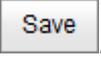
(New Task)

User created task Status: **New**
 Summary:

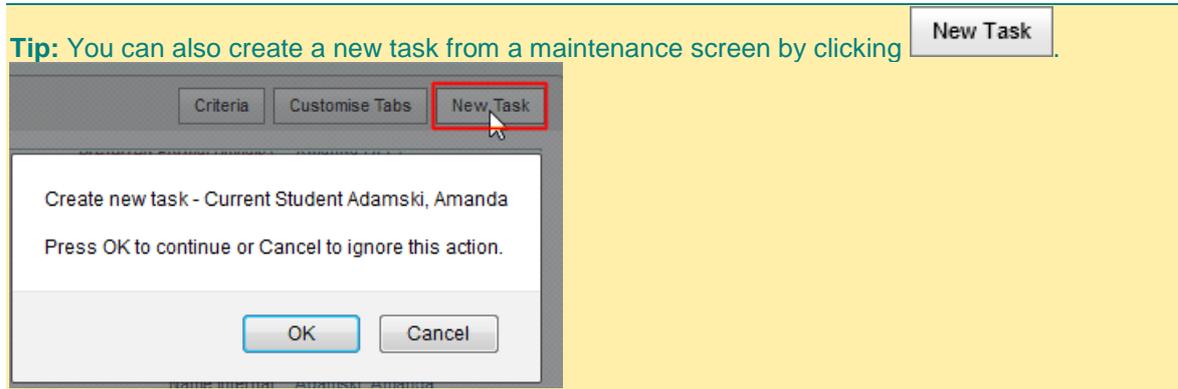
Linked to:
 Allocated To:

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 .

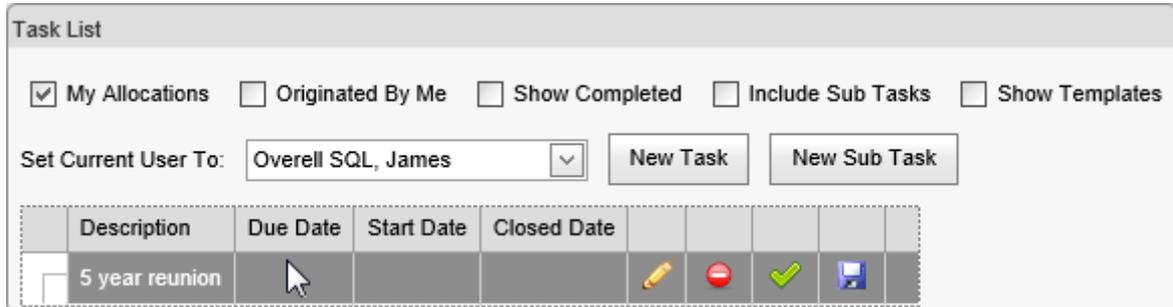
Note: If you have allocated the task to another community member or marked it as closed, you may need to select the fields at the top of the window to display the task.



Creating a new sub-task

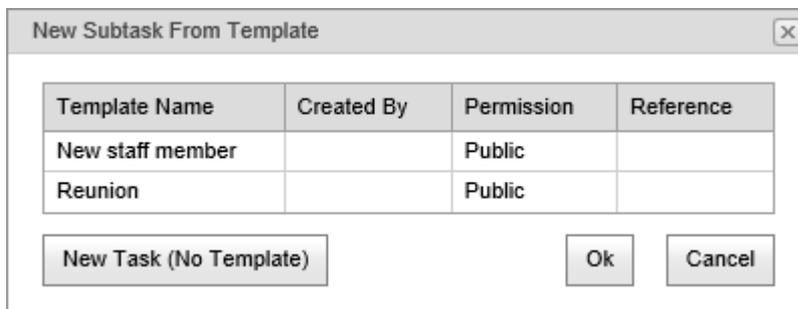
To create a new sub-task:

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.



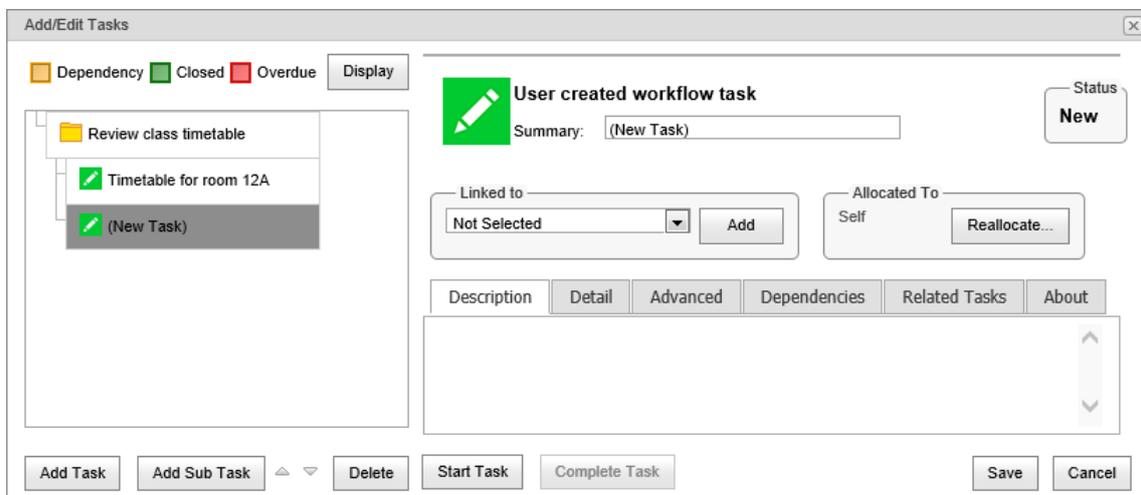
3. Click **New Sub Task**.

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.

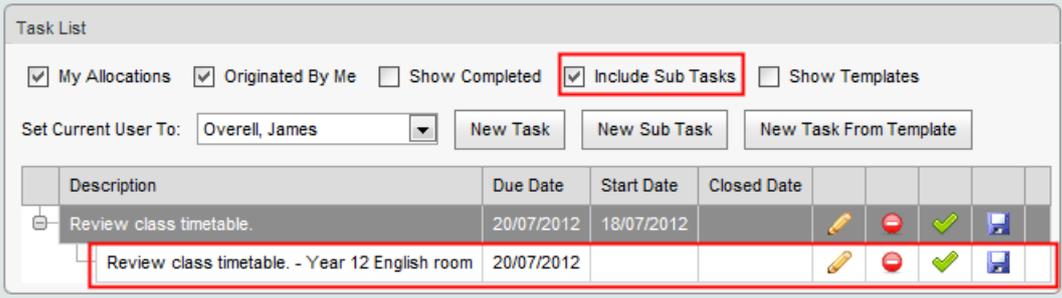
The **Add/Edit Tasks** window is displayed.



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

5. Click .

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



The screenshot shows a 'Task List' window with several filters and a table of tasks. The 'Include Sub Tasks' checkbox is checked and highlighted with a red box. The table below shows a main task with a sub-task listed underneath it, also highlighted with a red box.

Description	Due Date	Start Date	Closed Date				
Review class timetable.	20/07/2012	18/07/2012					
Review class timetable. - Year 12 English room	20/07/2012						

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.

Task List									
<input checked="" type="checkbox"/> My Allocations <input type="checkbox"/> Originated By Me <input type="checkbox"/> Show Completed <input type="checkbox"/> Include Sub Tasks <input type="checkbox"/> Show Templates									
Set Current User To:		<input type="text" value="knowledgedoc, knowledgedoc"/>		<input type="button" value="New Task"/>		<input type="button" value="New Sub Task"/>			
Description	Due Date	Start Date	Closed Date						
Book report		4/12/2015							Maint...
Student : Abbot, Jacalyn		4/12/2015							
School photograph		1/04/2016							
Essay									Maint...
Prepare grounds for sporting carnival									Maint...

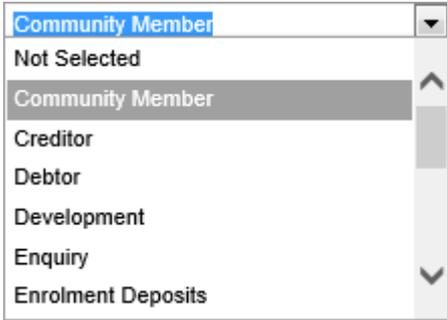
2. Click next to an existing task.

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

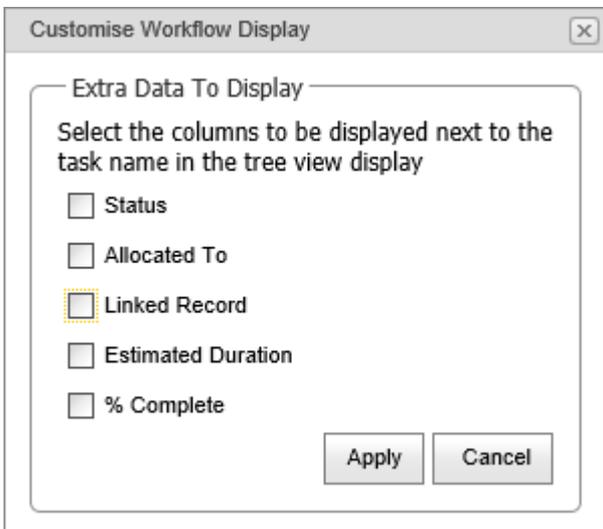
Add/Edit Tasks	
<input type="checkbox"/> Dependency <input checked="" type="checkbox"/> Closed <input type="checkbox"/> Overdue <input type="button" value="Display"/>	
<ul style="list-style-type: none"> Book report <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Read Hatchet: The Return <input checked="" type="checkbox"/> Write 500 word book report 	<div style="border: 1px solid gray; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> <div> <p> User created workflow task</p> <p>Summary: <input type="text" value="Book report"/></p> </div> <div> <p>Status: In Process</p> </div> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div> <p>Linked to Current Student</p> <p>Amanda Adamski <input type="button" value="Remove"/></p> </div> <div> <p>Allocated To</p> <p>Self <input type="button" value="Reallocate..."/></p> </div> </div> <div style="margin-top: 10px;"> <p> <input type="button" value="Description"/> <input type="button" value="Detail"/> <input type="button" value="Advanced"/> <input type="button" value="Dependencies"/> <input type="button" value="Related Tasks"/> <input type="button" value="DocMan"/> <input type="button" value="About"/> </p> <p>Book report - Hatchet: The Return.</p> </div> </div>
<input type="button" value="Add Task"/> <input type="button" value="Add Sub Task"/> ▲ ▼ <input type="button" value="Delete"/>	

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	<p>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.</p>  <p>Note: The maintenance modules displayed will depend on your security permissions. Contact your IT administrator.</p>
Allocated To	<p>Community member allocated to the task. Click the launch link to open Community Maintenance.</p> <p>Note: This defaults to the community member who created the task. Use the  button to allocate a different community member.</p>

Task Details area buttons

Button	Description
	<p>Launch the Customise Workflow Display window to display additional information next to task names in the tree view.</p> 

Button	Description																																										
<p data-bbox="193 264 309 315">Add</p>	<p data-bbox="507 264 1380 324">Launch the Link To window of the selected maintenance module to link a record to the task.</p> <div data-bbox="507 342 1238 1025" style="border: 1px solid gray; padding: 5px;"> <p data-bbox="528 353 1225 383">Link To Community Member x</p> <p data-bbox="544 398 1198 427">Name</p> <hr/> <p data-bbox="555 450 1193 479">Record Type: <input checked="" type="radio"/> Personal <input type="radio"/> Company <input type="radio"/> Personal Company</p> <p data-bbox="660 495 871 524">ID: <input type="text"/></p> <p data-bbox="644 546 1075 575">Title: <input style="width: 100%;" type="text"/></p> <p data-bbox="596 600 1083 629">Surname: <input style="width: 100%;" type="text"/></p> <p data-bbox="612 651 1083 680">Given 1: <input style="width: 100%;" type="text"/></p> <p data-bbox="596 703 1083 732">Preferred: <input style="width: 100%;" type="text"/></p> <p data-bbox="564 754 1083 784">Other Given: <input style="width: 100%;" type="text"/></p> <p data-bbox="612 806 1075 835">Gender: <input style="width: 100%;" type="text"/></p> <p data-bbox="564 857 1083 887">Date of Birth: <input style="width: 100%;" type="text"/></p> <p data-bbox="564 909 1075 938">Mail Format: <input style="width: 100%;" type="text"/></p> <div data-bbox="879 965 1193 1003" style="text-align: right;"> <input type="button" value="Previous"/> <input type="button" value="Next"/> <input type="button" value="Cancel"/> </div> </div>																																										
<p data-bbox="193 1048 309 1099">Remove</p>	<p data-bbox="507 1048 1145 1077">Remove the link to the displayed maintenance record.</p>																																										
<p data-bbox="193 1131 357 1182">Reallocate...</p>	<p data-bbox="507 1131 1362 1191">Launch the Reallocate Task window to reallocate the task to a different community member.</p> <div data-bbox="507 1209 1155 1792" style="border: 1px solid gray; padding: 5px;"> <p data-bbox="528 1220 1145 1249">Reallocate Task x</p> <table border="1" data-bbox="528 1261 1129 1713"> <thead> <tr> <th>Login Name</th> <th>Name</th> <th>ID</th> </tr> </thead> <tbody> <tr><td>abailey</td><td>Bailey SQL, Andrew</td><td>18455</td></tr> <tr><td>amartell</td><td>Martell SQL, Andrea</td><td>18369</td></tr> <tr><td>apaydon</td><td>Paydon SQL, Andrew</td><td>18363</td></tr> <tr><td>arose</td><td>Rose SQL, Andrew</td><td>18376</td></tr> <tr><td>asomodio</td><td>Somodio SQL, Anelie</td><td>18367</td></tr> <tr><td>CDA</td><td>Synergetic Management Systems</td><td>18100</td></tr> <tr><td>cda_main\abailey</td><td>Bailey WIN, Andrew</td><td>18456</td></tr> <tr><td>cda_main\amartell</td><td>Martell WIN, Andrea</td><td>18368</td></tr> <tr><td>cda_main\apaydon</td><td>Paydon WIN, Andrew</td><td>18365</td></tr> <tr><td>cda_main\arose</td><td>Rose WIN, Andrew</td><td>18377</td></tr> <tr><td>cda_main\ddowell</td><td>Dowell WIN, David</td><td>18389</td></tr> <tr><td>cda_main\dmariou</td><td>Marion WIN, Daniel</td><td>18383</td></tr> <tr><td>cda_main\dmcaskill</td><td>McAskill WIN, Daniel</td><td>18458</td></tr> </tbody> </table> <div data-bbox="963 1742 1129 1780" style="text-align: right;"> <input type="button" value="Save"/> <input type="button" value="Cancel"/> </div> </div>	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\dmariou	Marion WIN, Daniel	18383	cda_main\dmcaskill	McAskill WIN, Daniel	18458
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Button	Description												
<div data-bbox="188 264 322 315" style="border: 1px solid gray; padding: 2px; width: fit-content;">Add Task</div>	<p>Launch the New Task From Template window. The task can be created either:</p> <ul style="list-style-type: none"> • from a template listed in the grid area • without using a template. <div data-bbox="507 456 1310 786" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <div style="border-bottom: 1px solid gray; padding-bottom: 5px;"> ✕ New Task From Template </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 5px;"> <thead> <tr> <th style="width: 30%;">Template Name</th> <th style="width: 20%;">Created By</th> <th style="width: 20%;">Permission</th> <th style="width: 30%;">Reference</th> </tr> </thead> <tbody> <tr> <td colspan="4" style="text-align: center; padding: 5px;">No data to display</td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div style="border: 1px solid gray; padding: 2px 10px;">New Task (No Template)</div> <div style="border: 1px solid gray; padding: 2px 10px;">Ok</div> <div style="border: 1px solid gray; padding: 2px 10px;">Cancel</div> </div> </div>	Template Name	Created By	Permission	Reference	No data to display							
Template Name	Created By	Permission	Reference										
No data to display													
<div data-bbox="188 801 368 853" style="border: 1px solid gray; padding: 2px; width: fit-content;">Add Sub Task</div>	<p>Launch the New Subtask From Template window. The sub-task can be created either:</p> <ul style="list-style-type: none"> • from a template listed in the grid area • without using a template. <div data-bbox="507 994 1310 1301" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <div style="border-bottom: 1px solid gray; padding-bottom: 5px;"> ✕ New Subtask From Template </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-bottom: 5px;"> <thead> <tr> <th style="width: 30%;">Template Name</th> <th style="width: 20%;">Created By</th> <th style="width: 20%;">Permission</th> <th style="width: 30%;">Reference</th> </tr> </thead> <tbody> <tr> <td>New staff member</td> <td></td> <td>Public</td> <td></td> </tr> <tr> <td>Reunion</td> <td></td> <td>Public</td> <td></td> </tr> </tbody> </table> <div style="display: flex; justify-content: space-between; margin-top: 5px;"> <div style="border: 1px solid gray; padding: 2px 10px;">New Task (No Template)</div> <div style="border: 1px solid gray; padding: 2px 10px;">Ok</div> <div style="border: 1px solid gray; padding: 2px 10px;">Cancel</div> </div> </div>	Template Name	Created By	Permission	Reference	New staff member		Public		Reunion		Public	
Template Name	Created By	Permission	Reference										
New staff member		Public											
Reunion		Public											
 	<p>Move the selected task up or down the task tree.</p>												
<div data-bbox="188 1377 293 1429" style="border: 1px solid gray; padding: 2px; width: fit-content;">Delete</div>	<p>Delete the selected task.</p>												

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.

Task List									
<input checked="" type="checkbox"/> My Allocations <input type="checkbox"/> Originated By Me <input type="checkbox"/> Show Completed <input type="checkbox"/> Include Sub Tasks <input type="checkbox"/> Show Templates									
Set Current User To: <input type="text" value="knowledgedoc, knowledgedoc"/> <input type="button" value="New Task"/> <input type="button" value="New Sub Task"/>									
Description	Due Date	Start Date	Closed Date						
Book report		4/12/2015							Maint...
Student : Abbot, Jacalyn		4/12/2015							
School photograph		1/04/2016							
Essay									Maint...
Prepare grounds for sporting carnival									Maint...

2. Click next to an existing task.

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

Add/Edit Tasks	
<input type="checkbox"/> Dependency <input checked="" type="checkbox"/> Closed <input type="checkbox"/> Overdue <input type="button" value="Display"/>	
<ul style="list-style-type: none"> Book report <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Read Hatchet: The Return <input checked="" type="checkbox"/> Write 500 word book report 	<div style="border: 1px solid gray; padding: 5px;"> <div style="display: flex; justify-content: space-between;"> <div> User created workflow task </div> <div> Status: In Process </div> </div> <div style="margin-top: 5px;"> Summary: <input type="text" value="Book report"/> </div> <div style="display: flex; justify-content: space-between; margin-top: 10px;"> <div> Linked to Current Student Amanda Adamski <input type="button" value="Remove"/> </div> <div> Allocated To Self <input type="button" value="Reallocate..."/> </div> </div> <div style="margin-top: 10px;"> <input type="button" value="Description"/> <input type="button" value="Detail"/> <input type="button" value="Advanced"/> <input type="button" value="Dependencies"/> <input type="button" value="Related Tasks"/> <input type="button" value="DocMan"/> <input type="button" value="About"/> </div> <div style="border: 1px solid gray; padding: 5px; margin-top: 5px;"> Book report - Hatchet: The Return. </div> </div>
<input type="button" value="Add Task"/> <input type="button" value="Add Sub Task"/> <input type="button" value="Delete"/>	

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.

Description	Due Date	Start Date	Closed Date					
Book report		4/12/2015						Maint...
Student : Abbot, Jacalyn		4/12/2015						
School photograph		1/04/2016						
Essay								Maint...
Prepare grounds for sporting carnival								Maint...

2. Click next to an existing task.

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

Add/Edit Tasks

Dependency
 Closed
 Overdue

Book report
 Read Hatchet: The Return
 Write 500 word book report

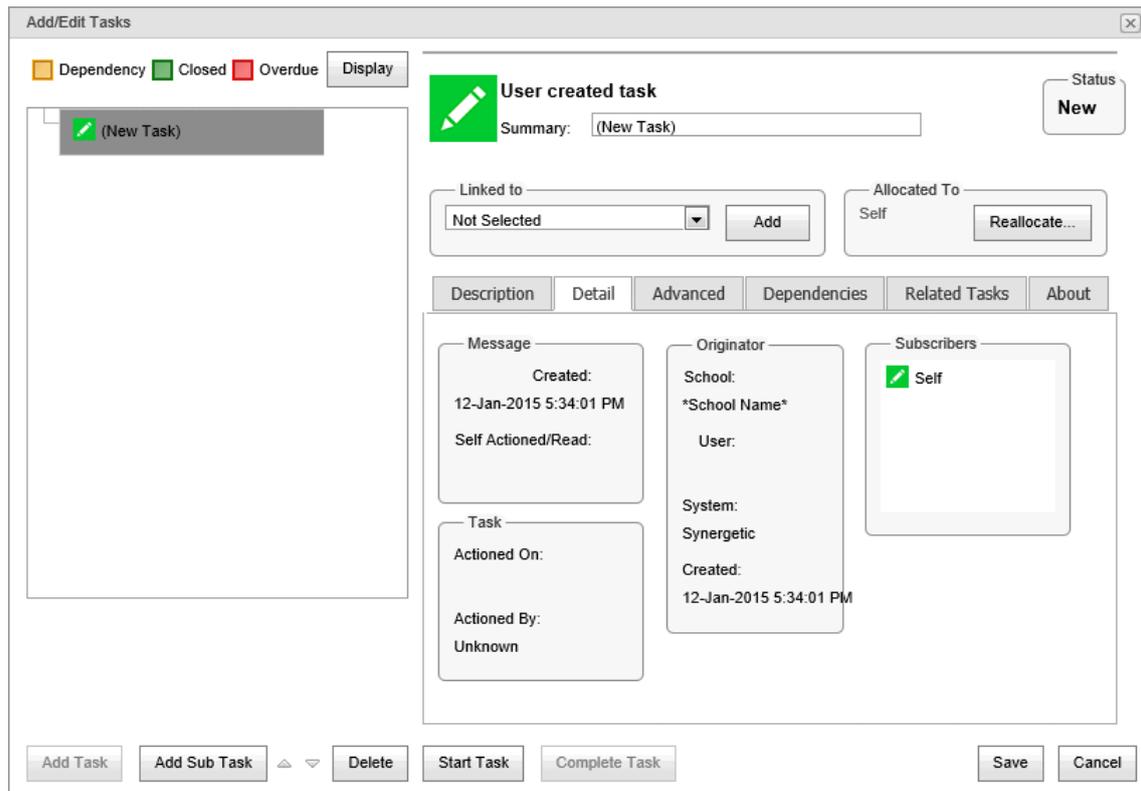
User created workflow task
 Summary: Book report
 Status: In Process

Linked to Current Student: Amanda Adamski
 Allocated To: Self

Book report - Hatchet: The Return.

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. <u>Note: This field is only visible for task messages.</u>
Actioned By	Community member that actioned the task. <u>Note: This field is only visible for task messages.</u>
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 <i>Group/User Security Maintenance - Users view</i> 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.

Description	Due Date	Start Date	Closed Date						
Book report		4/12/2015							Maint...
Student : Abbot, Jacalyn		4/12/2015							
School photograph		1/04/2016							
Essay									Maint...
Prepare grounds for sporting carnival									Maint...

2. Click next to an existing task.

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

Add/Edit Tasks

Dependency
 Closed
 Overdue

Book report

 Read Hatchet: The Return

 Write 500 word book report

User created workflow task
Status: In Process

Summary:

Linked to Current Student: Amanda Adamski

Allocated To: Self

Book report - Hatchet: The Return.

3. Click the **Advanced** tab.

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

The screenshot shows the 'Add/Edit Tasks' window with the 'Advanced' tab selected. The task is titled 'Future student enquiry follow up' and has a status of 'New'. It is linked to the current student 'Amanda Adamski' and is allocated to 'Self'. The 'Advanced Details' section includes fields for Start Date, Due Date, Completed Date, Task Status (set to 'New'), Time Spent In, and Estimated Duration. The 'Send Reminder to the Allocated To' section has a 'Reminder Date' field and a 'Reminder Day' field. The 'Status' section includes fields for % Complete, Current Estimate, Elapsed, and Seq (set to 32). At the bottom, there are buttons for 'Add Task', 'Add Sub Task', 'Delete', 'Start Task', 'Complete Task', 'Save', and 'Cancel'.

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. <u>Note: Use the Time Spent In field to determine the unit of time.</u>
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: <ul style="list-style-type: none"> • before the due date • 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.

Description	Due Date	Start Date	Closed Date					
Book report		4/12/2015						Maint...
Student : Abbot, Jacalyn		4/12/2015						
School photograph		1/04/2016						
Essay								Maint...
Prepare grounds for sporting carnival								Maint...

2. Click next to an existing task.

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

Add/Edit Tasks

Dependency
 Closed
 Overdue

Book report
 Read Hatchet: The Return
 Write 500 word book report

User created workflow task
 Summary:
Status: In Process

Linked to Current Student: Amanda Adamski
 Allocated To: Self

Book report - Hatchet: The Return.

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.

Description	Due Date	Start Date	Closed Date					
Book report		4/12/2015						Maint...
Student : Abbot, Jacalyn		4/12/2015						
School photograph		1/04/2016						
Essay								Maint...
Prepare grounds for sporting carnival								Maint...

2. Click next to an existing task.

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

Add/Edit Tasks

Dependency
 Closed
 Overdue

Book report

- Read Hatchet: The Return
- Write 500 word book report

User created workflow task

Summary:
Status: In Process

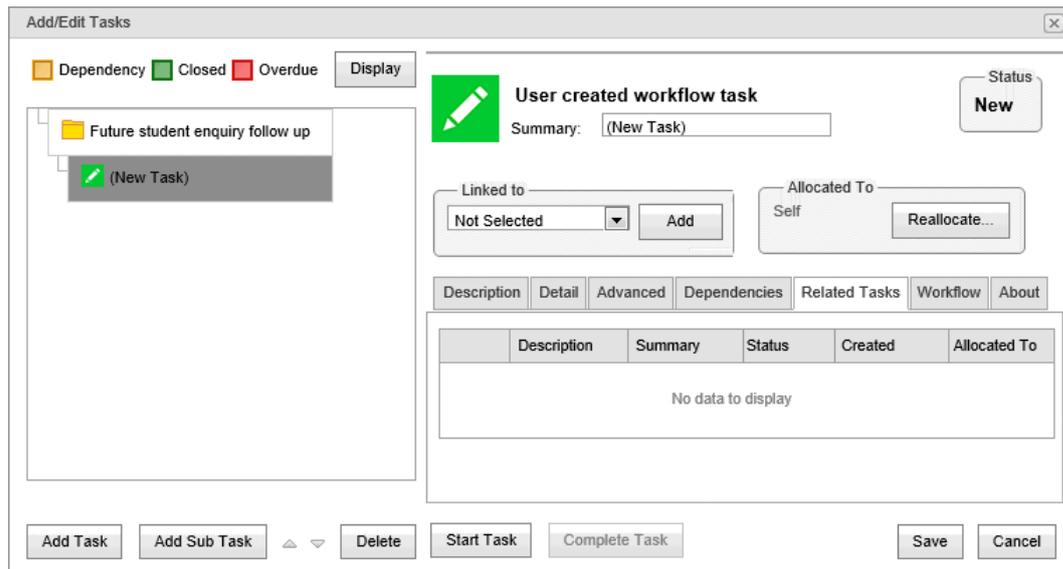
Linked to Current Student: Amanda Adamski

Allocated To: Self

Book report - Hatchet: The Return.

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.

Description	Due Date	Start Date	Closed Date						
Book report		4/12/2015						Maint...	
Student : Abbot, Jacalyn		4/12/2015							
School photograph		1/04/2016							
Essay								Maint...	
Prepare grounds for sporting carnival								Maint...	

2. Click next to an existing task.

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

Add/Edit Tasks

Dependency
 Closed
 Overdue

Book report

 Read Hatchet: The Return

 Write 500 word book report

User created workflow task
Status: In Process

Summary:

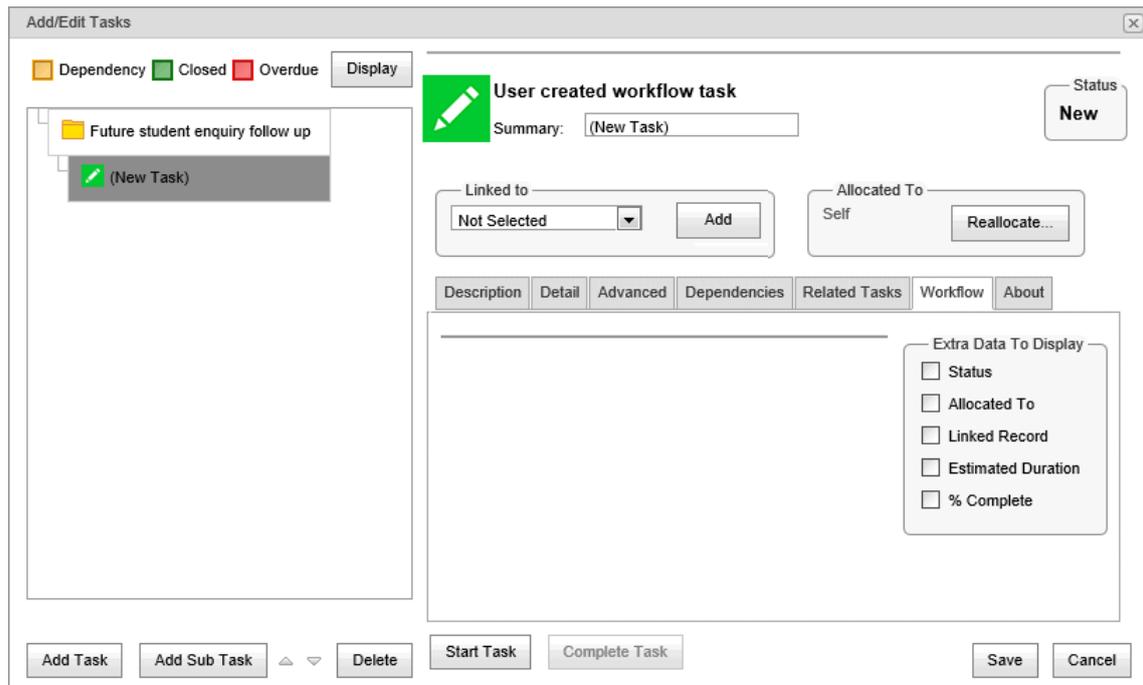
Linked to Current Student: Amanda Adamski

Allocated To: Self

Book report - Hatchet: The Return.

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. You can display: <ul style="list-style-type: none">• statuses• allocations• linked records• estimated durations• % 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.

Task List									
<input checked="" type="checkbox"/> My Allocations <input type="checkbox"/> Originated By Me <input type="checkbox"/> Show Completed <input type="checkbox"/> Include Sub Tasks <input type="checkbox"/> Show Templates									
Set Current User To: <input type="text" value="knowledgedoc, knowledgedoc"/> <input type="button" value="New Task"/> <input type="button" value="New Sub Task"/>									
Description	Due Date	Start Date	Closed Date						
Book report		4/12/2015							Maint...
Student : Abbot, Jacalyn		4/12/2015							
School photograph		1/04/2016							
Essay									Maint...
Prepare grounds for sporting carnival									Maint...

2. Click next to an existing task.

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

Dependency
 Closed
 Overdue

Display

- Book report
- Read Hatchet: The Return
- Write 500 word book report

User created workflow task

Status
 In Process

Summary:

Linked to Current Student
 Amanda Adamski

Allocated To
 Self

Description
Detail
Advanced
Dependencies
Related Tasks
DocMan
About

Book report - Hatchet: The Return.

3. Click the **DocMan** tab.

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

The screenshot shows the 'Add/Edit Tasks' window with the 'DocMan' tab selected. The window title is 'Add/Edit Tasks'. On the left, there is a tree view showing a folder 'Book report' with two sub-tasks: 'Read Hatchet: The Return' and 'Write 500 word book report', both with green checkmarks. Above the tree are icons for 'Dependency' (orange square), 'Closed' (green square), and 'Overdue' (red square), along with a 'Display' button. The main area is titled 'User created workflow task' and contains a 'Summary' field with the text 'Book report'. To the right of the summary is a 'Status' dropdown menu set to 'In Process'. Below the summary, there are two sections: 'Linked to Current Student' with the name 'Amanda Adamski' and a 'Remove' button, and 'Allocated To' with the name 'Self' and a 'Reallocate...' button. A tabbed interface below these sections includes 'Description', 'Detail', 'Advanced', 'Dependencies', 'Related Tasks', 'DocMan' (selected), and 'About'. Under the 'DocMan' tab, there are 'Document Filters' with 'Classification' and 'Document Type' dropdown menus set to 'Not Selected', and 'Description' and 'Source Reference' text input fields. Below the filters is a table with columns: 'Created', 'Classification', 'Description', 'Source Code', 'Type', 'View', and a '+ New' button. The table is currently empty, with the text 'No documents have been added at this time.' displayed below it. At the bottom of the window are three buttons: 'Add Task', 'Add Sub Task', and 'Delete'.

Add/Edit Tasks - DocMan tab key fields and buttons

Fields

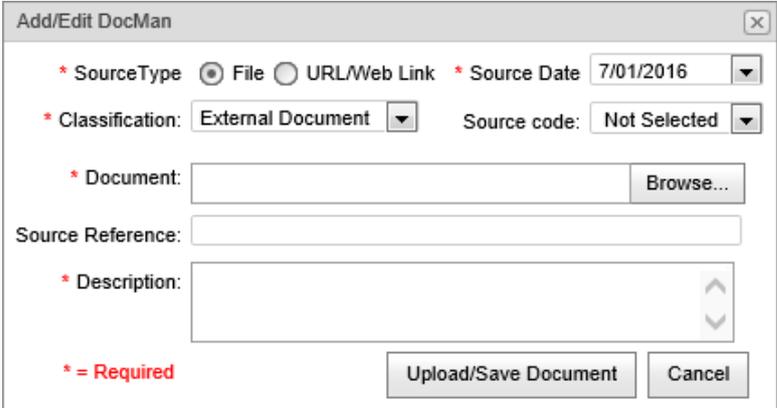
Field	Description
Classification	<p>Classification of the documents to be displayed. Access to documents can be restricted based on user security levels.</p> <p>Select the classification from the drop-down list to filter the documents displayed.</p>
Document Type	<p>Type of document. For example:</p> <ul style="list-style-type: none"> • Microsoft Word Document • JPG Photo • Adobe Acrobat File • Microsoft Excel Spreadsheet. <p>Note: The document types set up are those that are used at your organisation as defined in the <code>luDocumentType</code> lookup table. See <code>luDocumentType</code> lookup table in the Synergetic System maintenance manual.</p> <p>Select the type of document from the drop-down list to filter the documents displayed.</p>
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	<p>Classification of the item.</p> <p>Classifications are maintained in the <code>luDocumentClassification</code> lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.</p>
Description	Meaningful description of the document.
Source Code	<p>Source of the item. Typical examples include:</p> <ul style="list-style-type: none"> • Archive • Magazine • Newspaper • School Photo • Website. <p>Document sources are maintained in the <code>luDocumentSourceCode</code> lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.</p>

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: <ul style="list-style-type: none"> • DOC, DOCX (Microsoft Word document) • JPG (photo using the Joint Photographic Experts Group format) • PDF (Adobe Acrobat file) • XLS, XLSX (Microsoft Excel spreadsheet). <p>Document types are maintained in the luDocumentType lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.</p>
View	View the selected document.

Buttons

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

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.

Description	Due Date	Start Date	Closed Date					
Book report		4/12/2015						Maint...
Student : Abbot, Jacalyn		4/12/2015						
School photograph		1/04/2016						
Essay								Maint...
Prepare grounds for sporting carnival								Maint...

2. Click next to an existing task.

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

Add/Edit Tasks

Dependency
 Closed
 Overdue
 Display

Book report

- Read Hatchet: The Return
- Write 500 word book report

User created workflow task

Summary:

Status: In Process

Linked to Current Student: Remove

Allocated To: Reallocate...

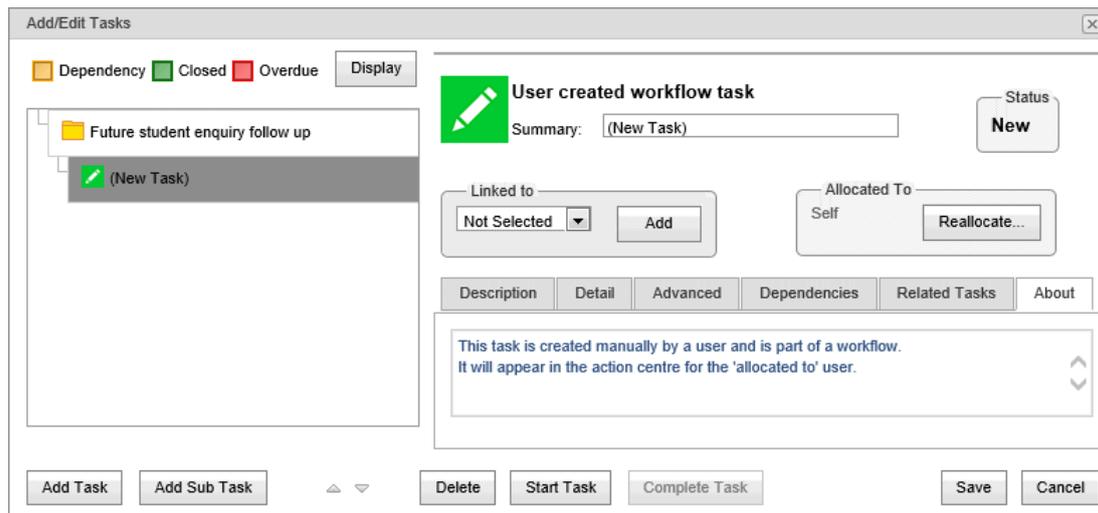
Description Detail Advanced Dependencies Related Tasks DocMan About

Book report - Hatchet: The Return.

Add Task Add Sub Task Delete

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.

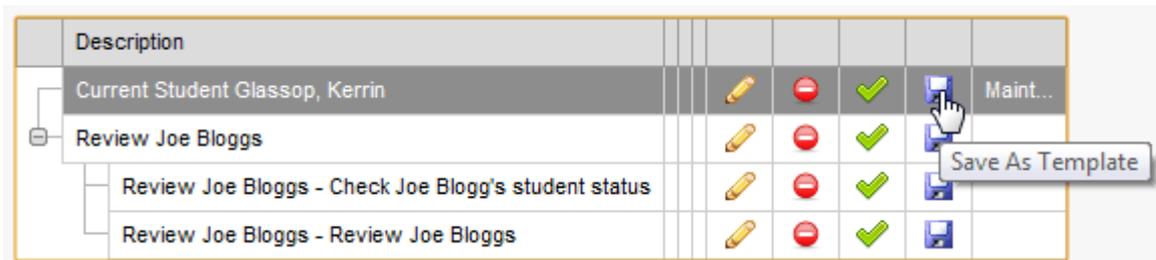
See *Using task templates* in the Synergetic Introduction manual.

In SynWeb you can:

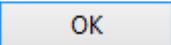
- create templates from current tasks
- create tasks from templates.

Creating a template from a current task

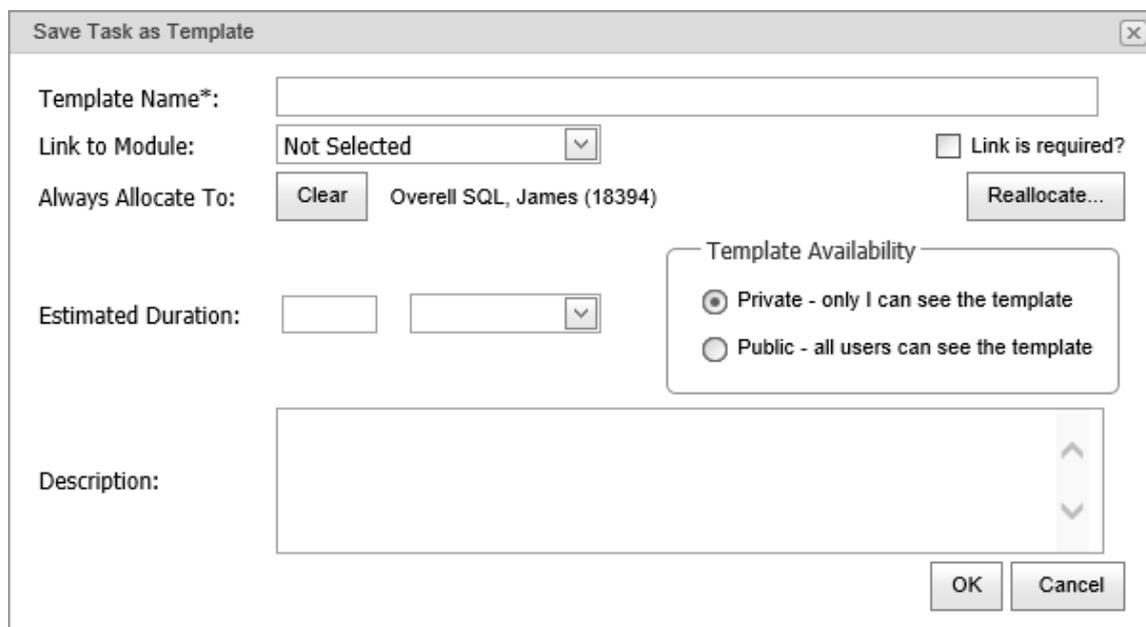
1. Open the **Task List** window. See *Managing tasks* (on page 185).
2. Click  for the task that you want to make into a template.



A confirmation dialog is displayed.

3. Click .

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



The dialog box contains the following fields and options:

- Template Name*:
- Link to Module: Link is required?
- Always Allocate To:
- Estimated Duration:
- Template Availability:
 - Private - only I can see the template
 - Public - all users can see the template
- Description:
-

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  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 .

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

The screenshot shows a 'Task List' window with several filters and a table of tasks. The 'Show Templates' checkbox is checked and highlighted with a red box. The table below shows a list of tasks, with the 'Template Description' column highlighted in red.

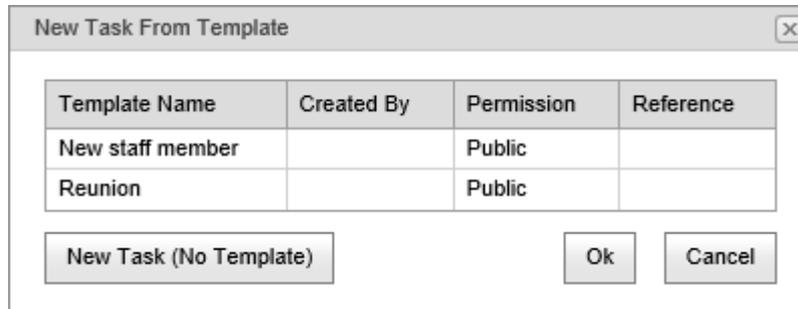
Template Description	Description	Due Date	Start Date	Closed Date		
Current Student Glassop, Kerrin	Current Student Glassop, Kerrin					
Organise PTI Evening	Organise PTI Evening	28/07/2012	19/07/2012			
Organise PTI Evening	Send email asking which teachers	20/07/2012				
Review Joe Bloggs	Review Joe Bloggs	28/09/2012	23/07/2012			

Creating a task from a template

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

2. Click .

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



The dialog box titled "New Task From Template" contains a table with the following data:

Template Name	Created By	Permission	Reference
New staff member		Public	
Reunion		Public	

Below the table are three buttons: "New Task (No Template)", "Ok", and "Cancel".

3. Select a template.

4. Click .

Action Centre

The screenshot displays the Action Centre interface. On the left, there are subscription level indicators (176 unread, 39 received, 652 total), a list of alert types with counts, and various filter options. The main area shows a list of alerts, with the selected 'Aged debtors summary report' expanded to show a detailed table of outstanding amounts and a count of debtors.

Description	Summary	Created	Originator
Aged debtors summary report	As at close of Tue 13 September, 2016	Yesterday 7:30 PM	System
Vehicle registration expired	Vehicle registration expired	Yesterday 7:30 PM	System
Staff passport expired	Staff passport expired	Yesterday 7:30 PM	System
Staff passport expired report	2 Staff passports have expired	Yesterday 7:30 PM	System

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total
Not Selected	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FAMILY	36,250.00	0.00	0.00	0.00	0.00	3,344,899.50	3,381,149.50
SS	4,200.00	0.00	0.00	0.00	0.00	0.00	4,200.00
Total	40,450.00	0.00	0.00	0.00	0.00	3,344,899.50	3,385,349.50

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.

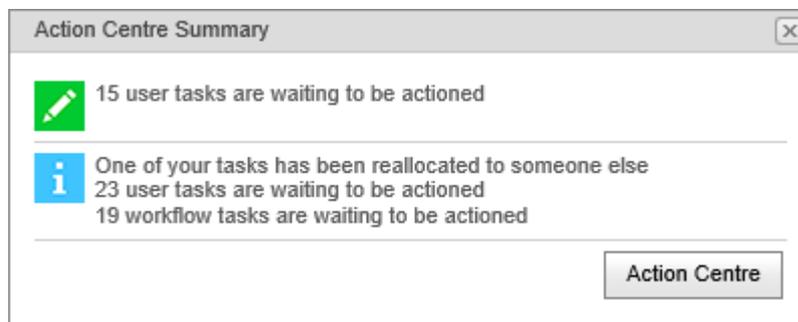
Opening the Action Centre

To open the **Description** tab:

1. Click  76.

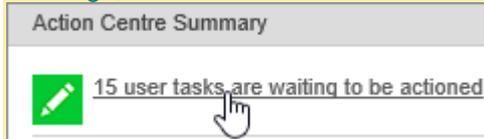
Note: The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

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



- Click the  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

Subscription Level

176 39 652

Type Description	Count
<input checked="" type="checkbox"/> Portal Medical Details Updated	3
<input checked="" type="checkbox"/> Portal details updated	1
<input checked="" type="checkbox"/> Vehicle registration expired	23
<input checked="" type="checkbox"/> Vehicles expired report	2

Display

Unread/Unactioned
 Received Read/Actioned

Text Filters

Type Description:

Summary:

Originator:

Originated by me?

Date Created

From: To:

Date Actioned / Read

From: To:

Show Sent/Received Panel

Description	Summary	Created	Originator
<input checked="" type="checkbox"/> Aged debtors summary report	As at close of Tue 13 September, 2016	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Vehicle registration expired	Vehicle registration expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired	Staff passport expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired report	2 Staff passports have expired	Yesterday 7:30 PM	System

Aged debtors summary report
As at close of Tue 13 September, 2016

Status: **Unread**

Description Detail About

Aged Debtor Summary - as at close of Tue 13 September, 2016.

AMOUNT OUTSTANDING (\$):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total
Not Selected	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FAMILY	36,250.00	0.00	0.00	0.00	0.00	3,344,899.50	3,381,149.50
SS	4,200.00	0.00	0.00	0.00	0.00	0.00	4,200.00
Total	40,450.00	0.00	0.00	0.00	0.00	3,344,899.50	3,385,349.50

COUNT OF DEBTORS (#):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total

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Action Centre filters area key fields and buttons

Subscription Level fields

Field	Description
Message Type	Filter Action Centre messages by: <ul style="list-style-type: none"> •  information message •  task message •  alert message.

Filter grid area fields

Field	Description
Type	Type of Action Centre message. Either <ul style="list-style-type: none"> •  information message •  task message •  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: <ul style="list-style-type: none"> • received messages • unread/unactioned messages • 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.

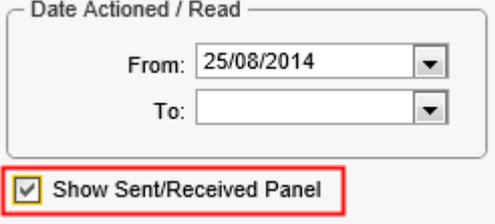
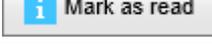
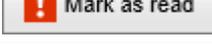
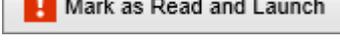
Grid area fields

Field	Description
Type	Type of Action Centre message. Either: <ul style="list-style-type: none">  information message  task message  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  . <div data-bbox="529 1377 901 1659" style="border: 1px solid gray; padding: 5px; margin-top: 10px;"> <p>Linked to</p> <p>Creditor</p> <p>Not Selected</p> <p>Community Member</p> <p>Creditor</p> <p>Current Student</p> <p>Debtor</p> <p>Future Student</p> <p>General Ledger</p> </div>
Allocated To	Community member allocated to Action Centre message. <div data-bbox="576 1749 1358 1888" style="border: 1px solid blue; padding: 10px; margin-top: 10px;"> <p>Note: Clicking  automatically allocates the community ID linked to the current Synergetic user. Click  to assign to another community member.</p> </div>

Common buttons

Button	Description
	<p>Update the number of unread/unactioned messages in each category.</p>  <p>Note: Select the Show Sent/Received Panel field to display this button.</p> 
	Mark all alerts as read.
	Mark all information messages as read.
	Link to the selected community member.
	Remove the link to the selected community member.
	Reallocate the task to a different community member.
	Filter records using the selection criteria.
	Reset all filter fields.
	Mark the selected information message as read.
	Mark the selected alert message as read.
	Mark the selected message as read and launch the associated Linked To maintenance record.
	<p>Start the selected task.</p> <p>On the Advanced tab:</p> <ul style="list-style-type: none"> the Start Date is set to the current date and time the Task Status field is set to In Process.
	Start the selected task and launch the associated Linked To maintenance record.

Button	Description
	Complete the selected task. On the Advanced tab: <ul style="list-style-type: none">• the Completed Date is set to the current date and time• the Task Status field is set to Completed.
	Complete the selected task and launch the associated Linked To maintenance record.
	Save the changes made to the selected task.
	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.

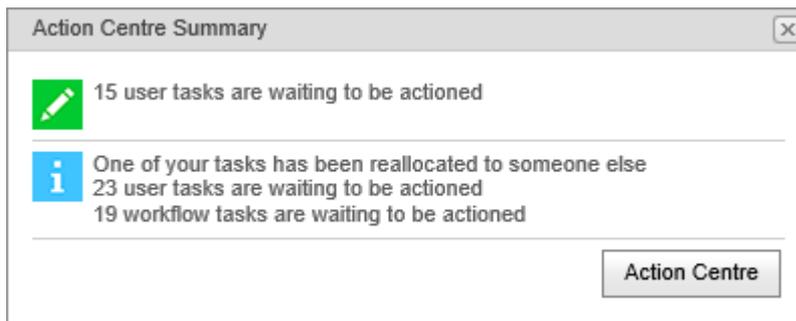
Opening the Description tab

To open the **Description** tab:

1. Click .

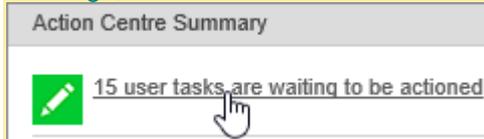
Note: The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

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



- Click the  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

Subscription Level

176 39 652

Type Description	Count
Portal Medical Details Updated	3
Portal details updated	1
Vehicle registration expired	23
Vehicles expired report	2

Display: Unread/Unactioned Received Read/Actioned

Text Filters

Type Description:

Summary:

Originator:

Originated by me?

Date Created

From: To:

Date Actioned / Read

From: To:

Show Sent/Received Panel

Description	Summary	Created	Originator
Aged debtors summary report	As at close of Tue 13 September, 2016	Yesterday 7:30 PM	System
Vehicle registration expired	Vehicle registration expired	Yesterday 7:30 PM	System
Staff passport expired	Staff passport expired	Yesterday 7:30 PM	System
Staff passport expired report	2 Staff passports have expired	Yesterday 7:30 PM	System

Aged debtors summary report
As at close of Tue 13 September, 2016

Status: **Unread**

Description Detail About

Aged Debtor Summary - as at close of Tue 13 September, 2016.

AMOUNT OUTSTANDING (\$):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total
Not Selected	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FAMILY	36,250.00	0.00	0.00	0.00	0.00	3,344,899.50	3,381,149.50
SS	4,200.00	0.00	0.00	0.00	0.00	0.00	4,200.00
Total	40,450.00	0.00	0.00	0.00	0.00	3,344,899.50	3,385,349.50

COUNT OF DEBTORS (#):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total

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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.

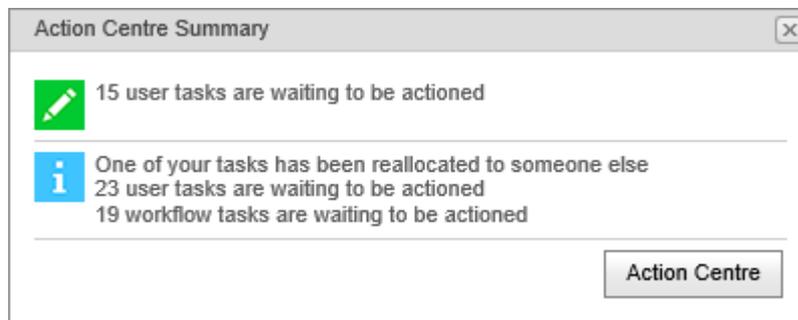
Opening the Detail tab

To open the **Detail** tab:

1. Click .

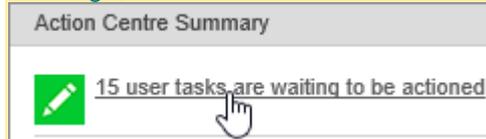
Note: The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

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



- Click the  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

Subscription Level

176 39 652

Type Description	Count
<input checked="" type="checkbox"/> Portal Medical Details Updated	3
<input checked="" type="checkbox"/> Portal details updated	1
<input checked="" type="checkbox"/> Vehicle registration expired	23
<input checked="" type="checkbox"/> Vehicles expired report	2

Display

Unread/Unactioned
 Received Read/Actioned

Text Filters

Type Description:

Summary:

Originator:

Originated by me?

Date Created

From: To:

Date Actioned / Read

From: To:

Show Sent/Received Panel

Description	Summary	Created	Originator
<input checked="" type="checkbox"/> Aged debtors summary report	As at close of Tue 13 September, 2016	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Vehicle registration expired	Vehicle registration expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired	Staff passport expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired report	2 Staff passports have expired	Yesterday 7:30 PM	System

Aged debtors summary report
As at close of Tue 13 September, 2016

Status: **Unread**

Description

Aged Debtor Summary - as at close of Tue 13 September, 2016.

AMOUNT OUTSTANDING (\$):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total
Not Selected	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FAMILY	36,250.00	0.00	0.00	0.00	0.00	3,344,899.50	3,381,149.50
SS	4,200.00	0.00	0.00	0.00	0.00	0.00	4,200.00
Total	40,450.00	0.00	0.00	0.00	0.00	3,344,899.50	3,385,349.50

COUNT OF DEBTORS (#):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total
Not Selected	0	0	0	0	0	0	0
FAMILY	36	0	0	0	0	3344	3381
SS	4	0	0	0	0	0	4
Total	40	0	0	0	0	3344	3385

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3. Click the **Detail** tab.

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

Action Centre

Subscription Level

0 33 43

Display

Received Unread/Unactioned Read/Actioned

Type	Description	Count
	Task has been reallocated	1
	User task ready for commencement	15
	User workflow ready for commencer	19
	User workflow ready for commencer	18

Text Filters

Type Description:

Summary:

Originator:

Originated by me?

Date Created

From:

To:

Date Actioned / Read

From:

To:

Show Sent/Received Panel

Description	Summary	Status	Created	Actioned	Originator
	User task ready for commencement	New	22-Aug-14 2:14 PM		Self
	User task ready for commencement	New	20-Aug-14 4:54 PM		Self
	User task ready for commencement	New	20-Aug-14 4:36 PM		Self
	User task ready for commencement	New	20-Aug-14 2:30 PM		Self

Mark all as read

User task ready for commencement

Status **New**

Summary:

Linked to

Allocated To

Self

Description

Detail

Advanced

Dependencies

Related Tasks

Message

Created: 20-Aug-14 04:54PM

Self Actioned/Read:

Task

Actioned On:

Actioned By:

Unknown

Originator

School: *School Name*

User:

System: Synergetic

Created: 20-Aug-14 04:54PM

Subscribers

Self

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. <u>Note: This field is only visible for task messages.</u>
Actioned By	Community member that actioned the task. <u>Note: This field is only visible for task messages.</u>
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 <i>Group/User Security Maintenance - Groups View</i> in the Synergetic System maintenance manual.

Action Centre - Advanced tab

Use the **Advanced** tab to maintain:

- key dates
- reminders
- current task status.

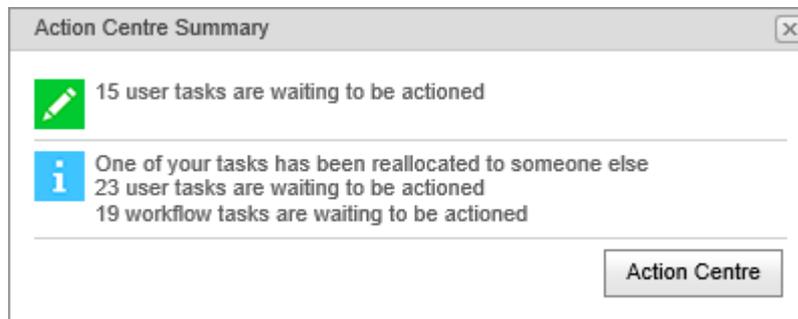
Opening the Advanced tab

To open the **Advanced** tab:

1. Click .

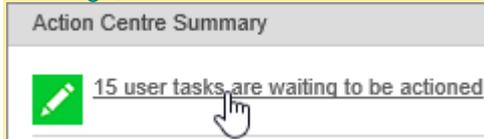
Note: The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

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



- Click the  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

Subscription Level

176 39 652

Type Description	Count
<input checked="" type="checkbox"/> Portal Medical Details Updated	3
<input checked="" type="checkbox"/> Portal details updated	1
<input checked="" type="checkbox"/> Vehicle registration expired	23
<input checked="" type="checkbox"/> Vehicles expired report	2

Display

Unread/Unactioned
 Received Read/Actioned

Text Filters

Type Description:

Summary:

Originator:

Originated by me?

Date Created

From: To:

Date Actioned / Read

From: To:

Show Sent/Received Panel

Description	Summary	Created	Originator
<input checked="" type="checkbox"/> Aged debtors summary report	As at close of Tue 13 September, 2016	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Vehicle registration expired	Vehicle registration expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired	Staff passport expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired report	2 Staff passports have expired	Yesterday 7:30 PM	System

Aged debtors summary report
As at close of Tue 13 September, 2016

Status: **Unread**

Description Detail About

Aged Debtor Summary - as at close of Tue 13 September, 2016.

AMOUNT OUTSTANDING (\$):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total
Not Selected	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FAMILY	36,250.00	0.00	0.00	0.00	0.00	3,344,899.50	3,381,149.50
SS	4,200.00	0.00	0.00	0.00	0.00	0.00	4,200.00
Total	40,450.00	0.00	0.00	0.00	0.00	3,344,899.50	3,385,349.50

COUNT OF DEBTORS (#):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total

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3. Click the **Advanced** tab.

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

Action Centre

Subscription Level

0 33 43

Display

Received Unread/Unactioned Read/Actioned

Type	Description	Count
	Task has been reallocated	1
	User task ready for commencement	15
	User workflow ready for commencer	19
	User workflow ready for commencer	18

Text Filters

Type Description:

Summary:

Originator:

Originated by me?

Date Created

From: To:

Date Actioned / Read

From: To:

Show Sent/Received Panel

Description	Summary	Status	Created	Actioned	Originator
User task ready for commencement	Current Student Adamski, Amanda	New	22-Aug-14 2:14 PM		Self
User task ready for commencement	(New Task)	New	20-Aug-14 4:54 PM		Self
User task ready for commencement	(New Task)	New	20-Aug-14 4:36 PM		Self
User task ready for commencement	(New Task)	New	20-Aug-14 2:30 PM		Self

User task ready for commencement Status **New**

Summary:

Linked to Allocated To

Description Detail **Advanced** Dependencies Related Tasks

Advanced Details

Start Date: Due Date:

Completed Date: Task Status:

Time Spent In: Estimated Duration:

Send Reminder to the Allocated To

Reminder Date: Reminder Day:

Status

% Complete:

Current Estimate:

Elapsed:

Seq: 159

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. <u>Note: Use the Time Spent In field to determine the unit of time.</u>
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: <ul style="list-style-type: none"> • before the due date • 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.

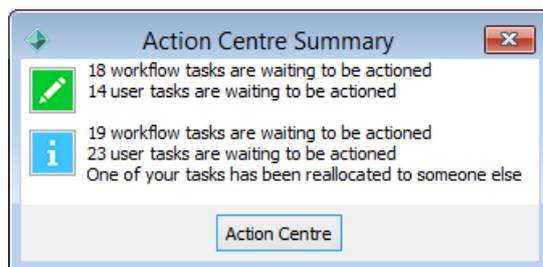
Opening the DocMan tab

To open the DocMan tab:

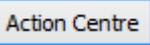
1. Click .

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

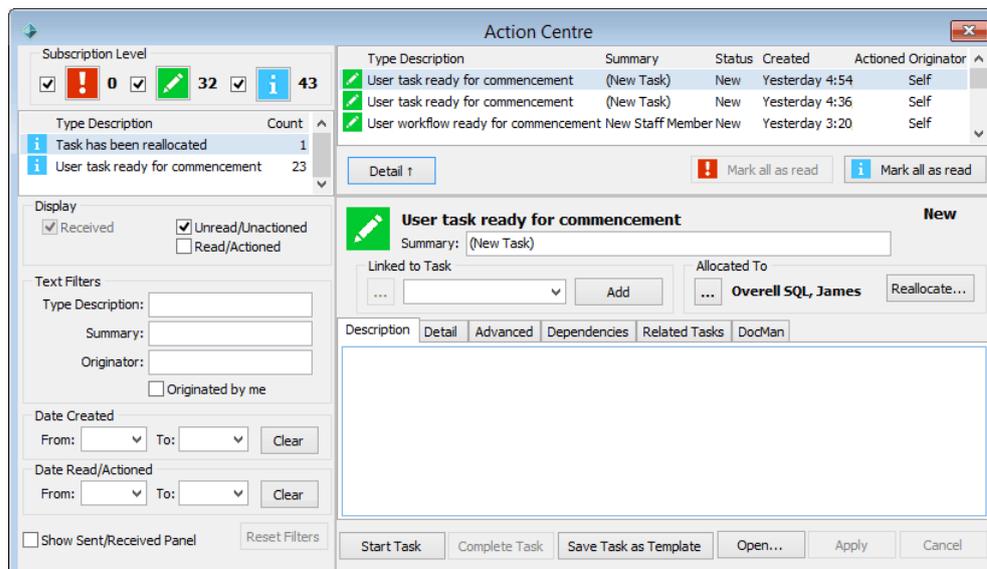
The **Action Centre Summary** window is displayed.



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 .

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



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

	Description
	User created task
	User created task
	User created task
	Aged debtors summary report

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

User created task Status: New

Summary: (New Task)

Linked to: Not Selected Add Allocated To: Self Reallocate...

Description | Detail | Advanced | Dependencies | Related Tasks | DocMan | About

Start Task Complete Task Save Cancel

- 4. Click the **DocMan** tab.

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

User created task Status: New

Summary: (New Task)

Linked to: Not Selected Add Allocated To: Self Reallocate...

Description | Detail | Advanced | Dependencies | Related Tasks | DocMan | About

Document Filters

Classification: Not Selected Document Type: Not Selected

Description: Source Reference:

Created	Classification	Description	Source Code	Type	View	+ New
No documents have been added at this time.						

Start Task Complete Task Save Cancel

Action Centre - DocMan tab key fields and buttons

Fields

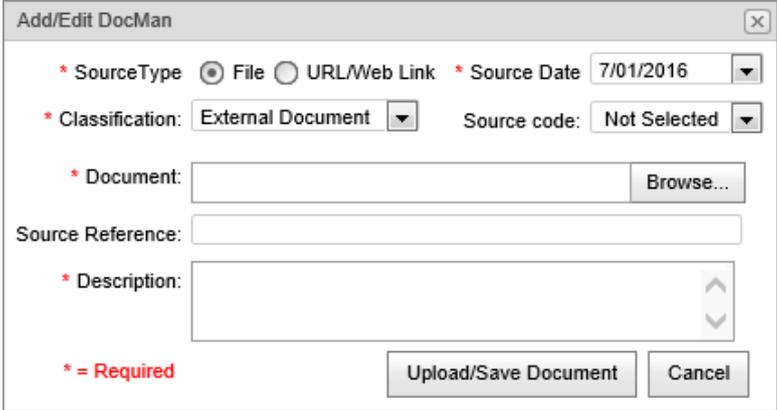
Field	Description
Classification	<p>Classification of the documents to be displayed. Access to documents can be restricted based on user security levels.</p> <p>Select the classification from the drop-down list to filter the documents displayed.</p>
Document Type	<p>Type of document. For example:</p> <ul style="list-style-type: none"> • Microsoft Word Document • JPG Photo • Adobe Acrobat File • Microsoft Excel Spreadsheet. <hr/> <p>Note: The document types set up are those that are used at your organisation as defined in the <code>luDocumentType</code> lookup table. See <code>luDocumentType</code> lookup table in the Synergetic System maintenance manual.</p> <hr/> <p>Select the type of document from the drop-down list to filter the documents displayed.</p>
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	<p>Classification of the item.</p> <p>Classifications are maintained in the <code>luDocumentClassification</code> lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.</p>
Description	Meaningful description of the document.
Source Code	<p>Source of the item. Typical examples include:</p> <ul style="list-style-type: none"> • Archive • Magazine • Newspaper • School Photo • Website. <p>Document sources are maintained in the <code>luDocumentSourceCode</code> lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.</p>

Field	Description
<p>Type</p>	<p>Type of document. Typical examples include:</p> <ul style="list-style-type: none"> • DOC, DOCX (Microsoft Word document) • JPG (photo using the Joint Photographic Experts Group format) • PDF (Adobe Acrobat file) • XLS, XLSX (Microsoft Excel spreadsheet). <p>Document types are maintained in the luDocumentType lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.</p>
<p>View</p>	<p>View the selected document.</p>

Buttons

Button	Description
	<p>Launch the Add/Edit DocMan window to add a new document, spreadsheet or picture.</p>  <p>* = Required</p>

Action Centre - About tab

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

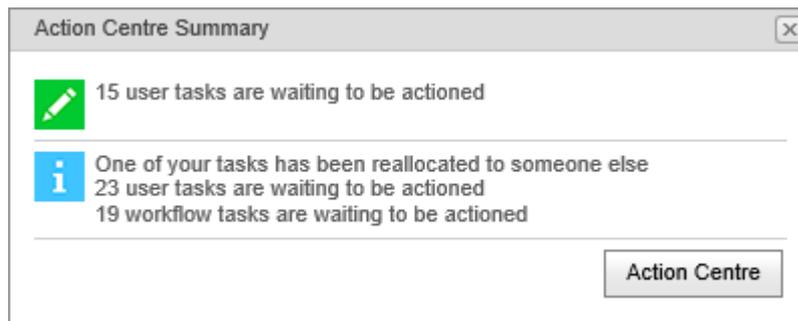
Opening the About tab

To open the **About** tab:

1. Click .

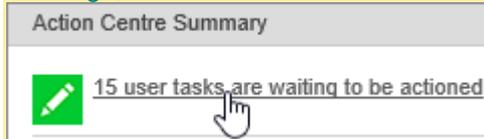
Note: The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

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



- Click the  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

Subscription Level

176 39 652

Type Description	Count
<input checked="" type="checkbox"/> Portal Medical Details Updated	3
<input checked="" type="checkbox"/> Portal details updated	1
<input checked="" type="checkbox"/> Vehicle registration expired	23
<input checked="" type="checkbox"/> Vehicles expired report	2

Display Unread/Unactioned Received Read/Actioned

Text Filters

Type Description:

Summary:

Originator:

Originated by me?

Date Created

From: To:

Date Actioned / Read

From: To:

Show Sent/Received Panel

Description	Summary	Created	Originator
<input checked="" type="checkbox"/> Aged debtors summary report	As at close of Tue 13 September, 2016	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Vehicle registration expired	Vehicle registration expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired	Staff passport expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired report	2 Staff passports have expired	Yesterday 7:30 PM	System

Aged debtors summary report
As at close of Tue 13 September, 2016

Status: **Unread**

Description

Aged Debtor Summary - as at close of Tue 13 September, 2016.

AMOUNT OUTSTANDING (\$):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total
Not Selected	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FAMILY	36,250.00	0.00	0.00	0.00	0.00	3,344,899.50	3,381,149.50
SS	4,200.00	0.00	0.00	0.00	0.00	0.00	4,200.00
Total	40,450.00	0.00	0.00	0.00	0.00	3,344,899.50	3,385,349.50

COUNT OF DEBTORS (#):

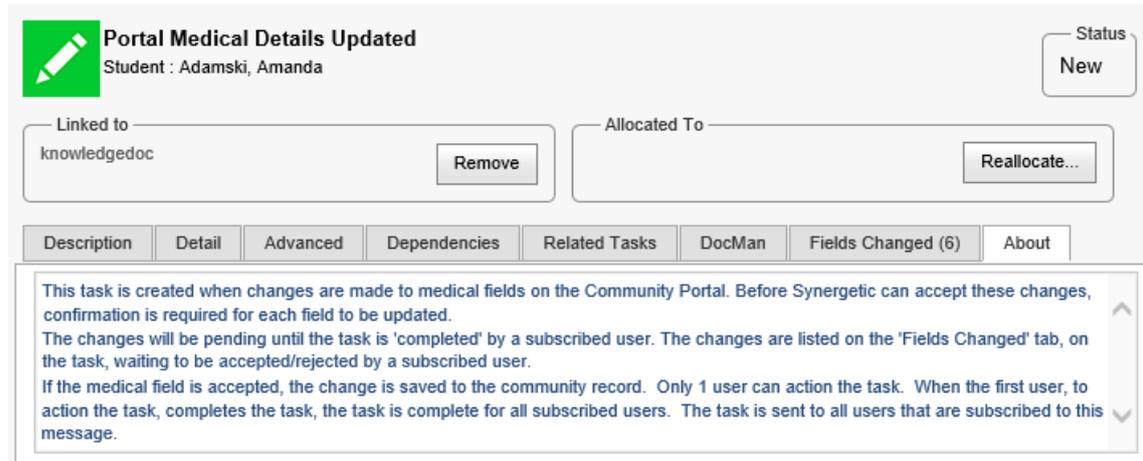
Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total

Version 7

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3. Click the **About** tab.

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



The screenshot shows the 'About' tab of a task in the Action Centre. The task is titled 'Portal Medical Details Updated' and is for a student named 'Adamski, Amanda'. The status is 'New'. The task is linked to 'knowledgedoc' and has no allocated users. The 'About' tab is selected, showing a detailed description of the task's purpose and workflow.

Portal Medical Details Updated
Student : Adamski, Amanda

Status: New

Linked to: knowledgedoc [Remove]

Allocated To: [Reallocate...]

Navigation tabs: Description | Detail | Advanced | Dependencies | Related Tasks | DocMan | Fields Changed (6) | **About**

This task is created when changes are made to medical fields on the Community Portal. Before Synergetic can accept these changes, confirmation is required for each field to be updated.
The changes will be pending until the task is 'completed' by a subscribed user. The changes are listed on the 'Fields Changed' tab, on the task, waiting to be accepted/rejected by a subscribed user.
If the medical field is accepted, the change is saved to the community record. Only 1 user can action the task. When the first user, to action the task, completes the task, the task is complete for all subscribed users. The task is sent to all users that are subscribed to this message.

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.



Dependencies (2)

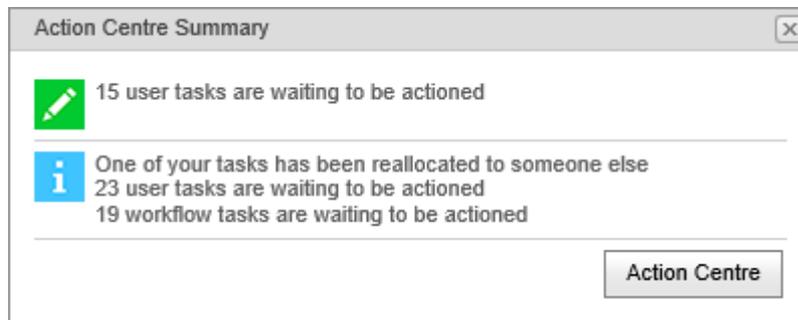
Opening the Dependencies tab

To open the **Dependencies** tab:

1. Click  76.

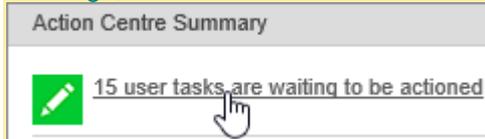
Note: The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

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



- Click the  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

Subscription Level

176 39 652

Type	Description	Count
<input checked="" type="checkbox"/>	Portal Medical Details Updated	3
<input checked="" type="checkbox"/>	Portal details updated	1
<input checked="" type="checkbox"/>	Vehicle registration expired	23
<input checked="" type="checkbox"/>	Vehicles expired report	2

Display

Unread/Unactioned
 Received Read/Actioned

Text Filters

Type Description:

Summary:

Originator:

Originated by me?

Date Created

From: To:

Date Actioned / Read

From: To:

Show Sent/Received Panel

Description	Summary	Created	Originator
<input checked="" type="checkbox"/> Aged debtors summary report	As at close of Tue 13 September, 2016	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Vehicle registration expired	Vehicle registration expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired	Staff passport expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired report	2 Staff passports have expired	Yesterday 7:30 PM	System

Aged debtors summary report
As at close of Tue 13 September, 2016

Status: **Unread**

Description

Aged Debtor Summary - as at close of Tue 13 September, 2016.

AMOUNT OUTSTANDING (\$):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total
Not Selected	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FAMILY	36,250.00	0.00	0.00	0.00	0.00	3,344,899.50	3,381,149.50
SS	4,200.00	0.00	0.00	0.00	0.00	0.00	4,200.00
Total	40,450.00	0.00	0.00	0.00	0.00	3,344,899.50	3,385,349.50

COUNT OF DEBTORS (#):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total

Page 1-248

Version 7

3. Click the **Dependencies** tab.

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

Description	Summary	Status	Created	Actioned	Originator
User task ready for commencement	Current Student Adamski, Amanda	New	22-Aug-14 2:14 PM		Self
User task ready for commencement	(New Task)	New	20-Aug-14 2:30 PM		Self
User workflow ready for commencement	New Staff Member Induction	Depen	20-Aug-14 3:09 PM		Self
User task ready for commencement	(New Task)	New	20-Aug-14 2:30 PM		Self

Description	Summary	Status	Created	Allocated To
User workflow ready for commencement	New Staff Member Induction - Prepare contract	New	20-Aug-14 3:09 PM	Overell SQL, James
User workflow ready for commencement	New Staff Member Induction - (New Task)	New	20-Aug-14 3:20 PM	Overell SQL, James

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.

Related Tasks (1)

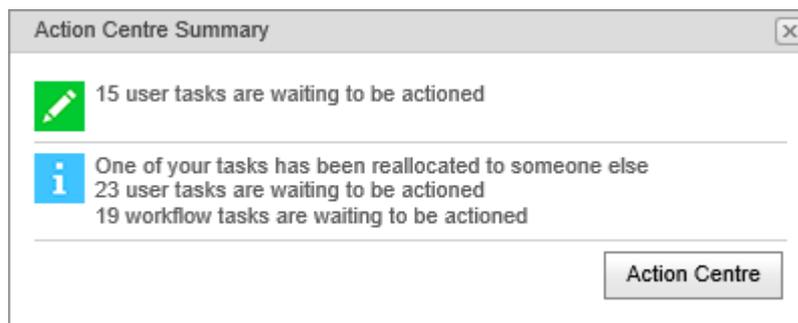
Opening the Related Tasks tab

To open the **Related Tasks** tab:

1. Click .

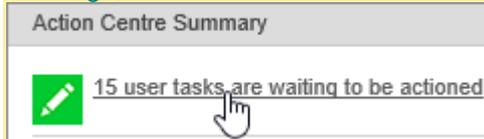
Note: The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

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



- Click the  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

Subscription Level

176 39 652

Type Description	Count
<input checked="" type="checkbox"/> Portal Medical Details Updated	3
<input checked="" type="checkbox"/> Portal details updated	1
<input checked="" type="checkbox"/> Vehicle registration expired	23
<input checked="" type="checkbox"/> Vehicles expired report	2

Display Unread/Unactioned Received Read/Actioned

Text Filters

Type Description:

Summary:

Originator:

Originated by me?

Date Created

From: To:

Date Actioned / Read

From: To:

Show Sent/Received Panel

Description	Summary	Created	Originator
<input checked="" type="checkbox"/> Aged debtors summary report	As at close of Tue 13 September, 2016	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Vehicle registration expired	Vehicle registration expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired	Staff passport expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired report	2 Staff passports have expired	Yesterday 7:30 PM	System

Aged debtors summary report
As at close of Tue 13 September, 2016

Status: **Unread**

Description Detail About

Aged Debtor Summary - as at close of Tue 13 September, 2016.

AMOUNT OUTSTANDING (\$):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total
Not Selected	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FAMILY	36,250.00	0.00	0.00	0.00	0.00	3,344,899.50	3,381,149.50
SS	4,200.00	0.00	0.00	0.00	0.00	0.00	4,200.00
Total	40,450.00	0.00	0.00	0.00	0.00	3,344,899.50	3,385,349.50

COUNT OF DEBTORS (#):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total

Version 7

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

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

The screenshot displays the Action Centre interface with the 'Related Tasks' tab selected. On the left, there are filter sections for Subscription Level (0 unread, 33 received, 43 info), Display (Unread/Unactioned, Read/Actioned), Text Filters (Type Description, Summary, Originator, Originated by me), and Date Created/Actioned (From/To dropdowns). The main task list shows four items, all with a status of 'New'. A detailed view for the first task, 'User task ready for commencement' with summary 'Cable upgrade', is shown. It includes a 'Linked To' field with 'Creditor' and an 'Add' button, and an 'Allocated To' field with 'Self' and a 'Reallocate...' button. The 'Related Tasks (1)' tab is active, showing a table with one related task: 'User workflow ready for commencement' with summary 'Operating system upgrade' and allocated to 'Overell SQL, James'. At the bottom, there are buttons for 'Filter', 'Reset Filters', 'Start Task', 'Complete Task', 'Save', and 'Cancel'.

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.

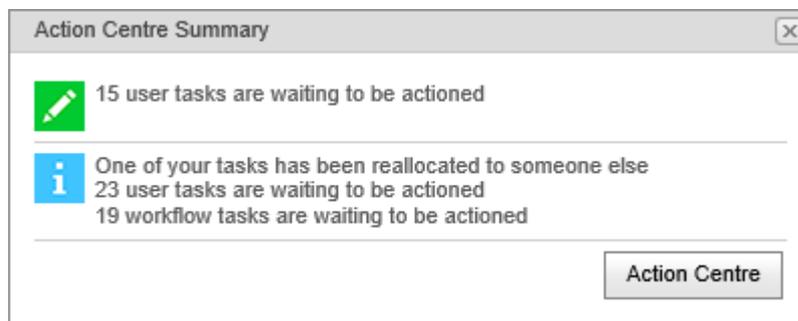
Opening the Workflow tab

To open the **Workflow** tab:

1. Click .

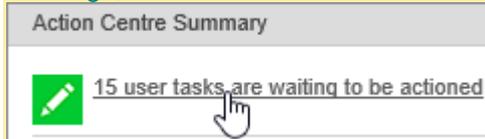
Note: The **Action Centre** icon displays a combination of red, green and blue flags depending on the currently active messages. It is located at the top right-hand side of the SynWeb window.

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



- Click the  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

Subscription Level

176 39 652

Type	Description	Count
<input checked="" type="checkbox"/>	Portal Medical Details Updated	3
<input checked="" type="checkbox"/>	Portal details updated	1
<input checked="" type="checkbox"/>	Vehicle registration expired	23
<input checked="" type="checkbox"/>	Vehicles expired report	2

Display

Unread/Unactioned
 Received Read/Actioned

Text Filters

Type Description:

Summary:

Originator:

Originated by me?

Date Created

From: To:

Date Actioned / Read

From: To:

Show Sent/Received Panel

Description	Summary	Created	Originator
<input checked="" type="checkbox"/> Aged debtors summary report	As at close of Tue 13 September, 2016	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Vehicle registration expired	Vehicle registration expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired	Staff passport expired	Yesterday 7:30 PM	System
<input checked="" type="checkbox"/> Staff passport expired report	2 Staff passports have expired	Yesterday 7:30 PM	System

Aged debtors summary report
As at close of Tue 13 September, 2016

Status: **Unread**

Description Detail About

Aged Debtor Summary - as at close of Tue 13 September, 2016.

AMOUNT OUTSTANDING (\$):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total
Not Selected	0.00	0.00	0.00	0.00	0.00	0.00	0.00
FAMILY	36,250.00	0.00	0.00	0.00	0.00	3,344,899.50	3,381,149.50
SS	4,200.00	0.00	0.00	0.00	0.00	0.00	4,200.00
Total	40,450.00	0.00	0.00	0.00	0.00	3,344,899.50	3,385,349.50

COUNT OF DEBTORS (#):

Statement Group	Current	30+ Days	60+ Days	90+ Days	150+ Days	200+ Days	Total

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Version 7

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	<p>Select fields in this area to display extra information on the workflow.</p> <p>You can display:</p> <ul style="list-style-type: none"> • statuses • allocations • linked records • estimated durations • % 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.

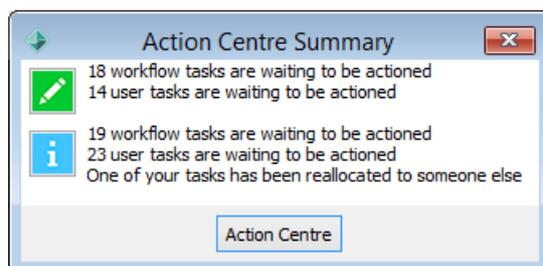
Opening the Fields Changed tab

To open the **Fields Changed** tab:

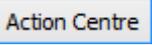
1. Click .

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

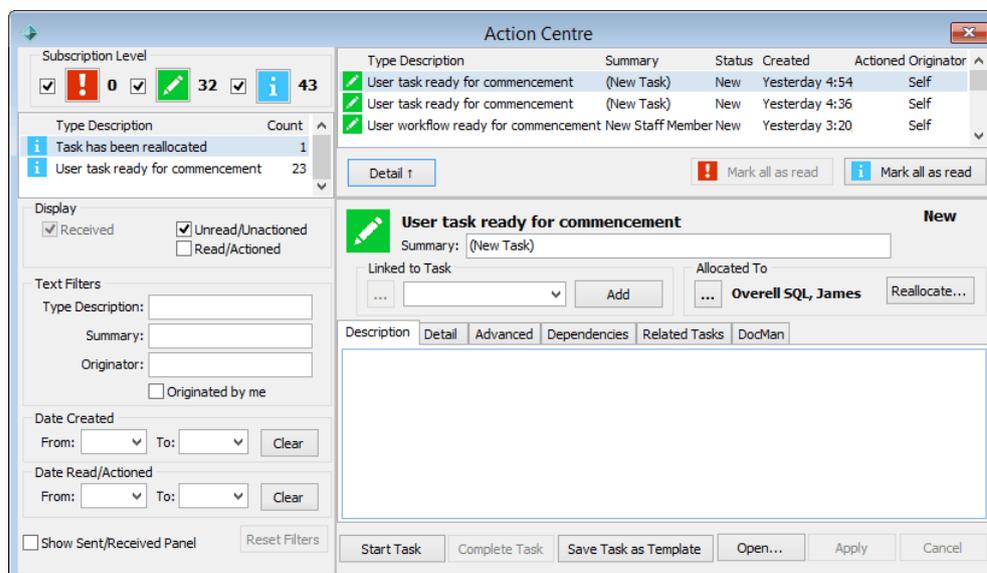
The **Action Centre Summary** window is displayed.



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 .

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



- Select a message that indicates that fields have been changed.

	Type Description	Summary	Status	Created
	No subscribers	No Subscribers for Pass_Staf	Unread	6/12/2015
	No subscribers	No Subscribers for Pass_Curr	Unread	6/12/2015
	Staff registration expired report	59 Staff Registrations have e	Unread	6/12/2015
	Portal Medical Details Updated	Student : Adamski, Amanda	New	4/12/2015

- Click the **Fields Changed** tab.

The **Fields Changed** tab of the **Action Centre** is displayed.

Portal Medical Details Updated

Student : Adamski, Amanda

New

Linked to Medical

...
Amanda Adamski

Allocated To

...

Fields Changed (6)

Description

Detail

Advanced

Dependencies

Related Tasks

About

Also Show Matched Values

Accept All

Reject All

Field Changed	New Value	Current Value	Accept	Reject
MedicalCondition.ActiveFlag	True		<input type="checkbox"/>	<input type="checkbox"/>
MedicalCondition.ConfidentialFlag	False		<input type="checkbox"/>	<input type="checkbox"/>
MedicalCondition.ConditionDetails	Amanda has been:		<input type="checkbox"/>	<input type="checkbox"/>
MedicalCondition.Visibility	C		<input type="checkbox"/>	<input type="checkbox"/>
MedicalCondition.MedicalConditionCode	TRAVELSICKNESS		<input type="checkbox"/>	<input type="checkbox"/>
MedicalCondition.NotifiedBy	18338		<input type="checkbox"/>	<input type="checkbox"/>

Apply Change Selections

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
<input type="button" value="Accept All"/>	Accept all changes.
<input type="button" value="Reject All"/>	Reject all changes.
<input type="button" value="Apply Change Selections"/>	Apply changes based on selections in the grid area.
<input type="button" value="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.

Created	Classification	Description	Source Code	Source Date	Source Reference	Type	View	New
11/04/2014	PHOTO	Inserted fro		11/04/2014	Manual Load			
31/03/2014	Teach	50 year Col		31/03/2014				

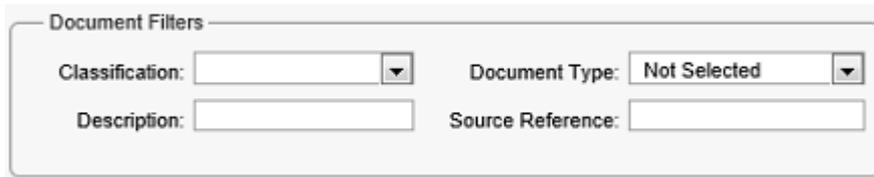
How to:

- 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.



Document Filters

Classification: Document Type:

Description: Source Reference:

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

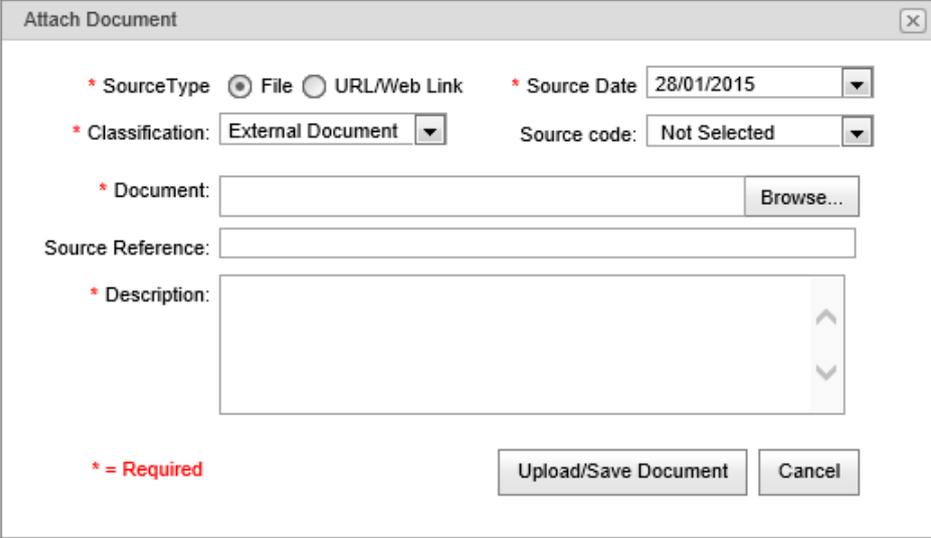
The grid area consists of:

- 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. Document classifications are maintained in the luDocumentClassification lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.
Description	Meaningful description for the document.
Source code	Source of the item. Typical examples include: <ul style="list-style-type: none"> • Archive • Magazine • Newspaper • School Photo. Document sources are maintained in the luDocumentSourceCode lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.
Source date	Date that the source document was created. For example, if you are importing a historical picture you might specify the date when the picture was taken. 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: <ul style="list-style-type: none"> • DOC (Word document) • JPG (Photo using the Joint Photographic Experts Group format) • PDF (Adobe Acrobat file) • XLS (Excel spreadsheet). Document types are maintained in the luDocumentType lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.
View	View the selected document, photo or spreadsheet in a new browser window.

Buttons

Button	Description																											
 New	<p>Launch the Add Document window to add a new document.</p> 																											
	<p>Download the selected document, photo or spreadsheet.</p>																											
	<p>Launch the selected document, photo or spreadsheet in a new window.</p>																											
	<p>Edit the details of the selected document, photo or spreadsheet in the Attach Document window.</p>																											
	<p>Delete the selected document, photo or spreadsheet from the list of documents. To do this:</p> <ol style="list-style-type: none"> Click the Delete icon. <table border="1" data-bbox="496 1290 1366 1417"> <thead> <tr> <th>Created</th> <th>Classification</th> <th>Description</th> <th>Source Code</th> <th>Source Date</th> <th>Source Reference</th> <th>Type</th> <th>View</th> <th></th> </tr> </thead> <tbody> <tr> <td>21/11/2014</td> <td>PHOTO</td> <td>Inserted from Photos</td> <td></td> <td>21/11/2014</td> <td>Manual Load</td> <td></td> <td></td> <td> </td> </tr> <tr> <td>31/03/2014</td> <td>Teach</td> <td>50 year College birth</td> <td></td> <td>31/03/2014</td> <td></td> <td></td> <td></td> <td> </td> </tr> </tbody> </table> <p>The following window is displayed.</p> <div data-bbox="496 1480 978 1619" style="border: 1px solid gray; padding: 5px; width: fit-content;"> <p>Are you sure you want to delete this document?</p> <p style="text-align: center;"> <input type="button" value="OK"/> <input type="button" value="Cancel"/> </p> </div> <ol style="list-style-type: none"> Click <input type="button" value="OK"/> to confirm the deletion. 	Created	Classification	Description	Source Code	Source Date	Source Reference	Type	View		21/11/2014	PHOTO	Inserted from Photos		21/11/2014	Manual Load				31/03/2014	Teach	50 year College birth		31/03/2014				
Created	Classification	Description	Source Code	Source Date	Source Reference	Type	View																					
21/11/2014	PHOTO	Inserted from Photos		21/11/2014	Manual Load																							
31/03/2014	Teach	50 year College birth		31/03/2014																								

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.

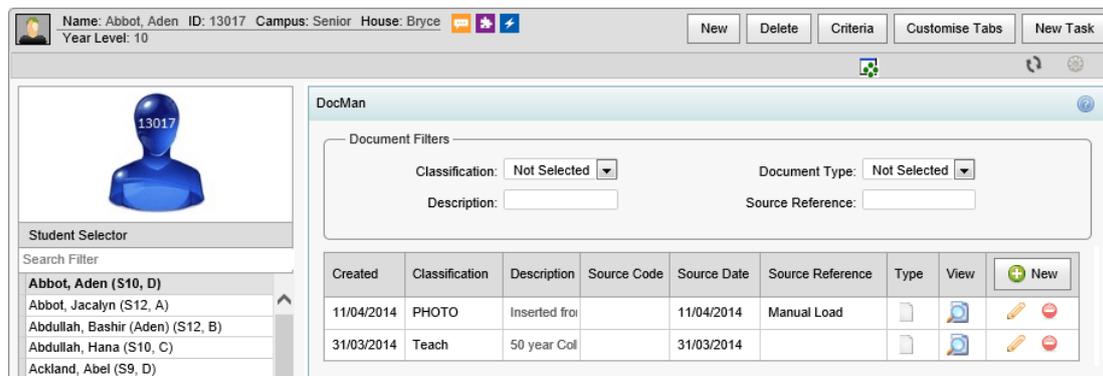
For example, search for the student. See *Searching for students* in the Current students manual.

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.



The screenshot shows the Synergetic Student Maintenance window for student Abbot, Aden (ID: 13017). The DocMan bar is expanded, showing document filters and a list of documents.

DocMan Document Filters:

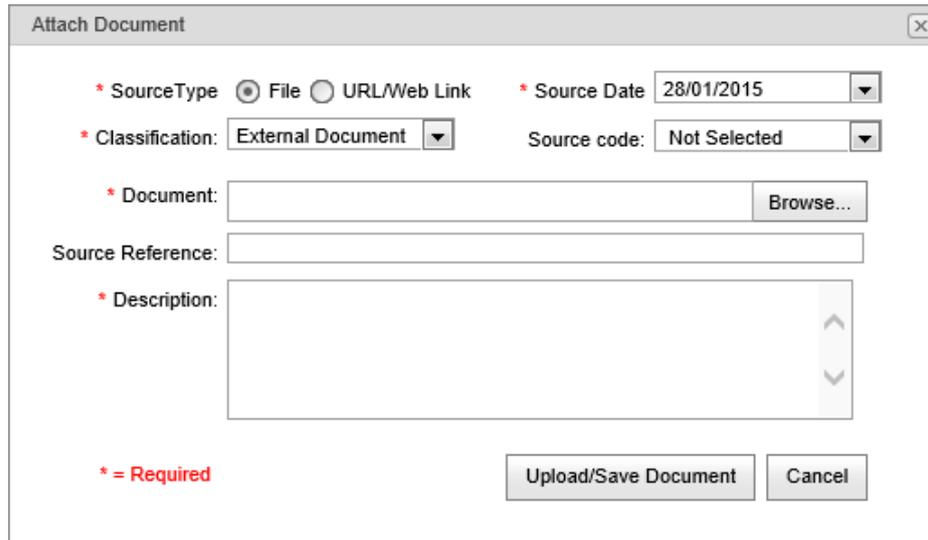
- Classification: Not Selected
- Document Type: Not Selected
- Description:
- Source Reference:

DocMan Document List:

Created	Classification	Description	Source Code	Source Date	Source Reference	Type	View	New
11/04/2014	PHOTO	Inserted fro		11/04/2014	Manual Load			
31/03/2014	Teach	50 year Col		31/03/2014				

- Click .

The **Attach Document** window is displayed.



The **Attach Document** window is a dialog box with the following fields and controls:

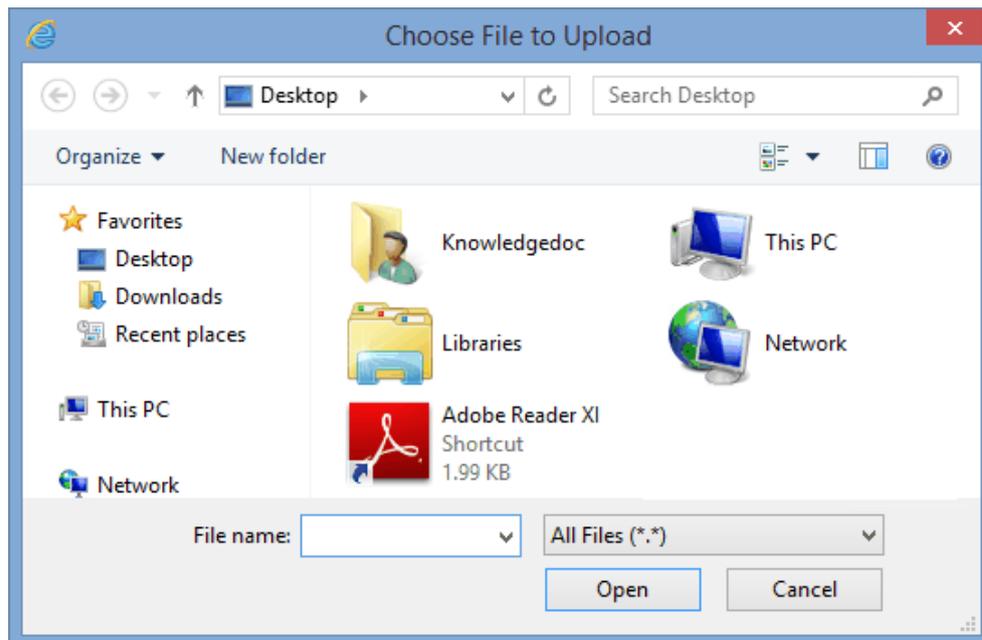
- Source Type:** Radio buttons for **File** (selected) and **URL/Web Link**.
- Source Date:** A dropdown menu showing **28/01/2015**.
- Classification:** A dropdown menu showing **External Document**.
- Source code:** A dropdown menu showing **Not Selected**.
- Document:** A text input field with a **Browse...** button to its right.
- Source Reference:** A text input field.
- Description:** A large text area with scrollbars.
- Legend:** *** = Required** (in red text).
- Buttons:** **Upload/Save Document** and **Cancel**.

Note: The **Attach Document** window may appear slightly different depending on the browser that you are using.

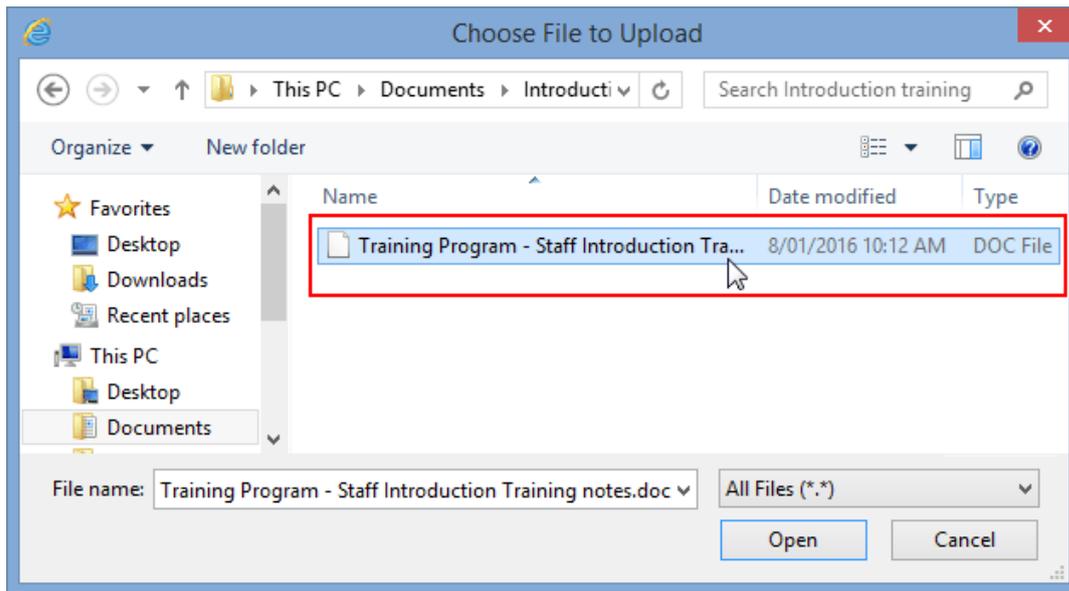
- Select **File** in the **Source Type** field.

- Click .

A window is displayed, similar to the example below.



7. Locate and select the document, spreadsheet or photo you want to import.



8. Click .

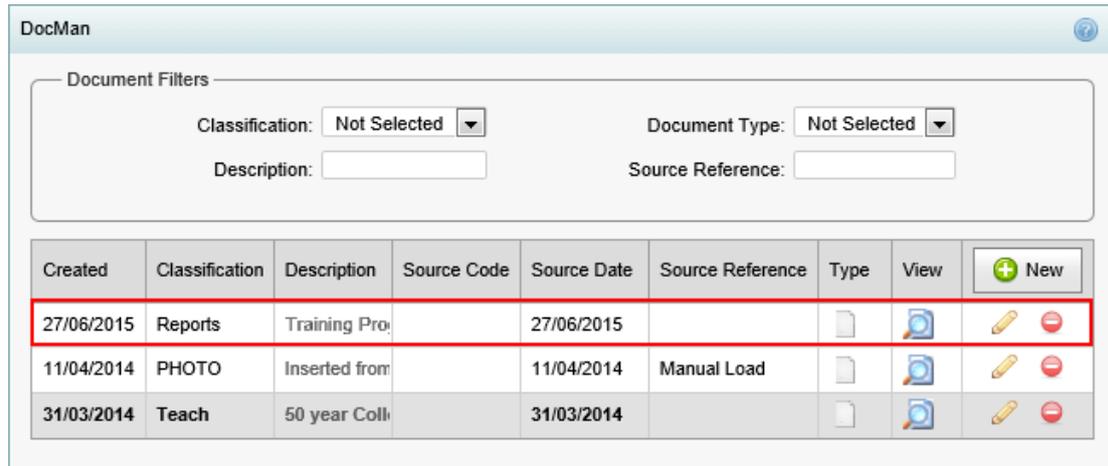
The selected file name appears next to the **Document** field.

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 .

The documents, or their links, are added to the community members' available documents.



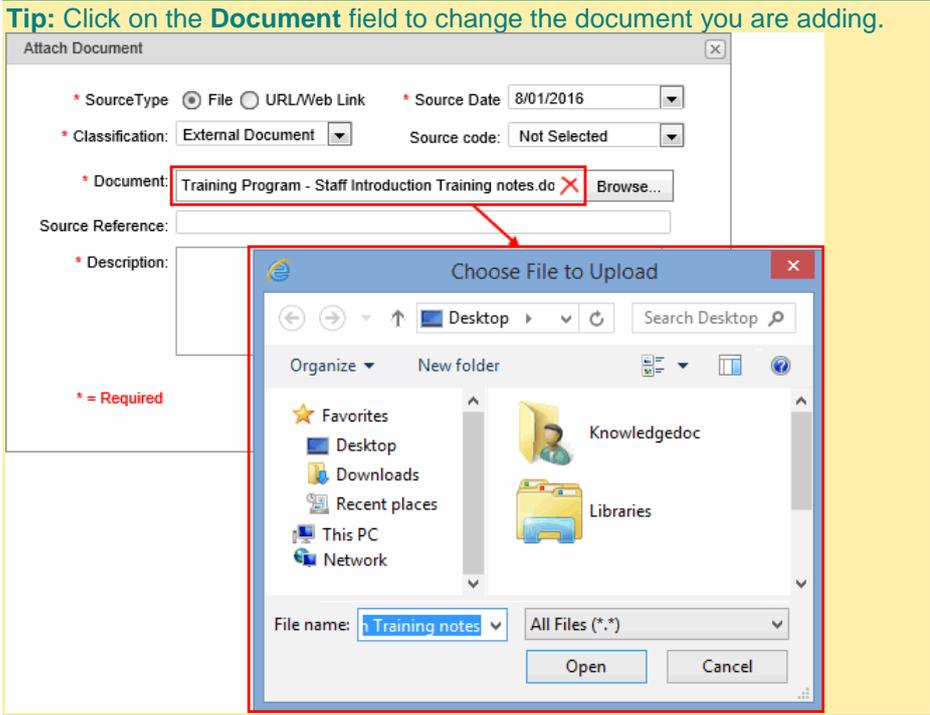
The screenshot shows the DocMan interface. At the top, there is a window title 'DocMan' and a help icon. Below the title is a 'Document Filters' section with four input fields: 'Classification' (set to 'Not Selected'), 'Document Type' (set to 'Not Selected'), 'Description' (empty), and 'Source Reference' (empty). Below the filters is a table with the following data:

Created	Classification	Description	Source Code	Source Date	Source Reference	Type	View	+ New
27/06/2015	Reports	Training Pro		27/06/2015				 
11/04/2014	PHOTO	Inserted from		11/04/2014	Manual Load			 
31/03/2014	Teach	50 year Coll		31/03/2014				 

14. Repeat steps 4 through 19 until there are no more documents to link, or embed, for the community member.

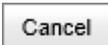
Attach Document window key fields and buttons

Fields

Field	Description
Source Type	Source type of the document. Select either: <ul style="list-style-type: none"> File to import a file from your computer into the Synergetic database 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. This field is empty if the file has been embedded in the Synergetic database. <p>Tip: Click on the Document field to change the document you are adding.</p> 
Source Date	Date that the source document was created. For example, if you are importing a historical picture you might specify the date when the picture was taken. This defaults to the current date and time for new entries.
Classification	Classification of the document. Document classifications are maintained in the luDocumentClassification lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.

Field	Description
Source Code	<p>Source of the item. Typical examples include:</p> <ul style="list-style-type: none"> • Archive • Magazine • Newspaper • School Photo. <p>Document sources are maintained in the luDocumentSourceCode lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.</p>
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
	Locate and select the document, spreadsheet or photo you want to import.
	Upload the selected document, spreadsheet or photo.
	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.

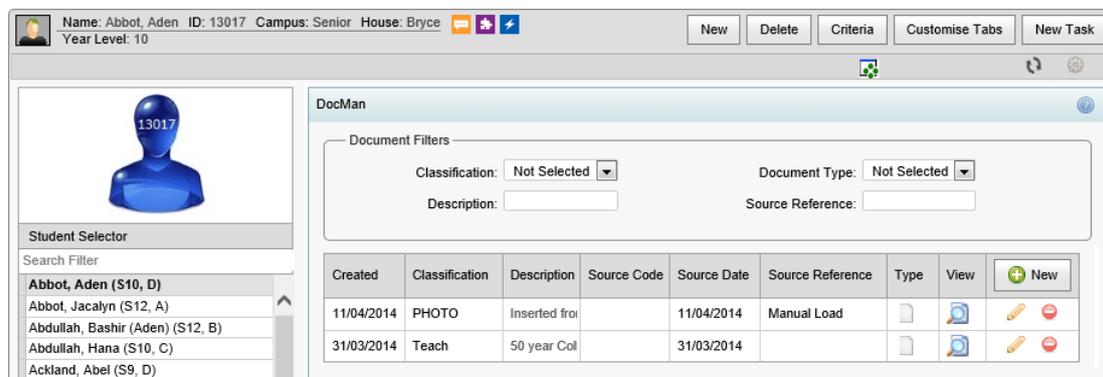
You can import the documents and attach them to either the:

- 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.

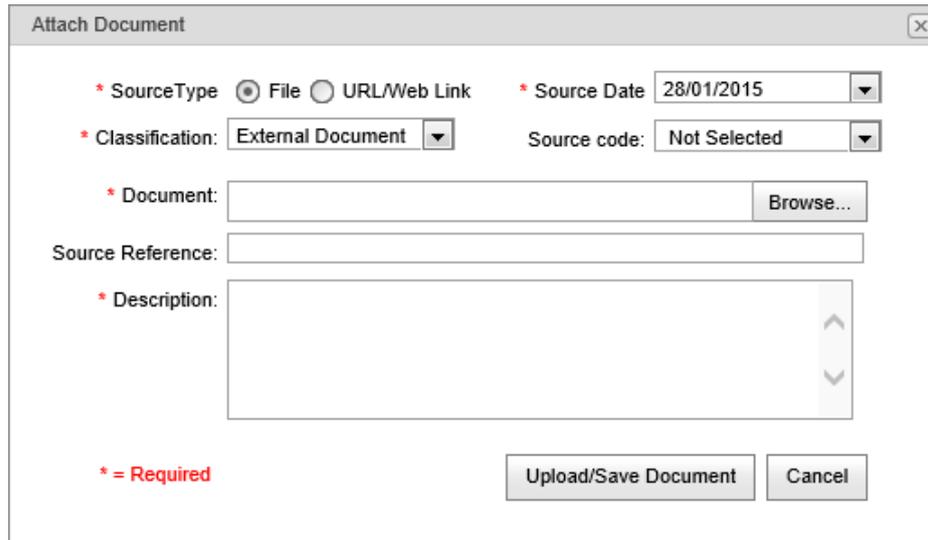


The screenshot shows the DocMan interface for a student. The top bar displays the student's name (Abbot, Aden), ID (13017), campus (Senior), house (Bryce), and year level (10). Below this, there are buttons for 'New', 'Delete', 'Criteria', 'Customise Tabs', and 'New Task'. The main area is divided into two sections: a 'Student Selector' on the left and a 'DocMan' window on the right. The 'Student Selector' shows a blue bust icon with the ID 13017 and a list of students: Abbot, Aden (S10, D), Abbot, Jacalyn (S12, A), Abdullah, Bashir (Aden) (S12, B), Abdullah, Hana (S10, C), and Ackland, Abel (S9, D). The 'DocMan' window has a 'Document Filters' section with dropdowns for 'Classification' (Not Selected) and 'Document Type' (Not Selected), and text boxes for 'Description' and 'Source Reference'. Below the filters is a table of documents:

Created	Classification	Description	Source Code	Source Date	Source Reference	Type	View	+ New
11/04/2014	PHOTO	Inserted fro		11/04/2014	Manual Load			
31/03/2014	Teach	50 year Col		31/03/2014				

- Click .

The **Attach Document** window is displayed.



* Source Type: File URL/Web Link * Source Date: 28/01/2015

* Classification: External Document Source code: Not Selected

* Document: Browse...

Source Reference:

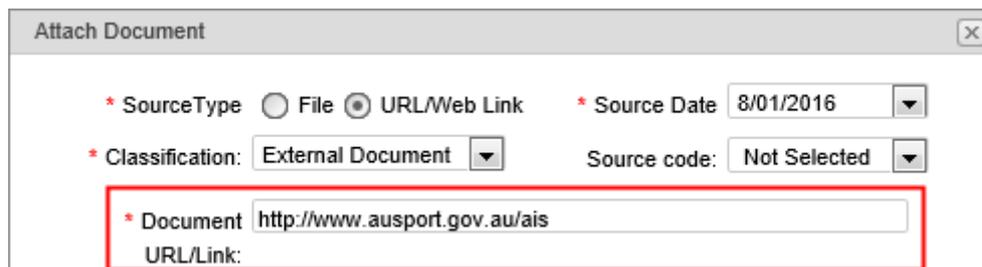
* Description:

* = Required

Upload/Save Document Cancel

Note: The **Attach Document** window may appear slightly different depending on the browser that you are using.

- Select **URL/Web Link** in the **Source type** field.
- Type the URL into the **Document URL/Link** field.



* Source Type: File URL/Web Link * Source Date: 8/01/2016

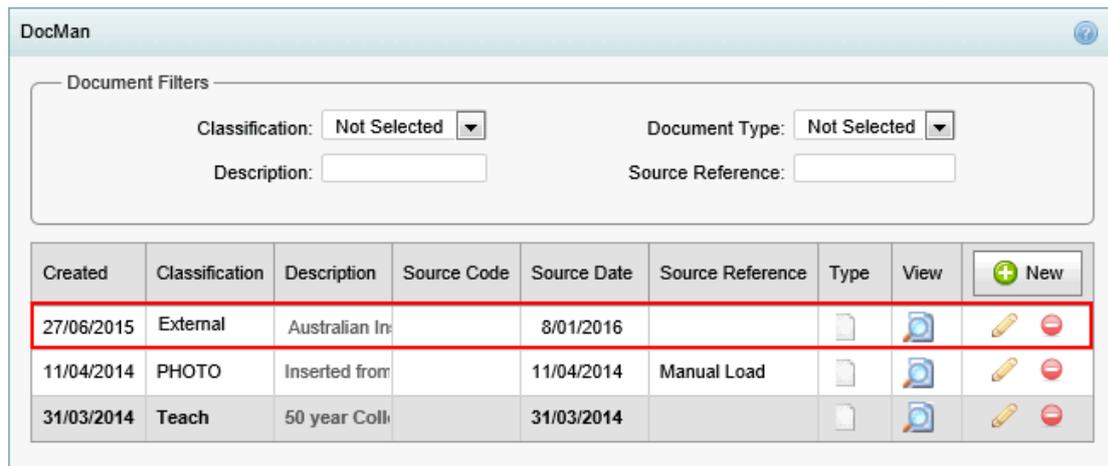
* Classification: External Document Source code: Not Selected

* Document: URL/Link:

- Select a **Classification**.
- Select a **Source Code**.
- Type in a **Source Reference**.
- Type in a **Description**.

11. Click .

The URL link is added to the community members' available documents.



The screenshot shows the DocMan interface with a 'Document Filters' section and a table of documents. The 'Document Filters' section includes dropdown menus for 'Classification' (Not Selected) and 'Document Type' (Not Selected), and text input fields for 'Description' and 'Source Reference'. The table below has columns for 'Created', 'Classification', 'Description', 'Source Code', 'Source Date', 'Source Reference', 'Type', 'View', and '+ New'. The first row of the table is highlighted with a red border.

Created	Classification	Description	Source Code	Source Date	Source Reference	Type	View	+ New
27/06/2015	External	Australian In		8/01/2016				 
11/04/2014	PHOTO	Inserted from		11/04/2014	Manual Load			 
31/03/2014	Teach	50 year Coll		31/03/2014				 

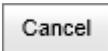
12. Repeat steps 4 through 11 until there are no more URL links to record for the community member.

Attach Document window key fields and buttons

Fields

Field	Description
Source Type	Source type of the document. Select either: <ul style="list-style-type: none"> • File to import a file from your computer into the Synergetic database • URL to link to a website.
Document URL Link	Website address of the URL/web link. For example, http://www.ausport.gov.au/ais .
Source Date	Date that the source document was created. For example, if you are importing a historical picture you might specify the date when the picture was taken. This defaults to the current date and time for new entries.
Classification	Classification of the document. Document classifications are maintained in the luDocumentClassification lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.
Source Code	Source of the item. Typical examples include: <ul style="list-style-type: none"> • Archive • Magazine • Newspaper • School Photo. Document sources are maintained in the luDocumentSourceCode lookup table. See <i>Maintaining lookup tables</i> 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
	Locate and select the document, spreadsheet or photo you want to import.
	Upload the selected document, spreadsheet or photo.
	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.

Tag list

<input type="checkbox"/>	ID	Name	Launch Into
<input type="checkbox"/>	18338	Adamski, Amanda (J3, B)	Student Maint...
<input type="checkbox"/>	18337	Adamski, Angelo (S10, A)	Student Maint...
<input type="checkbox"/>	11036	Aitken, Briony (S7, B)	Student Maint...
<input type="checkbox"/>	14867	Carter, Gretchen	
<input type="checkbox"/>	17582	Robertson, Elijah	

Add...

Delete

Clear

Email

Email All

SMS

SMS All

DocMan

Load...

Import ID...

Store

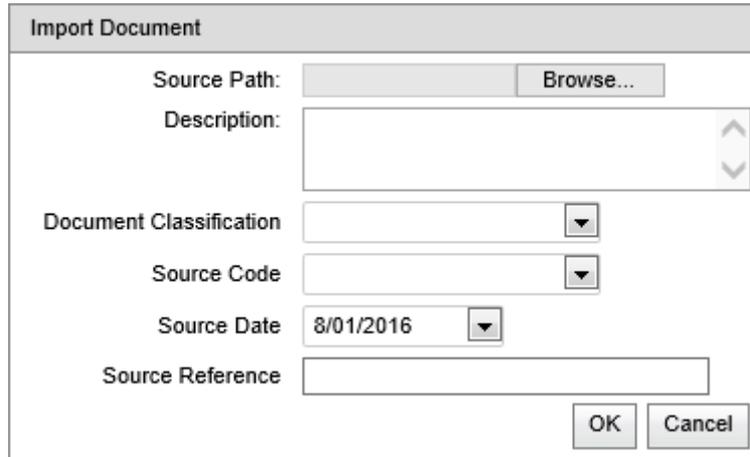
Constit

Class

Refresh

2. Click .

The **Import Document** window is displayed.

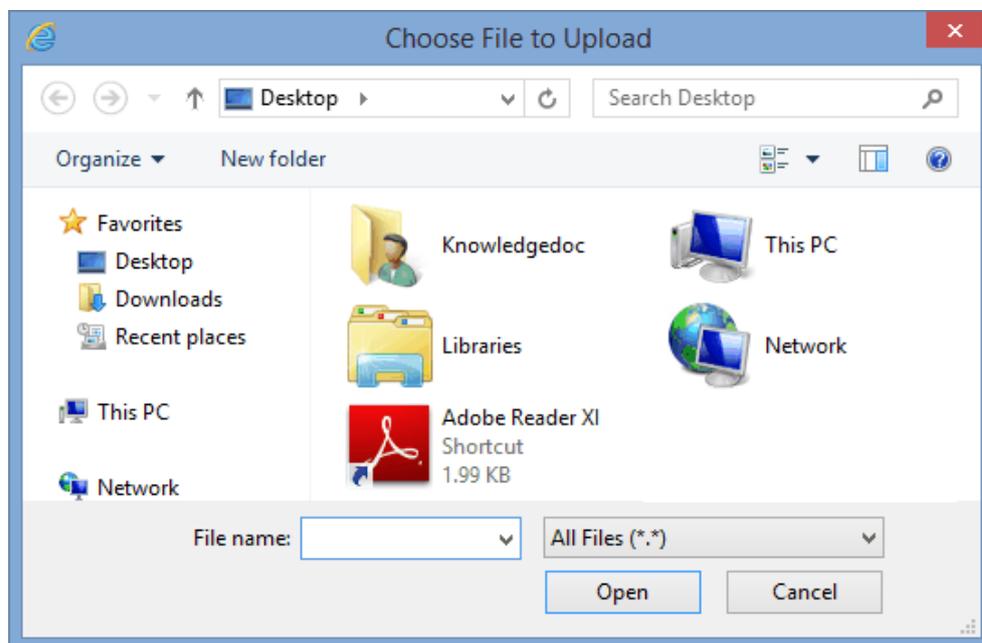


The **Import Document** dialog box contains the following fields and controls:

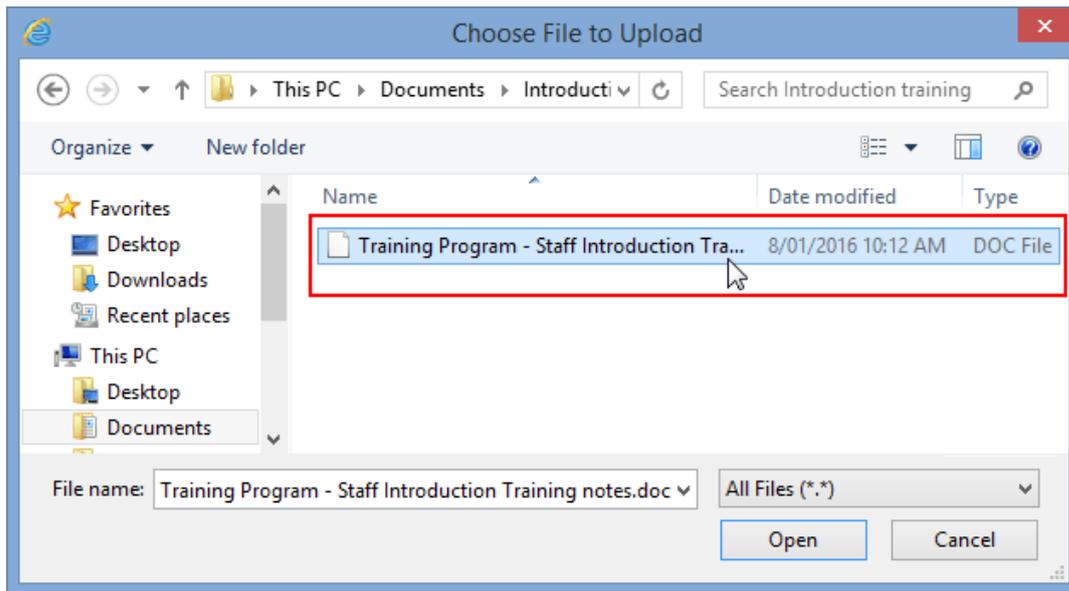
- Source Path:** A text field with a **Browse...** button to its right.
- Description:** A text area with up and down arrow buttons on the right side.
- Document Classification:** A dropdown menu.
- Source Code:** A dropdown menu.
- Source Date:** A dropdown menu with the value **8/01/2016**.
- Source Reference:** A text field.
- OK** and **Cancel** buttons at the bottom right.

3. Click .

A window is displayed, similar to the example below.

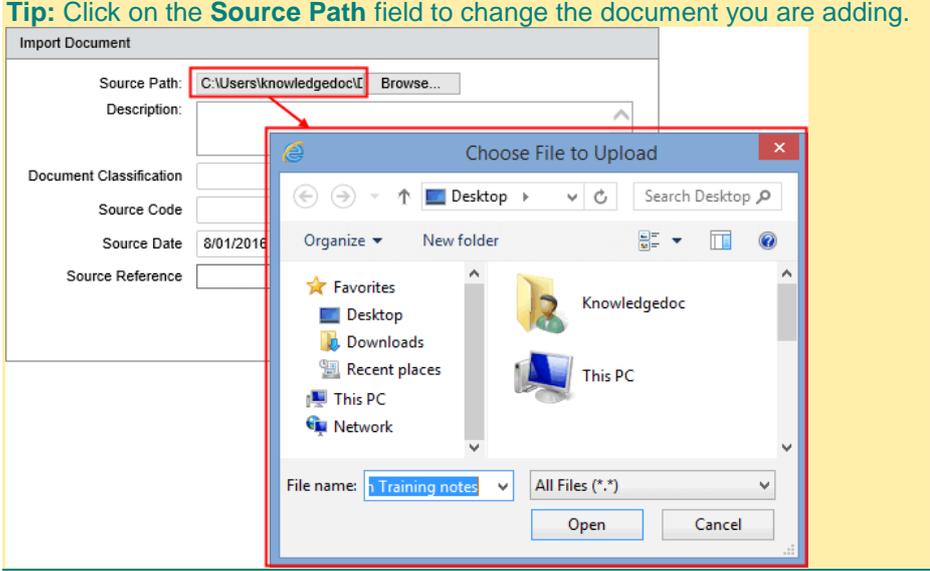


4. Locate and select the document, spreadsheet or photo you want to import.



5. Click .
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 .
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

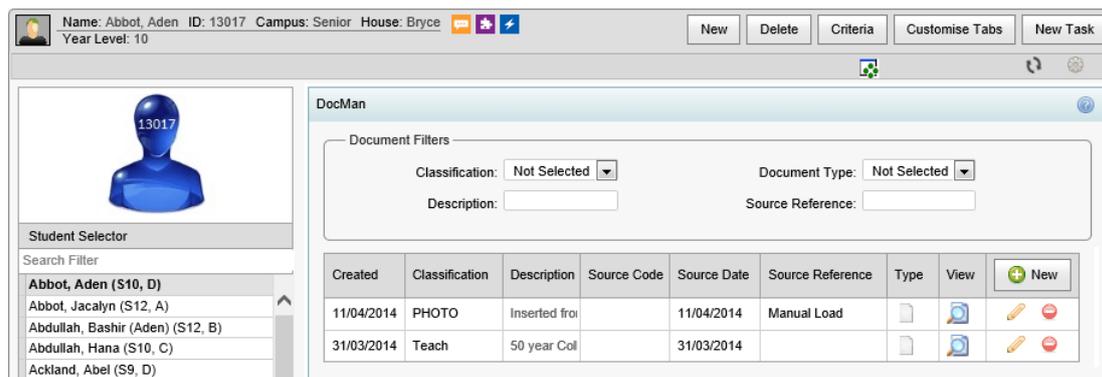
Field	Description
Source Path	<p>Directory path of the source document, the document name and its file extension if adding a document on a file server or PC.</p> <p>This field is empty if the file has been embedded in the Synergetic database.</p> <p>Tip: Click on the Source Path field to change the document you are adding.</p> 
Source Date	<p>Date that the source document was created.</p> <p>For example, if you are importing a historical picture you might specify the date when the picture was taken.</p> <p>This defaults to the current date and time for new entries.</p>
Document Classification	<p>Classification of the document.</p> <p>Document classifications are maintained in the luDocumentClassification lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.</p>
Source Code	<p>Source of the item. Typical examples include:</p> <ul style="list-style-type: none"> • Archive • Magazine • Newspaper • School Photo. <p>Document sources are maintained in the luDocumentSourceCode lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.</p>
Source Reference	<p>Cross-reference to the source. For example the name, issue date and page of a newspaper where the photograph appeared.</p>
Description	<p>Meaningful description for the document.</p>

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.



The screenshot shows the DocMan interface for a student named Abbot, Aden (ID: 13017). The interface includes a 'Student Selector' on the left with a search filter and a list of students. The main area displays 'DocMan' with document filters and a table of documents.

DocMan Document Filters:

- Classification: Not Selected
- Document Type: Not Selected
- Description: [Text Input]
- Source Reference: [Text Input]

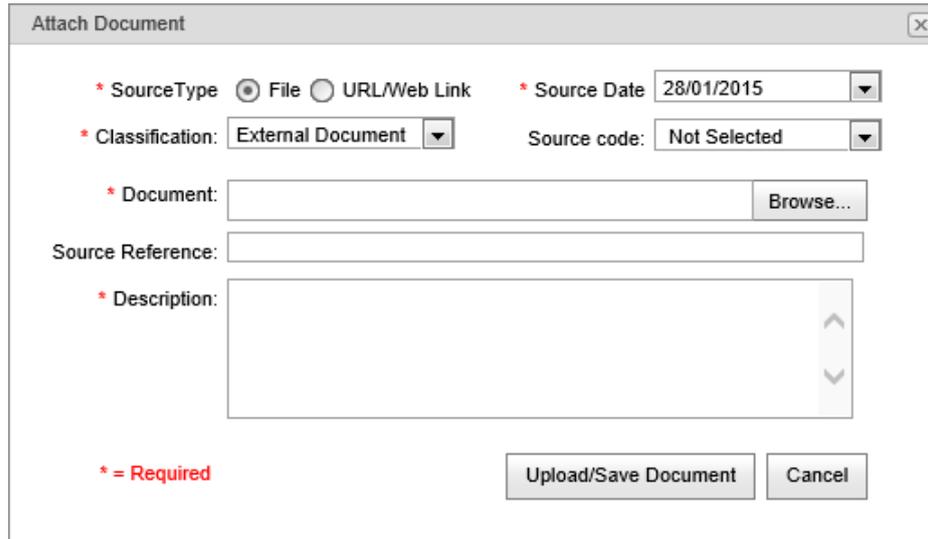
DocMan Document Table:

Created	Classification	Description	Source Code	Source Date	Source Reference	Type	View	New
11/04/2014	PHOTO	Inserted from		11/04/2014	Manual Load	[Icon]	[Icon]	[Icon]
31/03/2014	Teach	50 year Col		31/03/2014		[Icon]	[Icon]	[Icon]

4. If required, filter the documents:
 - Select the:
 - **Classification** from the drop-down list.
 - **Document Type** from the drop-down list.
 - Click .
5. If required, scroll down to the required document.

6. Click .

The **Attach Document** window is displayed.



* Source Type: File URL/Web Link * Source Date: 28/01/2015

* Classification: External Document Source code: Not Selected

* Document: Browse...

Source Reference:

* Description:

* = Required Upload/Save Document Cancel

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.

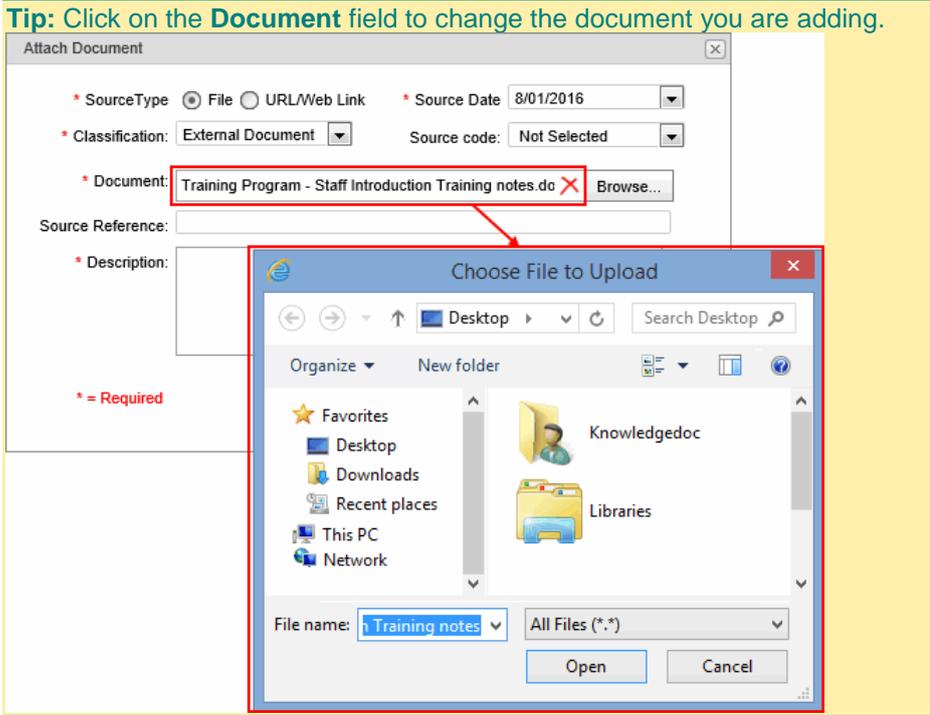


Description: Archive Student Photograph

* 

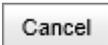
Update Document Details window key fields and buttons

Fields

Field	Description
Source Type	Source type of the document. Select either: <ul style="list-style-type: none"> • File to import a file from your computer into the Synergetic database • URL to link to a website.
Document	<p>Directory path of the source document, the document name and its file extension if adding a document on a file server or PC.</p> <p>This field is empty if the file has been embedded in the Synergetic database.</p> <p>Tip: Click on the Document field to change the document you are adding.</p> 
Source Date	<p>Date that the source document was created.</p> <p>For example, if you are importing a historical picture you might specify the date when the picture was taken.</p> <p>This defaults to the current date and time for new entries.</p>
Classification	<p>Classification of the document.</p> <p>Document classifications are maintained in the luDocumentClassification lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.</p>

Field	Description
Source Code	<p>Source of the item. Typical examples include:</p> <ul style="list-style-type: none"> • Archive • Magazine • Newspaper • School Photo. <p>Document sources are maintained in the luDocumentSourceCode lookup table. See <i>Maintaining lookup tables</i> in the Synergetic System maintenance manual.</p>
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
	Locate and select the document, spreadsheet or photo you want to import.
	Upload the selected document, spreadsheet or photo.
	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.

Available Reports

Modules:

Search:

Favourite SSRS Only

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 . <u>Note: Marked reports have yellow icons.</u>

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.

Report	Code	Module	Favourite
Class Student Contact Labels 2X8 (Barcode)	CLSC28B	REP	★
Class Student Contact Labels 3X10 (Barcode)	CLSL31B	REP	★
Class Student Contact Labels 2x7 (L7163)	CLSCNT27	REP	★
Class Student Contact Labels 2X8	CLSCNT28	REP	★
Class Student Contact Labels 3X10	CLSCNT31	REP	★
Class Student Labels 3X10 (Barcode)	CLSL310B	REP	★
Class Student Labels 2x7 (L7163)	CLSLB27	REP	★
Class Student Labels 2X8	CLSLB28	REP	★
Class Student Labels 2X8 (Barcode)	CLSLB28B	REP	★
Class Student Labels 3X10	CLSLB310	REP	★
Assessment Report	REPASSESS	REP	★

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.

Available Reports

Modules: **CRD / Creditors**

Search:

Favourite

Report

Class Student C

Class Student C

Class Student C

- AST / Asset Register
- ATT / Attendances
- CEOVIC / CEO - Victoria
- COR / Courses
- CRD / Creditors**
- DEB / Debtors
- DEV / Development
- EDP / Enrolment Deposits
- ENQ / Future Enquirers
- FUT / Future Students
- GEN / General Ledger
- HUM / Human Resources

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.

Available Reports

Modules: **CRD / Creditors**

Search:

Favourite SSRS Only

Report	Code	Module	Favourite
Creditor E.F.T. Selection Listing	CRDEFT	CRD	★
Creditor E.F.T. Remittance Advices	CRDEFTRA	CRD	★
Creditor G/L Trans History	CRDGLTR	CRD	★
Creditor Master File Listing	CRDMFL	CRD	★
Creditor List of Outstanding Transactions	CRDOS	CRD	★
Creditor Payment Method Listing	CRDPML	CRD	★
Creditor Invoice Listing	CRDPP	CRD	★
Creditor Past Paid (chq details with drill-down)	CRDPPCD	CRD	★

3. Select the **Favourite** field to view your favourites.

Tip: Click the  button to add a report to your list of favourites.

Report	Code	Module	Favourite
Class Student Contact Labels 2X8	CLSCNT28	REP	★
Class Student Contact Labels 3X10	CLSCNT31	REP	★

4. Select the **SSRS Only** field to prioritise the Synergetic reports over the site reports for the current session if this option is installed.

- Click on the launch link of the report.

Available Reports

Modules:

Search:

Favourite SSRS Only

Report	Code	Module	Favourite
Creditor E.F.T. Selection Listing	CRDEFT	CRD	★
Creditor E.F.T. Remittance Advices	CRDEFTRA	CRD	★
Creditor G/L Trans History	CRDGLTR	CRD	★

The selection screen is displayed for the report.

Creditor E.F.T. Remittance Advices / CRDEFTRA

Required Selections

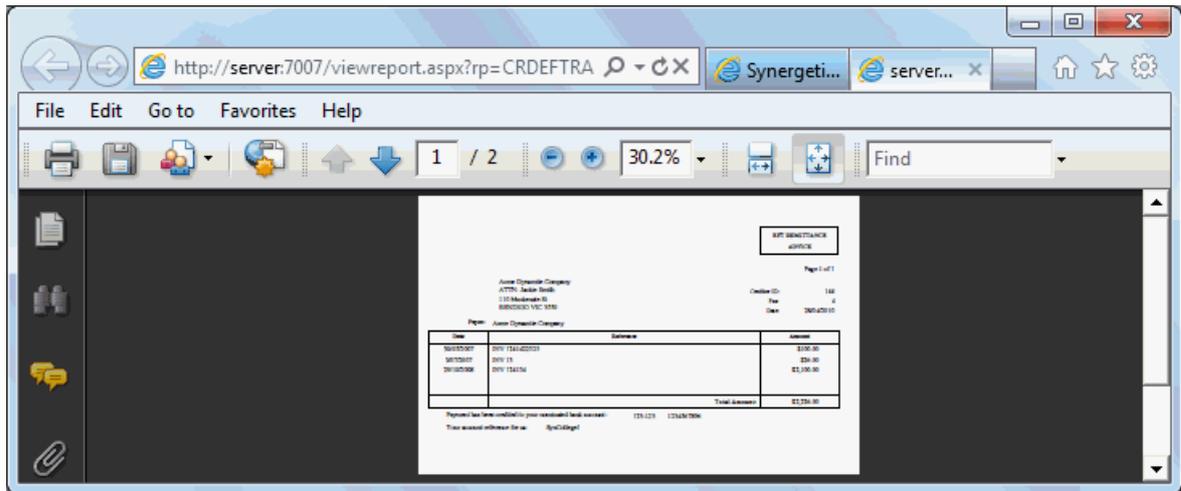
E.F.T. Posting Number:

Transmission Type:

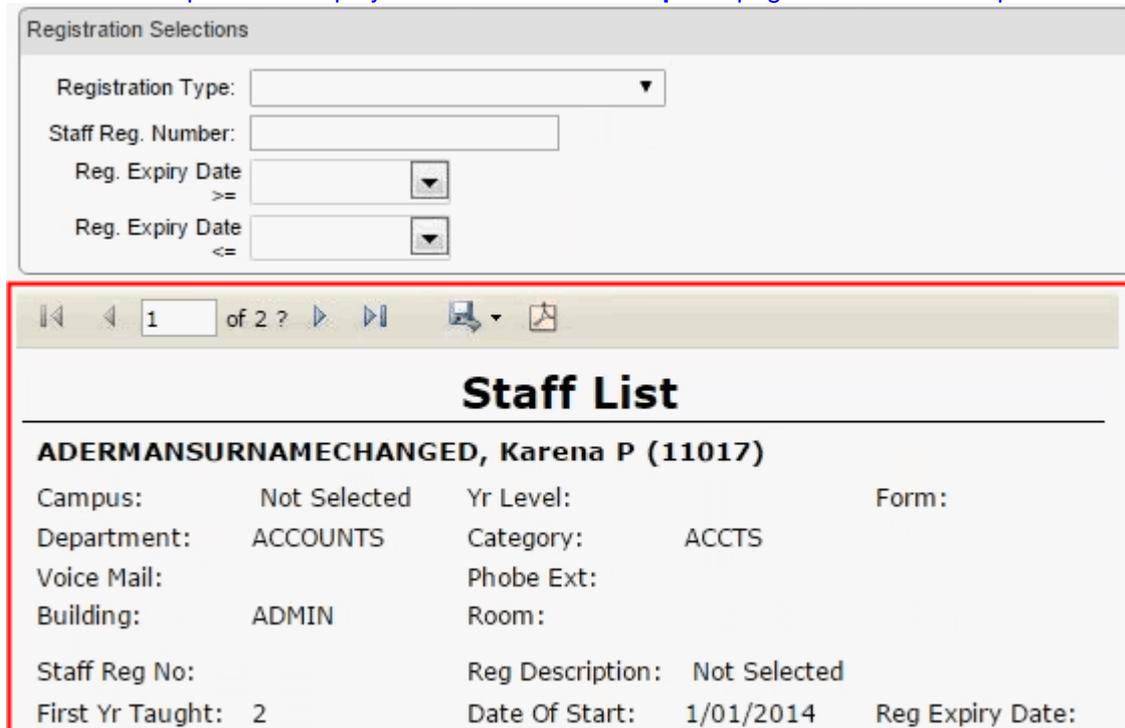
- Enter any required selections.
- Enter any other selections, as needed.

- Click **Show Report**.

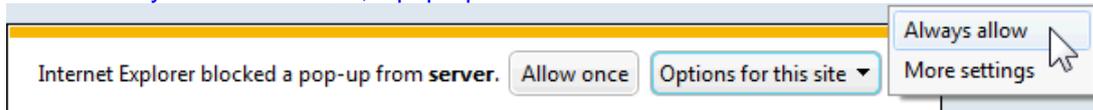
The report is displayed in a new browser window.



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) (*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

Synergetic Management Systems
1st Floor, Building 4
303-313 Burwood Highway
Burwood East Victoria 3151
Australia

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