

ParentCONNECTxp Course Requests Setup and Operation Overview

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This document provides an overview of how to set up and use the ParentCONNECTxp Course Request system with Chancery SMS.

For complete setup and operation instructions, refer to the following documentation:

- [Chancery SMS 7.7 eDocs](#) (for information specific to Chancery SMS setup and operation)
- *ParentCONNECTxp Installation and Setup Guide*
- *ParentCONNECTxp Administrator’s Guide*
- *PCXP Tools Guide*
- [ParentCONNECTxp Course Request system eDocs](#) (online help for students and parents using the course request system)

The following software is required:

- Chancery SMS 7.7 or later
- ParentCONNECTxp 4.0 or later

Important: It is highly recommended that the Academic Plan functionality in Chancery SMS be used in conjunction with the Online Course Request system. Student academic plans are used to filter the courses available to them when making course requests, and to provide the Academic Plan Progress report to both the ParentCONNECTxp website and the Course Requests website.

About the ParentCONNECTxp Course Requests website

Students can access the Course Requests website from the ParentCONNECTxp Course Plan pencil or from the ParentCONNECTxp URL with /OCR added; for example, <https://DistrictPCXP/OCR>.

Students will use the same login credential for both the ParentCONNECTxp website and the Course Requests website.

The Help link on the website provides instructions for students and parents, though note that only students can access the Course Requests website.

Chancery SMS setup

Follow these guidelines to set up online course requests in Chancery SMS:

- Install Chancery SMS 7.7.
- Districts: To allow prerequisite courses to be requested in the same year, in the planning calendar select the Course Catalog > Course Scheduling > Allow Prerequisites in the Same Year checkbox for a course. This setting rolls over with each calendar year. Corequisite courses are not supported.
- Schools: Set the permissions for the appropriate roles.
 - **Online Course Request Setup** in the School Setup node: School administrators require Edit or View permission to view or manage online course request settings.
 - **Course Recommendations and Requests** in the Student node: Counselors and teachers require Edit permission to make course recommendations for students.
 - **Course Requests Approval** in the Student node: School administrators and counselors require Edit permission to approve courses if required by the school.
 - **Student Academic Plan** in the Academic Planning node: Even if your district does not use Academic Plans, the Delete, Edit, or View permission is required for counselors and administrators to make individual course recommendations and approve student course requests in the Academic Plan area of Chancery SMS.
- Schools: In the planning calendar, enable the online course request system and appropriate options for each grade level on the School Setup > Online Course Request Setup page. Select the “Include” checkbox for a grade level only after all options are set up as needed; consider this action as publishing the selected options. After the first counselor or teacher course recommendation is made, many of the options are locked down. Note that the Submission End Date is one of the few options that can be changed later to extend the submission period.

Chancery SMS operation

Follow these guidelines to manage online course requests in Chancery SMS:

- Counselors and teachers make course recommendations in the active calendar after the planning calendar is set up for the next year.
- Course recommendations must be completed by 9:00 pm before the start of the student submission window to allow for server time discrepancies.
- Teachers can assign course recommendations to multiple students on the My Classes > Recommendations page.
- Counselors can assign course recommendations to multiple students on their home page.
- Course recommendations for individual students are made on the Academic Plan > Next Year Recommendations page. This is typically done by counselors.
- If required by the school, counselors approve student course requests on the Academic Plan > Next Year Requests page.
- Where there are pending counsellor approvals, administrators can force those approvals in order to publish the course requests to student planning schedules (School Setup > Force Course Request Approval).
- Administrators can use audit logs to find modifications and deletions to Online Course Recommendations and Online Course Requests (School Setup > Audit Log > Database).

ParentCONNECTxp setup and operation

Follow these guidelines to set up and manage online course requests in ParentCONNECTxp:

- Obtain an SSL security certificate for ParentCONNECTxp if you do not already have one.
- Note that a new Web Display Group called Students is now available. Only users assigned to the Student group can access the Course Requests website (parents cannot).
- Install ParentCONNECTxp 4.0. Version 4.0 has a new installer, so ensure that you follow the steps in the installation guide.
Important: Restart your server before installing version 4.0 if you have uninstalled an older version.
- AdminApp: Ensure that the Alert Notifier Service is enabled in Data Control > Alert Processing Maintenance. See Chapter 8 of the *ParentCONNECTxp Installation and Setup Guide* for details.
- AdminApp: Enable Admin Message Processing Options in Data Control > Alert Processing Maintenance > Admin Message Processing Options.
- AdminApp: Set the OCR Processing Interval to an appropriate time (60 minutes is recommended) in Data Control > Alert Processing Maintenance > Admin Message Processing Options. The processing interval can be up to 360 minutes.
- AdminApp: Set the System Configuration > ParentCONNECTxp System Settings > Feature Settings > ParentCONNECTxp Features selection to ParentCONNECTxp / Online Course Requests or Online Requests Only.
- AdminApp: Ensure that the Chancery SMS URL and login credentials are entered in System Configuration > SMS Web Data Access > URL and SMS login.
Note: If the ParentCONNECTxp Web server(s) are on a network that is separated from the Chancery SMS Web server by a firewall, each ParentCONNECTxp Web server requires a firewall rule that permits http traffic to flow between the ParentCONNECTxp Web server and the Chancery SMS Web server.
- AdminApp: Enter district support information in System Configuration > ParentCONNECTxp Web Site Configuration Settings > Support Web Page Options.
- PCXP Tools: Import students from Chancery SMS. See the *PCXP Tools Guide*.
Important: After importing user accounts from Chancery SMS, a log file is generated and stored in the PCxp\PCXPtools\LOG folder with all account information, including passwords, in clear text format to assist in troubleshooting. Make sure this folder is not shared and that the log file is properly deleted or secured.
- AdminApp: Manage Student and Web User (parent/counselor) accounts, including setting their default Display Groups (Web Display Groups > User Group Association). Note that there is now a function to link student accounts to a Chancery SMS contact in AdminApp > Edit Web User Login > Add/Delete Students > SMS Relationships. The selected contact will be the one that defines the ParentCONNECTxp permissions for that user, for example the “lives with” or “has custody” flag.
- AdminApp: After the submission window for a grade level has closed, force any pending course requests (those that are incomplete or pending parent/guardian approval) to Chancery SMS in the AdminApp > School Maintenance area.