

# District Administration Addendum

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Chancery SMS 7.3



## Chancery SMS 7.3 District Administration Addendum

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For support, contact:

By email: [psstechsupp@pearson.com](mailto:psstechsupp@pearson.com)

By telephone: 800-688-9939 (Monday to Friday, 5 am to 5 pm Pacific Time)

By web: *Pearson PowerSource* (<https://powersource.pearsonschoolsystems.com>).

For customer service, telephone 800-999-9931.

See also Chancery SMS online Help (on any page, click **Help**).

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# About this addendum

This addendum contains information not yet included in the *Chancery SMS 7.3 Administration Manual*, such as:

- “Implementing Chancery SMS” page 1
- “Setting up schools” page 11
- “Working with setup lists” page 15
- “Setting up transcripts” page 33
- “Setting up the course catalog” page 39
- “Setting up Test Management” page 53
- “Setting up mid-year transfer” page 59
- “Working with task manager” page 61

All other information concerning the installation, setup, and maintenance of district, school, and student data in Chancery SMS, that is not included in this addendum, can be found in the *Chancery SMS 7.3 Administration Manual* available from *Pearson PowerSource* at <https://powersource.pearsonschools.com> or by selecting **Help > Contents...** on any Chancery SMS page.

Tennessee customers should also refer to the latest version of the *Chancery SMS Tennessee State Reporting Guide*, available from *Pearson PowerSource* at <https://powersource.pearsonschools.com>.

## Implementing Chancery SMS

Chancery SMS is a centralized solution, giving districts the ability to maintain both district-wide and school-specific data in the same, centralized database.

### Overview of the steps

District staff work closely with Chancery’s consultants to ensure Chancery SMS is successfully implemented. This section provides an overview of the steps involved in implementing Chancery SMS.

- 1 “Install Chancery SMS at the district” page 2.
- 2 “Define the calendar” page 2.
- 3 “Identify the district and schools” page 5.
  - Set up district profile and district preferences.
  - Create school profiles.
- 4 “Standardize district-wide data” page 5.
  - Populate setup lists.
  - Define district-wide grade levels.
  - Define district-level course catalog.
  - For Tennessee only: Set up district-level data to support EIS reporting.
  - Standardize data at existing schools.
- 5 “Import student data” page 6.
- 6 “Set up log on accounts” page 6.
  - Set up staff records
  - Set up user roles.
  - Set up user accounts.

- 7 “Customize Chancery SMS” page 7.
  - Create custom pages and modify existing student pages.
  - Create custom district and school reports.
- 8 “Standardize school setup” page 7.
  - Complete School Setup tasks for “source” school.
  - For Tennessee Only: Set up school-level data to support EIS reporting.
  - Standardize school setup data for “target” schools.
  - Advise school administrators that school setup is complete.
- 9 “Tennessee only: EIS setup tasks” page 8.
  - Use Assign Values and Assign Multi-Values to populate EIS fields.
- 10 “Use Chancery SMS to maintain district and school data” page 8.

## Install Chancery SMS at the district

To install Chancery SMS, follow the instructions in the Chancery SMS 7.3 Administration Guide, available from Pearson PowerSource: <https://powersource.pearsonschools.com>.

## Define the calendar

The first step in setting up Chancery SMS is to set up the calendar at the district level. Calendars are the foundation that other information is built on.

When you log on, you cannot navigate in the system until you set up a calendar.

**Note:** When you first log on to set up Chancery SMS, you must log on as a district administrator. It is the only user account that has the required permissions to set up calendars.

Three types of calendars are available:

- Active calendar for students currently attending school.
- Planning calendar to schedule and plan for the next year.
- Historical calendar to store information about past years.

After you create calendars at the district level, schools create corresponding calendars at the school level. For example, after you create a district active calendar, schools can create their school active calendars and associate those calendars to the district active calendar.

The options available for setting up calendars depend on whether you are installing or upgrading:

- If you just installed Chancery SMS for the first time, see “Defining the district calendar after a new installation” page 2.
- If you are upgrading from a previous version of Chancery SMS, see “Defining the district calendars after an upgrade” page 3.

### Defining the district calendar after a new installation

When you install Chancery SMS for the first time, you must create an active calendar.

After creating the active calendar, do not immediately create a planning calendar. See “Choosing an approach to the planning calendar” page 4.



To create the active calendar:

- 1 Log on as a district administrator. The **District Calendar** page appears.
- 2 From the **Actions** menu, click **Add Active Calendar**.
- 3 In the blank row that appears, define the active calendar as follows:

In this field	Enter
District Calendar Name	A description for the active calendar, such as "2009-2010" .
Start	The first day of the active calendar, such as "08/10/2005" .
End	The last day of the active calendar, such as "08/09/2010" . Ensure it is long enough to encompass the calendar of every school in the district, including summer schools. The end date can be 1 to 550 days after the start date. , to accommodate major changes in calendars. Typically, it is 364 days after the start date.

- 4 Click **OK**. The **District Setup** page appears.
- 5 Continue with "Identify the district and schools" page 5.

## Defining the district calendars after an upgrade

When you upgrade, Chancery SMS creates district calendars automatically.

You may want to change the names and dates of these default calendars. To encourage you to review the calendars, Chancery SMS takes you to the District Calendar page when you first log on.

For a list of the calendars that are created and their default settings, see "Default Settings of district calendars after an upgrade" page 4.

Even though a planning calendar exists, do not immediately start setting it up. See "Choosing an approach to the planning calendar" page 4.

To change district calendars:

- 1 Log on as a district administrator. The **District Calendar** page appears.
- 2 To change the name of a calendar, enter the new name.
- 3 To change the date of a calendar, follow these rules:

Type	Date Change Rules
Active calendar	Can be changed if: <ul style="list-style-type: none"> <li>• range from 1 to 550 days</li> <li>• encompass the dates of every associated school calendar</li> </ul> The Start field can only be changed if a historical calendar does not exist. Changing the End field automatically sets the planning calendar's start date to the next day.
Planning calendar	Can be changed if: <ul style="list-style-type: none"> <li>• range from 1 to 550 days</li> <li>• encompass the dates of every associated school calendar</li> </ul> Changing the Start field automatically sets the active calendar's end date to the preceding day.
Historical calendars	Cannot be changed.

- 4 If a confirmation message appears, click **OK**.
- 5 Click **OK**.

## Default Settings of district calendars after an upgrade

If at least one school had an active school calendar before the upgrade, Chancery SMS automatically creates an district active calendar for the current year.

The default active calendar has these settings:

Field	Active Calendar's Default Setting
District Calendar Name	The year of the Start date, followed by a hyphen, followed by the year after the Start date. For example, if the start date is "08/10/2009", the name is "2009-2010".
Start	The earliest start date of the active calendars of all the schools using Chancery SMS in the district.
End	The latest end date of the active calendars of all of the schools using Chancery SMS in the district.

If at least one school had a planning school calendar before the upgrade, Chancery SMS automatically creates a district planning calendar for the next year.

The default planning calendar has these settings:

Field	Planning Calendar's Default Setting
District Calendar Name	The year of the start date, followed by a hyphen, followed by the year after the Start date. For example, if the Start date is "08/10/2009", the name is "2009-2010".
Start	The day after the end date of the active calendar.
End	364 days after the start date.

If the district had historical data before upgrading, Chancery SMS creates the appropriate historical calendars for past years.

The default historical calendars have these settings:

Field	Historical Calendar's Default Setting
District Calendar Name	The year of the start date, followed by a hyphen, followed by the year after the Start date. For example, if the Start date is "08/10/2009", the name is "2009-2010".
Start	The earliest start date of the historical calendars of all the schools using Chancery SMS in the district.
End	The latest end date of the historical calendars of all of the schools using Chancery SMS in the district.

## Choosing an approach to the planning calendar

Before setting up a planning calendar, decide how you will manage the course catalog.

The course catalog is specific to each calendar at the district level. When you create a planning calendar, Chancery SMS takes a copy of course catalog in the active calendar. From then on, the two course catalogs are independent of one another.

If you already have a planning calendar, set up the course catalog only in the planning calendar. Ignore the course catalog in the active calendar, even if some of it is set up.

If you do not have a planning calendar yet, we recommend that you set up the course catalog in the active calendar and then create a planning calendar. By using this approach, you:

- avoid switching back and forth between the planning and active calendars to set up Chancery SMS
- are less likely to accidentally set up part of the course catalog in the active calendar and part of it in the planning calendar

If you want, however, you can start setting up the course catalog in the active calendar, create the planning calendar, and then finish setting up the course catalog in the planning calendar. Or you can set up the course catalog only in the planning calendar, and leave course catalog in the active calendar empty. Whatever choice you make, pick an approach and stick to it.

For information about planning calendars, see the *Chancery SMS 7.3 Administration Manual*.

## Identify the district and schools

### Set up district profile and district preferences

In Chancery SMS, create the district profile. The district profile includes the demographic information associated with the district.

Define the district preferences, which include settings for how student numbers are generated and padded, how students are enrolled, settings for required enrollment fields, and technical information associated with how Chancery SMS is set up.

For information about creating the district profile and entering preferences, see the *Chancery SMS 7.3 Administration Manual*.

### Create school profiles

Add a profile for each school. For information about adding schools, see “Setting up schools” page 11.

## Standardize district-wide data

### Populate setup lists

For information about working with setup lists, see “Ensuring consistent data” page 15.

### Define district-wide grade levels

Define the grade levels used in the district. Information entered in the Description field is visible in reports and in dropdowns found throughout Chancery SMS. In addition, for reporting purposes, enter information in the State Code and State Description fields. This is useful if the state codes and descriptions are different from those recognized by the district.

## Define district-level course catalog

Define the course catalog used by all schools in the district. The course catalog contains the subject framework and subjects for elementary schools, and courses for middle and secondary schools. Create the course catalog and assign subjects and courses to the schools in the district. You can assign the same subject or course to multiple schools.

For information on setting up the course catalog, see the *Chancery SMS Scheduling Guide*.

## For Tennessee only: District-level data to support EIS reporting

To support EIS reporting, make sure the setup lists are populated to meet the current school year's state requirements. For more information, see the *Chancery SMS Tennessee State Reporting Guide*.

## Import student data

To reduce data-entry time when initially transferring data from your existing system to Chancery SMS, use ASCII Import to automatically import student data into district-wide fields, such as demographic, medical, and test score data.

For more information, see the *Chancery SMS Import/Export Guide*.

## Set up log on accounts

To set up log on accounts, you set up user roles for district and school users and create user accounts. Then you assign roles to each account. For more information, see the *Chancery SMS 7.3 Administration Manual*.

If your school uses Active Directory, see the *Chancery SMS Active Directory Integration Guide* for more information about working with roles, accounts, and staff records.

## Set up user roles

Set up roles suited for district and school users. User roles are a grouping of permission settings often associated with a specific job description. Chancery SMS provides a number of pre-defined roles suited for school users, such as Teacher and School Administrator. For more information, see the *Chancery SMS 7.3 Administration Manual*.

## Set up user accounts

Set up district user accounts and assign permissions using custom roles. In addition, set up school user accounts and assign access permissions using the Chancery SMS pre-defined roles, such as School Administrator, School Secretary, and Teacher. For more information, see the *Chancery SMS 7.3 Administration Manual*.

**Note:** Before users can log on to Chancery SMS, you must set up staff records. For more information, see the *Chancery SMS 7.3 Administration Manual*.

# Customize Chancery SMS

## Create custom pages

Customize pages to meet the unique needs of your district. For example, create new pages with custom fields so district and school staff can enter district-wide Special Education data about each student. **Note:** All custom pages are district-wide.

For more information, see the *Chancery SMS cTools Guide*.

## Create custom district and school reports

Depending on what version of Crystal Reports you are using, there are a number of reporting options. You can:

- run pre-defined, built-in Chancery SMS reports to capture school and district data.
- customize pre-defined, built-in Chancery SMS reports to meet the reporting needs of your district.
- upload and run pre-defined Chancery SMS report packages.
- create your own custom reports, based on the Chancery SMS Data Access View Generator or XML Schema, and add them to Chancery SMS.
- create your own custom reports, based on the Chancery SMS data dictionary, and then add them to Chancery SMS.

For more information about creating custom reports, see the *Chancery SMS Report Writer Guide*.

# Standardize school setup

## Complete school setup tasks for “source” school

Determine which schools will serve as the “source” for other compatible schools in the district. For example, use an elementary school to serve as the source for other elementary schools in the district.

Complete all Chancery SMS school setup tasks for the source school. This includes:

- defining calendar settings, such as defining the school calendar, choosing grade levels, adding day types and exceptions days, and defining attendance reporting periods.
- defining attendance settings, such as specifying attendance general settings, adding attendance codes, and defining daily attendance calculation rules and attendance exception rules.
- defining school settings, such as setting up awards and alerts.

In addition to school setup data, you can also standardize grading setup information, such as:

- report card and progress report templates.
- grading periods, common report card elements, and grading tables.

For more information, see “Setting up schools” page 11 and the *Chancery SMS 7.3 School Administration Manual*

## For Tennessee only: School-level data to support EIS reporting

As part of your school setup, make sure the following tasks are completed in accordance with EIS constraints:

- set up school calendars

- define attendance reporting periods
- set up day types and adding exception days
- set up instructional grade assignment codes
- set up tracks (instructional program) codes
- schedule schools
- set up grading information
- set up attendance codes
- set up teachers and homerooms
- set up club memberships

For more information, see the *Chancery SMS School 7.3 Administration Manual* and the *Chancery SMS Tennessee State Reporting Guide*.

## Standardize school setup data for “target” schools

Standardize school setup data for all Chancery SMS schools in your district. Use the Copy School Information feature to copy the school setup information from the source school to all target schools in the district.

For more information, see “Setting up schools” page 11.

## Advise school administrators that school setup is complete

When school setup is complete at each school, advise the school administrators. School staff can then set up homerooms, schedule students, and - if your district policy allows - add any additional school-specific setup data they might need.

For more information, see “Setting up schools” page 11 and the *Chancery SMS School 7.3 Administration Manual*.

## Tennessee only: EIS setup tasks

### Use assign values and assign multi-values to populate EIS fields

To help populate EIS fields in Chancery SMS, use the Assign Values and Assign Multi-Values features for the following fields:

- Student Classification
- Student Standard Day
- Instr Service Period
- English Language Background
- Course of Study
- End of Service Action (and date)
- Completion Document Type (and date)

**Note:** Assign Values and Assign Multi-Values are not available for all EIS fields.

For more information, see the *Chancery SMS Tennessee State Reporting Guide*.

## Use Chancery SMS to maintain district and school data

District and school staff can use Chancery SMS to perform key district-wide tasks, such as:

- enrolling students
- searching for student records
- maintaining detailed student demographic information

- tracking test scores
- transferring students to other schools in the district

School staff can use Chancery SMS to perform key school-specific tasks, such as:

- scheduling students enrolled in their school
- adding photos to student demographic records
- taking attendance
- entering grades

In addition, Chancery SMS provides the ability to report on student data, making it easy for schools and districts to track students' scholastic performance. Pre-defined, built-in school reports available include:

- Homeroom Attendance Report
- Student Cumulative Attendance Report
- Missing Grades Report
- Phone Register Report
- Student Medical Report
- ADA/ADM Summary Report
- Grade/Ethnicity Report

For information about:

- Working with school and student data, see the *Chancery SMS 7.3 Administration Manual*.
- Using pre-defined reports, see the *Chancery SMS Report Addendum*.
- Creating custom reports, see the *Chancery SMS Report Writer Guide*.





# Setting up schools

You need to identify basic information about every school in the district.

Add schools when you set up Chancery SMS or when a school starts using Chancery SMS for the first time. Later, you can change a school's information, delete the school, or purge its data.

Before you add a school to Chancery SMS, the school must be registered; that is, you must update Chancery SMS with the appropriate registration information. For more information, see the *Chancery SMS 7.3 Administration Manual*.

To add schools to a district, you must log on as a district administrator. After schools are added to Chancery SMS, you can log on to a school as a school administrator.

## Permissions required to set up school information

To set up school information, you need the following permissions:

To	You need this permission	Set to
Add a school to a district	Schools>Add School	Yes
Delete a school from the district	Schools>Delete School	Yes
Purge school information	Schools>Purge School	Yes

By default, the district administrator role has all the permissions required to set up school information and the school administrator role has all the permissions to view the school information. For more information about user permissions, see the Chancery SMS Permissions Guide.

## Adding a school

Before you add schools to Chancery SMS, complete the following tasks:

- 1 Register the schools in Chancery SMS. For more information, see the *Chancery SMS 7.3 Administration Guide*.
- 2 Ensure there are appropriate items in the **School Category** setup list so that you can choose a school category when you add a school. For more information about setup lists, see "Ensuring consistent data" page 15.

To add a school:

- 1 Log on as a district administrator.
- 2 In the control bar, under **School**, click **School Info**.
- 3 On the **School Info** page, from the **Actions** menu, click **Add**.
- 4 On the **Add School** page, enter the following information:

Field	Description
<b>Basic</b>	
School Number	Enter a unique school number. School numbers are usually defined by the district or state.
School Name	Enter the school's full name.
License Number	Enter the school's License Number as it appears on your Registration Key.

Field	Description
School Category	Select a School Category, such as Elementary School or Middle School. The options available will vary, depending on how your district is set up.
School Email	Enter an email address for the school.
Graduation Grade	Select the grade at which this school graduates its students. For example, a high school typically graduates students in Grade 12.
<b>School Entry Grades</b>	
Available/Assigned Items	Select the grades available to the school when using Geocode to perform Year End Transfer to this schools' projected school.
<b>Phone Numbers</b>	
Place, Prefix, Area, Phone, Ext., Listing, Type	Enter the place (Home or Work), the complete number including a dialing prefix and extension. Select whether Listed or Unlisted, and the type of device (phone, fax, cellular, or pager).
<b>Address</b>	
Address	Enter the school's address, including City, State, Zip Code, and County.
<b>Extended Information</b>	
School Year	Enter the start and end dates of the current school year. For Tennessee only: For reports and extracts to run correctly, the School Year Start Date must match the 200 Day Calendar Start Date Day Event.
District Number	Enter the number of the district in which this school resides.
District Type	Enter the type of district.
Organization Number	Enter the organization number.
School Days	Select Instructional Days and Non-Instructional Days.
Lunch Eligibility	Select Free Lunch or Reduced Lunch or both.
Year End	Select if this school can graduate students. For example, High Schools in your district graduate students.
<b>Contacts</b>	
Title	Enter the contact's title, such as Mr, Mrs, Miss, or Ms.
Last Name	Enter the contact's last name.
First Name	Enter the contact's first name.
Middle Name	If applicable, enter the contact's middle name.
Email	Enter the contact's email address.
Phone Numbers	Enter the contact's main phone number. This phone number might be different from the school's main phone number.
<b>School Comments</b>	
Comment	Enter any comments.

5 Click OK.

## Accessing new schools

After you add a school, no one can log on to it immediately. You first need to create a specific role, user account, and staff record for the school administrator of the new school.

For detailed information, see the *Chancery SMS 7.3 Administration Manual*.

**To access new schools:**

- 1 Log on as a district administrator.
- 2 Create a school administrator role for the school.
- 3 Create a user account for the person who is the school administrator.
- 4 Assign the school administrator role to the user account of the person who is the school administrator.
- 5 Create a staff record for the person who is the school administrator.
- 6 Assign the staff record to the school.

The user can now log on to the school as the school administrator.

## Setting up other school users

To allow other people to log on to the new school:

- Create a school role for each type of user, such as Teacher or School Secretary. The district administrator can do this by default. If you want the school administrator to do this, change the school administrator role so the User Roles permission is set to Edit or Delete. For more information, see the Chancery SMS Permissions Guide.
- Create a user account for each person, and assign the person a role at the school. The district administrator can do this by default. If you want the school administrator to do this, change the school administrator role so the User Accounts permission is set to Edit or Delete. For more information, see the Chancery SMS Permissions Guide
- Create a staff record for each person at the school, and assign the staff record to the school. Either the district administrator or the school administrator can do this.

For detailed information, see the *Chancery SMS 7.3 Administration Manual*.

To log on, the user must have a user account with a role for the school, plus a staff record for the school.

## Changing school information

**Important Note:** Do not use this procedure to change school names or numbers. If you need to change a school name or number, you must enter a new registration key. For assistance, contact Customer Support.

**To change school information:**

- 1 Log on as a district administrator.
- 2 In the control bar, under **School**, click **School Info**.
- 3 On the **School Info** page, click the school name.
- 4 To modify basic information about a school, on the **School Info Detail** page, click **Edit**.

- 5 On the **Schools** page, edit the information, as required. For information about this page, see “Adding a school” page 11.
- 6 Click **Save**. Click **OK**.

## Adding cities to a school

If the district preference to limit cities for student and contact addresses is set to **Yes** (see the *Chancery SMS 7.3 Administration Manual*), then you can select which cities are available to a particular school on the **School Info Detail** page.

**To add a city to a school:**

- 1 Log on as a district administrator.
- 2 In the control bar, under **School**, click **School Info**.
- 3 On the **School Info** page, select the school you want to edit.
- 4 On the **School Info Details** page, under **Cities Associated with School**, select the cities you want from the **Available** list and move them to the **Selected** list.
- 5 Click **OK**.

## Deleting schools

Deleting a school from the district removes its profile and its school-owned data from the district database. **Important Note:** Do not delete a school unless you are sure that you no longer need the school in Chancery SMS.

**To delete a school:**

- 1 Log on as a district administrator.
- 2 In the control bar, under **School**, click **School Info**.
- 3 On the **School Info** page, select the schools that you want to remove from the district database.
- 4 From the **Actions** menu, click **Delete**.
- 5 Click **OK**.

# Ensuring consistent data

Make data entry easier and ensure consistent spelling and terminology by using “setup lists”. Setup lists contain the data available in the dropdown lists in fields in Chancery SMS.

For example, the contents of the City dropdown are defined in the City setup list. When you enter student addresses, you can click a dropdown to select a city, rather than manually entering the entire name. Each setup list is composed of any number of items. For example, “Detroit” and “Chicago” would be items in the City setup list.

Setup list pairs are linked pairs of setup lists - made up of a parent and a child - that work together dynamically. For example, you can have a setup list pair for programs and program options, in which the two setup lists are linked together so that selecting a program from the first setup list automatically filters the second setup list to show only those options that apply to that particular program.

When you first install Chancery SMS, a typical sequence of tasks is:

- 1 Develop a plan for standardizing school data.
- 2 Populate setup lists.
- 3 Add schools to Chancery SMS.
- 4 Set school availability options for each list.
- 5 Select default items for dropdowns.
- 6 Add more setup items as needed.

## Working with setup lists

With each setup list, you can set the item that appears by default whenever the list is used, group the list with other similar lists, and control what happens to school dropdowns when someone changes items in the list at the district level.

To make setup lists more manageable, you can assign them to groups, such as Contact Data, Staff Data, and Student Data.

You can also change, add, and delete the groups, except for any required groups, which are indicated by an asterisk (\*). When you delete a group, the lists assigned to that group are assigned to the “N/A” group.

**To set the defaults for setup lists:**

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 On the **District Setup** page, under **District**, click **Setup Lists**.
- 3 On the **Setup Lists** page, click a setup list.
- 4 In the control bar, click **List Settings**.
- 5 From the **List Default** dropdown, select an item.
- 6 Click **Save**.

**To group setup lists together:**

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 On the **District Setup** page, under **District**, click **Setup Lists**.
- 3 On the **Setup Lists** page, click a setup list.
- 4 In the control bar, click **List Settings**.
- 5 From the **Setup List Group** dropdown, select an item.

6 Click **Save**.

**To change, add, or delete a group:**

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 On the **District Setup** page, under **District**, click **Setup Lists**.
- 3 In the control bar, click **Setup List Groups**.
- 4 On the **Setup List Groups** page, do one of the following:

To	Do this
Add a new group	Click <b>Add</b> . On the <b>Add Group</b> page, enter a description and click <b>OK</b> .
Delete an existing group	Select the group, click <b>Delete</b> , and then click <b>OK</b> .
Change the name of a group	Click the group name, change the <b>Description</b> , and then click <b>OK</b> .

5 Close the window.

## Managing setup item availability in schools

The district can control the items that appear in the setup lists at each school in two different ways:

- automatically by using the “Availability Requirement” for the entire list
- manually by assigning specific items to specific schools

### Automatically assigning lists to schools

For each setup list, you can choose to have:

- every school see every item in the list (“All Items in All Schools”)
- the schools in specified categories see every item in the list (“If Selected for Category”); for example, you can assign some student behavior codes to secondary schools and some student behavior codes to elementary schools
- every school see changes to any existing item in the list, but remain unaffected by new or deleted items (“Changes Only”)

No matter what you choose, items are not deleted at schools where the items are currently in use. For example, if a student has an address with the city name “Seattle,” you cannot make “Seattle” unavailable at schools where the student is enrolled.

**To automatically assign lists to schools:**

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 On the **District Setup** page, under **District**, click **Setup Lists**.
- 3 On the **Setup Lists** page, click a setup list.
- 4 In the control bar, click **List Settings**.

5 From the **Availability Requirement** dropdown, select an item:

To	Do this
Make all items in the list available in all schools	<ul style="list-style-type: none"><li>• Select <b>All Items in All Schools</b>.</li></ul>
Make each list item available to schools in specific categories on an item-by-item basis	<ul style="list-style-type: none"><li>• Select <b>If Selected for Category</b>.</li></ul>
Propagate any changes to existing items in the list to all schools that currently use the items	<ul style="list-style-type: none"><li>• Select <b>Changes Only</b>.</li></ul>

6 Click **Save**.

If you made the list items available by choosing **If Selected for Category**, edit each item in the list to select the categories that the item applies to.

For more information, see "To add and edit setup list items:" page 17.

## Manually assigning items to schools

You can manually assign an item in a setup list to one or more specific schools. This can be useful if you want to assign items to a group of schools, but you do not have a specific category for that group of schools.

**To manually assign items to a school:**

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 On the **District Setup** page, under **District**, click **Setup Lists**.
- 3 On the **Setup Lists** page, click a setup list.
- 4 Click **Assign**.
- 5 On the **Assign List Items** page, from the **School** dropdown, select a school name.
- 6 Select items to make them available at the school.
- 7 Click **OK**.

## Working with Items in Setup Lists

Once a setup list is created, you can work with the items in the list. You can add new items, change or delete existing items, and merge items together.

You can delete items from setup lists if you have the required access permissions and the item is not used in any record in the district database.

If two or more items have the same meaning, do not delete one of them. Instead, merge the similar items together. You can merge two or more items into one single item if you have the required access permissions. Merging is useful when you have several items with the same meaning, such as city names "Los Angeles" and "LA".

**To add and edit setup list items:**

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 On the **District Setup** page, under **District**, click **Setup Lists**.
- 3 On the **Setup Lists** page, click a setup list.
- 4 To add an item, click **Add**.

OR

To edit an item, click the description.

- 5 On the **Edit List Item** page, enter or change the **Description**, **Short Code**, **State Description**, and **State Short Code**, according to district and state policies.
- 6 Set the availability of the list item, which depends on the availability setting of the entire list.

If the Availability Requirement of the entire setup list is set to	Do this
All Items in All Schools	Ignore this step.
If Selected for Category	Choose either All Schools or No Other Schools.
Changes Only	Choose any one of the availability options.

- 7 Click **OK**, and then click **Return**.

**To delete a setup list item:**

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 On the **District Setup** page, under **District**, click **Setup Lists**.
- 3 On the **Setup Lists** page, click a setup list.
- 4 Click **Delete**.
- 5 Select the items you want to delete.
- 6 Click **OK**.

**To merge setup list items:**

We recommend that you merge only two setup items at a time.

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 On the **District Setup** page, under **District**, click **Setup Lists**.
- 3 On the **Setup Lists** page, click a **setup list**.
- 4 Click **Merge**.
- 5 On the **Merge List Items** page, from the **Merge selected items** as dropdown, select the **Description** you want to assign to all the items.
- 6 Select the other items to merge. Do **not** select the item you selected in step 5.
- 7 Click **OK**.

## Setup Lists in Chancery SMS

Most district-wide setup items have the following fields:

Field	Description
<b>Description</b>	Text that appears in dropdowns, up to 45 characters. Called Long Code in Mac School.
<b>Short Code</b>	Text, up to 11 characters, usually a number or an abbreviation of the description.
<b>State Description</b>	Text, up to 50 characters, used for state reporting.
<b>State Short Code</b>	Text, up to 10 characters, used for state reporting.



## Address Data Setup Lists

Setup List Name	Populate Setup List With	For Example
Address Area	Geographical areas within the district where students live.	
Address Direction	Geographical directions that apply when entering address information.	E, W, N, or S (East, West, North, or South)
Address Type	Types of streets that apply when entering address information.	Street, Blvd., or Rural Route
City	City names within the district.	
Contact Communication Number Type	Types of telecommunication devices.	Cellular, fax, pager, phone or email
Country	Country names used for entering address information.	
County	County names used for entering address information.	
Geocode	Geographical regions or zones within the district, usually associated with bus routes.	
State or Province	State names used for entering address information.	

## Contact Data Setup Lists

Setup List Name	Populate Setup List With	For Example
Contact Type	Type of contact a person is for a student.	"If Student is Absent."
Employer Type	Employer types for contacts.	Government or Military
Relation of Contact to Student	Relationship between a student and a contact.	Father or Neighbor
Title for Contacts	Proper title to be associated with student contacts.	Mrs. or Dr.

## Legacy Tests

Setup List Name	Populate Setup List With	For Example
Interpretation Code	Unusual testing conditions that affects the interpretation of a student's test score. Note: This is used only for the Legacy Test Scores module.	Braille test.
Test Exclusion Code	Reasons for students not taking a test. Note: This is used only for the Legacy Test Scores module.	IEP (Individualized Education Plan) exemption.

## Program Management Setup Lists

Setup List Name	Populate Setup List With	For Example
Program Category	The program categories program groups and/or programs	After School Athletics
Program Group	The program groups that contain similar programs.	Volleyball
Program	The individual programs in which students are enrolled.	Varsity Girls, Varsity Boys, Junior Varsity Girls
Contacts Role	The role of the program's contact person.	Program Clerk, Program Coordinator
Off-Campus Facility	Facilities where the program meetings will occur.	County Rec Center, Town Meeting Hall
Funding Source	The program's source of funding.	Federal, Business, State
Program Interactions	Interactions to other program services.	Elementary Breakfast, Free & Reduced Lunch
Program Documentation	Any documentation required for eligibility or enrollment.	Parent Consent Form, Physical Exam, Application Form

## Program/Course Data Setup Lists

Setup List Name	Populate Setup List With	For Example
Chancery SMS Course Type	Course type for secondary school scheduling method course catalog.	Core or Specialty
Chancery SMS Department	Departments for secondary school scheduling method course catalog.	Math, Advance Math, and so on
Course Subject Area	Cross-departmental subject areas.	Renaissance Studies
Course Type	Types of courses offered in the district.	Special Education or Lab

## School/District Data Setup Lists

Setup List Name	Populate Setup List With	For Example
Address Exception Reason	Reasons for overriding address validation settings.	Special program
Chancery SMS Room Type	Valid room types.	Gymnasium
Department	School departments.	History or Industrial Arts
District Name	Names of districts associated with all schools in the School Names list.	For Tennessee EIS reporting, if you want to consolidate multiple schools into a single school for schools that are in different districts, you can merge the districts. Populate the State Short Code field with an identical district number, and the State Description field with an identical district name.

Setup List Name	Populate Setup List With	For Example
Override Queue Rank Reason	Reasons a low-ranked student can be assigned to a program.	Principal's discretion
Schedule Change Reason	Reasons users may change a student's schedule in the active calendar. If items are defined in this list, the Change Reason dropdown is available on pages where student schedules may be changed. To make change reasons required when student schedules are changed, on the District Preferences page, under Reason Codes, select "Required for Scheduling Changes".	Parental request Schedule conflict
School Category	School categories found within the district. Used to group schools for assigning other setup items, and for scheduling replication. Not stored in Win School or Mac School.	Elementary or Senior High
School Name	Names of schools in the district.	For Tennessee EIS reporting, if you want to consolidate multiple schools into a single school for schools, you can merge the schools. Populate the State Short Code field with an identical school number, and the State Description field with an identical school name.

## Staff Data Setup Lists

Setup List Name	Populate Setup List With	For Example
Instruction Type to EL	Type of instruction a staff member might offer to English Language learners.	
Licensure Check	Reasons staff may not be in the licensure file.	
Licensure Check		
Scheduling Aide Type	Types of teacher aides.	Translation or Special Needs
Staff Assignment	A position a staff member is assigned to provide service. A staff member can have multiple assignments.	Full-time, Part-time
Staff Credential or Teaching Area	Area of teaching credential	Humanities, Math, Science
Staff Credential Type	Type of teaching credential	Bachelor of Arts, State Certificate
Staff Department	School department to which staff member is assigned.	Biology, Foreign Languages, Physical Education
Staff Education Level	The type or level of degree	Undergraduate, Masters, Doctorate
Staff Job Classifications	Job classification	HS1, HS2, HS3
Staff Position Status	Type of position	Administrator, Teacher, Aide

Setup List Name	Populate Setup List With	For Example
Staff Service to English Learner	Type of service	Normal, Specialized
Staff Status		
Teacher Fund		No, Yes
Teacher Position	Staff positions and roles.	Teacher, Librarian, Nurse
Tennessee only: Teaching Method	Traditional or Distance Learning. Distance Learning facilitator must be a licensed teacher but endorsement in subject is not required.	

## Student Behavior Setup Lists

Setup List Name	Populate Setup List With	For Example
Behavior Action	Defines the overall actions that might be executed in response to incidents, events, or concerns. Actions can be punitive or corrective processes that might be executed by the school or court authority to reprimand or rehabilitate a student after an incident is committed. Actions can also be educational to address academic concerns, or supportive to assist victims or witnesses of incidents. Each behavior action is associated with one or more action steps.	Expulsion, Suspension, Academic Intervention
Behavior Action Category	Defines the categorization or grouping of actions. This setup list is referenced by the Behavior Action setup list.	Counselling, Suspensions, Transfers, Communications
Behavior Action Severity	Defines levels of severity of the action. This setup list is referenced by the Behavior Action Setup list.	High, medium, low
Behavior Action Step	Defines discrete portions of behavior actions. Each behavior action step is associated with one behavior action. This setup list is referenced by the Behavior Action setup list.	For Expulsion behavior action, might include: letter to parents, expulsion hearing, counselling sessions For Academic Intervention behavior action, might include: letter to parents, tutoring sessions, appointments with specialized service providers
Behavior Action Step Category	Defines the categorization or grouping of behavior action steps. This setup list is referenced by the Behavior Action Sub-Category setup list.	Counselling, Suspension, Transfer, Communications
Behavior Action Step Status	Defines the status of an action step.	Completed, Pending, Incomplete

Setup List Name	Populate Setup List With	For Example
Behavior Action Sub-Category	Defines the sub-grouping of actions for the specified behavior action category.	For suspension category: 1-day, 1-week
Behavior Action Type	Describes the nature of the action. This setup list is referenced by the Behavior Action setup list.	Expulsion, Suspension, Therapy
Behavior Attendance Action	Defines attendance actions. Note Items in the Behavior Attendance Action setup list may be deleted even if they are mapped to attendance actions. You cannot delete an item from this setup list if it is referenced by an item in the Behavior Action Step setup list. This setup list is referenced by the Behavior Action Step setup list.	Suspension, In-school Suspension, Expulsion
Behavior Discrepancy Reason	Defines reasons for a reduced number of days or time served. This field is a required field for PEIMS (TX reporting). The district requires a value in this field even when there is no discrepancy.	Good behavior
Behavior Event/Concern	Defines specific events or concerns, including offenses or violations of any of the established codes of the school, district board of education, or civic authorities, as well as academic concerns or issues.	Alcohol, arson or explosive possession, battery, breaking & entering/ burglary, disorderly conduct, fighting, reading below grade level, failed tests
Behavior Incident and Event/Concern Category	Defines primary-level categorizations or groupings of incidents or events/concerns. This setup list is referenced by the Behavior Event Category setup list.	Discipline, Academic
Behavior Incident and Event/Concern Severity	Defines the severity level associated with an incident or event/concern.	High, medium, low
Behavior Event/Concern Sub-category	Defines the secondary-level categorization of behavior events and concerns. Each behavior event/concern sub-category is associated with a behavior event/concern category.	For the behavior Event/Concern category, Substance Abuse: alcohol, marijuana, cocaine
Behavior Incident Factor	Defines flags that indicate the nature of the incident or the types of things involved in the incident.	Drugs involvement, gang involvement, hate crime, racial discrimination, sexual assault, weapons involvement
Behavior Incident Location Category	Defines high-level locations where a student behavior incident occurred. This setup list is referenced by the Behavior Incident Location setup list.	On School Property, Off School Property

Setup List Name	Populate Setup List With	For Example
Behavior Incident Location	Designation or description of the site where the incident took place.	Cafeteria, classroom, hallway, not school property, other, stairwell
Behavior Incident Time Classification	Defines high-level times when a student behavior incident occurred. This setup list is referenced by the Behavior Incident Time Sub-Classification setup list.	After School, During School Hours, Before School
Behavior Incident Time Sub-Classification	Defines specific times when a student behavior incident occurred. Each behavior incident time sub-classification is associated with a behavior incident time classification.	For the behavior incident time classification, During School Hours: Period 1, Period 2, during lunch, between classes
Behavior Weapon Category	Defines a primary-level categorization or grouping of weapons used in a behavior incident. This setup list is referenced by the Behavior Weapons setup list.	Firearms
Behavior Weapon	Defines specific weapons used in behavior incidents. Each behavior weapon sub-category is associated with a behavior weapon category.	Rifle, knife

## Student Data Setup Lists

Setup List Name	Populate Setup List With	For Example
Birthdate Verification	Items that can be used to verify a student's birthdate.	Baptismal Record, Birth Certificate
Ethnic Category	Ethnic categories to be assigned to students and teachers.	For Tennessee only: I - American Indian or Alaskan Native P - Native Hawaiian or Other Pacific Islander B - Black or African American H - Hispanic or Latino W - White A - Asian
Federal Ethnicity	Federally-defined ethnicity options.	Hispanic or Latino Not Hispanic or Latino For Tennessee only: I - American Indian or Alaskan Native P - Native Hawaiian or Other Pacific Islander B - Black or African American H - Hispanic or Latino W - White A - Asian

Setup List Name	Populate Setup List With	For Example
Federal Race	Federal-defined race options.	American Indian or Alaska Native Asian Black or African American Native Hawaiian or Other Pacific Islander White
Home Language	Languages spoken by students, contacts, and teachers.	English, Spanish
Incomplete Participation Type	Options that indicate the extent to which a student participated in testing. For example, a student might not have participated in a test because they are a special education student.	
Lunch Status	Lunch status options.	Free or Vegetarian.
Registration Status	Status that may or may not allow enrollment. For example, a student's registration status won't allow enrollment if the status is set to Graduated or Not Registered.	Needs Address Verification.
Status Code	Student entry and withdrawal codes.	Enrolled or Transferred Out of District
Student Type	Types of students enrolled in the district. Not stored in Win School or Mac School	Mature Student

## Student Health Setup Lists

Setup List Name	Populate Setup List With	For Example
Health Ability to Play Sports	Indicates whether the student is able to participate in sports. This list is predefined.	Yes - without accommodations, Yes - with accommodations, No
Health Dental Observable Problem	A noticeable problem or concern, such as appearance, behavior, or complaints.	Ortho or braces needed, Teeth decay, Pain
Health Dental Referral Status	The status of the dental referral.	No telephone/unable to contact, Open, Ortho referral, Patient refused treatment, Patient seeing own dentist, Treatment complete, Treatment incomplete, Treatment terminated/no show
Health Dental Screen Result	The findings or recommendations from a dental screening.	No cavities, Fillings observed, Standing sealants, Decay/pain - follow-up care referred, Decay/no pain - follow-up care referred
Health Examination Category	The category of health examination.	Athletic program, First time enrollment, Required for registration, Standard Physical
Health Examination Type	The type of health examination.	Lead screening, TB screening, Chest x-ray, Body fat percentage, Blood/glucose test

Setup List Name	Populate Setup List With	For Example
Health Hearing Observable Problem	A noticeable problem or concern, such as appearance, behavior, or complaints.	Chronic ear infections, Does not respond when name called, Hearing equipment need
Health Hearing Screen Action	Specifies recommended action as a result of the screening test.	Re-Screen, Unable to instrument screen, Referred to nurse, Referred to audiologist
Health Hearing Screen Record Type	Names or number of screens available for a vision record.	Screening 1, Screening 2, Screening 3
Health Hearing Screen Result	The findings or recommendations from a hearing screening.	Pass and complete, Pass and incomplete, Fail - follow-up care needed from audiologist, Fail - follow-up care needed from physician
Health Hearing Test Device	Specifies the test device used in the instrument screening.	
Health Hearing Tested With	Specifies aids used during vision screening tests.	Unaided, Hearing Aid
Health Immunization Action	Indicates whether the immunization has been administered or is exempt. This list is predefined to include Administered. You cannot delete predefined items	Medical Exempt, Religious Exempt, Military Exempt, Illness Exempt, Parental Exempt
Health Immunization Dose Action	Indicates whether the dose has been administered or is exempt. This list is predefined to include Administered and Exempt - incorrectly administered. You cannot delete these predefined items.	Medical Exempt, Religious Exempt, Military Exempt, Illness Exempt, Parental Exempt
Health Immunization Exemption	The reason the student is exempt from the immunization.	Immune, Medical Exempt, Religious Exempt, Military Exempt, Illness Exempt, Parental Exempt
Health Immunization Modification Reason	Coded reason for each change from a predefined immunization schedule.	In hospital, Vaccine not available, Scheduled for future date
Health Medical Condition	A list of health medical conditions. You can include the health conditions defined by the International Center for Disease.	Diabetes, Asthma, Crohn's Disease, Allergy - milk products
Health Medication Route Type	Indicates the method used to administer the medication.	Oral, Topical, Shot
Health Non-Schedule Immunization Type	The type of immunizations, including state mandated immunizations.	Haemophilus, DTP/DTaP, Polio, Hepatitis B, Measles, Rubella, Influenza, Meningitis, Small Pox
Health Office Disposition	Indicates the result or action of the health office.	Return to class, Sent home, Remain in health office, Other
Health Office Examiner	The name of the person conducting examinations for health office visits.	The name of the school nurse



Setup List Name	Populate Setup List With	For Example
Health Pregnancy Outcome	The result of the pregnancy.	Healthy birth, Premature, Full Term, Stillborn, Abortion, Adoption
Health Pregnancy Special Accommodation	Specifies special accommodations that the student requires because of their pregnancy.	Physical education
Health Screen Action	Specifies recommended action as a result of the screening test.	Re-screen, Referred
Health Screen Payment Type	Specifies the type of payment used for the health screening.	Medicaid, Donated, Kidcare, Medical Card, Private insurance
Health Screen Result	Specifies the result of vision screening tests.	Pass, Fail
Health Screening Record Action	The recommendation for action.	Screening required, Referred without screening, Updated exam without screening
Health Screening Referred By	The person referring the student for a health examination or screening.	Parent, Teacher
Health Vision Observable Problem	A noticeable problem or concern, such as appearance, behavior, or complaints.	Crossed eyes, Signs of infection, Broken glasses
Health Vision Screening Record Type	Names or number of screens available for a vision record.	Screening 1, Screening 2
Health Vision Test Device	Specifies the test device used in the instrument screening.	Snellin Chart, Blackbird Vision System
Health Vision Tested With	Specifies aids used during vision screening tests.	Unaided, Glasses, Contact lenses
Health Yes/No	Provides Yes/No options that are used for several Student Health options. This list is predefined to include yes and no. You cannot delete those options, but you can add others.	Sometimes
Immunization Dose Name	The immunization dose number.	Dose 1, Dose, 2, Booster 1, Booster 2
Immunization Dose Modification	Specifies possible reason a dose schedule was modified.	Vaccine not available, Scheduled for a future date

## Test Management Setup Lists

For additional information about Test Management setup lists, see “Setting up Test Management” page 53.

Setup List Name	Populate Setup List With	For Example
Exemption Reason	Reasons why a test is waived for a student.	Parental request, Department of Education waiver
Norm Type	Types of norming that can be applied to a test.	State Norms.
Norming Period	The norming period for a test.	Fall.
Score Type	Ways in which test score can be expressed as numeric values.	Percentile, raw score, or stanine.

Setup List Name	Populate Setup List With	For Example
Skill	Skills that relate to subtests.	Reading Comprehension, Algebraic Reasoning
Subtest Code	Names of subtests administered within the district. Subtests should relate to a Test.	Verbal, Mathematics
Test Category	Types of tests.	College Placement, English Language Proficiency
Test Code	Names of tests administered within the district.	Scholastic Aptitude Test
Test Grade Level	Grade levels you might assign to a test.	
Test Subject Content	The subject area of the test.	
Test Use	The purpose of the test.	

## Working with items in setup list pairs

Setup list pairs are linked pairs of setup lists - made up of a parent and a child - that work together dynamically.

Once the structure of a setup list pair is defined, you can add items to the components of the setup list pair. At the same time that you add or edit the items, you can set up links with the items in the parent of the list you are modifying.

For example, you can create a setup list pair linking programs (parent) and program types (child). If the same program type item is used by more than one program, this feature allows you to create the appropriate links to allow the item to appear for both programs without having to create duplicate items. Conversely, if a specific program type applies only to one of the programs, you can set up the item so that it does not appear for the other program.

In this scenario, if you selected Program A from the Programs dropdown, the Program Types dropdown would contain three items: Classroom, Individual Study, and Online. If you selected Program B from the Programs dropdown, the Program Types dropdown would contain only two items: Individual Study and Online.

### Adding and editing setup list pair items

Items for setup list pairs are added separately from items for setup lists.

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup** page, under **District**, click **Setup List Pairs**.
- 4 On the **Setup List Pair** page, click the setup list pair component.
- 5 On the **<Component> Search** page (the name changes based on the component you previously selected), do one or more of the following:

To	Do this
Add a new item	From the <b>Actions</b> menu, click <b>Add &lt;item&gt;</b> .
Edit an existing item	In the <b>Search Results</b> panel, select the item to be edited and from the <b>Actions</b> menu, click <b>Edit &lt;item&gt;</b> .
Delete an existing item	In the <b>Search Results</b> panel, select the item to be deleted and from the <b>Actions</b> menu, click <b>Delete &lt;item&gt;</b> . Confirm the deletion and skip the remaining steps.

- 6 On the **Add/Edit Item** page, in the <Item> panel (the name changes based on the component you previously selected), specify the following:

Field	Description
Description	Enter the description of the item. This field defaults if an existing item has been selected.
Code	Enter the code used to identify the item. This field defaults if an existing item has been selected.
State Description	Enter the state description of the item. This field defaults if an existing item has been selected.
State Code	Enter the state code used to identify the item. This field defaults if an existing item has been selected.

**Note:** When the first item is added to the component, a new item is automatically added for N/A, which is the default value unless otherwise specified.

- ④ If another component has been designated as the parent of the component to which this item belongs, the <Parent Component> panel also displays a list of all items available in the parent component. Select all parent items that you want to associate this item with from the Available Items list and use the arrows to move them to the Selected Items list.

- 7 Click **OK**.

## Setup List Pairs in Chancery SMS

Currently, setup list pairs in Chancery SMS are related to Health.

## Student Health Setup List Pairs

Setup List Pair	Parent Name	Description
Health Office Visit	N/A	The reason the student went to the health office. This list is predefined with the following items: Illness, Injury, Medication administration.
Diagnosis	Health Office Visit	Indicates the diagnosis. This list is predefined and linked to the office visit type. This list contains the following items: Health Office Visit Type "Illness": <ul style="list-style-type: none"> <li>• Sore throat</li> <li>• Cold</li> <li>• Headache</li> <li>• Upset Stomach</li> <li>• Toothache</li> <li>• Cramp</li> <li>• Other</li> </ul> Health Office Visit Type "Injury": <ul style="list-style-type: none"> <li>• Bump/Bruise</li> <li>• Cut/abrasion</li> <li>• Sprain</li> <li>• Fracture</li> <li>• Other</li> </ul> Health Office Visit Type "Medication Administration": <ul style="list-style-type: none"> <li>• N/A</li> </ul>
Treatment	Health Office Visit	Indicates the treatment administered at the health office. This list is predefined and linked to the office visit type. This list contains the following items: Health Office Visit Type "Illness": <ul style="list-style-type: none"> <li>• Medication given</li> <li>• Ice</li> <li>• Rest</li> <li>• Drink more water</li> <li>• Other</li> </ul> Health Office Visit Type "Injury": <ul style="list-style-type: none"> <li>• Medication given</li> <li>• Ice</li> <li>• Dress wound</li> <li>• Other</li> </ul> Health Office Visit Type "Medication Administration": <ul style="list-style-type: none"> <li>• Medication given</li> </ul>

## Mapping grade levels

Mapping grades is useful if your district uses grade descriptions that are different from those used by the state, or if state codes are different from those used in Chancery SMS. You can specify a State Code and a State Description for each grade level. Map each grade to a code and description used for state reporting. At the district level, to customize grades on the Grade Levels page:

Changing descriptions is useful if you want to change how the grade appears in reports and in dropdowns throughout Chancery SMS. For example, you could describe Grade 2 as "2," "02", or "2- Primary." Your choice affects the Grade Level dropdown on the Detail Search page, the Grade dropdown on the Basic Search, and many other dropdowns.

Changes to descriptions immediately affect dropdowns in Chancery SMS, but are not displayed on the Grade Levels (setup list) page for School Setup until after data mapping occurs overnight.

**To map grade levels:**

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 On the **District Setup** page, under **Profile**, click **Grade Levels**.
- 3 Change the **Description**, **State Code**, or **State Description** for any grade.
- 4 Click **Save**.



# Setting up transcripts

A transcript is an official document that summarizes students' academic history. Often, transcripts summarize secondary school performance for students applying to college or university.

The steps to set up transcripts are as follows:

- Choose the columns that contain grade information and what their names are, such as S1 for Semester 1 and S2 for Semester 2. The district can choose up to four columns for grade information. See "Name the transcript columns" page 33.
- Choose the specific content of the transcript, including the subject areas that are shown, the tests that the person printing the transcript can choose to show, and specific details such as whether the student's address or the principal's name is shown. See "Define transcript content" page 34.
- Choose whether to add custom fields to store historical data. See "Consider customizing historical data" page 37.
- Inform the schools that district transcript setup is complete. See "Ask schools to finish the setup" page 37.

## About transcripts

In Chancery SMS, you can print student transcripts for students who have historical information on record, meaning that information has been:

- manually entered on the Historical student pages. See the *Chancery SMS Grading Setup Guide*.
- imported as historical data using Import/Export. See the *Chancery SMS Import/Export Guide*.
- entered in a previous year and converted to historical records through Year-End Processing. See the *Chancery SMS 7.3 Administration Manual*.

Transcripts in Chancery SMS contain only historical information that is entered or imported; they do not contain current year data.

Transcripts can include the following information: school information, courses, course grades and grade averages, attendance, scores on state or college exams, credits, student information, and graduation information. You can group transcripts by school year (e.g., 2006, 2007, 2008), or by subject area.

Printing transcripts is like printing other reports in Chancery SMS. For information about printing transcripts, see the *Chancery SMS 7.3 Administration Manual*.

## Name the transcript columns

Name the columns that will display grades on every transcript in the district. Transcripts can have up to four columns for grade items, plus optional columns for credits and absences.

For each column on the transcript, you also need to indicate whether credit is awarded for the item and whether the item is included in cumulative GPAs.

To add, edit, and delete transcript columns, you need a role with the **Transcript Columns** permission set to **Delete**. By default, the Administrator role has this permission.

To name the columns of transcripts:

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 On the **District Setup** page, under Transcript Options and Permanent Record Setup, click **Transcript Columns**.
- 3 On the **Transcript Columns** page, add or edit the **Transcript Column** and a **Description** by clicking in the rows.
- 4 From the **Award Credit** dropdown, choose one of the following:

Option	Effect
No	Credit is not awarded for the grade item at any school. When schools set up columns on the Transcript Grade Items page, the Award Credit dropdown contains only one option—No.
Yes	Credit is awarded for the grade item at all schools. When schools set up columns on the Transcript Grade Items page, the Award Credit dropdown contains only one option—Yes.
School-Defined	The school can decide whether to award credit for this grade item. When schools set up columns on the Transcript Grade Items page, the Award Credit dropdown contains two options—Yes and No.

- 5 From the **Use in Cum GPA** dropdown, choose one of the following:

Option	Effect
No	This grade item is not used in cumulative GPAs at any school. When schools set up columns on the Transcript Grade Items page, the Use in Cum GPA dropdown contains only one option—No.
Yes	This grade item is used in cumulative GPAs at all schools. When schools set up columns on the Transcript Grade Items page, the Use in Cum GPA dropdown contains only one option—Yes.
School-Defined	The school can decide whether to include this grade item in cumulative GPAs. When schools set up columns on the Transcript Grade Items page, the Use in Cum GPA dropdown contains two options—Yes and No.

- 6 Click **OK**.

## Define transcript content

Define the standard elements that will appear on every transcript, including:

- the subject areas that are shown.
- the tests that the person printing the transcript can choose to show.
- specific details such as whether the student's address or the principal's name is shown.

To set transcript options, you need a role with the **Transcript Options** permission set to **Edit**. By default, the Administrator role has this permission.



**To define the content of transcripts:**

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 On the **District Setup** page, under Transcript Options and Permanent Record Setup, click **Transcript Options**.
- 3 On the **Transcript Options** page, in the **Transcript Name** field, enter the name shown on the transcript.
- 4 Under Transcript Header, select the items that appear in the header of transcripts.

Field	Description
School District	Select this to include the name of the district between the school name and the transcript name.
College Board Campus Code (CBCC)	Select this to show the school's CBCC number in the School Information section of the transcript. The CBCC number is assigned to each school by the college board. Students present the number when they are evaluated in any of the college board exams.
Student Social Security Number	Select this to show the student's social security number in the Student Information section of the transcript.
High School Enrollment Date	Select this to show the student's high school enrollment date in the Student Information section of the transcript.
Student Address	Select this to show the student's address in the Student Information section of the transcript.
School Principal Name	Select this to show the principal's name in the School Information section of the transcript. The principal name shown is from the school that the student is enrolled in. If the student is not enrolled in any school, the school is the one with the most recent historical year.
Student Parent/Guardian	Select this to show the name of the student's parent or guardian in the Student Information section of the transcript.

- 5 Under Course Content and Summary Information, select the information to display on the transcript.

Field	Description
Course Number	Select this to show the number of each course, in addition to the course name. This comes from the Course Number field on the Edit Historical Course page.
Course Type	Select this to show the type of each course, such as "H" for honors. This comes from the Course Type field on the Edit Historical Course page.
Credits Earned	Select this to show the credits the student earned for each course. Selecting this option adds a credits column labeled "Cr" to the Course Information section of the transcript. This comes from the Credits Earned column on the Edit Historical Course page.
Yearly Credits Earned	Select this to show the credits the student earned each year. This comes from the Yearly Credits Earned field on the Edit Historical Year page.
Course Absences	Select this to show the number of absences the student had in each course. Selecting this option adds an absences column labeled "Abs" to the Course Information section of the transcript. This comes from the Unexcused Absences field on the Edit Historical Course page.

Field	Description
Yearly Absences	Select this to display the number of absences the student had each year. This comes from the Yearly Absences field on the Edit Historical Year.
Yearly GPA	Select this to display the grade average for each year. This comes from the Unweighted GPA field on the Edit Historical Year page.

- 6 Under Subject Areas, choose the subjects area that transcripts include. Only courses with these subject areas are shown on transcripts.
- 7 Under Standardized Tests, determine the standardized tests that can be shown on transcripts, the order that they appear, and the exact score that is used.
  - ④ Selecting tests does not mean that they will always be shown on transcripts. It means that the tests appear in the Print Options dialog when transcripts are being printed, and the person printing the transcript can choose whether to include the test.
- 8 From the **Test Score Field to Print** dropdown, select the field that is used as the source of the test score. For example, options include Raw, Scaled, Standard, and so on.
- 9 Under Graduation Information, select the overall graduation information that is shown on transcripts.

Field	Description
Coursework Completion Date	Select this to show the date that the student completed coursework required for graduation. This comes from Coursework Completion Date field on the Historical page.
Grant Eligibility	Select this to show whether the student is eligible to receive a grant from the state. This comes from the Grant Eligibility field on the Historical page.
Credits Information	Select this to show the total credits that the student earned for all years, as well as which credits were state credits and which were local credits. This information comes from the Total Credits (Earned, State, and Local) fields on the Historical page.
Cumulative GPA	Select this to display the student's unweighted grade average for all years. This comes from the Cumulative GPA (Unweighted) field on the Historical page.
Cumulative Weighted GPA	Select this to display the student's weighted grade average for all years. This comes from the Cumulative GPA (Weighted) field on the Historical page.
Ranking Information	Select this to display the student's class rank, the number of students in the class, and the date that the ranking was done. This comes from the Class Rank, Out Of, and Class Rank Date fields on the Edit Historical Year page for the most recent historical year.

- 10 Under General Information, select the other information that appears on transcripts.

Field	Description
Date of Signature	Select this to display an area for the official who signs the transcript to write a date. Select this only if you also select Official Signature.
Official Signature	Select this to display an area for an official to sign the transcript.

Field	Description
Footer Information	Select this to display footer information, such as the student's name, the page number and total pages, and the date that the transcript is printed.
Grading Tables	Select this to display a legend with the grading table. If you select this, enter the text, such as: A - 90-100E - Excellent B - 80-89S - Satisfactory C - 75-79I - Needs Improvement D - Below 70U - Unsatisfactory
District Message	Select this and enter a message to display a district-wide message on all transcripts, such as: August 19 is the last day to change electives. A message from the school can also be added when transcripts are printed.

11 Click OK.

## Consider customizing historical data

You can collect custom historical data by adding panels to these pages:

- Historical page
- Add/Edit Historical Year
- Add/Edit Historical Course

Determine whether you want to collect custom data before you import or start entering historical data. For more information, see the *Chancery SMS cTools Guide*.

## Ask schools to finish the setup

Ask the school administrators to complete the transcript setup by naming the historical grade items for the school and linking them to the transcript columns you set up.

Until the schools define historical grade items, you cannot enter grades for historical courses for students at those schools on the Add/Edit Historical Course page.

For more information about setting up transcripts at schools, see the "Setting Up Transcripts (school level)" section in the *Chancery SMS Grading Setup Guide*.



# Setting up the course catalog

Schools that use the elementary school scheduling method use the subject framework containing subjects and subject elements. Schools that use the secondary school scheduling method use courses.

The district course catalog, including all subjects (the subject framework) and courses, is set up at the district. To make subjects and courses available to schools, the district assigns them to schools. Each school has its own distinct course catalog containing the subjects and courses assigned by the district. The district can assign a subject or course to one or more schools. When a subject or course is changed at the district, the subject or course is changed in all schools that use that subject or course.

Because the district course catalog is set up and maintained at the district, district-level fields cannot be changed by schools. Any additions or changes to district-level fields in subjects or courses must be done by the district.

Some secondary school course fields that are initially set up at the district can be changed at the school.

While schools can view the district course catalog containing all the subjects and courses in the district, each school uses the subject framework or courses assigned by the district to build its schedule.

Schools using the elementary school scheduling method can use the **Edit Subject** page to change how each subject is scheduled. All other fields in the subject framework are read-only for school users.

Schools using the secondary school scheduling method can use the **Course Grading** page (**Grading > Course List > Course Grading**) to specify the Grading Period Set. All other course fields are either read-only or do not appear for school users.

For information about using the course catalog during the scheduling process, see the *Chancery SMS Scheduling Guide*.

If necessary, you can import course information into the course catalog. For information about importing, see the *Chancery SMS Import/Export Guide*.

## Permissions to work with the course catalog

To work with the Course Catalog, you need the following permissions:

To	You need this permission	Set to
Set up or change the course catalog	District > Assign Courses to Schools	Yes
	District > Course Catalog	Edit or Delete
	School Setup > Subject Framework / Course Catalog	Edit or Delete

To	You need this permission	Set to
Define course catalog setup lists	District > Chancery SMS Course Subject Areas	Edit or Delete
	Setup Lists > Chancery SMS Course Type (Under Program/ Course Data)	Merge or Delete
	Setup Lists > Chancery SMS Department (Under Program/ Course Data)	Merge or Delete
	Setup Lists > Chancery SMS Room Type (Under School/ District Data)	Merge or Delete

## Overview of building the course catalog

The district builds the district course catalog by creating the subject framework and courses. Then the district assigns subjects to schools that use the elementary school scheduling method and publishes the course catalog to schools that use the secondary school scheduling method.

The school takes the subjects or courses assigned or published by the district and uses them to build the school schedule. For more information, see the *Chancery SMS Scheduling Guide*.

Building the course catalog involves the following steps. Some steps are performed by the district administrator and some by the school administrator.

- 1 The district administrator creates and populates the course catalog setup lists. For more information, see “Ensuring consistent data” page 15.
- 2 The district administrator sets up the subject framework and courses and assigns subjects and courses to schools. This chapter covers this step.
- 3 The school administrator schedules students into the subjects or courses for their school. For more information, see the *Chancery SMS Scheduling Guide*.

## Setting up the subject framework

Schools using the elementary school scheduling method use a subject framework containing subjects and subject elements, which are definitions of subjects taught at elementary schools.

The subject framework, including all subjects and subject elements, is set up at the district. Even if the district assigns the same subject to multiple schools, each school has its own distinct subject framework.

When a subject or course is changed at the district, the subject or course is changed in all schools that have that subject or course.

For more information, see the *Chancery SMS Scheduling Guide*.

### Creating subjects for the subject framework

After determining what subjects and associated subject elements are taught in your district during the school year, set up the subject framework by creating generic subjects and assigning subject elements, where needed.

Generic subjects are the main building blocks of your subject framework. Language Arts, Math, Social Studies, Art, and Physical Education are all considered generic subjects. Generic subjects are designated as either specialty or core. For example, Language Arts is typically a core subject, while Art is often designated a specialty subject.

For grading purposes, you can break generic subjects down into several subject elements. For example, Language Arts might be broken down into Spelling, Reading, and Writing. Both the subject (Language Arts) and the subject elements (Spelling, Reading, and Writing) appear on report cards with grades assigned.

A subject is an instance of a generic subject associated with a grade level. For example, Math 2 (Math for Grade 2) is a subject associated with the generic subject called Math. For reporting purposes, each subject has its own subject number. For each grade in which a subject element is taught, you can also record a subject element number.

**To create the subject framework:**

- 1 Log on as a district administrator.
- 2 In the control bar under **Admin**, click **District Setup**.
- 3 In the District section, click **Course Catalog**. Under Step 2, click **Subject Framework**.
  - ④ The **Subject Framework** page lists the core and specialty generic subjects taught in your district, along with the associated subject elements.
- 4 To add a subject to the framework, select an existing subject. From the **Actions** menu, click **Add Generic Subject**, and indicate whether you want to add the new subject before or after the selected subject.

OR

To edit a generic subject, click the generic subject name.

- 5 On the **Add Generic Subject** or **Edit Generic Subject** page, enter the following information:

Field	Description
Generic subject name	Enter a generic subject name, such as Language Arts.
Short name	Enter a short name, such as LA, as it appears on the Grades pages.
Designation	Select core or specialty.
Grade level	Select the grade levels that teach this subject.

- 6 If applicable, expand the Subject Elements section.
- 7 In the Subject Element Name column, enter all the subject elements, and select the grade levels for each subject element.
  - ④ For example, Language Arts is often broken down into subject elements such as Spelling, Reading, and Writing. However, these subject elements might not apply to all grade levels.
- 8 Click **OK**. The subject is added to the framework, along with the subject elements you defined.

**To change the display order:**

- 1 Make sure you are using a role with district scope.
- 2 On the **Subject Framework** page, or **Add Generic Subject**, or **Edit Generic Subject** page, from the **Edit** menu, click **Change Order**.

- 3 On the **Change Order** page, click to highlight a subject element, and click the up and down arrows to change the display order.
- 4 Click **OK**.

## Deleting subjects and subject elements

If you want to permanently delete a subject, make sure that subject is not assigned to any school. For information about un-assigning a subject to a school, see “Viewing the subjects assigned to a school” page 43.

### To delete a generic subject:

- 1 Make sure you are using a role with district scope.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 In the District section, click **Course Catalog**. Under Step 2, click **Subject Framework**.
- 4 On the **Subject Framework** page, select the generic subject that you want to delete. From the **Actions** menu, click **Delete Generic Subject**.
- 5 Click **OK**.

### To delete a subject element:

- 1 Make sure you are using a role with district scope.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 In the District section, click **Course Catalog**. Under Step 2, click **Subject Framework**.
- 4 On the **Subject Framework** page, click the generic subject with the subject element you want to delete.
- 5 In the **Edit Generic Subject** page, select the subject elements you want to delete. From the **Actions** menu, click **Delete Row**.
- 6 Click **OK**.

## Assigning elementary school subjects to schools

You can assign subjects to one or more schools.

When you assign a subject or a course to a school, there might be a short delay before the subject or course appears on the **Subject Framework** or **Course List** page at the school.

### To assign subjects to schools using the Assign to Schools page:

- 1 Make sure you are using a role with district scope.
- 2 In the control bar under **Admin**, click **District Setup**.
- 3 In the District section, click **Course Catalog**. Under Step 2, click **Subject Framework**.
- 4 On the **Subject Framework** page, select the subject you want to assign. From the **Actions** menu, click **Assign to Schools**.
- 5 To search for a school, in the **School Name** field, enter part of the school name, or from the **Category** dropdown, select a school category. Click **Search**.
  - ① The school name is case sensitive.
  - ① To list all schools that use elementary school scheduling, leave both **School Name** and **Category** blank, and click **Search**.
- 6 In the **Available Schools** list, select the schools, and click the right-arrow to move them to the **Assign to Schools** list.
- 7 Repeat the steps 5 and 6 until the subject is assigned to all applicable schools.
- 8 Click **OK**.



## Viewing the subjects assigned to a school

You can use the [View School Assignment](#) page to display the subjects assigned to a specific school. You can also use this page to assign or unassign subjects to schools.

To assign subjects to schools using the [View School Assignment](#) page:

- 1 Make sure you are using a role with district scope.
- 2 In the control bar under **Admin**, click **District Setup**.
- 3 In the District section, click **Course Catalog**. Under Step 2, click **Subject Framework**.
- 4 On the **Subject Framework** page, click the generic subject name link of the subject you want to work with.
- 5 On the **Edit Generic Subject** page, from the **Actions** menu, click **View School Assignment**.
  - ④ On the **School Assignment** page, the **School Assignment** list shows the schools that have been assigned this subject.
- 6 To assign this subject to a school, select the school in the **Available Schools** list and click right-arrow to move it to the **School Assignment** list.
- 7 Click **OK**.
  - ④ To remove a subject from a school, select the school in the **School Assignment** list and click the right-arrow to move it to the **Available Schools** list.

## Setting up courses

Schools that use the secondary school scheduling method use courses for scheduling. For more information see the *Chancery SMS Scheduling Guide*.

The course catalog and its courses are set up at the district. The courses are then assigned to schools. Even though the district can assign the same course to multiple schools, each school has its own distinct list of courses.

For information about how changing the course catalog at the district affects schools, see “Making changes to a course at the district” page 51.

## Defining course catalog setup lists

Before you set up the course catalog, make sure you have defined the following setup lists:

Setup List Name	Populate Setup List With	For Example
Chancery SMS Subject Area	Subject area for secondary school scheduling method course catalog	Communications, Fine Arts, Science
Chancery SMS Course Type	Course type for secondary school scheduling method course catalog	Academic or non-academic
Chancery SMS Department	Departments for secondary school scheduling method course catalog	Math, Social Studies
Chancery SMS Room Type (if you want to specify rooms for courses)	Types of rooms where classes are taught	Classroom or Lab

Changes to these setup lists apply to both the active and planning calendar, including all planning schedules in the planning calendar.

For information about setup lists, see “Working with setup lists” page 15.

To define course catalog setup lists:

- 1 Make sure you are using a role with district scopes.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 In the District section, click **Course Catalog**.
- 4 On the **Course Catalog Home** page:

To	Do this
Define subject areas	<ol style="list-style-type: none"> <li>1 Under Step 1, click <b>Chancery SMS Subject Area</b>.</li> <li>2 From the <b>Actions</b> menu, click <b>Add Rows</b>.</li> <li>3 Enter a code and description for the subject area.</li> <li>4 To change the display order, from the <b>Edit</b> menu, click <b>Change Order</b>. Then click a subject area and use the up and down arrows to change its order. Click <b>OK</b>.</li> <li>5 To return to the <b>Course Catalog Home</b> page, click <b>OK</b>.</li> </ol>
Define course types or departments	<ol style="list-style-type: none"> <li>1 Under Step 1, click <b>Chancery SMS Course Types or Chancery SMS Departments</b>.</li> <li>2 Click <b>Add</b>.</li> <li>3 Enter the course type or department description and short code, and click <b>OK</b>.</li> <li>4 To return to the <b>Course Catalog Home</b> page, close the window.</li> </ol>
Define room types	<ol style="list-style-type: none"> <li>1 Under Step 1, click <b>Chancery SMS Room Types</b>.</li> <li>2 Click <b>Add</b>.</li> <li>3 Enter a description and short code for the room type.</li> <li>4 Enter a state description and state short code (optional).</li> <li>5 Click <b>OK</b>.</li> <li>6 To return to the <b>Course Catalog Home</b> page, close the window.</li> </ol>

## Accessing the course list page

The following table shows the ways you can access the **Course List** page and what is available.

Log on as	Path to access Course List page	Description
District administrator	District Setup > Course Catalog > Courses	<ul style="list-style-type: none"> <li>Available in both active and planning calendars.</li> <li>You can modify all district-level fields. You cannot modify school-specific fields, which are either dimmed or not displayed.</li> </ul>
School administrator	School Setup > Courses	<ul style="list-style-type: none"> <li>Available in both active and planning calendars.</li> <li>Schools can only modify school-specific fields.</li> </ul>
	Scheduling > Course Setup	<ul style="list-style-type: none"> <li>Available in planning calendar only.</li> <li>Schools can only modify school-specific fields.</li> </ul>
	Scheduling > Course Offerings & Meeting Patterns	<ul style="list-style-type: none"> <li>Available in planning calendar only.</li> <li>Schools can only modify school-specific fields.</li> <li>The <b>Course List &gt; Course Offerings</b> page is only available in the planning calendar.</li> </ul>
	Grading > Courses	<ul style="list-style-type: none"> <li>Available in active calendar only.</li> <li>Schools can only modify school-specific fields.</li> </ul>
	District Setup > Course Catalog > Courses	<ul style="list-style-type: none"> <li>Available in both active and planning calendars.</li> <li>All fields are read-only.</li> <li>This is the same as accessing this page from the district, except that all fields are read-only.</li> </ul>

## Setting up the course list

Create the courses that will form the course list for the district. You can assign each course to one or more schools that use the secondary school method of scheduling.

To create courses:

- 1 Make sure you are using a role with district scope.
- 2 Navigate to the **Course List** page.
  - ④ For information about accessing the **Course List** page, see “Accessing the course list page” page 45. For information about searching for courses on the **Course List** page, see “Searching for courses” page 49.
- 3 To edit a course, click the course number.

OR

To add a course, from the **Actions** menu, click **Add Course**. The **Course Detail** page opens.

Field or Section	Description
Course Number	<p>The course number cannot be changed once the record is saved.</p> <p>The course number must be unique; no two courses in the entire district can have the same course number. You cannot re-use course numbers from previous years. You can include alphabetic characters in the course number. The course name is case sensitive, so course number 101A and 101a are different. You cannot use commas in the course number.</p> <p>For Tennessee only: For EIS reporting, this number cannot exceed 9 characters</p>
Course State Number	If required, enter the state-assigned course number.
Course Name	Enter the course name.
Course Short Name	Enter a short name of up to 10 characters.
Course Alternate Name	If you wish, enter an alternate name for the course.

Field or Section	Description
Course Description	Enter the course description.
Course Subject Area	Select the subject area that has been set up in Chancery SMS Subject Area.
Course Type	Select the course type that has been set up in Chancery SMS Course Type.
Recommended Grade Levels	Select the grade levels recommended for this course. These are the grade levels set up on the District Setup > Grade Levels page. At the school, this field is read-only and only shows the grades taught at that school.
Course Is	Specify whether the course is required, an elective, or a study hall course. Study hall courses cannot collect grades.
Collect Attendance	Indicates whether attendance is collected for this course. If attendance is not collected, such as some study halls, deselect this checkbox.
Inactive	You can make courses inactive for now; and then make them active later, for example, in the next term. Or you can make a course inactive in preparation for deleting it. You cannot assign an inactive course to schools. If a course is already assigned to schools, but no classes have been created for the course, making it inactive unassigns the course from schools. Making a course inactive does not change any classes or schedules that have been set up in the schools.
Copy	When you are setting up courses, you can use the Copy link to the right of the section heading to copy course information and just change the fields that are different. You can copy courses only before they are published to schools.

- 4 Click **Save**.
- 5 To specify course scheduling, in the control bar, click **Course Scheduling**.
  - ④ Master Schedule Builder uses the settings on this page to build the schedule for your school. The Copy feature is available to both district and school users.

Field or Section	Description
<b>General Scheduling section</b>	
Scheduling load	This value is summed with the scheduling load values for other courses that a student requests to determine whether the student has a full course load for the year. This field is also used to determine a teacher's scheduling load. The total scheduling load for a student or teacher cannot exceed 99.99. If you set the scheduling load for course to 1.0, students could take 99 courses before they reach the maximum allowed. If you set the scheduling load for courses to 20, students could only take four courses before they reach the maximum allowed.

Field or Section	Description
Maximum Students Minimum Students Optimal Students	The maximum, minimum, and optimal number of students that the class for this course should have. The values set at the district for this course become the initial values for these fields at the school. If the district changes these values after the course has been published, the changes are not reflected in schools.
<b>Prerequisites &amp; Corequisites section</b>	
Prerequisites and corequisites	You can specify one or more prerequisite and corequisite courses for this course. You can enter prerequisites and corequisites either by using the Course Search section to search for courses, select the course, and click Add to Prereqs or Add to Coreqs or typing the course number in the Course number(s) field and clicking Add to Prereqs or Add to Coreqs. Prerequisites and corequisites you have selected are listed in the Selected Prerequisites & Corequisites section. To delete a prerequisite or corequisite, select it and click Remove. For information about the effects on schools when the district changes prerequisites and corequisites, see "Changing prerequisites and corequisites at the district" page 52.
Copy	When you are setting up courses, you can use the Copy link to the right of the section heading to copy course information and just change the fields that are different. You can copy courses only before they are published to schools.

- 6 Click Save.
- 7 To specify course grading, in the control bar, click **Course Grading**.
  - ④ This page does not apply to study hall courses. Study hall courses do not collect grades.
  - ④ Schools can modify school-specific fields and view district-level fields. The Copy function is available to both district and school users.

Field	Description
Collect Grades For This Course	Specifies whether grades are collected for the course. If grades are not collected for this course, deselect this checkbox. Study hall courses cannot collect grades.
Maximum Credits	Enter the maximum number of credits a student can achieve for this course. You can enter 0 for courses that do not award credits.
Allow Partial Credits	If a student can achieve partial credits for this course, select this checkbox. If this checkbox is not selected, you can only specify one grade item at which point credits can be achieved.
Exclude from GPA	If this course is included in any GPA calculations, deselect this checkbox.

Field	Description
Adjustment factor	The Adjustment Factor alters the numeric value of the grade that is used in GPA calculations, typically to give more weight to honors courses that are more challenging than other courses. The idea is that a grade achieved in a difficult course is worth more than the same grade achieved in a relatively easier course. For example, assume you set the adjustment factor to Multiply by 1.5 for Honors English and the school uses a letter grade grading table to mark its courses. If a student gets a B in the course and the grading table indicates that a B has a numeric value of 2.5, the adjusted grade is 2.5 x 1.5, which equals 3.75. The GPA calculation would use the adjusted 3.75 value, not the original 2.5. The student's GPA would be higher than if the Honors English course did not have an Adjustment Factor.
Copy	When you are setting up courses, you can use the Copy link to the right of the section heading to copy course information and just change the fields that are different. You can copy courses only before they are published to schools.

- 8 Click **Save**.
- 9 To assign this course to schools, in the control bar, click **School Assignment**.

Field	Description
School Name	Enter the first letters of a school name to search for that school. The school name is case sensitive. Enter upper and lower case letters correctly.
Category	To search by a category, select the category, then click Search.

- 10 Select the schools in the **Available Schools** list, then click the right-arrow to move them to the **School Assignment** list.
  - ④ Continue to search for schools and assign courses until the course is assigned to all applicable schools.
- 11 Click **Save**.
  - ④ You can also assign courses to schools on the **Course List** page by using **Assign to Schools** from the **Actions** menu. For more information, see "Assigning secondary school courses to schools" page 51.

#### To change the display order on the **Course List** page:

- 1 Make sure you are using a role with district scope.
- 2 On the **Course List** page, from the **Edit** menu, click **Change Order**.
- 3 From the **Subject Area** dropdown, choose a subject area to list its courses.
- 4 Click a course, and click the up or down arrow to change its position in the list.
- 5 Click **OK**.

#### Deleting a course

A course must be inactive before you can delete it. For information about making a course inactive, see "Setting up the course list" page 45.

#### To delete a course:

- 1 Make sure you are using a role with district scope.
- 2 On the **Course List** page, select the course you want to delete.

- 3 From the **Actions** menu, click **Delete Course**. Click **OK**.

## Searching for courses

A Course Search panel is available on the **Course List** page (**District Setup > Course Catalog > Courses**) and enables you to find specific courses. The Course Search panel provides two ways to search for courses: Basic and Detail.

A basic search allows you to enter up to three search criteria and the search results return records that match all specified criteria. A Detail search provides more flexibility. You can define multiple criteria and then specify whether records must match all the specified criteria or any of the criteria.

### To open the Course Search panel:

- 1 Make sure you are using a role with district scope.
- 2 Navigate to a page that has a Course Search panel, such as the **Course List** page, and click the down arrow beside the Course Search title.
- 3 On the Course Search panel, search for courses.

### To use a previously defined search criteria:

- 1 Make sure you are using a role with district scope.
- 2 Navigate to a page that has a Course Search panel.
- 3 From the List dropdown, select the search criteria that you want to use.

### To display inactive and active courses:

- 1 Make sure you are using a role with district scope.
- 2 In the control panel, under **Admin**, click **District Setup**.
- 3 On the **District Setup** page, under **District**, click **Course Catalog**.
- 4 On the **Course Catalog** page, under **Step 3**, click **Courses**.
- 5 From the **Edit** menu, select **Show Inactive Courses**.

## Performing a basic course search

In a Basic course search, you can enter up to three search criteria and returned records match all defined criteria.

Each criteria has three parts:

- a field name
- an operator
- a value

### To perform a Basic search:

- 1 Make sure you are using a role with district scope.
- 2 Navigate to a page with a Course Search panel and open the Course Search panel.
- 3 From the left dropdown in the first row, select a field name.
- 4 From the middle dropdown in the first row, select an operator.

Operator	Finds records where the field...
Contains	Includes the value anywhere in the field
Does not equal	Is anything but the value
Ends with	Ends with the value
Equals	Exactly matches the value
Is empty	Does not contain a value

Operator	Finds records where the field...
Is not empty	Contains any value
Starts with	Starts with the value

- 5 In the right field in the first row, enter a value, if applicable.
- 6 Repeat steps 3 to 5 for the second and third rows (optional).
- 7 Click **Search**.

## Performing a detail course search

In a Detail course search, you can enter multiple search criteria and specify whether returned records match all defined criteria or any defined criteria.

Each criteria has three parts:

- a field name
- an operator
- a value

To perform a Detail search:

- 1 Make sure you are using a role with district scope.
- 2 Navigate to page with a Course Search panel and open the Course Search panel.
- 3 Click the **Detail** tab.
- 4 From the left dropdown in the first row, select a field name.
- 5 From the middle dropdown in the first row, select an operator.

Operator	Finds records where the field...
Contains	Includes the value anywhere in the field
Does not equal	Is anything but the value
Ends with	Ends with the value
Equals	Exactly matches the value
Is empty	Does not contain a value
Is not empty	Contains any value
Starts with	Starts with the value

- 6 In the right field in the first row, enter or select a value from the dropdown, if applicable.
- 7 Click **Add Criteria**.
- 8 To add more criteria to your search, repeat steps 3 to 6 (optional).
- 9 Select whether you want your search to match **All Criteria** or whether you want to match **Any Criteria**.
  - ① To remove a criteria from the search, highlight the criteria and click **Remove**.
- 10 Click **Search**.
  - ① The **Search Results** page displays a list of possible matches. If there are many courses, you may need to scroll or click **Prev/Next** to find the course you're looking for.
  - ① If you're not satisfied with your search results or no records are found, click **Back** to return to the previous page, modify your search criteria, and then click **Search**.



## Assigning secondary school courses to schools

After you have defined courses, you can assign them to schools. You can assign a course to one or many schools. You cannot assign inactive courses.

When you assign a subject or a course to a school, there might be a short delay before the subject or course appears on the **Subject Framework** or **Course List** page at the school.

**To assign courses to schools:**

- 1 Make sure you are using a role with district scope.
- 2 In the control bar under **Admin**, click **District Setup**. In the District section, click **Course Catalog > Courses**.
  - ④ The **Course List** page shows all the courses that you have set up.
- 3 If needed, use the **Course Search** section to search for specific courses.
  - ④ You can also use the **List** or **Group By** dropdowns to view specific courses or to view courses by subject area or course type.
- 4 Select the courses you want to assign. From the **Actions** menu, click **Assign to Schools**.
- 5 To search for a school, in the **School Name** field, enter part of the school name, or from the **Category** dropdown, select a school category. Click **Search**.
  - ④ The school name is case sensitive. Enter upper and lower case letters correctly.
  - ④ To list all schools that use secondary school scheduling, leave both **School Name** and **Category** blank, and click **Search**.
- 6 In the **Available Schools** list, select the schools, and click the right-arrow to move them to the **Assign Schools** list.
- 7 Click **OK**.

## Viewing the courses assigned to a school

District users can display all the courses that have been set up, or display the courses assigned to a specific school. This allows you to quickly see which courses have been assigned to a school.

**To view courses:**

- 1 Make sure you are using a role with district scope.
- 2 In the control bar under **Admin**, click **District Setup**.
- 3 In the District section, click **Course Catalog**. Under Step 3, click **Courses**.
- 4 From the **Filter By** dropdown, select the name of the school.

## Making changes to a course at the district

Making changes to courses at the district has different effects on courses at schools depending on when you make the change and which fields you change. To avoid unexpected results, do not make changes to courses at the district in the active calendar.

If the course catalog is not published, changing the course catalog in the planning calendar does not affect schools.

If the course catalog is published, whether the school is using the planning or active calendar, course requests and schedules that have been created are not affected by district changes to the course catalog. New course requests and schedules, as well as changes to course requests and schedules, are constrained by the changed course catalog.

Making changes to the course catalog in the planning calendar does not affect the active calendar, and vice versa.

### **Changing prerequisites and corequisites at the district**

If the district changes a course's prerequisites or corequisites, schools are affected in the following ways depending on when the change takes place:

- If courses have not been published to schools, there is no effect on schools.
- If courses have already been published to schools but are still in the planning calendar, course requests and schedules that have been created are not affected. Any changes to course requests and schedules or new course requests and schedules are constrained by changed prerequisites and corequisites.
- If the courses are in the active calendar, course requests and schedules that have been created are not affected. Any changes to course requests and schedules or new course requests and schedules are constrained by changed prerequisites and corequisites.

# Setting up Test Management

Use Chancery SMS to record the results of any district or regional test, state-wide and national tests, and college entry exams.

**Note:** The legacy “Test Scores” component continues to be available in Chancery SMS. A district preference setting is available to disable the legacy test component. For more information about setting district preferences, see the Chancery SMS Administration Manual.

Capturing test results in Chancery SMS using the Test Management feature area is a three-part process:

- 1 The district sets up a definition for each test, which includes what subtests and skills are included, what score types are captured, and what grade levels can take the test and subtests.
- 2 Once the tests have been defined, the district also sets up test sessions, which group together test results in ways that are meaningful for reporting purposes. For high-stakes tests, such as K-12 assessment tests mandated by the state, the district can set up a test session for each major offering of the test; for low-stakes tests that are administered on a daily basis, the district can set up a single test session that spans the entire calendar.
- 3 Finally, once students have taken the test, their results are entered into Chancery SMS. The test definitions determine what information is captured for each test, and the test sessions group together students who have taken the test under the same set of circumstances. For details about entering student test results once setup is complete, the *Chancery SMS 7.3 Administration Manual*.

## Permissions to set up tests and test sessions

To set up tests and test sessions, you must have the following permissions:

To	You need this permission	Set to
Add items to test-related setup lists	<ul style="list-style-type: none"> <li>• Test Code</li> <li>• Test Category</li> <li>• Grade Level</li> <li>• Score Type</li> <li>• Subtest Name</li> <li>• Skill Name</li> <li>• Test Use</li> <li>• Test Subject Content</li> <li>• Norm Type</li> <li>• Norming Period</li> <li>• Language</li> <li>• Exemption Reason</li> </ul>	<ul style="list-style-type: none"> <li>• Merge</li> <li>• Merge</li> <li>• Merge</li> <li>• Merge</li> <li>• Merge</li> <li>• Merge</li> <li>• Merge</li> <li>• Merge</li> <li>• Merge</li> <li>• Merge</li> <li>• Merge</li> <li>• Merge</li> </ul>
Add, change, or delete tests and test sessions	<ul style="list-style-type: none"> <li>• Define Tests</li> </ul>	<ul style="list-style-type: none"> <li>• Delete</li> </ul>
Import student test results	<ul style="list-style-type: none"> <li>• Schedule Import</li> <li>• Template Editor</li> </ul>	<ul style="list-style-type: none"> <li>• Yes</li> <li>• Yes</li> </ul>
Add, change, or delete student test results	<ul style="list-style-type: none"> <li>• Student Test Results</li> </ul>	<ul style="list-style-type: none"> <li>• Delete</li> </ul>

## Populating setup lists for tests

There are several setup lists used in the pages on which you define your district-level tests. These setup lists - tests, subtests, skills, score types, test categories, etc. - are pre-populated with a large number of standard items. This will both assist you in getting started with test setup right away, and standardize the use of the Test Management feature area across implementations.

However, there are some setup lists that are not pre-populated, as their use is defined differently for each state and district. Also, some populated setup lists may not contain items you want to use. Before starting test setup, you should therefore check the test-related setup lists to ensure that all required items have been added. If any are missing, you can easily add the new items. It is recommended that you do not change any of the existing items that were installed with the latest release of Chancery SMS, as these will facilitate state-wide reporting in future releases.

### Test Management setup lists

The following outlines the setup lists that are used by Test Management and provides examples of the kind of entries they contain:

Setup List	Type of Items to Enter	Examples
Test Code	Names of tests	<ul style="list-style-type: none"> <li>• SAT - Scholastic Aptitude Test</li> <li>• FCAT - Florida's Comprehensive Assessment Test</li> <li>• ITBS - Iowa Tests of Basic Skills</li> </ul>
Test Category	Types of tests	<ul style="list-style-type: none"> <li>• K-12 Assessment</li> <li>• English Language Proficiency</li> <li>• College Placement</li> </ul>
Grade Level	Grades in your district	<ul style="list-style-type: none"> <li>• K</li> <li>• 1</li> <li>• 2</li> <li>• 20</li> <li>• N/A</li> </ul>
Score Type	Ways in which test scores can be expressed as a numeric value	<ul style="list-style-type: none"> <li>• Raw score</li> <li>• Percent of items correct</li> <li>• Percentile</li> <li>• Grade equivalent</li> <li>• Scaled score</li> <li>• Standard score</li> <li>• Stanine</li> <li>• Normal curve equivalent</li> <li>• Equated score</li> </ul>
Subtest Name	Names of subtests (subsets of a test)	<ul style="list-style-type: none"> <li>• Verbal</li> <li>• Math</li> <li>• Reading</li> <li>• Writing</li> <li>• Science</li> </ul>
Skill Name	Names of skills (subsets of a subtest)	<ul style="list-style-type: none"> <li>• Reading comprehension</li> <li>• Sentence completion</li> <li>• Probability</li> <li>• Scientific thinking</li> </ul>
Test Use	How the test is used in your district	<ul style="list-style-type: none"> <li>• Aptitude testing</li> <li>• State requirements</li> </ul>
Test Subject Content	The main subject of the test	<ul style="list-style-type: none"> <li>• Mathematics</li> <li>• Writing</li> </ul>

Setup List	Type of Items to Enter	Examples
Norm Type	Types of averaging that can be applied to a test	<ul style="list-style-type: none"> <li>• annual user norms</li> <li>• national probability sample</li> <li>• state norms</li> </ul>
Norming Period	Times of year that can be applied to the norming	<ul style="list-style-type: none"> <li>• spring</li> <li>• summer</li> <li>• fall</li> <li>• winter</li> </ul>
Exemption Reason	Reasons for students not taking a test	<ul style="list-style-type: none"> <li>• Parental request</li> <li>• Board of Education waiver</li> <li>• IEP waiver</li> <li>• Absent</li> <li>• Unusual circumstances</li> <li>• ESL waiver</li> </ul>

For information about working with setup lists, see “Working with setup lists” page 15.

## Defining tests

After you ensure the test-related setup lists are complete, you are ready to define the tests that will be used to capture student test results, which involves the following:

- “Setting up tests” page 55
- “Setting up subtests” page 56
- “Setting up skills” page 57

### Setting up tests

The process of setting up a test involves defining the overall properties for the test, and specifying which score types (e.g., raw score, percentile, etc.) will be captured for that test when the results come in.

To add a test:

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 On the **District Setup** page, under **District**, click **Tests**.
- 3 On the **Tests** page, from the **Actions** menu, click **Add Test**.
  - ① To edit a test click the test name
  - ① To delete a test, select the test and from the **Actions** menu, click **Delete Test**.
- 4 On the **Add/Edit Test** page, enter or edit the following information, as required:

Field	Description
Test	Select the test name.
Test Version	Enter a number that corresponds to the version of the test. This is used to identify multiple versions of tests for grandfathering purposes.
Description	Enter a description for the test to differentiate between versions.
Test Category	Select a test category. The category is used for searching and reporting.
Grade Levels	In the Available list, select the grade levels that are eligible for the test and use the arrows to move them to the Selected list. Select at least one grade level.

Field	Description
Display in transcript?	To have the test results display on a student's transcript, select this checkbox.
Display in report card?	To have the test results display on a student's report card, select this checkbox.

#### To add a test score types for the test:

- 1 From the **Actions** menu, click **Add Test Score Type**.
- 2 On the **Add/Edit Test Score Type** page, from the **Score Type** dropdown, select the score type.
- 3 In the **Maximum Score** field, enter the highest number score a student can achieve for the test.
- 4 In the **Passing Score** field, enter the number score a student must achieve to pass the test.
- 5 Click **OK**.
  - ④ If you are setting up subtests and want to be able to administer subtests individually when you create test sessions, in the **Subtests** panel, select the **Independent Subtests?** checkbox.

### Setting up subtests

If necessary, you can also add subtests to a test (e.g., Verbal and Math for the SAT), with their own score types.

- 1 On the **Add/Edit Test** page, from the **Actions** menu, click **Add Subtest**.
  - ④ To edit a subtest, in the **Subtests** panel, click the subtest name.
  - ④ To delete a subtest, select it and from the **Actions** menu, click **Delete Subtest**.
- 2 On the **Add/Edit Subtest** page, specify the following:

Field	Description
Subtest	Select the subtest.
Grade Levels	In the <b>Available</b> list, select the grade levels that are eligible for the subtest and use the arrows to move them to the <b>Selected</b> list. Select at least one grade level. Ensure that you select only grade levels that have also been selected for the test as a whole.

#### To add score types for the subtest:

- 1 From the **Actions** menu, click **Add Subtest Score Type**.
- 2 On the **Add/Edit Subtest Score Type** page, from the **Score Type** dropdown, select the score type.
- 3 In the **Maximum Score** field, enter the highest number score a student can achieve for the subtest.
- 4 In the **Passing Score** field, enter the number score a student must achieve to pass the subtest.
- 5 Click **OK**.
  - ④ Add skills as required. For details on adding skills, see "Setting up skills" page 57.
- 6 Click **OK**.

## Setting up skills

If you want to capture test results at an even more granular level, you can add skills to the subtests (e.g., algebraic reasoning for the Math subtest), and define skill-specific score types.

**To add a skill to a subtest:**

- 1 On the **Add/Edit Test** page, click a subtest.
- 2 On the **Add/Edit Subtest** page, from the **Actions** menu, click **Add Skill**.
  - ① To edit a skill, click the skill name
  - ① To delete a skill, from the **Actions** menu, click **Delete Skill**
- 3 On the **Add/Edit Skill** page, from the **Skill Name** dropdown, select the skill.

**To manage score types for the skill:**

- 1 From the **Actions** menu, click **Add Skill Score Type**.
- 2 On the **Add/Edit Skill Score Type** page, from the **Score Type** dropdown, select the score type.
- 3 In the **Maximum Score** field, enter the highest number score a student can achieve for the skill.
- 4 In the **Passing Score** field, enter the number score a student must achieve to pass the skill.
- 5 Click **OK**.
- 6 Click **OK**.

## Setting up test sessions

After tests have been defined, the district can set up test sessions to manage how students take tests. Before you can add, edit, or view test results for students, you must create test sessions.

**To add a test session:**

- 1 On the **Add/Edit Test** page, in the control bar, click **Test Sessions**.
- 2 On the **Test Sessions** page, from the **Actions** menu, click **Add Test Session**.
  - ① To edit a test session, click the test session name.
  - ① To delete a test session, select the test session and from the **Actions** menu, click **Delete Test Session**.
- 3 On the **Add/Edit Test Session** page, specify the following:

Field	Description
Grade Level	Select the grade level for the test session.
Subtest	If you selected the Independent Subtests? checkbox in the test definition, in the Available list, select the subtests to be included in the test session and use the arrows to move them to the Selected list.
Session Name	Enter the name for the test session.
Start Date	Enter or select the date on which the test session starts.
End Date	Enter or select the date on which the test session ends.
Session Comment	Enter an optional comment. If two or more sessions of the same test are given for the same range of dates, this can be used to differentiate the sessions.

Field	Description
Test Form	Enter the form number assigned to the test. A test can have two or more variations to prevent cheating. For example, the questions on Form A and Form B are different, but both test the same level of knowledge. In the test room, Row 1 receives Form A, Row 2 gets Form B, Row 3 receives Form A, and so on.
Test Use	Select the purpose of the test session.
Test Subject Content	Select the main subject of the test session.
Norm Year	Enter the year used for norming purposes.
Norm Type	Select one of the following norm types: 01 = National Probability Sample 02 = Annual User Norms 03 = State Norms
Norming Period	Select the time of year of the norming (e.g., Fall, Midyear, Spring).
Additional Year ID	Enter an additional year ID, if required.
Language	Select the language in which the test is written.
Other Language	If a language is not listed in the Language dropdown, select Other from the Language dropdown and enter a language in this text field.

**4** Click Save.

For details about how to add test sessions to a student's record so you can capture test results, see the *Chancery SMS 7.3 School Administration Manual*.



# Setting up mid-year transfer

School or district staff with the required access can transfer one or more students from one school to another school during the school year.

Depending on your preferences, the student's new school can view and import some of the student's detailed information from the former school.

In this chapter, you set up mid-year transfers by:

- giving users access privileges to perform mid-year transfers.
- ensuring the district and school email addresses are set up.
- specifying preferences for all mid-year transfers in the district.

For information about performing a transfer, see the *Chancery SMS 7.3 School Administration Manual*.

## Permissions for mid-year transfers

To transfer students or to change transfer preferences, a user needs specific permissions, outlined in the table below.

To	You need this permission	Set to
Perform a mid-year transfer	Students> Mid Year Student Transfer	Edit
View the results of a mid-year transfer	Students> Mid Year Student Transfer	View or Edit
Change mid-year transfer preferences	District> Mid Year Transfer Preferences	Edit

## Setting up email notifications

After a student is transferred to a new school, emails are sent to the person doing the transfer, to the new school, and to the former school.

The emails are received only if you:

- specify a valid email address for the district office.
- specify an email address for the Demographics Contact at the school where the transfer is performed from and at the school where the transfer is performed to.
- set up district email preferences.

**To set up the district email address:**

- 1 Log on as a district user.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup** page, under **District**, click **Profile**.
- 4 On the **Profile** page, under **District Office**, enter the email address.
- 5 Click **Save**.

**To set up district email preferences:**

- 1 Log on as a district user.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup** page, under **District**, click **Preferences**.
- 4 On the **Preferences** page, under **Email and Mobile Alert Notification**:

- ④ Set Contact to “Send E-Mail to staff for significant events”.
- ④ Ensure the SMTP Server Address and Server Port are identified.
- 5 Click **Save**.

**Set up a school email address:**

- 1 In the control bar, under **School**, click **School Info**.
- 2 On the **School Info** page, click a school name.
- 3 On the **School Info Detail** page, click **Edit**.
- 4 On the **Schools** page, in the **School Email** field, enter the email address.
- 5 Click **Save**.

## Setting preferences for mid-year transfers

At the district level, you can set the default status codes for the withdrawal and the entry. The person doing the transfer can still change these codes, but you determine the ones that appear by default.

You determine how long transfer logs are kept. The logs can be automatically deleted anywhere from 2 to 99 days after a transfer occurs.

The decisions you make determine the options that are shown on the **Transfer to School** page, and determine whether the options are selected by default.

Two types of data—Daily Attendance and Current Year Grades—are special cases. They are available only in PDF, not in ASCII. Therefore, the **Transfer to School** page always displays **Cannot Import File** next to these two options.

**To set mid-year transfer preferences:**

- 1 In the control bar, under **Admin**, click **District Setup**.
- 2 Under **Mid-Year Transfer**, click **Mid-Year Transfer**.
- 3 On the **Mid-Year Transfer Preferences** page, choose a default withdrawal and entry status code in your district.
- 4 If necessary, revise the number of days in the **Delete Transfer Log** entries field.
- 5 Click **Save**, and then close the page.

# Working with task manager

The Task Manager is a Windows service that is used to manage how scheduled tasks - such as report requests, scheduling, attendance exception rule processing, etc. - are processed by the servers that are a part of your particular installation.

For more information about setting up the Task Manager, see the *Chancery SMS Implementation and Management Best Practices Guide*.

## Services

The Task Manager comprises two services: the Task Manager Service and the Task Manager Monitor.

### Task manager service

The Task Manager Service resides on each server and is set to run automatically once installed; however, after installing the service, you should verify that it is active and that the settings are correct.

If the Task Manager Service fails for any reason, you can manually restart it.

**To verify the Task Manager is running and set it to run automatically:**

- 1 From the **Start** menu, click **Settings > Control Panel > Administrative Tools > Services**.
- 2 In the **Services** dialog, check that the entry in the **Status** column for Chancery Task Manager Service is set to **Started**.
- 3 From the list of services, double-click **Chancery Task Manager Service**.
- 4 From the **Startup Type** dropdown, select **Automatic**. Click **OK**.
- 5 Restart the service.

**To restart the Task Manager manually:**

- 1 From the **Start** menu, click **Settings > Control Panel > Administrative Tools > Services**.
- 2 In the **Services** dialog, right-click the **Chancery Task Manager Service**. Click **Restart Service**.

### Task manager monitor

The Task Manager Monitor is an Internet Information Server (IIS) web service that manages the performance of the various Task Manager Services running in an installation.

Whenever a new task is initiated, such as when an import is scheduled or when cTools changes trigger the Data Access View Generator, that information is sent to the Task Manager Monitor. Every five seconds, the Task Manager Services check the Monitor for new activity, rather than checking the database directly. If there is a new task registered with the Monitor, and the Task Manager supports that type of task, the server then picks up the task from the database. If there are no supported tasks, the Task Manager does not need to take any action, thereby conserving system resources.

## Key files

When the Task Manager is installed, two key files are created as part of the installation process: the configuration file and the log file.

### Configuration file

The configuration file contains the configuration settings used by the Task Manager. When a new version of Chancery SMS is installed, the installer displays the current configuration settings. To update the configuration file, you can change these settings, as appropriate. The installer then recreates the configuration file based on the settings you specify.

When you apply a Chancery SMS HotFix, the existing configuration settings are automatically retained.

### Log files

Whenever there is a problem with the Task Manager or with a task run by the Task Manager, an error is written to the **Chancery.TaskManager.Service.Log** file. This is a cumulative log of issues; errors remain logged until the log itself is replaced or purged.

To locate the Task Manager log file:

- 1 From the Start menu, click **Settings > Control Panel > Administrative Tools > Services**.
- 2 In the **Services** dialog, right-click **Chancery Task Manager Service** and select **Properties** from the menu.
- 3 In the **Properties** dialog, note the location of key files in the **Path to executable** field.
- 4 Navigate to the appropriate folder.
- 5 Open the **Log** folder to access the **Chancery.TaskManager.Service.Log** file.

## Database components

The Task Manager is built into Chancery SMS, meaning that key components of the tool itself are located in tables in the Chancery SMS database. These tables are the source of important information on the configuration of the Task Manager, including Machine Types, tasks, and task status.

All of these tables are accessed using Microsoft SQL Query Analyzer. It is a good idea to create a user account that has read-only access to the database tables for the purpose of checking Task Manager settings. This will ensure that you do not alter the tables themselves accidentally.

### Machine type

The machine type for a Task Manager determines what types of tasks it can run. The number for the machine type is converted to binary to signal which tasks are supported:

Machine Type	Decimal	Binary
Directory Services	4	000000100
Database Server (includes SIF)	8	000001000
Web Server	16	000010000

Machine Type	Decimal	Binary
Report Server (Processor-Intensive)	32	0000100000
Gradebook Server	64	0001000000
Scheduling Server	128	0010000000
Lightweight Report Server	256	0100000000
Application Server (includes K12Planet, Import/ Export)	512	1000000000

These values can be added together to produce combinations of supported task types. For example, the machine type 1020 (1111111100) is the sum of all of the decimal values above. This machine type therefore indicates that all tasks are supported.

To prevent tasks from being skipped or missed, it is critical that each type of task is enabled for at least one server in your installation. Checking the Machine Types for all of the Task Managers is a good way to test this. CSL\_SS\_TASK\_MANAGER is a centralized location where you can review the Machine Type of all of the Task Managers set up on the various servers in your installation.

Old entries are not automatically removed from this table. If there are multiple entries for the same machine, refer to the LAST\_POLL\_TIME column to determine which is the most recent entry.

#### To review Machine Types:

- 1 From the **Start** menu, click **Programs > Microsoft SQL Server > Query Analyzer**.  
OR  
From the **Start** menu, click **Run**. Enter `isqlw` in the **Open** field and click **OK**.
- 2 In the **Connect to SQL Server** dialog, select a SQL Server from the dropdown, enter a **Login** name and **Password**, and click **OK**.
- 3 In the **SQL Query Analyzer** dialog, enter "Select \* from CSL\_SS\_TASK\_MANAGER".  
④ The table name is case-sensitive.
- 4 Click **Execute Query**.

## Tasks

You can also check the actual tasks that are a part of the Task Manager for a particular server in the CSL\_SS\_TASK table. This table includes the status of the various tasks in the Task Manager. The statuses are as follows:

- 0 - Unknown
- 1 - Waiting
- 2 - Not Started
- 3 - Completed
- 4 - Running
- 5 - Retrying
- 6 - Failed
- 7 - Aborted
- 8 - Suspended

#### To review the tasks in the Task Manager:

- 1 From the **Start** menu, click **Programs > Microsoft SQL Server > Query Analyzer**.  
OR  
From the **Start** menu, click **Run**. Enter `isqlw` in the **Open** field and click **OK**.

- 2 In the **Connect to SQL Server** dialog, select a SQL Server from the dropdown, enter a **Login** name and **Password**, and click **OK**.
- 3 In the **SQL Query Analyzer** dialog, enter "Select \* from CSL\_SS\_TASK (no-lock)".
  - ① The table name is case-sensitive.
  - ① If you omit (no-lock) from the query, the query will run indefinitely without returning any results, unless the Task Manager is not running.
- 4 Click **Execute Query**. Check the **Status** column to determine the status of a particular task.

# Glossary

## Access privileges

Controls the data you can access and the tasks you can perform in Chancery SMS. Access privileges are assigned to user accounts by a district administrator. For example, your access privileges might allow you to view student records but not edit or delete them.

## ADA

Average Daily Attendance. ADA is calculated as the sum of all Individual Students [Days Present \* Time Scheduled/ Student Day]/Report Period Days.

Students with either suspended or expelled status are not included in this calculation.

## ADM

Average Daily Membership. ADM is calculated as the sum of all Individual Students [Days Scheduled \* Time Scheduled/Student Day]/Report Period Days.

## ASCII

Pronounced ask-ee. Short for American Standard Code for Information Interchange. A code that represents English characters as numbers, with each letter assigned a number from 0 to 127. Used by most computers to represent text, which makes it possible to transfer data from one computer to another.

## ASP script timeout

How long Chancery SMS tries to generate a page before it stops trying to generate the page. Prevents server resources from being tied up by an individual user.

## Assignments

The kind of work that a staff member performs. This could include teaching a subject like English or Math, or performing an activity like Counseling.

## Basic data

Database tables in Custom Data Management (Student Data) that describe students using one record per student, such as the date and age of entry into the country.

See Multi-select list, Chronological data, and Repeating group.

## Bell Schedule

The start and end times of periods throughout the day. You can have a different bell schedule for each scheduling group, and for different days.

## Breadcrumbs

Links at the top of the page that help you keep track of where you are in the interface. Include links to pages you accessed to get to the current page.

To go back to a previous page you have visited in the current session, you can click a link in the Breadcrumbs trail, or click the browser Back button to load a cached version of the previous page, or click Home to return to your home page.

## Chancery SMS Centralized Solution

An innovative web-based solution that improves district-wide communication and offers universal access to real-time data. With features for district personnel, school administrators, teachers, parents, and students, Chancery SMS provides a centralized and comprehensive solution.

### Chronological data

A table in Custom Data Management (Student Data) used to keep track of changes to information over time. Each record has the same set of fields. Each student can have several records, but only one record per time period.

For example, if a student's reduced price meals status changes during the year, you can record the date ranges in which the student was eligible for free/reduced lunch and the date ranges in which the student was not eligible. Chancery SMS ensures that a student has no more than one kind of eligibility status on any date.

See Custom setup list, Basic data, Multi-select list, and Repeating group.

### Class

A group of students that meet regularly to receive instruction in a course from a specific teacher. For example, Band 4 meets Tuesdays and Thursdays at 2 P.M. with Mr. Bell providing instruction for thirty Grade 9 students.

A class includes the following:

- course name and number
- class name and number
- one or more meeting patterns
- one or more teachers
- one or more rooms
- students

### Contact

An adult who takes care of a student or who can be called in an emergency. Usually includes the student's parents.

### Control bar

The left-hand panel of a Chancery SMS page. Click links in the control bar to navigate to pages within Chancery SMS, such as School Setup, District Setup, Homerooms, My Classes, and any of the Student Search pages.

To edit district-wide data for a student, on the Student Demographics page, click a link such as Contacts or Enrollment, to access the appropriate page.

### Core data

Data that is entered into database tables that come with Chancery SMS.

### Core pages

Pages that come with Chancery SMS, such as Student Demographics, Contacts and Enrollment student pages.



## Course

In secondary school scheduling, a set of instructional topics and objectives taught to students for some duration of time (a full year, a semester, a six-week rotation, etc.). For example, Chemistry is a subject that is taught to all Grade 9 students for the whole year.

In elementary school scheduling, a course is usually called a subject.

## Course Catalog

At the district level, the list of all subjects and courses offered by the district.

At the school level, the list of all subjects and/or courses offered by the school. This list is assigned by the district to the school.

## cTools

A Chancery SMS component that gives you the ability to modify standard pages with additional panels and fields, as well as add new pages to your portfolio.

## Custom Data Management (Student Data)

A feature in Chancery SMS that enables you to create:

- custom tables, fields, and setup lists
- custom pages where you place custom fields
- links to your custom pages in the control bar

See Custom setup list, Basic data, Multi-select list, and Repeating group.

## Custom control bar

A section of the control bar or student control bar that you create to organize the custom pages you have created. Part of Custom Data Management (Student Data).

When you create custom student pages, you add the custom data links to the bottom of the control bar below the core data links. You then use these custom pages to view and enter data into custom tables and fields.

## Custom setup list

A setup list that you create in Custom Data Management (Student Data).

For example, you can create a custom field to record student Second Ethnic Category, and have this field reference the Ethnic Category setup list. The Ethnic Category setup list is a core setup list, so “Second Ethnic Category” is a custom field referencing a core setup list.

## Customization

The process of modifying built-in tables, reports, and pages of Chancery SMS.

## Data mapping

The process of transferring data from the new schema to the “legacy” schema. Some school data for Chancery SMS schools, such as student class schedule, attendance, and grading data is stored in a specific set of tables that cannot be used for reporting. This data must be transferred to the common set of tables or it will not appear in reports or cannot be uploaded to K12Planet.

## Day Pattern

The cycle of days that your school operates on. For example, your school can use a day-of-the-week pattern using Monday to Friday, or you can use a relative-day pattern using a set number of days in a cycle, such as day 1 to day 4 in a four-day relative cycle.

You can add special days to your day pattern, such as parent-teacher interview days, professional development days, or early dismissal days.

## Demographic record

Key information about students and contacts, such as student number, last name, first name, gender, phone numbers, and social security number.

## District data

Data that is automatically standard across the district. When you change district data, you can affect the data in several schools.

Examples of district data are last name, mailing address, gender, student birth date, and phone numbers. When working with data in Chancery SMS, you can view or edit district data, provided you have the required access privileges.

## Enrollment

The process of enrolling a student in one or more schools in a district.

## Family

A group of students and their contacts. Those contacts do not necessarily live with the students and are not necessarily related.

## Family unit

A group of students and contacts in a Family who live together. Contacts who do not live with students are not assigned to Family Units.

## Field delimiter

A character, such as a comma or tab, that marks the end of records and fields. Delimiters are generally treated as instructions, not data.

## Forms and Page Sets

Custom pages you create to display data, including custom tables, fields, and lists. Part of Custom Data Management (Student Data).

## Geocode

A geographical region or zone, usually associated with bus routes. Used in Geocode Map.

## Geocode Map

A matrix that identifies one school for every grade in every geocode. Uses geography, not a student's current school, to determine where a student will advance to. Contrast with Projected School Map.

## **Homeroom**

In elementary school scheduling, a group of students, usually in the same grade, who spend most of their time together. In a homeroom, students have attendance taken and receive instruction in core subjects, such as Math, Language Arts, and Social Studies.

## **Logging on**

The process of starting Chancery SMS and typing your user ID and password to connect to the centralized database.

## **Master Schedule**

The classes that are assigned to terms, periods, teachers, and rooms.

## **Meeting Pattern**

A series of periods when a class can meet. When you create the master schedule, classes are given one or more meeting patterns.

## **Multi-select list**

A set of single items in Custom Data Management (Student Data) where all items can apply to each student, some items can apply, or no items can apply. Similar to a checklist.

For example, a multi-select list can reference a list of teams students participate in, such as "Football," "Volleyball," and "Chess." A student can participate in none of these teams, or several of them.

See Custom setup list, Basic data, Chronological data, and Repeating group.

## **Page**

The contents of a Chancery SMS window. When you click a link in the control bar, you move from one page to another.

## **Period**

A timeslot on a particular day in which a class may be held.

## **Projected School**

The school that students are expected to transfer into when they complete all of the grades at their current school. Does not necessarily imply that the Projected School Map is in use. Can be determined by the Geocode Map, by the Projected School Map, or by manually assigning it.

## **Projected School Map**

A matrix that identifies the school that each school feeds into, and the grade at which students advance to the next school. Uses a student's current school, not geography, to determine where a student will advance to. Contrast with Geocode Map.

## **Pull-out**

A format of teaching, usually for resource services, where students are moved to another room for the class. A resource service can also be taught in an “inclusion” format where students are taught in their regular classroom.

## **Registration**

The process of registering students in the district, i.e., adding a new student record to the district database. The student does not have to be enrolled in a school.

## **Relationship record**

A record describing the relationship between students and their contacts. For example, a relationship record may indicate that Bob Smith is the father of John Smith, and also indicate that Bob Smith has custody of, lives with, and receives mailings related to John Smith.

## **Repeating group**

A table in Custom Data Management (Student Data) that contains an unlimited number of records for each student, where each record contains the same set of fields.

For example, you can create a group of fields for work experience, such as company, company type, start date, end date, supervisor, and so on. Each time a student participates in this program, you would add a record with that group of fields.

See Custom setup list, Basic data, Multi-select list, and Chronological data.

## **Resource Service**

A specialized subject or course taught by a resource teacher to a small group or an individual, such as remedial reading, speech therapy, and so on.

## **SBE**

State Board of Education.

## **Scheduling Group**

A group of students that use the same term set and term dates, bell schedules, and meeting patterns.

## **Scheduling Term Set**

See Term Set and Terms.

## **School**

Any organization that uses Chancery SMS to maintain school data.

## **School category**

A type of school, such as Elementary or Senior High. You can assign setup items and schedule replication by School Category, and write reports that filter or sort records by School Category.

## School data

Data that can vary from school to school in the district. For example, a student can have a different homeroom number in each school the student is enrolled in. The homeroom number field is school data.

## SDE

State Department of Education.

## Session timeout

How long a Chancery SMS session can be inactive before Chancery SMS ends the session. An important security feature that prevents unauthorized individuals from viewing pages if a user leaves Chancery SMS open and unattended.

## Setup item

An item or value in a setup list.

## Setup list

A set of possible values that can be used in a field. Can be a core (built-in) setup list or a custom setup list that you create.

For example, the Conduct Codes setup list contains all the conduct codes you can assign to students. Each Conduct Code is a setup item in the Conduct Codes setup list.

## Sibling

Two or more students who belong to the same Family. Your district sets policies on when to consider students to be siblings.

## Student-contact relationship

The relationship between a student and a contact, described by six fields: Mailings checkbox, Custody checkbox, Relationship to Student dropdown menu, Lives With checkbox, Contact Position for Schools, and Emergency Contact checkbox.

For example, a relationship record may indicate that Bob Smith is the Father of John Smith, and also indicate that Bob Smith has custody of, lives with, and receives mailings related to John Smith.

## Subject

In elementary school scheduling, a set of instructional topics and objectives taught to students, often for the entire school year. For example, Science is a subject that is taught to all Grade 4 students for the whole year.

In secondary school scheduling, a subject is usually called a course.

## Task bar

A bar near the top of a Chancery SMS page that contains several menus, such as the Actions, Edit, Reports, and Help menus. In addition, the Home and Log Off buttons are found in the far right-hand side of the task bar.

## **Template**

A definition of the data type, fields, field order, and methods of defining field and record lengths of data to be imported in an ASCII import.

## **Term Set and Terms**

In secondary school scheduling, a way to segment the school year. Within each term set are a number of terms. For example, you can have one term for the whole year or you can break a year up into two, three, or any number of terms. You can define any number of term sets, and any number of terms.

## **Test**

The district, regional, state-wide, national, or college entry evaluation performed by a student. A test may consist of subtests.

## **Text qualifiers**

Characters placed around fields to differentiate between a character used as a delimiter and one that is part of the data in a field. Also called surround characters.

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