

Permanent Record Guide

Chancery SMS



Released January 2009

Revised August 2010

This edition applies to Release 6.7 of the Chancery SMS software product and to all subsequent releases and modifications until otherwise indicated in new editions or updates.

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About Chancery SMS

Welcome to Chancery SMS® from Pearson. Chancery SMS is a software tool for managing student and family information in your school district.

Support Services Available

Chancery offers a full suite of documentation, online Help, and technical support to help you with your day-to-day tasks.

Documentation Included

The following documentation is included with Chancery SMS:

Type	Description
Chancery SMS Guides	<p>The following guides are available in PDF format from our support web site at https://powersource.pearsonschoolsandcolleges.com:</p> <ul style="list-style-type: none">• District Administration Guide: For district administrators, the District Administration Guide provides information about maintaining the centralized Chancery SMS solution, including setting up your district, adding schools to the district, and standardizing data across the district using setup lists.• District User Guide: For district office staff, the District User Guide provides information about using Chancery SMS at a district level, including registering and enrolling students and working with student data.• School Administration Guide: For school administrators, the School Administration Guide provides information about maintaining a school and performing administrative tasks.• School Setup Guide: The School Setup Guide provides information about setting up schools in the district, including the steps to be performed as a district administrator and as a school administrator.• School User Guide: For school office staff, the School User Guide provides information about using Chancery SMS at the school level, including how to take attendance, enter grades, and work with student data in the office.• Chancery SMS in the Classroom: This guide covers the basics of using Chancery SMS at the homeroom and class level, including how to take attendance, enter grades, and work with student data in the classroom.

Type	Description
Chancery SMS Speciality Guides	<p>Additional feature-specific guides to supplement the standard guides are available in PDF format from our support web site at https://powersource.pearsonschools.com:</p> <ul style="list-style-type: none"> • Address Validation Guide: For school and district administrators, the Address Validation Guide provides information about setting up address validation at the district and performing address validation tasks at the district and at schools. • cTools Guide: This guide provides information about customizing Chancery SMS, along with instructions for using the customization features. • Grading Setup Guide: For school administrators, the Grading Setup Guide provides information about setting up grading properties and performing grading-related tasks. • Health Tracking Guide: For district and school users who manage student health, this guide describes the process of setting up and using the health feature in Chancery SMS, including immunization calculations. • Permanent Record Guide: For districts who have converted to the Permanent Record feature in Chancery SMS, this guide provides information and instructions for using the permanent record functionality. • Permissions Guide: For district administrators, this guide provides information about setting up permissions in Chancery SMS. The Permissions Guide explains the permissions structure and provides information about each permission's dependencies, effect on the system, options, and defaults. • Program Management Guide: For district and school administrators and district and school staff who enroll students and process applications, the Program Management Guide is a feature-specific guide that describes the process of setting up programs at the district and at schools and performing program-related tasks. • Registration and Enrollment Quick Guide: For school and district staff, the Registration and Enrollment Quick Guide provides procedures for registering students in the district and enrolling students in schools. • Scheduling Guide: For school administrators, the Scheduling Guide covers the process of setting up a school scheduling structure, as well as scheduling in elementary and secondary schools. • Next-Year Preparation and Year-End Processing Guide: For district and school administrators, this guide covers all the steps required to close off the current school year and prepare for the next.

Type	Description
Chancery SMS Technical Guides	<p>Technical guides are available in PDF format from our support web site at https://powersource.pearsonschools.com:</p> <ul style="list-style-type: none"> • Import/Export Guide: For district administrators, the Import/Export Guide describes the process for importing and exporting data into and out of Chancery SMS. • Interoperability Guide: For district administrators, the Interoperability Guide covers how to integrate third-party applications with Chancery SMS using SIF and Import/Export functionality. • Report Writer Guide: For district and school administrators and third-party report writers, the Report Writer Guide covers how to plan, build, and upload reports using the new reporting framework. The guide also includes an in-depth examination of this framework, extensive information about how to use Crystal Reports® functionality, and reference material about using previous reporting methods.
Chancery SMS Online Help	Help is available by accessing the Help menu from the task bar.
Release Notes	Release Notes are summaries of the new features and changes in the current release.
Installation Documentation	<p>The Installation Guide provides technical details for installing the entire Chancery SMS system.</p> <p>The Upgrade Guide provides detailed instructions for upgrading from a prior version of Chancery SMS.</p>

Getting Training

Training courses are available to help ensure you get every advantage from your student information system. We are committed to helping you put our solutions to work. Our broad training offerings are designed with you in mind so that you'll receive the most suitable and effective training for your needs.

Choose from on site training or live online training. We can also create a customized training program to meet your district's needs.

Phone us toll free at 1-800-999-9931 or see the Training area of our customer support web site at <https://powersource.pearsonschools.com> for an up-to-date list of scheduled courses.

Getting Support

The following support programs are available by subscription only:

Support	Description
One-on-one Technical Support	Talk to a technical support analyst to help solve problems and answer questions when software doesn't produce the expected results. Analysts can use the telephone or Internet access to troubleshoot your issues. Monday to Friday, 5 am to 5 pm Pacific Time Phone: 1-800-688-9939 Fax: 1-800-446-5650 Email: psstechsupp@pearson.com
Access to our web site	https://powersource.pearsonschoolsandcolleges.com Our web site includes a searchable KnowledgeBase with frequently asked questions, tips, and troubleshooting instructions, as well as support forums for users to share experience and knowledge.
Software updates	Releases of new versions with improved functions and software updates.

For more information about Technical Support Programs, phone Customer Service at 1-800-999-9931.

Introduction

Use the Permanent Record (PR) feature in Chancery SMS to create a district-specific structure for secondary schools that defines the student data stored in a student’s permanent record, specifies which data should be included in cumulative GPA and credit calculations, and determines which information is shown on secondary student transcripts.

NOTE

Currently, Chancery SMS supports setting up and working with permanent record data for secondary schools. In a future version of Chancery SMS, there will be the ability to work with a Permanent Record structure and data for elementary schools.

The PR feature allows you to track detailed historical course data, such as grades, grade points, potential course credits, and earned credits, in the secondary student’s historical record, and then create district-wide, cumulative GPA definitions that use this detailed course data in cumulative GPA and credit calculations.

Calculation scheduling functionality enables you to schedule district cumulative GPA and credits calculations to run once on a particular date at a specified time or to run automatically on a recurring basis, such as every night. You can also configure time restrictions to ensure that calculations can only be run on certain days and/or at certain times. You can run cumulative GPA and credit calculations from many PR pages.

A catalog of out-of-district schools allows you to enter and reuse out-of-district schools when entering historical information for students.

Customizable grid views enable the district to define global views of PR data, and then each district- and school-level user can create personalized versions of these views.

Permissions to Work with Permanent Record Setup

To work with Permanent Record, you need the following permissions:

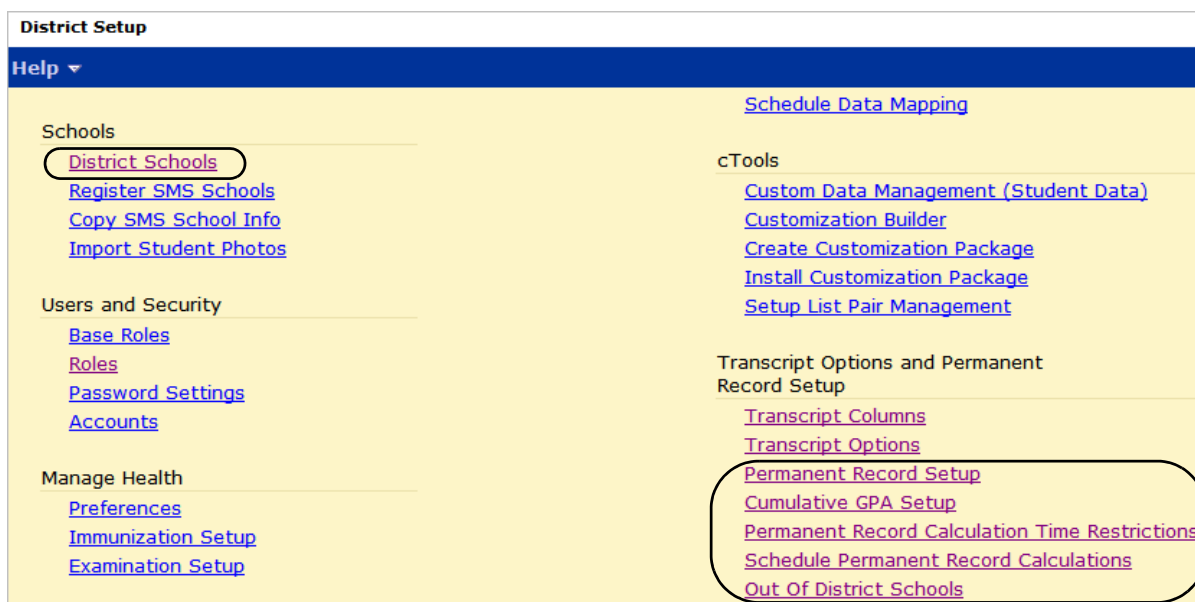
To	You need this permission	Set to
Add, edit, and delete elementary and secondary permanent record setup information	Transcript/Permanent Record >Permanent Record Setup	Delete
Specify cumulative GPA and credits calculation time restrictions	Transcript/Permanent Record > Permanent Record Calculation Time Restrictions	Yes
Create cumulative GPA and credits calculation schedules	Transcript/Permanent Record > Schedule Permanent Record Calculations	Yes

Summary of Changes after the Conversion to PR

When you convert your database to use the Permanent Record feature, numerous changes occur in Chancery SMS. Following is a summary of the changes, with cross-references to the sections in this guide that provide detailed information about how to work with the new links and pages.

Updated and New Links on the District Setup Page

- The **Schools** link is renamed **District Schools**, to differentiate between in-district and out-of-district schools, and takes you to the **School Info** page.
- The **Elementary Permanent Record Setup** link is changed to **Permanent Record Setup** and takes you to the new **Permanent Record Setup** page. See “Updated and New District-level Pages” on page 7.
- The following new links are available:
 - **Cumulative GPA Setup** - This link takes you to a page where you can create cumulative GPA definitions. See “Updated Secondary School-level Pages” on page 9.
 - **Permanent Record Calculation Time Restrictions** - This link takes you to a page where you can set time restrictions for running cumulative GPA calculations. See “Updated and New District-level Pages” on page 7.
 - **Schedule Permanent Record Calculations** - This link takes you to a page where you can schedule cumulative GPA calculations immediately or for a specified time. See “Updated and New District-level Pages” on page 7.
 - **Out of District Schools** - This link takes you to a page where you can add and manage historical out-of-district schools. See “Updated and New District-level Pages” on page 7.



Updated and New Links on the Student Demographics Page Control Bar

Historical is updated to **Historical Info** - This link takes you to historical pages, some of which have been redesigned.

The following new links are available:

- **Permanent Record** - This link takes you to the new PR pages for secondary students. The following links are displayed in the control bar of the Permanent Record feature:
 - **Summary Data** - This link takes you to the new **PR Summary Data** page where you can view the secondary student's current year class rank, and calculated GPAs and credits. See "Updated and New Secondary Student Pages" on page 10.
 - **Year Data** - This link takes you to the new **PR By Year** page, where you can view historical GPA, credits, class ranks, and attendance information for the secondary student by year, as well as enter historical class ranks. See "Updated and New Secondary Student Pages" on page 10.
 - **Year & Term Data** - If GPA/Class Rank Reporting Terms have been set up for your district, this link takes you to a page where you can view historical GPA information by term, and view and enter historical class ranks. From this page you can also view historical credits and edit attendance information by term for each year and school. See "Updated and New Secondary Student Pages" on page 10.

The image displays two screenshots of the Chancery SMS web application interface. The top screenshot shows the 'Edit Student Demographics' page for a student named A'Antone, @Gabriella K. The navigation menu on the left includes 'Demographics', 'Contacts', 'Family', 'Tests...', 'Registration', 'Enrollment...', 'Historical Info', 'Permanent Record', 'Program Profile', and 'Health Tracking'. The 'Permanent Record' link is circled in red. The bottom screenshot shows the 'PR Summary Data' page for the same student. The navigation menu on the left includes 'Historical Info', 'Permanent Record', 'Summary Data', 'Year Data', and 'Year & Term Data'. The 'Permanent Record' link is also circled in red. The main content area of the bottom screenshot shows a summary table with the following data:

	Rank	Out of	Date
Class rank:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Potential	Earned	
Total Credits:	3.12500	1.31250	

Updated and New District-level Pages

- **Course Grading - Partial Credits** checkbox is removed because it is no longer needed.
- **District Preferences** - The **Attendance** panel and fields on this page are moved to the **Elementary** tab on the new **Permanent Record Setup** page.

- **Transcript Columns** - This page is updated so that, in addition to specifying the column headings for the grade items that will be stored in students' permanent records and shown on their transcripts, you can define whether a grade item is awarded credit and/or used in a cumulative GPA calculation. See "Defining Transcript Columns" on page 13.

The following new pages are available:

- **Permanent Record Setup** - This new page displays two tabs: **Secondary** and **Elementary**.

The **Secondary** tab enables you to specify how items such as cumulative GPA, attendance, and credits will be calculated and how they will appear in each secondary student's permanent record.

The **Elementary** tab replaces the **Elementary Permanent Record Setup** page and allows you to select the elementary school data you want to keep after Year-End Processing. See "Performing Permanent Record Setup" on page 29.

NOTE

Although elementary student PR data is not currently viewable in the Chancery SMS interface, it is recommended that you select permanent record options for elementary student data so that the structure is set up when the elementary permanent record information is visible in a future version of Chancery SMS.

- **Cumulative GPA** - This new page enables you to create Cumulative GPA definitions for the district. See "Working with Cumulative GPAs" on page 21.
- **Select Courses** - This new page allows you to specify whether to include or exclude courses, active or historical, in cumulative GPA definitions. This page replaces the **Select Courses** page that was at the secondary school level. See "Adding and Editing Cumulative GPA Definitions" on page 24.
- **Calculate GPAs and Credits** (dialog) - This dialog appears if you select multiple secondary students and then select **Calculate Cumulative GPAs and Credits** from an **Actions** menu on a new PR page. Use this dialog to specify whether you want to calculate GPAs for only the student displayed on the screen or for all selected students. See "Running Calculations" on page 65.
- **Permanent Record Calculation Time Restrictions** - Use this new page to define time restrictions for cumulative GPA and credit calculations that are scheduled at the district and at secondary schools. See "Setting up Calculation Time Restrictions" on page 35.
- **Schedule Permanent Record Calculations** - This new page enables you to view existing scheduled cumulative GPA and credit calculations and navigate to the **Define Schedule** page where you can define new calculation schedules. See "Scheduling GPA and Credit Calculations" on page 36.
- **Define Schedule** - Use this new page to schedule one-time or recurring cumulative GPA and credit calculations for all secondary students in the district. This page displays defined calculation time restrictions. See "Scheduling GPA and Credit Calculations" on page 36.
- **Out of District Schools** - Use this new page to create a catalog of reusable, out-of-district school records. See "Adding and Editing Out-of-District Schools" on page 39.

Updated Secondary School-level Pages

- **Calculate Class Ranks** - The criteria that determines which students are included in class rank calculations has changed. For the year-to-date class rank calculation, the students included are those who are in the grade level and are enrolled for at least one scheduled day in the active calendar. For the term class rank calculation, the students included are those in the grade level who are enrolled in the term for at least one scheduled day.
- **Calculate Grades, Credits, & GPAs** - The **Credits** panel has been removed, as it is no longer possible to calculate credits separately from cumulative GPAs. The **GPAs** panel has been replaced with two new panels: **Current Year GPAs**, which displays only current-year GPA formulas and descriptions; and **Cumulative GPAs & Credits**, which displays cumulative GPA formulas and descriptions, along with a checkbox for running calculations. When cumulative GPA definitions exist, users with appropriate permissions will see a link to the cumulative GPA definition in the GPA Name column. The user will be able to use this link to access the cumulative GPA definition for viewing (or, with appropriate permissions, editing).

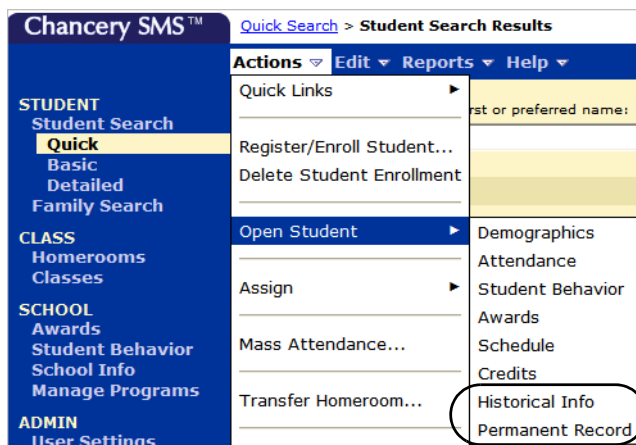
NOTE

In the **Students** panel on this page, when you select **All students in the school**, only students who were enrolled for at least one scheduled day during the active calendar year are included in the calculation. Students who are enrolled only in the planning calendar are not included, nor are historical students.

When **Run Calculations** is selected from the **Actions** menu on this page, a dialog appears with the option to run the calculation now or at a later time. If the option to run calculations for all students is selected, this dialog also displays calculation time restrictions defined by the district.

- **Class Ranks** - The **GPA Used** column on this page now displays a district cumulative GPA.
- **Class Rank** (formerly **Add/Edit Class Rank**) - In the **Global Criteria** panel, the **Cumulative GPA** dropdown contains district-defined cumulative GPAs. The **Grade Level Specific Criteria** panel now displays the grade levels used at the school (from the **Grade Levels Setup List** on the **School Setup** page).
- **Course Grading** - The **Allow Partial Credits** checkbox is removed. The **History** column now displays the district-defined transcript columns. The **Award Credit** and **Use in Cum GPA** columns are read-only for schools; the values in these two columns are defined on the district's **Transcript Columns** page.
- **Current Year GPA** - The **Historical Pages** panel and its contents are removed because current year GPAs are no longer rolled over into the PR pages during year end processing.
- **Grade Point Averages** - The ability to create cumulative GPA definitions is removed from this page. Schools can create current-year GPA definitions only. The district creates cumulative GPA definitions.
- **School Setup** - The **Transcript Grade Item** link and pages are removed. Transcript grade items are now set up at the district.
- **Select Courses** - For cumulative GPA, this page is moved to district-level and includes both current and historical courses. For current-year GPAs, it remains at the school level.

- There is a new **Define Schedule** dialog, available from the **Calculate Grades, Credits & GPAs** page, that is used to schedule grades, credits and current-year GPA calculations at the school level.
- On the **Student Search Results** page for secondary schools, new **Historical Info** and **Permanent Record** menu options are available from **Actions > Open Student**.



Updated and New Secondary Student Pages

- **Historical** - This page is renamed **Historical Info** and is updated to reflect the addition of the PR pages. See “Secondary Student Historical Information” on page 41.
- **Historical Year** - This page is redesigned. See “Adding and Editing Historical Year Records” on page 42.
- **Historical Course** - This page is redesigned. See “Entering Student Historical Course Details” on page 46.
- **Course** (historical) - This page is redesigned. See “Adding and Editing Cumulative GPA Definitions” on page 24.
- **Course List** - This page is updated to reflect changes to the historical **Course** page. See “Adding and Editing Cumulative GPA Definitions” on page 24.
- **PR Summary Data** - This new page enables you to view the student’s current year class rank, credits summary information, and cumulative GPAs on this page. See “Viewing Secondary Student Permanent Record Summary Data” on page 51.
- **Year Data** - This new page enables you to view the student’s historical GPA, view credits and edit attendance information for the student by year, and enter historical class ranks on this page. See “Working with Secondary Student Permanent Record Data by Year” on page 54.
- **Year & Term Data** - If GPA/Class Rank Terms exist, this new page enables you to view historical GPA information by term, and view and enter historical class ranks, as well as historical credits and attendance information by term. See “Working with Secondary Student Permanent Record Data by Term” on page 59.

Changes to Permissions

The following changes are made to permissions.

- Under the category **Transcript/Permanent Record** the following permissions are added, updated, or deleted:
 - Four new permissions are added: **Cumulative GPA Setup, Permanent Record Calculation Time Restrictions, Schedule Permanent Record Calculations, Manage Out Of District Schools**. For information about how to use these permissions, see the beginning of the appropriate sections in this guide.
 - **Permanent Record Setup** - This permission is renamed and was formerly named **Elementary Permanent Record Setup**.
 - **Import Historical Info** - This permission is renamed and was formerly named **Import Historical**.
 - **Student Historical Info Data** - This permission is renamed and was formerly named **Student Historical Data**.
 - **Transcript Grade Item** - This permission is deleted.
- Under the category **School Setup**, the permission **GPA Definitions** now applies only to current-year GPA definitions, rather than to both cumulative and current year.
- A new permission category, **User Settings**, exists with one permission, **Global Grid Views**.

Defining Transcript Columns

Defining transcript columns serves three purposes: to select the grades that will be the students' permanent record grades, to show those grades on your district's transcript, and to specify whether to award credit for the grades and/or include the grades in cumulative GPA calculations.

To specify the permanent record grades, the district creates transcript column headings. Schools then map their course grade items to the transcript columns so that the applicable grades appear on their students' transcripts.

District-level Transcript Columns page If your district uses Permanent Record terms and at least one Permanent Record term exists in your database, this column appears.

[District Setup](#) > [Transcript Columns](#)

Actions ▾ Help ▾ Home | Log Out

Enter the column headings for the grade items you want to store in the permanent record and display on the transcript.

NOTE: The built-in transcript reports support a maximum of 4 column headings. More than 4 transcript column headings will require a custom transcript report for your district.

Selected: 0 Total: 5

*Transcript Column	*Description	*Permanent Record Term	Award Credit	Use in Cum GPA
<input type="checkbox"/> DS1	Dist Sem One - AC & Use in Cum GPA	DSTm01	Yes	Yes
<input type="checkbox"/> DS2	Dist Sem Two - AC & Use in Cum GPA	DSTm02	Yes	Yes
<input type="checkbox"/> DSAvg	Dist Sem Average - AC & Use in Cum GPA	DSTm02	No	No
<input type="checkbox"/> DFin	Dist Final - AC & Use in Cum GPA	DSTm02	No	No

Parker High School Transcript

Student Information

Name: Joe Brown Student No.: 12345
 Address: 123 Main Rd Birthdate: Dec 1, 1991
 Parent/Guardian: Joan Brown Gender: Male

Course Information

2001-2003 Gr 12

Course Name	DS1	DS2	DSAvg	DFin
Math 1 (44033-1)	82	87	85	86
Eng 2 (54034-2)	67	62	65	68
PE (11022)	89	92	91	94

School-level Course Grading page

[Grading](#) > [Course List](#) > [Course Grading](#)

Actions ▾ Edit ▾ Help ▾ Home | Log Out

US HISTORY

Report Card

The Award Credit and Use In Cum GPA properties are defined by the district and only apply when a grade item is mapped to a district transcript column.

Total: 6

Grading Period	Grading Table	History	Final Grade	Award Credit	Use In Cum GPA
Course Grade					
RQ1	LG100	Transcript (DS1)		Yes	Yes
RQ2	LG100	Transcript (DS2)		Yes	Yes
RQ3	LG100	Transcript (DSAvg)			
RQ4	LG100	Transcript (DFin)	Yes		

Whether a grade item is awarded credit and/or used in a cumulative GPA calculation is determined by your selections on the **Transcript Columns** page. After you make these selections, schools cannot change them; this ensures secondary schools across the district are using consistent calculations.

For information about how your selections in the **Award Credit** and **Use in Cumulative GPA** affect calculations, see the “Selecting a Calculation Formula” on page 23.

Permissions to Work with Transcript Columns

To work with Transcript Columns, you need the following permissions:

To	You need this permission	Set to
View transcript columns	Transcript/Permanent Record>Transcript Columns	View
Add or edit transcript columns	Transcript/Permanent Record>Transcript Columns	Edit
Add, edit, or delete transcript columns	Transcript/Permanent Record>Transcript Columns	Delete

Setting up Transcript Columns

The Chancery SMS built-in transcript can have up to four columns for each course, plus one optional column each for credits and absences. The columns for credits and absences are determined by your settings on the **Transcript Options** page. For further information about the credit and absences columns, see “Selecting Transcript Options” on page 17.

NOTE

It is possible to use more than four columns if you create a custom transcript report.

To set up the columns for the transcript:

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup** page, under **Transcript Options and Permanent Record Setup**, click **Transcript Columns**.
- 4 On the **Transcript Columns** page, do one of the following:

To	Do this
Add a transcript column	<ul style="list-style-type: none"> • Click Add Rows. <p>NOTE The built-in Chancery SMS transcript supports a maximum of four columns.</p>
Edit a transcript column	<ul style="list-style-type: none"> • Click in a row.
Delete a transcript column	<ol style="list-style-type: none"> 1 Select a row. 2 From the Actions menu, click Delete Rows. 3 Click OK and skip the remaining steps.

- If your district uses Permanent Record terms and has defined terms in the **GPA/Class Ranks Reporting Term** setup list, the **Permanent Record Term** dropdown displays. From this dropdown, choose the term for the grade item.

Enter the column headings for the grade items you want to store in the permanent record and display on the transcript.

NOTE: The built-in transcript reports support a maximum of 4 column headings. More than 4 transcript column headings will require a custom transcript report for your district.

Selected: 0 Total: 5

<input type="checkbox"/> *Transcript Column	*Description	*Permanent Record Term	Award Credit	Use in Cum GPA
<input type="checkbox"/> DS1	Dist Sem One - AC & Use in Cum GPA	DSTm01	Yes	Yes
<input type="checkbox"/> DS2	Dist Sem Two - AC & Use in Cum GPA	DSTm02	Yes	Yes
<input type="checkbox"/> DSAvg	Dist Sem Average - AC & Use in Cum GPA	DSTm02	No	No
<input type="checkbox"/> DFin	Dist Final - AC & Use in Cum GPA	DSTm02	No	No

NOTE

Chancery SMS manages Permanent Record Terms in the background and keeps these terms synchronized with GPA/Class Rank Reporting Terms, which are created with a setup list. For information about GPA/Class Rank Reporting Terms, see the *Chancery SMS Setting up GPA/Class Rank Reporting Terms Technical Bulletin*.

- From the **Award Credit** dropdown, choose one of the following:

Option	Result
No	Credit is not awarded for the grade item at any school.
Yes	Credit is awarded for the grade item at all schools.

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

Option	Result
No	This grade item is not used in any cumulative GPA calculation. NOTE When schools map grade items to transcript columns on the school-level Course Grading page, the Use in Cum GPA column displays the option No , and is not editable.
Yes	This grade item is used in cumulative GPAs at all schools. NOTE When schools map grade items to transcript columns on the school-level Course Grading page, the Use in Cum GPA column displays the option Yes , and is not editable.

- Click **OK**.

Mapping a Course Grade Item to a Transcript Column

After the district has defined the columns that will appear on student transcripts, each school maps their course grade items to these Transcript Columns so that the applicable grades appear on the transcripts for the students in their school.

You can map no more than one course grade item to each Transcript Column.

To map a grade item to a transcript column:

- 1 Log on as a school administrator.
- 2 In the control bar, under **Admin**, click **School Setup**.
- 3 On the **School Setup** page, under **School**, click **Courses**.
- 4 On the **Course List** page, click a course number.
- 5 On the **Course Detail** page, in the control bar, click **Course Grading**.
- 6 On the **Course Grading** page, in the **Course Grade Items** panel, on the **Report Card** tab, in the **Grading Table** column, select the applicable grading table from the dropdown.
- 7 In the **History** column, select the Transcript Column to which you want to map the grade item. Transcript Columns are prefixed with the word **Transcript**.

US HISTORY

Collect grades for this course

Max credits: 1.000

Exclude from GPA

Adjustment factor

Add

Multiply

Course Level: Regular

*Grading period set: GP Set 9,10,11,12

Course Grade Items

Report Card **Progress Report**

The Award Credit and Use In Cum GPA properties are defined by the district and only apply when a grade item is mapped to a district transcript column.

Total:6

Grading Period	Grading Table	History	Final Grade	Award Credit	Use In Cum GPA
Course Grade					
RQ1	LG100	Transcript (DS1)		Yes	Yes
RQ2	LG100	Keep			
RQ3	LG100	Keep			
RQ4	LG100	Discard			
Other Grade					
RQ2	NLG	Transcript (DS1)			
RQ4	NLG	Transcript (DS2)			
		Transcript (DSAvg)			
		Transcript (DFin)	Yes		

- 8 If the grade item grades are final grades, in the **Final Grade** column, select **Yes** from the dropdown.

NOTE

The district determines whether a course grade is awarded credit and/or included in cumulative GPAs when they set up the Transcript Columns. When you select a Transcript Column from the **History** dropdown, **Award Credit** and **Use in Cum GPA** fields are populated based on the district's settings.

- 9 Click **Save**.

Setting Up the District Transcript

Setting up the district transcript in Chancery SMS involves selecting the specific content of the transcript, such as subject areas, tests, and cumulative GPAs, along with details such as whether the student's address or the principal's name is shown.

Before you set up the district transcript, ensure you have selected the columns of data you want to appear on students' transcripts. For further information, see "Defining Transcript Columns" on page 13.

Permissions to Work with the District Transcript

To work with the district transcript setting, you need the following permissions:

About Student Transcripts

In Chancery SMS, you can print student transcripts for secondary students who have historical information on record, meaning that historical information has been entered using one of the following methods:

- Manually entered on the student historical pages. See "Adding and Editing Historical Year Records" on page 42.
- 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 "Working with Student Records" in the *Chancery SMS District User Guide*.

A transcript can include school information, courses, course grades, and credits, attendance, scores on state or college exams, credits, cumulative GPAs and student demographic information.

Printing transcripts is like printing other reports in Chancery SMS. You can print a student's transcript information grouped by school year (e.g., 2006, 2007, 2008), or by subject area. For information about printing transcripts, see "Running a Student Transcript Report" on page 66.

Selecting Transcript Options

Select the standard elements that will appear on every student's transcript.

To select transcript options:

- 1** Log on as a district administrator.
- 2** In the control bar, under **Admin**, click **District Setup**.
- 3** On the **District Setup** page, under **Transcript Options and Permanent Record Setup**, click **Transcript Options**.
- 4** On the **Transcript Options** page, in the **Transcript Name** field, enter or edit the name of the transcript.

5 Select the options to include on the transcript:

Field	Description
Transcript Header	
School District	Select this option to show the name of the district between the school name and the transcript name.
College Board Campus Code (CBCC)	Select this option to show students' home school 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. NOTE If a student does not have a home school, a transcript does not print for that student.
Student Social Security Number	Select this option to show the student's social security number in the Student Information section of the transcript.
High School Enrollment Date	Select this option to show the student's high school enrollment date in the Student Information section of the transcript.
School Address	Select this option to show the school's address in the Student Information section of the transcript.
School Principal Name	Select this option to show the principal's name in the School Information section of the transcript. The principal name is from the student's home school. NOTE If a student does not have a home school, a transcript does not print for that student.
Student Parent/Guardian	Select this option to show the name of the student's parent or guardian in the Student Information section of the transcript.
Course Content and Summary Information	
Course Number	Select this option to show the number of each course, in addition to the course short name.
Course Type	Select this option to show the type of each course, such as "H" for honors.
Credits Earned	Select this option 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.
Yearly Credits Earned	Select this option to show the credits the student earned each year.
Course Absences	Select this option 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.

Field	Description
Yearly Absences	Select this option to show the number of absences the student had each year. Select from the dropdown to show this information by value or by occurrence. NOTE Prior to the conversion to Permanent Record, the options in this dropdown were determined by the Attendance settings on the District Preferences page. To change these options, use the PR by Year or PR by Year & Term page.
Year GPA	Select this option to show the grade average for a year, and then select the year GPA from the dropdown. NOTE A year GPA is based on a cumulative GPA formula, but only includes the grades for a single year and only those grades that are marked to be used in cumulative GPAs.

- 6 In the **Subject Areas** panel, choose the subject areas that should be included on each student’s transcript. To add the subject areas, select from the **Available** List, then use the arrow buttons to move them to the **Selected** List.

NOTE

Only courses with the subject areas you select here will appear on students’ transcripts.

- 7 If your district uses legacy test data, under **Standardized Tests**, determine the standardized tests that can be shown on student transcripts, the order that they appear, and the exact score that is used. To add the test, select from the **Available** List, then use the arrow buttons to move them to the **Selected** List. To change the order, use the up and down arrow buttons.
- 8 From the **Test Score Field to Print** dropdown, select the field that is used as the source of the test score; for example, **Raw**, **Scaled**, **Standard**, etc.
- 9 In the **Student Profile** panel, select the overall graduation information that should appear on students’ transcripts:

Field	Description
Coursework Completion Date	Select this option to show the date that the student completed coursework required for graduation.
Grant Eligibility	Select this option to show whether the student is eligible to receive a grant from the state.
Credits Information	Select this option 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.
Ranking Information	Select this option to show the student’s class rank, the number of students in the class, and the date that the ranking was done.

- 10 In the **Cumulative GPA** panel, select the cumulative GPA calculation results you want to show on students’ transcripts. To add the cumulative GPAs, select from the **Available** List, then use the arrow buttons to move them to the **Selected** List.

11 In the **General Information** panel, select the other information you want to appear on students' transcripts:

Field	Description
Date of Signature	Select this option to show an area for the official who signs the transcript to write a date. NOTE Select this option only if you also select Official Signature (below).
Official Signature	Select this option to show an area for an official to sign the transcript.
Footer Information	Select this option to show 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 option to show a legend with the grading table. If you select this, enter the legend text, for example: A - 90-10 E - Excellent B - 80-89 S - Satisfactory C - 75-79 N - Needs Improvement D - Below 70 U - Unsatisfactory
District Message	Select this and enter a message to show a district-wide message on all transcripts, for example: August 19 is the last day to change electives. Schools can also add a message when they print their students' transcripts.

12 Click **OK**.

Working with Cumulative GPAs

You set up cumulative GPA definitions at the district level. To understand cumulative GPA and credits options, rules, and calculation formulas, and to learn how to set up cumulative GPA definitions, refer to the appropriate topic:

- “Options for Cumulative GPAs” on page 21
- “Cumulative GPA Calculation Rules” on page 22
- “Credit Calculation Rules” on page 22
- “Selecting a Calculation Formula” on page 23
- “Adding and Editing Cumulative GPA Definitions” on page 24

NOTES

- For an explanation of what happens to cumulative GPAs and credits when you convert your existing database to use the Permanent Record functionality, see the *Chancery SMS 6.7 Converting to Permanent Record Technical Bulletin*.
- Current year GPA definitions (i.e., report card GPA definitions for the active year) are created at the school level.
- A year GPA is the grade point average for a single year, using a cumulative GPA formula.

Permissions to Work with Cumulative GPAs

To work with cumulative GPAs, you need the following permissions:

To	You need this permission	Set to
Add, edit, and delete cumulative GPA definitions	Transcript/Permanent Record > Cumulative GPA Setup	Delete

Options for Cumulative GPAs

For any cumulative GPA definition, you can:

- Calculate as a potential credits grade average or a simple grade average.
- Apply course adjustment factors to determine points.
- Use grade points or numeric values scaled to 100 in the calculation.
- Specify that if the student is denied credit for any reason the grade should be counted as 0 in cumulative GPA calculations.
- Define how to treat missing grades.
- Use course leveling to apply adjustment factors.
- Control the current year and historical year courses included in the cumulative GPA calculation by selecting specific courses to include or exclude. A GPA can only include courses for which grades are collected, as defined in the district Course Catalog.

Cumulative GPA Calculation Rules

All cumulative GPA calculations follow these rules:

- For current year and historical grades, special grades are ignored because they have no point values or numeric equivalents.
- For the historical grades portion, the calculation uses data from historical course details. For further information, see “Entering Student Historical Course Details” on page 46.
- For both current year and historical year grades, the calculation uses the course inclusions/exclusions specified in the cumulative GPA definition. However, if **Exclude from GPA** is selected on the **Course Grading** page for current year courses or, for historical courses, the **Exclude from Cum GPA Calcs** is set to **Yes** on the student’s historical course page, the grade for that course is not included in the calculation.
- After determining which course grades to include in the calculation, the system looks at the **Use in Cum GPA** setting defined on the **Transcript Columns** page. For further information about transcript columns, see “Defining Transcript Columns” on page 13.
- For a student’s current year grades to be included in the calculation, the student must be enrolled during the time period to which the calculation applies. A new student’s current year grades earned prior to enrollment and entered in Chancery SMS are not counted in the cumulative GPA calculations because the student was not enrolled during the applicable time period. A student’s historical grades, however, are included in GPA calculations, regardless of the student’s enrollment.
- If a student is enrolled in multiple schools, the calculation includes all applicable courses from all schools in which the student is enrolled.

Credit Calculation Rules

It’s important to be aware of the rules for credit calculations that apply to the current year grades portion of cumulative GPA calculations. The rules are as follows:

- If both **Award Credit** and **Use in Cum GPA** are set to **Yes** on the district Transcript Columns, then the attendance rules on the **Attendance Rules for Credit Calculations** page that affect credit awarding are taken into account.
- If a student is denied credit due to excessive absences based on the settings on the **Attendance Rules for Credit Calculations** page, then the grade is considered 0 (zero) for the cumulative GPA calculation. For example, if a student gets 87 in a course but is denied credit due to excessive absences, that course is counted as 87 in current year averages, but as 0 for cumulative GPA calculations. For information about attendance rules for credit calculations, see the *Chancery SMS School Setup Guide*.
- If a student’s credits earned value is 0 due to the student’s grade, then the grade is used for calculations. For example, D=0 grade points in the grading table is a grade with 0% credit awarded.

NOTE

Attendance Rules for Credit Calculations are not automatically applied to detailed historical data. That is, if you change the number of historical course attendance absences, Chancery SMS does not automatically change the credits earned number, i.e., to deny credits based on attendance.

Selecting a Calculation Formula

When you create cumulative GPAs, you must select a calculation formula. How this calculation formula works depends on the calculation method you select: grade points (converts existing grades to the grade point equivalents specified in the grading table) or numeric values scaled to 100 (divides grades entered by the appropriate scale and multiplies them by 100).

The following topics describe the cumulative GPA calculation formulas and how they work with the calculation methods.

NOTE

All calculations include grade item values (either numeric or grade points) that are mapped to the district transcript columns where **Use in Cumulative GPA** is Yes.

Sum (Points) / Total Number of Grades (Simple Grade Average)

The simple grade average formula does not use weights, so each grade is considered an equivalent unit, regardless of the potential credits.

The formula for “Sum (Points) / Total Number of Grades” using grade points is:

$$\frac{\sum \text{historical course (Grade Points) grades} + \sum \text{current year (Grade Points) grades}}{\text{Total Number of Grades}}$$

The formula for “Sum (Points) / Total Number of Grades” using numeric values scaled to 100 is:

$$\frac{\sum \text{historical course grades} \left(\frac{\text{Grade}}{\text{Grade Points Scale from PR Setup}} \times 100 \right) + \sum \text{current year grades} \left(\frac{\text{Grade}}{\text{Numeric Grade Scale from grading table}} \times 100 \right)}{\text{Total Number of Grades}}$$

Sum (Points x Potential Credits) / Total Potential Credits (Potential Credits Grade Average)

The “Potential Credits” for a grade item is the maximum credits for the course divided by the number of grade items within the class’s schedule that have **Use in Cum GPA** set to Yes. For example, if a course has maximum credits of 1 and it has two grade items – one in each semester – set to **Use in Cum GPA**, the potential credits are calculated as $1 / 2 = 0.5$. If the class only runs in one semester, the potential credits are calculated as $1 / 1 = 1$.

The potential credits grade average formula weights the historical cumulative or yearly GPAs and the current year grades by multiplying them by their potential credits.

The formula for “Sum (Points x Potential Credits) / Total Potential Credits” using numeric values scaled to 100 is:

$$\frac{\sum \text{historical course grades} \left(\left(\frac{\text{Grade}}{\text{Numeric Grade Scale from PR Setup}} \times 100 \right) \times \text{Potential Credits} \right) + \sum \text{current year grades} \left(\left(\frac{\text{Grade}}{\text{Numeric Grade Scale from grading table}} \times 100 \right) \times \text{Potential Credits} \right)}{\text{Total Potential Credits}}$$

The formula for “Sum (Points x Potential Credits) / Total Potential Credits” using grade points is:

$$\frac{\sum \text{historical course grades} \left(\text{Grade Points} \times \text{Potential Credits} \right) + \sum \text{current year grades} \left(\text{Grade Points} \times \text{Potential Credits} \right)}{\text{Total Potential Credits}}$$

Adding and Editing Cumulative GPA Definitions

If you edit a cumulative GPA definition, keep in mind that class ranks use cumulative GPAs as part of their definitions. Student ranks may be affected by your changes; therefore, run calculations after making edits to any cumulative GPA definition. For information about running calculations, see “Running Calculations” on page 65.

NOTE

If your district calculates term GPAs, Chancery SMS uses the formula you set up for the cumulative GPA when calculating both the end-of-term GPA and the cumulative-to-end-of-term GPA. For more information about term GPAs, see:

- “Working with Secondary Student Permanent Record Data by Term” on page 59.
- The *Chancery SMS Grading Setup Guide*.
- The *Setting up GPA/Class Rank Reporting Terms* Technical Bulletin.

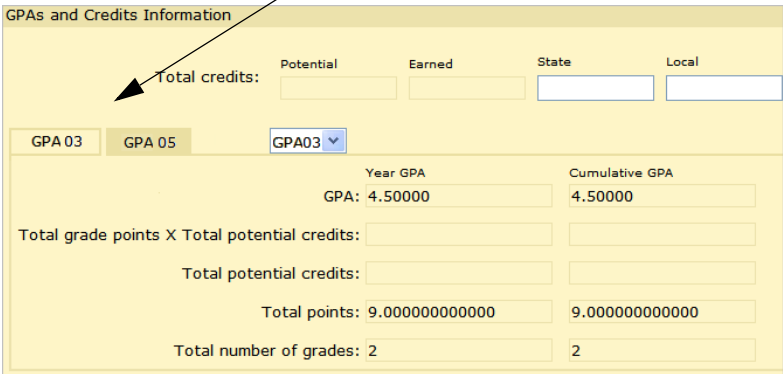
To add or edit a cumulative GPA:

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup** page, under **Transcript Options and Permanent Record Setup**, click **Cumulative GPA Setup**.

4 On the **Cumulative GPAs** page, do one of the following:

To	Do this
Add a cumulative GPA definition	<ul style="list-style-type: none"> From the Actions menu, click Add Cumulative GPA Definition.
Edit a cumulative GPA definition	<ul style="list-style-type: none"> Click the cumulative GPA definition you want to edit. OR 1 Select the cumulative GPA definition. 2 From the Actions menu, click Edit Cumulative GPA Definition.
Delete a cumulative GPA definition	<ol style="list-style-type: none"> Select the cumulative GPA definition you want to delete. From the Actions menu, click Delete GPA Definition. Click OK and skip the remaining steps. <p>CAUTION Deleting a cumulative GPA definition deletes all student GPAs that were calculated using this definition.</p> <p>NOTES</p> <ul style="list-style-type: none"> You can delete only one cumulative GPA definition at a time. You cannot delete cumulative GPA definitions that are assigned to class rank definitions.

5 On the **Cumulative GPA** page, complete the following fields:

Field	Description
Cumulative GPA Name	Enter a unique name for the cumulative GPA. Ensure the name clearly differentiates this GPA from all others.
Cumulative GPA Short Code	<p>Enter a short code for the GPA. When a cumulative GPA definition is created, tabs appear on the student Historical Year page. These tabs are labeled with the short code you enter here.</p> 
Description	If you want to describe the GPA in greater detail, enter a description.

Field	Description
Calculation formula	<p>Select one of the following:</p> <ul style="list-style-type: none"> • Sum (Points x Potential Credits) / Total Potential Credits • Sum (Points) / Total Number of Grades <p>For further information about calculation formulas, see “Selecting a Calculation Formula” on page 23.</p>
Adjustment factor	<p>If you want the points value in the formula to be adjusted by the course adjustment factor, select Use course adjustment factor to determine points. Both current year courses and historical courses have adjustment factors.</p>
Calculation method	<p>Select one of the following:</p> <ul style="list-style-type: none"> • Use grade points – converts existing grades to the grade point equivalents. <p>NOTE To use this option, a grade points scale must be entered on the Permanent Record Setup page.</p> <p>When this method is selected, the calculation uses grade points for both historical and current year grades:</p> <ul style="list-style-type: none"> • For current year grades, the calculation uses the grade points specified in the grading table, taking into account course leveling. • For historical grades, the calculation uses the grade points from historical courses, taking into account course leveling. • Use numeric grades scaled to 100 – divides grades entered by the appropriate scale and multiplies them by 100. <p>NOTE To use this option, a numeric grades scale must be entered on the Permanent Record Setup page.</p> <ul style="list-style-type: none"> • For current year numeric grades, the numeric value is scaled to 100; for other current year grades the grade point value is scaled to 100. • For historical grades, the calculation will either scale numeric grades into a scale of 100 or scale grade points into a scale of 100 (based on the scale entered in the Permanent Record set up). If numeric grades do not exist, the calculation uses grade points. If neither numeric grades nor grade points exist, the calculation checks for any grade type. If none is found, the grade is considered a missing grade.
Credits earned penalty	<p>To have a grade figure as zero in the calculation, select If credits earned is zero, count grade as zero.</p> <p>NOTE If a student receives a grade that does not produce a credit, regardless of the options selected in this cumulative GPA definition, the student will earn zero credit. This options determines if the grade will be zero in the calculation. For example, if a grade of 40 earns 0 credit, the calculation will use 40 unless the credits earned penalty is selected, in which case the calculation will use 0.</p>

Field	Description
Missing grade	<p>Indicate how you want missing grades to be treated in the calculation. Select one of the following:</p> <ul style="list-style-type: none"> • Ignore Grade Item – removes the grade item from both the numerator and the denominator. • Count Item as Zero – enters a value of zero in the numerator and leaves the corresponding potential credits number of grades in the denominator. <p>How missing grades are determined:</p> <ul style="list-style-type: none"> • For current year grades, the grading period set indicates which grade items are to be collected in any grading period. If a student was taking a course in the grading period and no grade was entered, the grade is considered a missing grade. • For historical grades, if there is no numeric grade, no letter grade, and no grade point, the grade is considered a missing grade.
Level	<p>Select one of the following:</p> <ul style="list-style-type: none"> • Use Assigned Level <ul style="list-style-type: none"> • For current year grades, values from the version of the grading table specified for the course (e.g., Honors, Remedial) are used. • For historical grades, leveled grades from historical courses are used. • Use Regular Level <ul style="list-style-type: none"> • For current year grades, values from the Regular version of the grading table are used, regardless of the course level specified for the course. The name of this option may be different (e.g., not "Regular") if your district has changed the name of the Regular course level setup list item. • For historical grades, unleveled grades from historical courses are used.

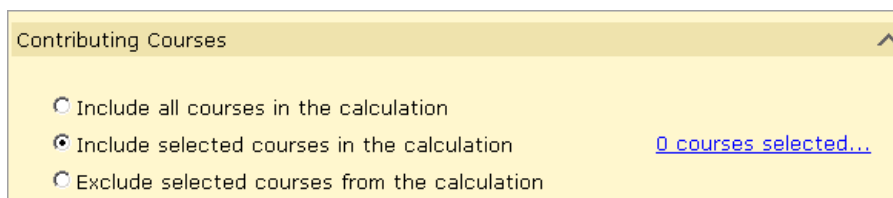
- 6 In the **Calculation Display Result** panel, from the **Decimal Places** dropdown, select how many decimal places the resulting GPA should be rounded to when displaying the result.

NOTE

The number you select here for the decimal places is the display precision, not the calculation precision. When Chancery SMS performs calculations, it uses an internal value with more decimal places, and then rounds and displays the result in the number of decimal places you specify here. The calculation precision results might not be exactly the same as the displayed precision results, however, you can use the Cumulative GPA report to print calculated precision values for comparison.

7 In the **Contributing Courses** panel, do one of the following:

To	Do this
Include all current and historical courses in the cumulative GPA calculation	<ul style="list-style-type: none"> • Select Include all courses in the calculation. <p>For current year courses, the Exclude from GPA setting on the District Setup > Course Catalog Home > Course List > Course Grading page supersedes the Include all courses setting. If Exclude from GPA is selected, the course is not included in the calculation.</p> <p>For historical courses, the Exclude from Cum GPA Calcs setting on the Student Demographics > Historical Info > Course List > Course page supersedes the Include all courses setting. If Exclude from Cum GPA Calcs is set to Yes, the course is not included in the calculation.</p>
Include only certain courses in the cumulative GPA calculation	<ol style="list-style-type: none"> 1 Select Include selected courses in the calculation. 2 Click 0 courses selected. 3 On the Select Courses page, search for and select the courses to include in the cumulative GPA. 4 Click OK. <p>For current year courses, the Exclude from GPA setting on the District Setup > Course Catalog Home > Course List > Course Grading page supersedes the Include all courses setting. If Exclude from GPA is selected, the course is not included in the calculation.</p> <p>For historical courses, the Exclude from Cum GPA Calcs setting on the Student Demographics > Historical Info > Course List > Course page supersedes the Include all courses setting. If Exclude from Cum GPA Calcs is set to Yes, the course is not included in the calculation.</p>
Exclude only certain courses from the cumulative GPA calculation	<ol style="list-style-type: none"> 1 Select Exclude selected courses from the calculation. 2 Click 0 courses selected. 3 On the Select Courses page, search for and select the courses to be excluded from the GPA, and then click OK.



8 Click **OK**.

Performing Permanent Record Setup

Perform Permanent Record (PR) setup for both secondary and elementary schools.

NOTE

Although elementary student PR data is not currently viewable in the Chancery SMS interface, it is recommended that you select permanent record options for elementary student data so that the structure is set up when the elementary permanent record information is visible in a future version of Chancery SMS.

For secondary schools, define how data is to be displayed on students' permanent record (PR) pages, including whether or not to view active year class rank and credits data on students' PR pages. Select the grading scale type and configure the display precision for attendance and credit calculation results. See "Selecting Permanent Record Options for Secondary Schools" on page 29.

For elementary schools, indicate which report card data to store in elementary records in permanent record tables after year-end processing. See "Selecting Permanent Record Options for Elementary Schools" on page 32.

Permissions to Work with Permanent Record Setup

To work with permanent record setup, you need the following permissions:

To	You need this permission	Set to
View elementary and secondary permanent record setup information	Transcript/Permanent Record >Permanent Record Setup	View
Add or edit elementary and secondary permanent record setup information	Transcript/Permanent Record >Permanent Record Setup	Edit
Add, edit, and delete elementary and secondary permanent record setup information	Transcript/Permanent Record >Permanent Record Setup	Delete


Selecting Permanent Record Options for Secondary Schools

Selecting permanent record options for secondary schools involves specifying whether or not active year data will be included in calculation results, and how cumulative GPA, attendance, and credits will be displayed on secondary students' PR pages. For information about the student PR pages, see "Secondary Student Permanent Records" on page 51.

To select permanent record options for secondary schools:

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup** page, under **Transcript Options and Permanent Record Setup**, click **Permanent Record Setup**.

4 On the **Permanent Record Setup** page, complete the following fields:

Field	Description										
<p>Active Year Data</p>	<p>This preference enables you to control whether or not active year data is included in the data displayed on the PR Summary Data. For information about student PR summary data page, see “Viewing Secondary Student Permanent Record Summary Data” on page 51.</p>  <p>District Setup > Permanent Record Setup</p> <p>Help ▾</p> <p>Secondary Elementary</p> <p>Active Year Data</p> <p>Specify whether or not to include active year data on the Permanent Record Summary affect cumulative GPA calculations.</p> <p>Active year data: <input type="radio"/> Last completed report card grading period <input checked="" type="radio"/> Current report card grading period <input type="radio"/> Do not include active year data</p> <p>Quick Search > Student Search Results > Edit Student Demographics (Valley, @Barbara R) > PR Summary Data</p> <p>Actions ▾ Edit ▾ Reports ▾ Help ▾</p> <p>Valley, @Barbara R</p> <p>Information on this page includes data from the active calendar year.</p> <p>Summary</p> <p>Rank Out of Date Class rank: <input type="text"/> <input type="text"/> <input type="text"/></p> <p>Potential Earned Total Credits: 5.2 <input type="text"/> 3.2 <input type="text"/></p> <p>GPA's</p> <p>View: (G) GPA Summary ▾</p> <table border="1"> <thead> <tr> <th>GPA Short Code</th> <th>Cum GPA</th> <th>Total Grade Points X Cum GPA</th> <th>Total Potential Credits</th> <th>Total Potential Credits Cum GPA</th> </tr> </thead> <tbody> <tr> <td>001</td> <td>0.250</td> <td>0.083333333400</td> <td></td> <td>0.33333333400</td> </tr> </tbody> </table> <ul style="list-style-type: none"> • Last completed report card grading period - Select this option if you want a student’s class rank, credits, and GPA data from the last completed grading period included in the calculation results that appear on secondary students’ PR Summary Data page. • Current report card grading period - Select this option if you want a student’s class rank, credits, and GPA data from the current grading period included in the calculation results that appear on secondary students’ PR Summary Data page. • Do not include active year data - Select this option if you do not want active year data included in the calculation results on secondary students’ PR Summary Data page. <p>NOTE If you change this option, you must recalculate cumulative GPAs and summary credits totals for all students in the district. For further information, see “Running Calculations” on page 65.</p>	GPA Short Code	Cum GPA	Total Grade Points X Cum GPA	Total Potential Credits	Total Potential Credits Cum GPA	001	0.250	0.083333333400		0.33333333400
GPA Short Code	Cum GPA	Total Grade Points X Cum GPA	Total Potential Credits	Total Potential Credits Cum GPA							
001	0.250	0.083333333400		0.33333333400							

Field	Description
Effective As Of	<ul style="list-style-type: none"> • Last completed report card grading period - Select this option if, on the PR by Year or PR by Year & Term page, you want GPAs and credits to include a student's active year grades up to and including the last completed grading period. • Current report card grading period - Select this option if, on the PR by Year or PR by Year & Term page, you want a student's GPAs and credits to include active year grades up to and including the current grading period. <p>NOTES</p> <ul style="list-style-type: none"> • The options you select here affect the current active year data that appears on the PR by Year and on PR by Year & Term pages. For further information, see "Working with Secondary Student Permanent Record Data by Year" on page 54 and "Working with Secondary Student Permanent Record Data by Term" on page 59. • If you change this option, you must recalculate cumulative GPAs and summary credits totals for all students in the district. For further information, see "Running Calculations" on page 65.
Numeric Grades Scale	Enter the numeric grades scale you want used in cumulative GPA definitions that are based on the calculation method of "Use numeric values scaled to 100". A typical numeric grades scale is "100".
Grade Points Scale	Enter the grade points scale you want used in cumulative GPA definitions that are based on the calculation method "Use grade points". A typical grade points scale is "4".
Attendance, Decimal Places	Select the number of decimal places for the summary attendance totals by value that will show on each secondary student's PR By Year page (or, if your district calculates GPAs by term, on the PR By Year & Term page). For further information about these pages, see "Secondary Student Permanent Records" on page 51.
Credits, Decimal Places	Select the number of decimal places for the summary credits totals that will show on each secondary student's PR Summary Data and PR By Year page (or, if your district calculates GPAs by term, on the PR By Year & Term page). For further information about these pages, see "Secondary Student Permanent Records" on page 51.

5 Click **OK**.

Selecting Permanent Record Options for Elementary Schools

When year-end processing is run, Chancery SMS creates a record in the permanent record tables for each student in an elementary school. If a student is enrolled in two different schools within the district, two separate records are created in the database for the same year.

Permanent record setup for elementary schools involves selecting the data that should be stored in each elementary student's permanent record after year-end processing. This data is stored in permanent record tables but will not be visible in the interface until a future version of Chancery SMS.

To select permanent record options for elementary schools:

- 1 Log on as a district administrator.
- 2 In the control bar, click **District Setup**.
- 3 On the **District Setup** page, under **Transcript Options and Permanent Record Setup**, click **Permanent Record Setup**.
- 4 On the **Permanent Record Setup** page, click the **Elementary** tab.
- 5 On the **Elementary** tab, complete the following:

Field	Description
Report Card Periods (panel)	<p>All Report Card Period Grades - Select this option if you want to keep all grades for elementary students in elementary permanent record tables.</p> <p>Final Report Card Period Grades - Select this option if you want to keep only final grades for elementary students in the elementary permanent record tables.</p>
Report Card Setup (panel)	Click the checkbox for each report card grade item you want to keep in elementary permanent record tables.
Daily Attendance	Select this option if you want to keep daily attendance in the elementary permanent record tables.
Present totals	<ul style="list-style-type: none"> • Values. Select this option if, during Year-End Processing, you want to roll over the sum of present attendance codes assigned to each elementary student. • Occurrences. Select this option if, during Year-End Processing, you want to roll over the number of present attendance codes assigned to each elementary student, expressed in whole numbers.
Absent totals	<ul style="list-style-type: none"> • Values. Select this option if, during Year-End Processing, you want to roll over the sum of absent attendance codes assigned to each elementary student. • Occurrences. Select this option if, during Year-End Processing, you want to roll over the number of absent attendance codes assigned to each elementary student, expressed in whole numbers.

Field	Description
Tardy totals	<ul style="list-style-type: none">• Values. Select this option if, during Year-End Processing, you want to roll over the sum of tardy attendance codes assigned to each elementary student.• Occurrences. Select this option if, during Year-End Processing, you want to roll over the number of tardy attendance codes assigned to each elementary student, expressed in whole numbers.

6 Click **OK**.

Setting up Calculation Time Restrictions and Schedules

Configure time restrictions to ensure district-wide or school-wide cumulative GPA and credit calculations only run on certain days and/or at certain times. Time restrictions allow you to limit running system-intensive calculations to times when few or no users are logged on to Chancery SMS.

Schedule district cumulative GPA and credits calculations to run once on a particular date at a specified time, or set the calculations to run automatically on a recurring basis. If you've configured time restrictions, these restrictions are visible when you create the schedule so that you can avoid scheduling calculations during restricted time periods.

IMPORTANT NOTE

It is strongly recommended that you schedule a recurring cumulative GPA and credit calculation that runs every night. This recurring calculation will ensure students' cumulative GPAs and credits are up to date every day.

Permissions to Set Up Calculation Time Restrictions and Schedules

To set up Permanent Record calculation time restrictions and schedules, you need the following permissions:

To	You need this permission	Set to
Set up calculation time restrictions	Transcript/Permanent Record > Permanent Record Calculation Time Restrictions	Yes
Set up calculation schedules	Transcript/Permanent Record > Schedule Permanent Record Calculations	Yes

Setting up Calculation Time Restrictions

The calculation time restrictions you create here apply when cumulative GPA and credits are calculated for all students in the district or all students in a school.

To set up a calculation time restriction:

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup** page, under **Transcript Options and Permanent Record Setup**, click **Permanent Record Calculation Time Restrictions**.

- 4 On the **Permanent Record Calculation Time Restrictions** page, do one of the following:

To	Do this
Add a calculation time restriction	<ul style="list-style-type: none"> Click Add Rows.
Edit a calculation time restriction	<ul style="list-style-type: none"> Click in the row for the time restriction.
Delete a calculation time restriction	<ol style="list-style-type: none"> Select the row. From the Actions menu, click Delete Time Restriction. Click OK and skip the remaining steps.

- 5 In the **Day** column, select a day interval (e.g., Weekdays, Everyday, etc.) or day of the week from the dropdown.
- 6 Select the start and end times for the restriction.
- 7 Click **OK**.

Scheduling GPA and Credit Calculations

You can set up one time or recurring cumulative GPA and credit calculations that run for all students in the district.

IMPORTANT NOTE

It is highly recommended that you schedule a recurring cumulative GPA and credit calculation that runs every night. This recurring calculation will ensure students' cumulative GPAs and credits are up to date every day.

When you run a scheduled calculation, it can have one of three statuses:

- **In progress** - the calculation is running.
- **Scheduled** - the calculation has been scheduled to run on a recurring basis.
- **Failed** - the calculation was unsuccessful.
- **Completed** - the recurring calculation completed successfully.

NOTE

When a one-time calculation completes successfully, it no longer appears on the **Schedule Permanent Record Calculations** page.

If time restrictions for running calculations exist, a Time Restrictions panel appears on the **Define Schedule** page and displays the day, start time, and end time to which the restriction applies. For further information about calculation time restrictions, see “Setting up Calculation Time Restrictions” on page 35.

District Setup > Schedule Permanent Record Calculations > Define Schedule

Actions ▾ Help ▾

During a one-time calculation, cumulative GPAs and credits are calculated for all students enrolled in the district during the specified date and time.
 During a recurring calculation, cumulative GPAs and credits are calculated for students who require a recalculation due to data changes, or district setup changes.

One-time

*Date: mm/dd/yyyy

at: 12:00 AM ▾

Recurring

Every: 1 ▾ Day ▾

at: 12:00 AM ▾

*Start: 01/21/2009 mm/dd/yyyy

Time Restrictions
 District-wide and school-wide permanent record calculations cannot take place during the following times as specified below.

Day	Start Time	End Time
Monday	10:00 AM	3:00 PM
Wednesday	9:00 AM	2:00 AM
Friday	9:00 AM	12:00 PM

To schedule a calculation:

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup** page, under **Transcript Options and Permanent Record Setup**, click **Schedule Permanent Record Calculations**.

4 On the **Schedule Permanent Record Calculations** page, do one of the following:

To	Do this
Schedule a calculation	<ul style="list-style-type: none"> From the Actions menu, click Add Scheduled Calculation.
Delete a scheduled calculation	<ol style="list-style-type: none"> Select the scheduled calculation. From the Actions menu, click Delete Scheduled Calculation. Click OK and skip the remaining steps. <p>NOTE You can delete a schedule that has a status of "Scheduled" or "Failed". You cannot delete a schedule with a status of "In progress".</p>

NOTE

You cannot edit a scheduled calculation. To change a scheduled calculation, you must delete it and create a new scheduled calculation.

5 On the **Define Schedule** page, do one of the following:

To	Do this
To schedule a one time calculation	<ol style="list-style-type: none"> Select One-time. In the Date field, enter the date on which you want the calculation to run. If time restrictions have been set up, review the times listed in the Time Restrictions panel. In the At field, select a time to run the calculations that does not conflict with any of the times listed in the Time Restrictions panel. Click OK. <p>For information about time restrictions, see "Setting up Calculation Time Restrictions" on page 35.</p>
To schedule a recurring calculation	<ol style="list-style-type: none"> Select Recurring. In the Every field, select the interval and day on which you want the calculation to run. If time restrictions have been set up, review the times listed in the Time Restrictions panel. In the At field, select a time to run the calculations that does not conflict with any of the times listed in the Time Restrictions panel. In the Date field, enter the first date on which you want the calculation to run. Click OK. <p>For information about time restrictions, see "Setting up Calculation Time Restrictions" on page 35.</p>

6 Click **OK**.

Managing Out-of-District Schools

With the Permanent Record feature, you can create and manage a catalog of out-of-district schools. The catalog helps ensure information about students' previous out-of-district schools is consistent and can be reused. District and school users can select from this catalog when they enter historical information for secondary students. If out-of-district schools are missing from the catalog, district- and school-level users with the appropriate permissions can add them.

Permissions to Set Up Out-of-District Schools

To work with out-of-district schools, you need the following permissions:

To	You need this permission	Set to
View and select out-of-district schools	Transcript/Permanent Record > Manage Out of District Schools	View
Add or edit out-of-district schools	Transcript/Permanent Record > Manage Out of District Schools	Edit
Add, edit, or delete out-of-district schools	Transcript/Permanent Record > Manage Out of District Schools	Delete

Adding and Editing Out-of-District Schools

Enter and edit information about out-of-district schools, such as school name, address, phone, principal's name, school and district numbers, and CBCC number.

To add or edit an out-of-district school:

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **District Setup**.
- 3 On the **District Setup** page, under **Transcript Options and Permanent Record Setup**, click **Out of District Schools**.
- 4 Do one of the following:

To	Do this
Add an out-of-district school	<ul style="list-style-type: none">• From the Actions menu, click Add Out Of District School.
Edit an out-of-district school	<ul style="list-style-type: none">• Click the out-of-district school you want to edit. OR1 Select the out-of-district school.2 From the Actions menu, click Edit Out Of District School.

To	Do this
Delete an out-of-district school	<ol style="list-style-type: none"> 1 Select the out-of-district school you want to delete. 2 From the Actions menu, click Edit Out Of District School. 3 Click OK and skip the remaining steps. <p>NOTE You cannot delete an out-of-district school that is assigned to a student's historical record.</p>

5 On the **Out of District School** page, enter or edit the following information:

Field	Description
School Name	Enter the name of the out-of-district school.
School Number	Enter the school number.
District Number	Enter the district number.
CBCC (College Board Campus Code)	Enter the number that uniquely identifies the school for the college board. Students present this number when they are evaluated in any of the college board exams.
Principal	Enter the title and name of the school's principal.
Address, City, State, Country, Zip	Enter the school's address information.
Communication numbers	Select the communication device from the dropdown and enter the number (and extension, if applicable). To add more numbers, click Add Rows .

6 Click **OK**.

Secondary Student Historical Information

Chancery SMS uses secondary student historical data when calculating cumulative GPAs or, if your district calculates GPAs by term, when calculating cumulative-to-end-of-term GPAs. Before you run cumulative GPA calculations, it's important to ensure that, where applicable, historical data exists for secondary students.

You can enter three types of historical information:

- Information about a specific historical year. This includes the name of the school a student attended that year, along with credits, GPA and class rank for the year. See "Adding and Editing Historical Year Records" on page 42.
- Information about the courses a student took in a specific historical year, such as the course name and number and the grade the student received. See "Entering Student Historical Course Details" on page 46.
- Graduation information, such as enrollment and graduation dates and status. See "Adding and Editing Graduation Information" on page 49.

Permissions to Work with Historical Info

To work with historical transcript records, you need the following permissions:

To	You need this permission	Set to
View historical info	Transcript/Permanent Record>Student Historical Info Data	View
Add or edit historical info	Transcript/Permanent Record>Student Historical Info Data	Edit
Add, edit, or delete historical info	Transcript/Permanent Record>Student Historical Info Data	Delete

Methods for Entering Historical Info

Historical information for secondary students can be entered using the following methods:

- Populated during Year End Processing. After a school has used Chancery SMS for the first school year, current year information becomes historical information through an automated process during Year End Processing. For details, see the *Chancery SMS Next-Year Preparation and Year-End Processing Guide*.
- Manually entered on the student's **Historical Info**, **Historical Year**, and **Course** (historical) pages. This method is typically used when only one or two students require historical data entry. This section covers this manual entry method. Refer to the appropriate topic for details:
 - "Adding and Editing Historical Year Records" on page 42
 - "Entering Student Historical Course Details" on page 46
 - "Adding and Editing Graduation Information" on page 49

Adding and Editing Historical Year Records

Creating a historical year record for a secondary student enables you to:

- Enter the student’s grade level while at the historical school.
- View information about the school the student attended during the historical year.
- View the student’s GPA and credit information for the historical year.
- Enter the student’s class rank information for the historical year.
- View the student’s daily attendance for the historical year.

NOTE

You can also print a student’s transcript from this page. For further information, see “Running a Student Transcript Report” on page 66.

To add or edit a historical year:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 On the **Student Demographics** page, in the control bar, click **Historical Info**.
- 4 On the **Historical Info** page, do one of the following:

To	Do this
Add a historical year	<ol style="list-style-type: none"> 1 From the Actions menu, click Add Historical Year. 2 In the Year field, enter the historical year. 3 In the School field, select a school from the dropdown. <p>NOTE The school dropdown contains both in-district and out-of-district schools. If there is an out-of-district school you want that is not in the list, and you have the appropriate permissions, you can click the Out-of-District Schools link and complete the fields to add the school to the out-of-district school catalog.</p> <ol style="list-style-type: none"> 4 Click Continue.
Edit a historical year	<ul style="list-style-type: none"> • In the Historical Years panel, in the Year column, click the year you want to edit. <p>OR</p> <ol style="list-style-type: none"> 1 Select the historical year. 2 From the Actions menu, click Edit Historical Year.
Delete a historical year	<ol style="list-style-type: none"> 1 Select the year you want to delete. 2 From the Actions menu, click Delete Historical Year. 3 Click OK and skip the remaining steps. <p>CAUTION Deleting a historical year also permanently deletes all courses and grades for that year.</p> <p>NOTES</p> <ul style="list-style-type: none"> • To delete a historical year, you must have special permissions. For information about your permissions, see your system administrator. • You can only delete one historical year at a time.

- 5 On the **Historical Year** page, in the **Year and School Information** panel, enter or edit the following information:

Field	Description
Year	Displays the historical year.
Grade Level	Select the student's grade level for this historical year.
Student Promotion Status	Displays the final promotion status for the student for this historical year (i.e., Promoted or Retained).
Homeroom	Enter the student's homeroom for this historical year.
School	Displays the name of the school the student attended during this historical year. NOTE To view details about the school, click View Selected School Information . A dialog displays school demographic information.
Comments	Enter information about this historical year or school that does not belong elsewhere. This information does not appear on transcripts.

- 6 In the **GPAs and Credit Information** panel, view, enter, or edit the following information:

Field	Description
Total Credits	<ul style="list-style-type: none"> • Potential – Displays the total number of credits the student could have earned for all courses the student attempted in this historical year. • Earned – Displays the total number of credits the student actually earned in this historical year. • State – Enter the total number of credits the student earned for state courses in this historical year. • Local – Enter the total number of credits the student earned for local courses in this historical year.

- 7 If cumulative GPA definitions have been created at the district, a tab appears for each GPA definition and shows the following information:

Field	Description
GPA	<p>Year GPA - Displays the student's GPA for this historical year only.</p> <p>Cumulative GPA - Displays the student's cumulative GPA for all historical years, up to and including this historical year.</p> <p>NOTE The display precision is based on the display precision specified in the cumulative GPA definition.</p>

Field	Description
Total Grade Points x total potential credits	<p>Year GPA - Displays the student's points x potential credits totals for this GPA for this historical year.</p> <p>Cumulative GPA- Displays the student's points x potential credits totals for all historical years, up to and including this historical year.</p>
Total Potential Credits	<p>Year GPA - Displays the student's total potential credits for this GPA for this historical year.</p> <p>Cumulative GPA - Displays the student's total potential credits for this cumulative GPA for all historical years, up to and including this historical year.</p> <p>NOTE The display precision is based on the display precision specified on the Permanent Record Setup page for credits.</p>
Total Points	<p>Year GPA - Displays the student's total number of points for this GPA for this historical year.</p> <p>Cumulative GPA - Displays the student's total number of points for this cumulative GPA for all historical years, up to and including this historical year.</p>
Total Number of Grades	<p>Year GPA - Displays the students total number of grades for this historical year.</p> <p>Cumulative GPA - Displays the students total number of grades for all historical years, up to and including this historical year.</p>

8 In the **Ranking Information** panel, enter or edit the following information:

Field	Description
Class Rank	If the student was formally ranked against the rest of the class during this historical year, enter their rank in this field. For example, if the student was the second best student out of a class of 200, enter "2" for Class Rank.
Class Rank Date	Enter the date when class rank was calculated for this historical year.
Percentile	Enter the student's class rank percentile for this historical year.
Out Of	Enter the number that identifies the total number of classmates the student is being compared against for this historical year. For example, if the student ranked 2 out of 200, enter "200".
Relative Position	If, in this historical year, the student was assigned a relative position against the rest of the class—possibly because the student came from outside the district—enter the number in this field.

- 9 In the **Daily Attendance Information** panel, if Permanent Record Terms have not been set up, you can enter the student’s daily attendance information for this historical year. If Permanent Record Terms have been set up, values are calculated based on all terms for this historical year and fields are view only.

Field	Description
Days Possible	Enter or view the maximum number of days a student can be present for the year. IMPORTANT NOTE For districts using GPA/Class Rank Reporting Periods: To ensure that all days in all grading periods are included when days possible are calculated during Year-End Processing, schools must map every grading period to a GPA/Class Rank Reporting Period. For instructions, see the <i>Chancery SMS Grading Setup Guide</i> .
Present	Values - Enter or view the calculated present value for the student during this historical year. OR Occurrences - Enter or view the number of times the student was present during this historical year.
Excused Absences	Values - Enter or view the calculated excused absences value for the student during this historical year. OR Occurrences - Enter or view the number of times the student was absent during this historical year with a valid reason.
Unexcused Absences	Values - Enter or view the calculated unexcused absences value for the student during this historical year. OR Occurrences - Enter or view the number of times the student was absent during this historical year without a valid reason.
Excused Tardies	Values - Enter or view the calculated excused tardies value for the student during this historical year. OR Occurrences - Enter or view the number of times the student was late during this historical year with a valid reason.
Unexcused Tardies	Values - Enter or view the calculated unexcused tardies value for the student during this historical year. OR Occurrences - Enter or view the number of times the student was late during this historical year without a valid reason.

- 10 Click **OK**.

Entering Student Historical Course Details

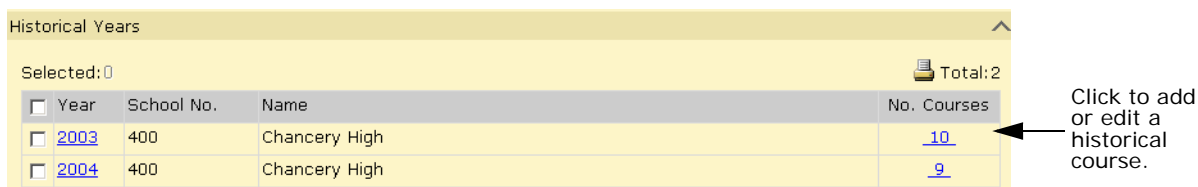
You can enter detailed information about the courses a student took in previous years, such as:

- General course information, e.g., course name, course type, etc.
- The student’s course attendance information.
- The student’s grades information at the district level (transcript grades) and at the school level (report card and progress report grades).

Before you can enter courses, you must create a historical year to identify the year the courses were taken. See “Adding and Editing Historical Year Records” on page 42.

To add or edit a historical course:

- 1 Open a student record.
- 2 In the control bar, click **Historical Info**.
- 3 On the **Historical Info** page, in the **Historical Years** panel, click the number in the **No. Courses** column corresponding to the year the courses were taken. If no courses have been added yet, click the **0**.



- 4 On the **Course List** page, do one of the following:

To	Do this
Add a historical course	<ul style="list-style-type: none"> • From the Actions menu, click Add Historical Course.
Edit a historical course	<ul style="list-style-type: none"> • In the Name column, click the historical course you want to edit. <p>OR</p> <ol style="list-style-type: none"> 1 Select the historical course. 2 From the Actions menu, click Edit Historical Course.
Delete a historical course	<ol style="list-style-type: none"> 1 Select the course you want to delete. 2 From the Actions menu, click Delete Historical Course. 3 Click OK and skip the remaining steps.

- 5 On the **Course** page, in the **Course Information** panel, enter or edit the following information:

Field	Description
Exclude From Cum GPA Calcs	Select Yes or No to specify whether the course should be included or excluded from GPA calculations.

Field	Description
Summer School	Currently, this field is not used. In a future version of Chancery SMS, this field will identify whether the course was taken as part of a summer school program.
Show on Transcript	Select Yes or No to specify whether the course appears on the transcript.
Course Number	Enter the official number (identifier) of the course.
State Course ID	Enter the official number (identifier) assigned by the state to the course.
Course Name	Enter the name of the course.
Alternate Name	If the course has another name, enter it.
Short Name	Enter an abbreviated version of the course name.
Course Type	Enter the type or category of the course; for example, "Academic".
Department	Enter the department the course was in; for example "Language Arts".
Course Level	Enter the level of difficulty of the course; for example "Regular" or "Honors".
Course Grade Level	Enter the grade level of the course.
Section	Enter the section number of the course.
Teacher	Enter the name of the teacher who taught the course.
Subject Item	Select the subject area of the course; for example, "Science" or "Mathematics".
Description	Enter a description of the course.
Adjustment Factor	If a course adjustment factor was used in this course, select this option, then enter the adjustment value in the applicable Add or Multiply field.

6 In the **Course Attendance** Information panel, enter or edit the following information:

Field	Description
Present	Enter the number of times the student was present for the course.
Excused Absences	Enter the number of times the student was absent from the course with a valid reason.
Unexcused Absences	Enter the number of times the student was absent from the course without a valid reason.
Excused Tardies	Enter the number of times the student was late for the course with a valid reason.
Unexcused Tardies	Enter the number of times the student was late for the course without a valid reason.

- 7** In the **Grades Information>District Grades** panel, enter or edit the following information:

NOTE

Both grids in the Grades Information panel (District Grades and Other Grades) have a custom grid view control. For information about using grid views, see “Working with Grid Views” on page 69.

Field	Description
Grade Item	Displays the grade items defined by the district on the District Setup>Transcript Columns page.
Permanent Record Term	If your district has set up Permanent Record Terms, this column appears and displays the Permanent Record Term defined by the district on the District Setup>Transcript Columns page.
Leveled Letter Grade	Enter the student’s leveled letter grade for this grade item.
Leveled Numeric Grade	Enter the student’s leveled numeric grade for this grade item.
Leveled Grade Points	Enter the student’s leveled points for this grade item.
Unleveled Letter Grade	Enter the student’s unleveled letter grade for this grade item.
Unleveled Numeric Grade	Enter the student’s unleveled numeric grade for this grade item.
Unleveled Grade Points	Enter the student’s unleveled points for this grade item.
P/F	Select P or F to indicate whether the grade is a pass or fail.
Potential Credits	Enter the credits the student could have earned for this grade item.
Credits Earned	Enter the credits the student actually earned for this grade item.
Final Grade	Indicate whether this was a final grade by selecting Yes or No .

- 8** In the **Grades Information>Other Grades** panel, enter or edit the following information:

NOTE

Each row in the grid in the **Other Grades** panel represents either a grade item that was rolled over during Year-End Processing (i.e., was marked as “Keep” on the school-level **Course Grading** page) or a grade item that was manually added by a user. Since this grid is not part of district setup, users can add and delete rows in this grid. The grade items in this grid do not count toward cumulative GPA calculations and credit calculations.

Field	Description
Grade Item	Enter or view the name of the grade item.
Leveled Letter Grade	Enter the student’s leveled letter grade for this grade item.
Leveled Numeric Grade	Enter the student’s leveled numeric grade for this grade item.
Leveled Grade Points	Enter the student’s leveled points for this grade item.
Unleveled Letter Grade	Enter the student’s unleveled letter grade for this grade item.
Unleveled Numeric Grade	Enter the student’s unleveled numeric grade for this grade item.
Final Grade	Indicate whether this was a final grade by selecting Yes or No .
Unleveled Grade Points	Enter the student’s unleveled points for this grade item.

Field	Description
P/F	Select or view P or F to indicate whether the grade is a pass or fail.

- 9 If you are editing more than one existing course, choose from the dropdown at the top of the page or click **Next** to move to the next course. Your changes are automatically saved.
- 10 Click **OK**.

Adding and Editing Graduation Information

Add and edit graduation information, such as the student's enrollment and graduation dates, and total credits for all historical years.

To add or edit graduation information:

- 1 Log on as a district or school administrator.
- 2 Open a student record.
- 3 In the control bar, click **Historical Info**.
- 4 On the **Historical Info** page, in the **Graduation Information** panel, complete the following information:

Field	Description
Program Type	Enter the program type; for example "Accelerated" or "Regular".
High School Enrollment Date	Enter the date the student entered high school.
Graduation Date	If applicable, enter the official date the student graduated from high school.
Coursework Completion Date	Enter the date the student actually completed all coursework – but not necessarily the tests – required for graduation.
Graduation Status	This field is populated during Year-End Processing.
Grant Eligibility	Select either Yes or No to indicate whether the student is eligible for grants. Eligibility is usually associated with the program type taken by the student. For example, students in the Accelerated Program Type may be eligible, while students in the Regular Program Type may not be.
Total Credits	State - Enter the total number of credits the student earned for state courses in all historical school years. Local - Enter the total number of credits the student earned for local courses in all historical school years.

- 5 Click **OK**.

Secondary Student Permanent Records

The Permanent Record (PR) feature in Chancery SMS enables you to track a student's GPAs and credits for active and historical years, as well as enter the student's class rank for the current school year. A student's GPAs and credits can be viewed for all historical years, by historical year or, if GPA/Class rank reporting terms have been set up, by historical year and term.

You can run cumulative GPA and credit calculations from students' PR pages, provided the time you choose does not conflict with time restrictions set up by the district. The calculations produce both cumulative GPAs and year GPAs for students. The year GPA calculation results are based on a cumulative GPA formula but display a student's GPA for a single historical year.

Viewing Secondary Student Permanent Record Summary Data

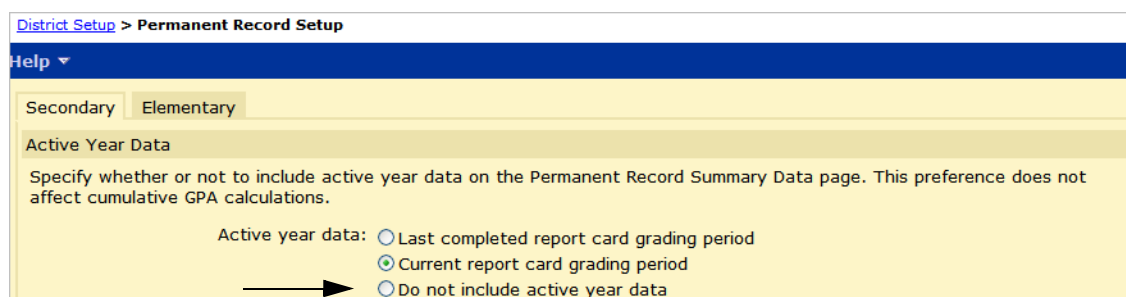
On the **PR Summary Data** page you can:

- View a student's class rank for the active calendar year. See "Viewing a Student's Current Year Class Rank" on page 52.
- View a student's credits and GPA for either the historical year only or for both the active year and historical years. See "Viewing a Student's Total Potential and Earned Credits" on page 53 and "Viewing a Student's Cumulative GPAs" on page 54.
- Calculate a single student or multiple students' cumulative GPAs and credits. An alert icon appears when a student's calculations are out of date. See "Running Calculations" on page 65.
- Print a student's transcript. See "Running a Student Transcript Report" on page 66.

To open the PR Summary Data page:

- 1 Log on as a district or school administrator.
- 2 Search for and open a student record.
OR
Search for and select multiple student records. Open the first student record.
- 3 On the **Student Demographics** page, in the control bar, click **Permanent Record**.

The class rank, credits, and GPA data that appears on the **PR Summary Data** page for a student is determined by the **Active Year Data** setting on the **Secondary** tab of the **Permanent Record Setup** page.



The screenshot shows the "Permanent Record Setup" page in a web application. At the top, there is a breadcrumb trail: "District Setup > Permanent Record Setup". Below this is a "Help" dropdown menu. The page is divided into two tabs: "Secondary" (which is selected) and "Elementary". Under the "Secondary" tab, there is a section titled "Active Year Data". The text below this title reads: "Specify whether or not to include active year data on the Permanent Record Summary Data page. This preference does not affect cumulative GPA calculations." There are three radio button options for "Active year data": "Last completed report card grading period", "Current report card grading period" (which is selected), and "Do not include active year data". A black arrow points to the "Current report card grading period" option.

For further information about the **Permanent Record Setup** page, see “Performing Permanent Record Setup” on page 29.

The following three topics describe how the **Active Year Data** setting works with each component of the **PR Summary Data** page.

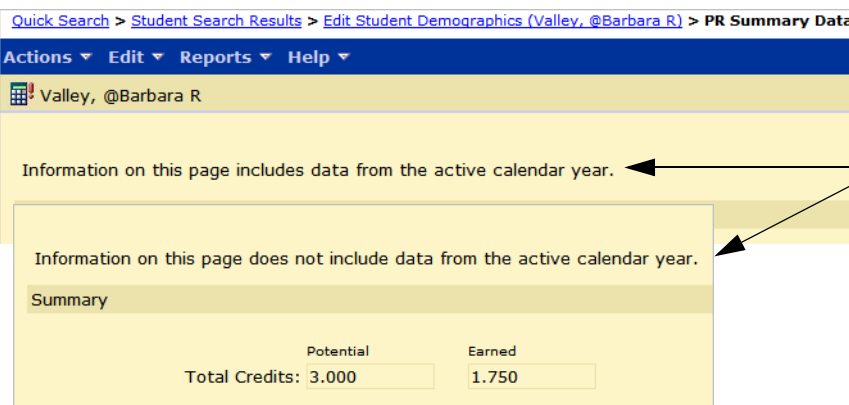
Viewing a Student’s Current Year Class Rank

The **PR Summary Data** page displays the student’s class rank for the active year, depending on the settings on the **Permanent Record Setup** page.

When **Do not include active year data** is *not* selected on the **Permanent Record Setup** page, (i.e., active year data is included in the calculation) the following **Class Rank** fields appear on the **PR Summary Data** page with the applicable data for the student:

- Class rank
 - Rank
 - Out Of
 - Date

When **Do not include active year data** is selected on the **Permanent Record Setup** page, no class rank fields are visible on the **PR Summary Data** page (even if class rank definitions exist in the active year).



When **Do not include active year data** is selected on the **Permanent Record Setup** page, the help text changes and class rank fields are no longer visible in the **Summary** panel.

If class rank fields appear, but are empty, this means the class rank is not yet entered for the student for the active year. For information about entering class rank data, see “Entering a Student’s Historical Class Rank Information by Year” on page 56.

Quick Search > Student Search Results > Edit Student Demographics (Valley, @Barbara R) > PR Summary Data

Actions ▾ Edit ▾ Reports ▾ Help ▾

Valley, @Barbara R

Information on this page includes data from the active calendar year.

Summary

Class rank:	Rank: <input type="text"/>	Out of: <input type="text"/>	Date: <input type="text"/>
Total Credits:	Potential: 3.000	Earned: 1.750	

NOTE

If the student is enrolled in multiple schools, the latest class rank is displayed.

Viewing a Student’s Total Potential and Earned Credits

The **PR Summary Data** page displays the student’s potential and earned credits either for all years (i.e., both the active year and historical years) or for only historical years, depending on settings on the **Permanent Record Setup** page.

When **Do not include active year data** is *not* selected on the **Permanent Record Setup** page (i.e., active year data is included in the credit calculation) the potential and earned credits on the **PR Data Summary** page are:

- The total potential and earned credits for all historical years and for all schools in which the student was enrolled,
AND
- The total potential and earned credits for the active year (for all schools in which the student is enrolled) as of either the last completed report card grading period or the current report card grading period.

When **Do not include active year data** is selected on the **Permanent Record Setup** page (i.e., active year data is not included in the credit calculation), potential and earned credits on the **PR Summary Data** are the total potential and earned credits for the student for all historical years.

NOTE

The number of decimal places displayed is determined by the credits precision setting on the **Permanent Record Setup** page.

Viewing a Student’s Cumulative GPAs

The **PR Summary Data** page displays the student’s cumulative GPA either for all years (i.e., both the active year and historical years) or for only historical years, depending on the settings on the **Permanent Record Setup** page.

When **Do not include active year data** is *not* selected on the **Permanent Record Setup** page (i.e., active year data is included in the calculation) the GPAs on the **PR Summary Data** page include both active year grades and historical grades. The active year grades are from either the current report card grading period or the last completed report card grading period (whichever was selected on the **Permanent Record Setup** page).

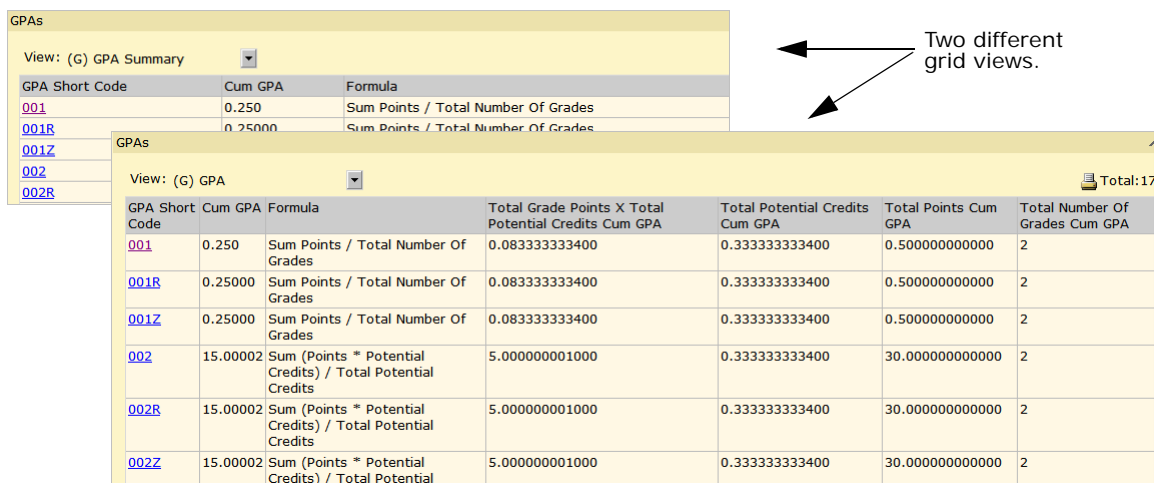
When **Do not include active year data** is selected on the **Permanent Record Setup** page (i.e., active year data is not included in the calculation), the GPAs on the **PR Summary** page include historical grades only.

When you run calculations, cumulative GPAs and credits are calculated using all formulas, regardless of which formula the cumulative GPA definition was based on. For a list of formulas, see “Working with Secondary Student Permanent Record Data by Year” on page 54 or “Working with Secondary Student Permanent Record Data by Term” on page 59.

NOTE

A year GPA includes grades only for a single year but is based on a cumulative GPA formula.

You can set up grid views that enable you to view one or more of the formulas and resulting GPA. For information about grid views, see “Working with Grid Views” on page 69.



The screenshot displays two overlapping grid views of GPA data. The top view, titled 'View: (G) GPA Summary', shows a table with three columns: GPA Short Code, Cum GPA, and Formula. The bottom view, titled 'View: (G) GPA', shows a more detailed table with seven columns: GPA Short Code, Cum GPA, Formula, Total Grade Points X Total Potential Credits, Total Potential Credits, Total Points Cum GPA, and Total Number Of Grades Cum GPA. Arrows from the text 'Two different grid views.' point to the two different table displays.

GPA Short Code	Cum GPA	Formula	Total Grade Points X Total Potential Credits	Total Potential Credits	Total Points Cum GPA	Total Number Of Grades Cum GPA
001	0.250	Sum Points / Total Number Of Grades	0.083333333400	0.333333333400	0.500000000000	2
001R	0.25000	Sum Points / Total Number Of Grades	0.083333333400	0.333333333400	0.500000000000	2
001Z	0.25000	Sum Points / Total Number Of Grades	0.083333333400	0.333333333400	0.500000000000	2
002	15.00002	Sum (Points * Potential Credits) / Total Potential Credits	5.000000001000	0.333333333400	30.000000000000	2
002R	15.00002	Sum (Points * Potential Credits) / Total Potential Credits	5.000000001000	0.333333333400	30.000000000000	2
002Z	15.00002	Sum (Points * Potential Credits) / Total Potential Credits	5.000000001000	0.333333333400	30.000000000000	2

Working with Secondary Student Permanent Record Data by Year

If your district calculates GPAs and class ranks by term, skip this topic and see “Working with Secondary Student Permanent Record Data by Term” on page 59.

On the **PR by Year** page, you can:

- View a cumulative GPA for a student for each year. See “Viewing a Student’s Cumulative GPAs By Year” on page 55.

- Enter a student's class rank for each year. See "Entering a Student's Historical Class Rank Information by Year" on page 56.
- View potential credits, earned credits, and attendance by year. See "Working with a Student's Historical Credits and Attendance by Year" on page 57.
- Calculate a single student or multiple students' cumulative GPAs and credits. An alert icon appears when a student's calculations are out of date. See "Running Calculations" on page 65.
- Print a student's transcript. See "Running a Student Transcript Report" on page 66.

Viewing a Student's Cumulative GPAs By Year

When you run calculations, cumulative GPAs and credits are calculated using all formulas, regardless of which formula the cumulative GPA definition was based on.

The formulas are:

- Total Grade Points x Total Potential Credits Cum GPA
- Total Potential Credits Cum GPA
- Total Points Cum GPA
- Total Number Of Grades Cum GPA
- Total Grade Points x Total Potential Credits Year GPA
- Total Potential Credits Year GPA
- Total Points Year GPA
- Total Number Of Grades Year GPA

NOTE

A year GPA includes grades only for a single year but is based on a cumulative GPA formula.

You can set up grid views that enable you to view one or more of the formulas and the resulting GPA. For information about custom grid views, see "Working with Grid Views" on page 69.

To view a student's cumulative GPAs by year:

- 1 Log on as a district or school administrator.
- 2 Search for and open a student record.
OR
Search for and select multiple student records. Open the first student record.
- 3 On the **Student Demographics** page, in the control bar, click **Permanent Record**.
- 4 In the control bar, under **Permanent Record**, click **Year Data**.

- 5 On the **PR By Year** page, view cumulative GPAs.

NOTES

- On the **PR By Year** page, the number of decimal places displayed for the GPA is based on the decimal places setting in the cumulative GPA definition.
 - GPA calculation results are for all schools the student was enrolled in during the specified year.
- 6 If all the information on the tabs on this page is view-only, the **Apply**, **OK**, and **Cancel** buttons do not display. Use the breadcrumbs to exit this page.

Entering a Student’s Historical Class Rank Information by Year

You can use grid views to choose which class rank information you want to enter and to sort this information. For information about grid views, see “Working with Grid Views” on page 69.

To enter historical class rank information by year:

- 1 Log on as a district or school administrator.
- 2 Search for and open a student record.
OR
Search for and select multiple student records. Open the first student record.
- 3 On the **Student Demographics** page, in the control bar, click **Permanent Record**.
- 4 In the control bar, under **Permanent Record**, click **Year Data**.
- 5 On the **PR By Year** page, click the **Class Ranks** tab.
- 6 Complete the following fields for each year:

NOTE

The grid on this tab has a custom grid view control; therefore, the columns of data you see, and the order in which the columns appear on the tab, may vary depending on the columns defined by the district. For information about using grid views, see “Working with Grid Views” on page 69.

Field	Description
Year	The year displayed here is the year from the student’s historical record.
Class Rank	If the student was formally ranked against the rest of the class during this historical year, enter their rank in this field. For example, if the student was the second best student out of a class of 200, enter “2” for Class Rank.
Class Rank Date	Enter the date when class rank was calculated for this historical year.
Out Of	Enter the number that identifies the total number of classmates the student was compared against for this historical year. For example, if the student ranked 2 out of 200, enter “200”.
Percentile	Enter the student’s class rank percentile for this historical year.
Relative Position	If, in this historical year, the student was assigned a relative position against the rest of the class—possibly because the student came from outside the district—enter the number in this field.

7 Click **Apply** to save your changes and remain on the page.

OR

Click **OK** to save your changes and close the page.

Working with a Student's Historical Credits and Attendance by Year

The **Credits and Attendance** tab displays potential and earned credits, along with attendance information, for each historical year.

You can use grid views to choose and sort the credits and attendance data you want to view. For information about grid views, see "Working with Grid Views" on page 69.

Viewing Student's Historical Credits by Year

The potential and earned credits that show on the **Credits & Attendance** tab are the credits calculated from the historical courses the student took during the historical year.

NOTE

View or enter State and Local credits information on the **Historical Year** page.

To view a student's historical credits by year:

1 Log on as a district or school administrator.

2 Search for and open a student record.

OR

Search for and select multiple student records. Open the first student record.

3 On the **Student Demographics** page, in the control bar, click **Permanent Record**.

4 In the control bar, under **Permanent Record**, click **Year Data**.

5 On the **PR By Year** page, click the **Credits & Attendance** tab.

6 If all the information on the tabs on this page is view-only, the **Apply**, **OK**, and **Cancel** buttons do not display. Use the breadcrumbs to exit this page.

Entering a Student's Historical Attendance by Year

If there is attendance information for the student during a historical year at a school, the attendance totals for the year are shown in the attendance columns. If attendance totals do not exist for the year, the fields in the attendance columns are editable so that you can manually enter the information.

To enter historical attendance by year:

1 Log on as a district or school administrator.

2 Search for and open a student record.

OR

Search for and select multiple student records. Open the first student record.

3 On the **Student Demographics** page, in the control bar, click **Permanent Record**.

4 In the control bar, under **Permanent Record**, click **Year Data**.

5 On the **PR By Year** page, click the **Credits & Attendance** tab.

NOTE

The grid on this tab has a custom grid view control; therefore, the columns of data you see, and the order in which the columns appear on the tab, may vary depending on the columns defined by the district. For information about using grid views, see “Working with Grid Views” on page 69.

Field	Description
Year	The year displayed here is the year from the student’s historical record. You can click the year link to open the associated Historical Year record.
School	Displays the name of the school the student attended during the year. This information comes from the student’s historical records.
Credits Earned	Displays the credits the student earned for the year at the school.
Credits Potential	Displays the credits the student could have earned for the year at the school.
Days Possible	Enter or view the number of days the student could have attended the school during the year. IMPORTANT NOTE For districts using GPA/Class Rank Reporting Periods: To ensure that all days in all grading periods are included when days possible are calculated during Year-End Processing, schools must map every grading period to a GPA/Class Rank Reporting Period. For instructions, see the <i>Chancery SMS Grading Setup Guide</i> .
Excused Absences (Occurrences)	Enter or view the student’s number of excused absences by occurrence at the school for the year.
Excused Absences (Values)	Enter or view the student’s number of calculated excused absences for the year at the school.
Excused Tardies (Occurrences)	Enter or view the student’s number of excused tardies by occurrence for the year at the school.
Excused Tardies (Values)	Enter or view the student’s number of calculated excused tardies for the year at the school.
Present	Enter or view the student’s number of present attendance codes for the year at the school.
Unexcused Absences (Occurrences)	Enter or view the student’s number of unexcused absences for the year at the school.
Unexcused Absences (Values)	Enter or view the student’s number of calculated unexcused absences for the year at the school.
Unexcused Tardies (Occurrences)	Enter or view the student’s number of unexcused tardies by occurrence for the year at the school.
Unexcused Tardies (Values)	Enter or view the student’s number of calculated unexcused tardies for the year at the school.

6 Click **Apply** to save your changes and remain on the page.

OR

Click **OK** to save your changes and close the page.

Working with Secondary Student Permanent Record Data by Term

If your district does not calculate cumulative GPAs and class ranks by term, skip this topic and see “Working with Secondary Student Permanent Record Data by Year” on page 54.

If your district has defined reporting terms in the GPA/Class Rank Reporting Terms setup list, you can work with students’ term GPAs, credits, class ranks, and attendance for each term in a historical year. For information about creating GPA/Class rank reporting terms, see the *Chancery SMS Setting up GPA/Class Rank Reporting Terms Technical Bulletin*.

On the **PR By Year & Term** page, you can:

- View the cumulative-to-end-of-term GPA for a student for each term in each historical year. See “Viewing a Student’s Cumulative GPAs By Term” on page 59.
- Enter a student’s class rank for each term in each historical year. See “Viewing a Student’s Cumulative GPAs By Term” on page 59.
- View potential and earned credits term, and enter attendance by term, for each historical year. See “Working with a Student’s Historical Credits and Attendance by Term” on page 61.
- Calculate a single student or multiple students’ cumulative-to-end-of-term GPAs and credits. An alert icon appears when a student’s calculations are out of date. See “Running Calculations” on page 65.
- Print a student’s transcript. See “Running a Student Transcript Report” on page 66.

Viewing a Student’s Cumulative GPAs By Term

When you run calculations, cumulative-to-end-of-term GPAs are calculated using all formulas, regardless of which formula the cumulative GPA was based on.

The formulas are:

- Total Grade Points x Total Potential Credits Cum GPA
- Total Potential Credits Cum GPA
- Total Points Cum GPA
- Total Number Of Grades Cum GPA
- Total Grade Points x Total Potential Credits Year GPA
- Total Potential Credits Year GPA
- Total Points Year GPA
- Total Number Of Grades Year GPA

NOTE

A year GPA includes grades only for a single year but is based on a cumulative GPA formula.

You can set up grid views that enable you to view one or more of the formulas and resulting GPA. For information about custom grid views, see “Working with Grid Views” on page 69.

To view a student’s cumulative GPAs by term:

- 1 Log on as a district or school administrator.
- 2 Search for and open a student record.
OR
Search for and select multiple student records. Open the first student record.
- 3 On the **Student Demographics** page, in the control bar, click **Permanent Record**.
- 4 In the control bar, under **Permanent Record**, click **Year & Term Data**.
- 5 On the **PR By Year & Term** page, view cumulative-to-end-of-term GPAs.

NOTES

- On the PR By Year & Term page, the number of decimal places displayed for the GPA results is based on the decimal places setting in the cumulative GPA definition.
 - GPA calculation results are for all schools the student was enrolled in during the specified term.
- 6 If all the information on the tabs on this page is view-only, the **Apply**, **OK**, and **Cancel** buttons are not visible. Use the breadcrumbs to exit this page.

Entering a Student’s Historical Class Rank Information by Term

Use grid views to choose which historical term class rank information you want to work with, and to sort this information. For information about grid views, see “Working with Grid Views” on page 69.

To enter historical class rank information by term:

- 1 Log on as a district or school administrator.
- 2 Search for and open a student record.
OR
Search for and select multiple student records. Open the first student record.
- 3 On the **Student Demographics** page, in the control bar, click **Permanent Record**.
- 4 In the control bar, under **Permanent Record**, click **Year & Term Data**.
- 5 On the **PR By Year & Term** page, click the **Class Ranks** tab.
- 6 Complete the following fields for each term:

NOTE

The grid on this tab has a custom grid view control; therefore, the columns of data you see, and the order in which the columns appear on the tab, may vary depending on the columns defined by the district. For information about using grid views, see “Working with Grid Views” on page 69.

Field	Description
Year	The year displayed here is the year from the student’s historical records.
Permanent Record Term	This is the term defined in the GPA\Class Rank Reporting Term setup list.

Field	Description
Class Rank	If the student was formally ranked against the rest of the class during the term, enter their rank in this field. For example, if the student was the second best student out of a class of 200, enter "2" for Class Rank.
Class Rank Date	Enter the date when class rank was calculated for the term.
Out Of	Enter the number that identifies the total number of classmates the student is being compared against for the term. For example, if the student ranked 2 out of 200, enter "200".
Percentile	Enter the student's class rank percentile for the term.
Relative Position	If, in this historical year, the student was assigned a relative position against the rest of the class—possibly because the student came from outside the district—enter the number in this field.

- 7 Click **Apply** to save your changes and remain on the page.
OR
Click **OK** to save your changes and close the page.

Working with a Student's Historical Credits and Attendance by Term

The **Credits and Attendance** tab displays potential and earned credits, along with attendance information, for each term in a historical year. You can enter historical attendance by term, but historical credits by term information is view-only.

You can use grid views to choose and sort the credits and attendance data you want to view. For information about grid views, see "Working with Grid Views" on page 69.

Viewing a Student's Historical Credits by Term

The potential and earned credits that show on the **Credits & Attendance** tab are the credits calculated from the historical courses the student took during the term in the historical year.

To view a student's historical credits by term:

- 1 Log on as a district or school administrator.
- 2 Search for and open a student record.
OR
Search for and select multiple student records. Open the first student record.
- 3 On the **Student Demographics** page, in the control bar, click **Permanent Record**.
- 4 In the control bar, under **Permanent Record**, click **Year & Term Data**.
- 5 On the **PR By Year & Term** page, click the **Credits & Attendance** tab.
- 6 If all the information on the tabs on this page is view-only, the **Apply**, **OK**, and **Cancel** buttons are not visible. Use the breadcrumbs to exit this page.

Entering a Student’s Historical Attendance by Term

If there is attendance information for the student during a historical year at a school, the attendance totals for that year are shown in the attendance columns. If attendance totals do not exist for the year, the fields in the attendance columns are editable so that you can manually enter the information.

NOTE

You can view or enter State and Local credits information on the **Historical Year** page.

To enter historical attendance by term:

- 1 Log on as a district or school administrator.
- 2 Search for and open a student record.
OR
Search for and select multiple student records. Open the first student record.
- 3 On the **Student Demographics** page, in the control bar, click **Permanent Record**.
- 4 In the control bar, under **Permanent Record**, click **Year & Term Data**.
- 5 On the **PR By Year** page, click the **Credits and Attendance** tab.

NOTE

The grid on this tab has a custom grid view control; therefore, the columns of data you see, and the order in which the columns appear on the tab, may vary depending on the columns defined by the district. For information about using grid views, see “Working with Grid Views” on page 69.

Field	Description
Year	The year displayed here is the year from the student’s historical records. You can click the year link to open the associated Historical Year record.
School	Displays the name of the school the student attended during the year. This information comes from the student’s historical records.
Credits Earned	Displays the credits the student earned for the year at the school.
Credits Potential	Displays the credits the student could have earned for the year at the school.
Days Possible	Enter or view the number of days the student could have attended the school during the year. IMPORTANT NOTE For districts using GPA/Class Rank Reporting Periods: To ensure that all days in all grading periods are included when days possible are calculated during Year-End Processing, schools must map every grading period to a GPA/Class Rank Reporting Period. For instructions, see the <i>Chancery SMS Grading Setup Guide</i> .
Excused Absences (Occurrences)	Enter the student’s number of excused absences by occurrence at the school for the year.
Excused Absences (Values)	Enter the student’s number of calculated excused absences for the year at the school.

Field	Description
Excused Tardies (Occurrences)	Enter or view the student's number of excused tardies by occurrence for the year at the school.
Excused Tardies (Values)	Enter the student's number of calculated excused tardies for the year at the school.
Present	Enter the student's number of present attendance codes for the year at the school.
Unexcused Absences (Occurrences)	Enter the student's number of unexcused absences for the year at the school.
Unexcused Absences (Values)	Enter the student's number of calculated unexcused absences for the year at the school.
Unexcused Tardies (Occurrences)	Enter the student's number of unexcused tardies by occurrence for the year at the school.
Unexcused Tardies (Values)	Enter the student's number of calculated unexcused tardies for the year at the school.

6 Click **Apply** to save your changes and remain on the page.

OR

Click **OK** to save your changes and close the page.

Running Calculations and Transcripts


You can run calculations and transcripts from any Permanent Record (PR) page and from the **Historical Year** page.

IMPORTANT NOTE

Create a nightly recurring task to ensure cumulative GPA and credit calculations are run every night and student calculations are up to date. For further information, see “Scheduling GPA and Credit Calculations” on page 36.

Running Calculations

You can run cumulative GPA and credit calculations from a student’s **Historical Year** page, **PR Summary Data**, and **PR By Year** pages (and, if reporting terms are set up, the **PR By Year & Term** page) at any time, provided the time you choose does not conflict with calculation time restrictions set at the district. When you run manual calculations, you can choose to run calculations for multiple students or for only the current student.

If a calculator icon () displays beside the student’s name on the PR pages, this means the student’s cumulative GPA and credits calculation results are out of date. A student’s calculation results could be out of date for any of the following reasons:

- A change was made to grades data in **Historical Info** and that change impacts cumulative GPA and credit calculations.
- A change was made to the **Active Year Data** preference on the **Permanent Record Setup** page.
- A change was made to at least one district-defined cumulative GPA definition.
- A credit override was entered in the active calendar year.

If the calculator icon appears, run cumulative GPA and credit calculations to update student records.

To run cumulative GPA and credit calculations for a student:

- 1 Log on as a district or school administrator.
- 2 Search for and open a student record.
OR
Search for and select multiple student records. Open the first student record.
- 3 On the **Student Demographics** page, in the control bar, click **Permanent Record**.

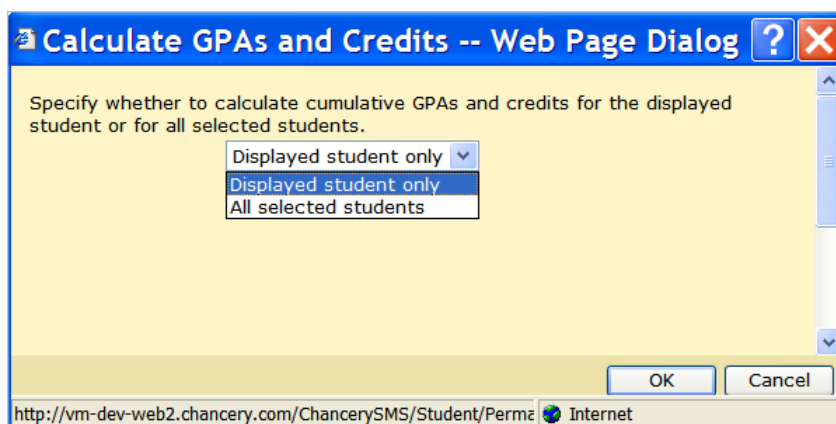
To	Do this
Run calculations from the Historical Year page	<ol style="list-style-type: none">1 In the control bar, click Historical Info.2 On the Historical Info page, click the link for a historical year.3 From the Actions menu, click Calculate Cumulative GPAs and Credits.
Run calculations from the PR Summary Data page	<ol style="list-style-type: none">1 In the control bar, click Summary Data.2 On the PR Summary Data page, from the Actions menu, click Calculate Cumulative GPAs and Credits.

To	Do this
Run calculations from the PR By Year page	<ol style="list-style-type: none"> 1 In the control bar, click Year Data. 2 On the PR By Year page, from the Actions menu, click Calculate Cumulative GPAs and Credits.
Run calculations from the PR By Year & Term page	<ol style="list-style-type: none"> 1 In the control bar, click Year & Term Data. 2 On the PR By Year & Term page, from the Actions menu, click Calculate Cumulative GPAs and Credits.

- 4 If you selected a single student in Step 2, the calculation runs.

OR

If you selected multiple student records in Step 2, a dialog appears in which you can choose to run calculations for the current student only or for all selected students.



- 5 Choose an option from the dropdown and click **OK**.
- 6 When calculations are complete, a dialog appears. Click **OK**.
- 7 On the PR page, click **OK** to remain on the page.

Running a Student Transcript Report

You can run a transcript report for a student from their **Historical Year** page, **PR Summary Data** page, and **PR By Year** page (and, if reporting terms are set up, from the **PR By Year & Term** page).

Information and how it is displayed on a transcript report is determined by settings on the following pages:

- **Transcript Columns** - see "Defining Transcript Columns" on page 13.
- **Permanent Record Setup** - see "Performing Permanent Record Setup" on page 29.
- **Cumulative GPA** - see "Working with Cumulative GPAs" on page 21.

NOTE

If your district uses a custom transcript, replace the Chancery SMS built-in transcript report with the custom transcript.

To run a Student Transcript report:

- 1 Log on as a district or school administrator.
- 2 Search for and open a student record.
OR
Search for and select multiple student records. Open the first student record.
- 3 On the **Student Demographics** page, in the control bar, click **Permanent Record**.

To	Do this
Run a transcript from the Historical Year page	<ol style="list-style-type: none"> 1 In the control bar, click Historical Info. 2 On the Historical Info page, click the link for a historical year. 3 From the Reports menu, click Student Transcript Report by Subject Area or Student Transcript Report by Year.
Run a transcript from the PR Summary Data page	<ol style="list-style-type: none"> 1 In the control bar, click Summary Data. 2 On the PR Summary Data page, from the Reports menu, click Student Transcript Report by Subject Area or Student Transcript Report by Year.
Run a transcript from the PR By Year page	<ol style="list-style-type: none"> 1 In the control bar, click Year Data. 2 On the PR By Year page, from the Reports menu, click Student Transcript Report by Subject Area or Student Transcript Report by Year.
Run a transcript from the PR By Year & Term page	<ol style="list-style-type: none"> 1 In the control bar, click Year & Term Data. 2 On the PR By Year & Term page, from the Reports menu, click Student Transcript Report by Subject Area or Student Transcript Report by Year.

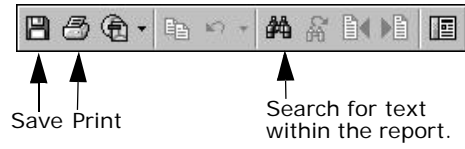
- 4 In the **Preferences** panel, select your display preferences.

NOTE

For school user roles, filters are automatically set based on the students selected in Step 2. If you are logged on as a school administrator, skip Step 5.

- 5 Expand the **Filters** panel and choose the students to print transcripts for.
- 6 Expand the **Scheduling Options** panel, and select your scheduling options.
- 7 Expand the **Output Options** panel and select a format option.

- 8 Click **Run Report**.
- 9 Print or save the report, and then close the PDF Viewer.



Working with Grid Views

Create different views of the data displayed in grids on Chancery SMS pages. Customizable grid views enable the district to define global views of data, and then each district-level or school-level user can create personalized versions of these views.

NOTE

Currently, you can create global and personal grid views for data in the Permanent Record (PR) feature. In future versions of Chancery SMS, there will be the ability to create grid views for data in other feature areas.

A Global Grid View is typically created at the district. A district can create grid views of data most appropriate for their schools. For example, a district may want schools to see cumulative GPA data based on the formula used at the district. The district can select the appropriate columns of data in the Global Grid View and, when the district user publishes this global view, it becomes available at the district and to all schools in the district. To create a Global Grid View, the user must have a special permission set up. For further information, see "Permissions to Create Global Grid Views" on page 70.

A Personal Grid View can be created by any district or school user. A user at a school may want to create separate grid views for different types of data, such as attendance or class rank data. A Personal Grid View is only visible to the user who created it.

Quick Search > Student Search Results > Edit Student Demographics (A) > PR Summary Data

Actions Edit Reports Help

A'Antone, @Gabiella K

Information on this page includes data from the active calendar year.

Summary

Class rank: Rank: _____ Out of: _____ Date: _____

Total Credits: Potential: 3.12500 Earned: 1.31250

GPA Summary

View: (P) Cumulative GPA - Grade Points

GPA Summary	Total Points	Cum GPA
001	22.000000000000	22.000000000000
001R	22.000000000000	22.000000000000
001Z	21.250000000000	21.250000000000
002	699.000000000000	699.000000000000
002R	550.000000000000	550.000000000000
002Z	531.250000000000	531.250000000000
003	22.000000000000	22.000000000000
003R	22.000000000000	22.000000000000
003Z	1.931818181818	21.250000000000
004	63.794117647059	699.000000000000
004R	45.588235294118	550.000000000000
004Z	41.176470588235	531.250000000000

Current view is a Personal Grid View, indicated by (P) in the dropdown.

Menu item for Global Grid View, indicated by (G) in the dropdown.

You can add global and personal grid views to the following PR pages:

Page Name	Panel or Tab Name	Grid Name
District Setup> Out of District Schools	Search Results	Out of District Schools
Student Demographics>Historical Info>Course List> Course	District Grades	DistrictHistoricalCourseGradeInfo
	Other Grades	Other Grades
Student Demographics> PR Summary Data	GPAs	GPAs
Student Demographics> PR By Year	GPAs	GPAs
	Class Ranks	Class Ranks
	Credits & Attendance	Credits & Attendance
Student Demographics> PR By Year & Term	GPAs	GPAs
	Class Ranks	Class Ranks
	Credits & Attendance	Credits & Attendance

Permissions to Create Global Grid Views

To create and manage global grid views, you need the following permission:

To	You need this permission	Set to
Create global grid views for the district	User Settings>Global Grid Views	Delete

NOTE

You do not need special permissions to create personal views.

Default Global Grid Views

Chancery SMS comes with several default global grid views. You can use these grid views as templates to create other global or personal views.

Page Name	View Name
Student Demographics>Historical Info>Course List> Course	All District Grades & Credits
	All Other Grades & Credits
District Setup> Out of District Schools	OutOfDistrictSchools
Student Demographics> PR By Year	Rank Summary
	Credits & Attendance Summary
	GPA Summary

Page Name	View Name
Student Demographics>PR By Year & Term	Rank Summary
	Credits & Attendance Summary
	GPA Summary
Student Demographics>PR Summary Data	GPA Summary

Adding and Editing Global Grid Views

You can create a Global Grid View and leave it unpublished until you are ready to make it available to the schools in your district, or you can publish it immediately.

To add or edit a global grid view:

- 1 Log on as a district administrator.
- 2 In the control bar, under **Admin**, click **User Settings**.
- 3 On the **User Settings** page, on the **Grid Views** tab, from the feature area dropdown, select the feature area to which you want to add a global grid view.

NOTE

Currently, the only feature area available for the creation of global grid views is Permanent Record. Additional feature areas will be added in future versions of Chancery SMS.

- 4 Do one of the following:

To	Do this
Add a global grid view	<ul style="list-style-type: none"> • From the Actions menu, click Add Grid View>Global View.
Edit a global grid view	<ul style="list-style-type: none"> • In the View Name column, click the view you want to edit. OR 1 Select the row for the view you want to edit. 2 From the Actions menu, click Edit Grid View.
Delete a global grid view	<ol style="list-style-type: none"> 1 Select the row for the view you want to delete. 2 From the Actions menu, click Delete Grid View. 3 Click OK and skip the remaining steps.

- 5 On the **Global Grid View** page, enter the view's name and a description.
- 6 Select the page you want to add the global grid view to.
- 7 Click **Continue**.

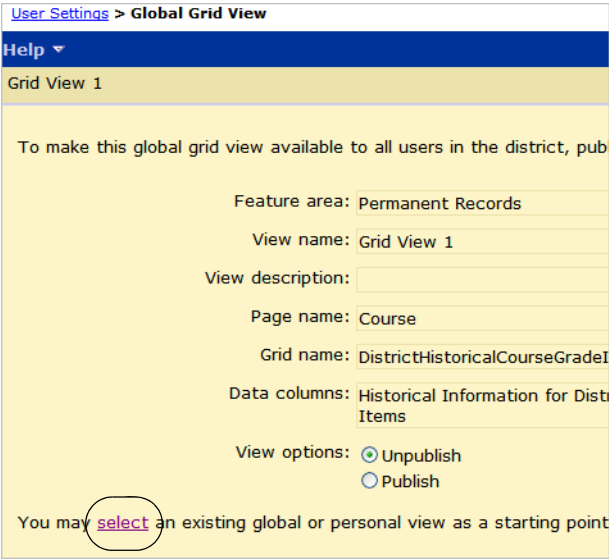
Defining Global Grid View Columns

When you create the global grid view, choose the columns you want to appear in the grid and define the columns' sort order. You can sort the columns in your grid view by any column in the grid, even if the column is not in the grid view.

You can use an existing global or personal view as a starting point for your new grid view, or create your view from scratch.

To define global grid view columns and sorting:

1 On the **Global Grid View** page, do one of the following:

To	Do this
<p>Use an existing grid view and customize</p>	<p>1 In the <global view name> panel, in the sentence You may select an existing..., click the word select.</p>  <p>2 In the Copy Grid View dialog, in the Copy From field, select the view you want to use as the starting point for the view you are creating.</p> <p>3 Click OK.</p> <p>4 Follow the steps below.</p>
<p>Create a new view from scratch</p>	<ul style="list-style-type: none"> Follow the steps below.

- 2** In the **Define Columns** panel, in the **Available columns** list, select the columns you want in your grid view and use the right-arrow button to move the columns into the **Selected columns** list.
- 3** In the **Define Sorting** panel, define the order of the columns in your grid view by selecting the column from the **Available columns** list and using the right-arrow button to move the column into the **Selected columns** list.

- If you are ready for schools to use this view, click **Publish**.

- Click **OK**.

Creating Personal Grid Views

Anyone using Chancery SMS can create a Personal Grid View—special permissions are not required. Personal Grid Views are exclusive to the person who created them; other users cannot see your personal views and you cannot see personal views created by other users.

To create a Personal Grid View:

- Log on as a district or school administrator.
- In the control bar, under **Admin**, click **User Settings**.
- On the **User Settings** page, do one of the following:

To	Do this
Add a personal grid view	<ul style="list-style-type: none"> From the Actions menu, click Add Grid View>Personal View.
Edit a personal global grid view	<ul style="list-style-type: none"> In the View Name column, click the view you want to edit. OR 1 Select the view you want to edit. 2 From the Actions menu, click Edit Grid View.
Delete a personal global grid view	<ol style="list-style-type: none"> 1 Select the view you want to delete. 2 From the Actions menu, click Delete Grid View. 3 Click OK and skip the remaining steps.

- On the **Personal Grid View** page, enter a name and description for your grid view.
- Select the page you want to add a grid view to.
- Click **Continue**.

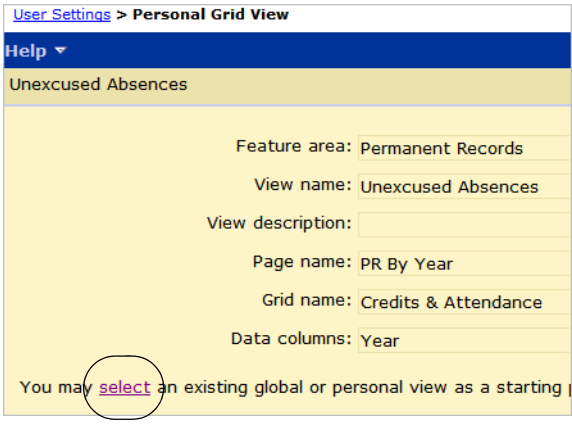
Selecting Personal Grid View Columns

When you define a personal grid view, choose the columns you want to appear in the grid and create the column sort order. You can sort the columns in your grid view by any column in the grid.

You can use an existing global or personal view as a starting point or create your personal grid view from scratch.

To select Personal Grid View columns:

- 1 On the **Personal Grid View** page, do one of the following:

To	Do this
Use an existing view and customize	<ol style="list-style-type: none"> 1 In the <global view name> panel, in the sentence You may select an existing..., click the word select.  <ol style="list-style-type: none"> 2 In the Copy Grid View dialog, in the Copy From field, select the view you want to use as the starting point for the view you are creating. 3 Click OK. 4 Follow the steps below.
Create a new view from scratch	<ul style="list-style-type: none"> • Follow the steps below.

- 2 In the **Define Columns** panel, in the **Available columns** list, select the columns you want in your grid view and use the right-arrow button to move the columns into the **Selected columns** list.

- 3 In the **Define Sorting** panel, define the order of the columns in your grid view by selecting the column from the **Available columns** list and using the right-arrow button to move the column into the **Selected columns** list.

Define Columns

Available columns:

- Potential Credits
- Credits Earned
- Days Possible
- Unexcused Absences (values)
- Excused Absences (values)
- Unexcused Tardies (values)
- Excused Tardies (values)
- Present (occurrences)

Selected columns: Total: 7

- [Year]
- [School]
- Unexcused Absences (occurrences)
- Unexcused Tardies (occurrences)
- Present (values)
- Excused Tardies (occurrences)
- Excused Absences (occurrences)

Define Sorting

Available columns:

- Year
- School

Selected columns: Total: 1

- Credits Earned

You can sort by columns that will not appear on the page.

Personal Grid View on student PR By Year page

Quick Search > Student Search Results > Edit Student Demographics (A) > PR By Year

A'Antone, @Gabriella K

GPAs | Class Ranks | Credits & Attendance

View: (P) Attendance

Year	Unexcused Tardies (values)	Present (values)
2004		238.000
2005		
2003		260.000

- 4 Click **OK**.

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