

Overview

This technical bulletin is intended for districts that want to use the Permanent Record (PR) feature in Chancery SMS 6.7.

This bulletin provides the following information:

- Details to be considered before converting. See "Are You Ready to Convert to Permanent Record?" on page 1.
- A checklist of conversion preparation steps that must be completed before converting to Permanent Record. See "Preparing for the Conversion - Checklist" on page 2.
- A description of the Chancery SMS Conversion Preparation Tool and the procedures for using it. See "Using the Chancery SMS PR Conversion Preparation Tool" on page 3.
- An explanation of what happens to historical data during the conversion to Permanent Record. See "What Happens During the Conversion" on page 5.
- Information about Permanent Record Reporting Terms. See "Using Permanent Record Reporting Terms" on page 11.
- Information about historical course details. See "Entering Historical Course Details" on page 12.
- Tasks you should complete after the conversion. See "After the Conversion" on page 12.

For information about working with the new Permanent Record feature after the conversion, see the *Chancery SMS Permanent Record Guide*.

WARNING

Switching from Historical tables to Permanent Record tables is irreversible; therefore, make sure you have read and understood this technical bulletin before converting to Permanent Record.

Are You Ready to Convert to Permanent Record?

Meticulous preparation is required to ensure a successful conversion to the new Permanent Record feature in Chancery SMS version 6.7.

A number of considerations must be addressed before converting to Permanent Record:

- **Time of year** - Because of the many changes to the district and school pages and to calculations in the Permanent Record feature, it's important to consider the time of year before converting. For example, it is not advisable to convert to Permanent Record in your production environment in the middle of the year.
- **Training** - The significant differences between Permanent Record in Chancery SMS 6.7 and the Historical feature in pre-6.7 versions of Chancery SMS means your end-users will likely require training. It's important to schedule training for the district and school level users of Permanent Record and Grading.
- **Testing** - Permanent Record includes changes to how calculations function. These changes may not be obvious until you have worked with the Permanent Record feature for some time. A significant amount of time should be spent working with the converted system in a test environment before putting it into production. Planning for this time needs to be included in your conversion schedule.

- **Data Accuracy** - To ensure calculations are accurate, detailed historical course data, such as grades and credits, must exist in Chancery SMS for each student who has a historical year record. You will need to make sure this historical course information exists in your database. You may want to work with Pearson Technical Support to develop a script for importing this data into Chancery SMS.

In addition, you'll need to clean up historical school data. Depending on the state of your database, this could be a lengthy process and it's important to schedule time to do this data clean up before you run the conversion. For further information, see "Using the Chancery SMS PR Conversion Preparation Tool" on page 3.

- **Term-based Data** - Before you convert, you must determine whether you want to manage permanent record data by term, such as daily attendance summaries, class ranks, permanent record GPAs, and attendance summaries. For further information, see "Using Permanent Record Reporting Terms" on page 11.

Preparing for the Conversion - Checklist

Use this checklist to help you prepare for the conversion to the Permanent Record feature.

- Determine whether you want to define reporting terms. See "Using Permanent Record Reporting Terms" on page 11.
- If you are defining reporting terms, set up GPA/Class Rank Reporting Terms. For instructions, see the *Setting up GPA/Class Rank Reporting Terms Technical Bulletin*.
- Ensure historical course details exist for students. See "Entering Historical Course Details" on page 12.
- Select a time to run the conversion that is off-hours.
- Back up your data.
- Contact Pearson Technical Support, who will run the PR Conversion Preparation Tool against your database. Technical support runs this tool so that they can view your historical records and check for issues that may require attention before you begin to clean up the historical data.

- ❑ After Pearson Technical Support has verified that your database is ready for clean up, you will run the PR Conversion Preparation Tool. This tool will help you clean up your data by enabling you to identify and fix historical school records. For instructions, see "Using the Chancery SMS PR Conversion Preparation Tool" on page 3.
- ❑ Manually update custom reports (including transcripts) to use the data from the Permanent Record tables. For a list of tables and fields that will be converted to Permanent Record, see "Conversion Change Technical Details" on page 9
If you require help with updating custom reports that reference historical data, contact Pearson Technical Support.

Using the Chancery SMS PR Conversion Preparation Tool

Make sure you run the Chancery SMS Conversion Preparation Tool before you convert to the Permanent Record feature. This tool ensures you can perform an accurate cleanup of historical school records before the conversion.

In previous versions of Chancery SMS, you could enter historical school information into a student's historical record in free-form text. This meant that data entry errors could occur; for example, the same historical school could be entered for multiple students, resulting in duplicate historical school records. These manual historical school entries do not have an internal ID, which is required after you convert to Permanent Record. When you use the PR Conversion Preparation Tool, it creates internal IDs for every school record without one.

With the new Permanent Record functionality in Chancery SMS 6.7, you select a school for a student's historical year record from a dropdown that contains both in-district and out-of-district schools. If the dropdown doesn't contain a particular out-of-district school, you can add it to the out-of-district school catalog, then re-use that entry when required.

Using the PR Conversion Preparation Tool, you can identify the historical school records that are duplicates or that do not match any schools in your database. After identifying these duplicate historical school records, you can either map the historical schools to the appropriate historical school in the database or, if required, create a new historical school that is added to the Out-of-District School catalog.

Installing the Chancery SMS PR Conversion Preparation Tool

To obtain the Chancery SMS PR Conversion Preparation Tool setup files, contact Pearson Technical Support.

NOTE

You can use the Conversion Preparation Tool with Microsoft® SQL Server 2000 or SQL Server 2005.

To install the PR Conversion Preparation Tool:

- 1 Copy the setup files to a folder on your network or hard drive.
- 2 Double-click **Setup.EXE**.
- 3 In the **Welcome** dialog, click **Next**.

- 4 In the **Select Installation Folder** dialog, click **Next** to save the files to the Conversion Preparation Tool folder or click **Browse** and navigate to a different location. Click **Next**.
- 5 In the **Confirm Installation** dialog, click **Next**.
- 6 In the **SQL Server Logon** dialog, in the **Database Server Name** field, enter the database server name.

NOTE

The database server name must be either the name of the server machine on which SQL is running, or an IP address.

- 7 In the **Database Name** field, enter the name of the database on which Chancery SMS is installed.

NOTE

The default User ID and password are your domain credentials. If you want to log into SQL Server using another ID and password, deselect **Use Integrated Security** and enter the information in the **User ID** and **Password** fields.

- 8 Click **OK**.

Running the PR Conversion Preparation Tool

As soon as you have installed the PR Conversion Preparation Tool, it starts checking for historical schools that do not match the schools in your database. One of two things can happen:

- If all historical schools match the schools in your database and there are no duplicates, a **Conversion Not Necessary** prompt appears.
- If there are historical schools that do not match any schools in your database, or if there are duplicate historical schools (i.e., if the name and/or address of one historical school is the same as another), the application displays schools in two windows. In the left window, the **List of historical school information that requires mapping** displays the historical schools that require attention. In the right window, the **List of schools to map to** displays the schools in your database. You will need to map the historical schools on the left to the appropriate schools on the right. If there are no schools in your database that match a particular historical school, you will need to create a new out-of-district school, and then map the historical schools to it. For instructions, see "Mapping Schools" on page 4 or "Creating a New School" on page 5.

Mapping Schools

If duplicate historical schools display in the left-hand window of the PR Conversion Preparation Tool, or if there are historical schools with incorrect names or addresses, map these schools to the correct schools in your database (located in the right-hand window).

To map a school:

- 1 Review the list in the left window of the PR Conversion Preparation Tool and determine which school (or schools) should be mapped to a school in your database (in the right window).

NOTE

The list in the left window contains student historical year records where the school record has a null ID_SET_SCHOOL_INFO.

- 2 Under **List of historical school information that requires mapping**, select the schools to be mapped. To select multiple schools, press and hold the <Shift> key and click the schools you want to map.
- 3 In the right window, under **List of schools to map to**, select the school to which you want to map the historical schools.
- 4 Click **Map to School**.

NOTE

If there are schools missing from your database (i.e., out-of-district schools), you will need to create new schools. See “Creating a New School” below.

- 5 Repeat steps 2 to 4 until all the schools are mapped and the “Conversion is complete...” prompt appears.
- 6 Click Save.

Creating a New School

If there are historical schools that display in the left window of the PR Conversion Preparation Tool that do not match any school in your database for the associated school record i.e., historical year records where the internal ID is null, you will need to create a new school. When you create a new historical school, it is added to the out-of-district catalog.

To create a new school:

- 1 Review the list in the left-hand window of the PR Conversion Preparation Tool and determine which schools need to be created in your database.
- 2 Under **List of historical school information that requires mapping**, select the historical school for which you want to create a school.
- 3 Click **Make New School**.
- 4 Map the applicable historical school to this new school. For instructions, see “Mapping Schools” on page 4.
- 5 Click **Save**.

What Happens During the Conversion

When you convert to Permanent Record, a backup of the Permanent Record structure is created in temporary database tables. This backup ensures that any data that was entered into the PR tables manually before you converted will not be lost after the conversion.

In addition, student historical data from secondary scheduled schools is copied from the Historical tables to the Permanent Record tables during the conversion. Built-in transcripts reports that previously pulled historical data from the Historical tables in Chancery SMS will access the data from the Permanent Record tables.

IMPORTANT NOTE

If your district uses custom reports, and/or a custom transcript, you will need to manually update some custom reports to use the data from the Permanent Record tables before you convert. For a list of tables and fields that will be converted to Permanent Record, see “Conversion Change Technical Details” on page 9.

After the conversion, there are considerable changes to historical and grading features in Chancery SMS. The following sections provide a summary of the changes that occur during conversion. For detailed information about these changes, see the *Chancery SMS Permanent Record Guide*.

Changes to Cumulative GPA and Class Ranks

During the conversion, the following changes occur to Cumulative GPAs and Class Rank definitions:

- Definitions for cumulative GPAs are created at the district-level and replace the school-level cumulative GPA definitions. District-level, cumulative GPA definitions are created as follows:
 - During 2007 YEP, two district level, *historical* cumulative GPAs were created; one *unweighted* named **GPA 1** and one *weighted* named **GPA 2**.
 - If, at the school-level, there is at least one *non-historical, unweighted*, active cumulative GPA definition referenced by at least one active class rank definition, a *non-historical* cumulative GPA Definition named **GPA 3** is created.
 - If, at the school-level, there is at least one *non-historical, weighted*, active cumulative GPA definition referenced by at least one active class rank definition, a non-historical GPA Definition named **GPA 4** is created.
- Class rank definitions are updated as follows:
 - Each *historical*, class rank definition is updated to reference the district-level *unweighted* cumulative GPA named **GPA 1**.
 - Each *historical*, class rank definition is updated to reference the district-level *weighted* cumulative GPA named **GPA 2**.
 - Each class rank definition that is *not* historical and references an *unweighted* cumulative GPA definition that is not historical is updated to reference the district-level cumulative GPA named **GPA 3**.
 - Each class rank definition that is *not* historical and references a *weighted* GPA definition that is not historical is updated to reference district-level cumulative GPA named **GPA 4**.

Changes to Calculations

After conversion, GPA and credit calculations work as follows:

- The conversion replaces the existing cumulative GPA and credit calculations that use historical summary data (from the Historical Info feature) with calculations that use course grade details in Historical Info.
- Calculations can be run from within the Permanent Record feature.
- GPAs and credits calculations can be run for individual students, a subset of students, or for all students.
- Student GPAs and credits are updated automatically when a change is made to related data, e.g., a student's grade is changed.
- There is the ability at the school level to schedule calculations and to view district-defined time restrictions.

Changes to Links and Pages

After the conversion, links and pages are changed as follows:

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.
- The **Elementary Permanent Record Setup** link changes to **Permanent Record Setup**.
- The following new links are available:
 - **Cumulative GPA Setup** - takes you to a page where you can create cumulative GPA definitions.
 - **Permanent Record Calculation Time Restrictions** - takes you to a page where you can set time restrictions for running cumulative GPA calculations.
 - **Schedule Permanent Record Calculations** - takes you to a page where you can schedule cumulative GPA calculations immediately or for a specified time.
 - **Out of District Schools** - takes you to a page where you can add and manage historical out-of-district schools.
- **Historical Info** and **Permanent Record** links appear in the control bar, at both the district and school levels. At the school level, on the Student Search Results page, these two links are also available from the Actions menu option **Open Student Historical Info** and **Permanent Record**.

New Link on the Student Demographics Page:

- **Permanent Record** - takes you to the redesigned Historical pages and the new Permanent Record pages for secondary students. The following links are displayed in the control bar for the Permanent Record feature:
 - **Summary Data** - takes you to the new PR Summary Data page where you can view the secondary student's calculated historical class rank and credits summary information, and GPA formulas.
 - **Year Data** - takes you to the new PR By Year page, where you can view historical GPA, and view and edit credits and attendance information for the secondary student by year and school, as well as enter historical class ranks.
 - **Year & Term Data** - if GPA/Class Rank Terms exist, this link takes you to a page where you can view historical GPA information by term, and view and enter historical class ranks, as well as historical credits and attendance information by term for each year and school.

New District-level Pages:

- **Permanent Record Setup** - 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 display in each secondary student's permanent record. The **Elementary** tab replaces the **Elementary Permanent Record Setup** page and allows you to set up the report card structure for Year-End Processing for elementary schools.

- **Permanent Record Calculation Time Restriction** - use this page to define time restrictions for cumulative GPA and credit calculations that are scheduled at the district and at secondary schools.
- **Schedule Permanent Record Calculations** - enables you to view existing scheduled cumulative GPA and credit calculations and navigate to a page where you can define new calculation schedules.
- **Define Schedule** - use this 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.
- **Cumulative GPA** - enables you to create Cumulative GPA definitions for the district.
- **Select Courses** - allows you to specify whether to include or exclude courses, active or historical, in cumulative GPA definitions. Replaces the **Select Courses** page that was at the secondary school level.
- **Out of District Schools** - use this page to create a catalog of reusable out-of-district schools.
- **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.

Updated District-level Pages:

- **District Preferences** - the **Attendance** panel and fields are moved to the new **Permanent Record Setup** page.
- **Transcript Columns** - updated to include the Permanent Record term.
- **Historical Year** and **Historical Course** - redesigned.

Updated and New School-level Pages:

- The following school level pages are updated to reflect the move of cumulative GPA definitions to the district:
 - **Calculate Grades, Credits, & GPAs**
 - **Class Ranks**
 - **Add/Edit Class Rank**
 - **Course Grading**
 - **Current Year GPA**
 - **Grade Point Averages**
 - **Select Courses** - for cumulative GPA, moved to district-level, for current year GPAs, 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.

Updated and New Student Pages:

- **Historical** - updated to reflect the addition of the Permanent Record pages.
- **Historical Year** - redesigned.
- **Course** (historical) - redesigned.
- **Course List** - updated to reflect changes to the historical **Course** page.
- **PR Summary Data** - view the student’s calculated historical class rank and credits summary information, and GPA formulas on this page.
- **Year Data** - view the student’s historical GPA, view and edit credits and attendance information for the student by year, and enter historical class ranks on this page.
- **Year & Term Data** - if GPA/Class Rank Terms exist, view historical GPA information by term, and view and enter historical class ranks, as well as historical credits and attendance information by term.

Changes to Permissions

The following changes are made to permissions. For detailed information about each permission, see the *Chancery SMS Permanent Record Guide*.

- 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.**
 - **Elementary Permanent Record Setup** - renamed **Permanent Record Setup**
 - **Import Historical** - renamed **Import Historical Info.**
 - **Student Historical Data** - renamed **Student Historical Data Info.**
 - **Transcript Grade Item** - 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 and Permission**, is created with one permission, **Global Grid Views**.

Conversion Change Technical Details

The following table provides a detailed list of the database changes in Chancery SMS 6.7 after the conversion to Permanent Record:

Name	Change
CSL_SMS_PR_SETUP	This table is updated with all existing years in CSL_STD_HISTORICAL_YEAR that are not the current year.
CSL_SMS_PR_TERM	Synchronized with CSL_SET_GPA_REPORTING_TERM

Name	Change
CSL_SMS_PR_CUM_GPA_DEFINITION	<p>A <i>non-historical</i>, cumulative GPA Definition named GPA 3 is created from a non-historical, active, <i>unweighted</i> cumulative CSL_SMS_GPA_DEFINITION</p> <p>NOTE GPA 3 is only created if there is at least one non-historical, active, unweighted, cumulative GPA definition referenced by at least one active class rank definition.</p> <p>A <i>non-historical</i> GPA Definition named GPA 4 is created from a non-historical, active, <i>weighted</i>, cumulative CSL_SMS_GPA_DEFINITION</p> <p>NOTE GPA 4 is only created if there is at least one non-historical, active, weighted cumulative GPA definition referenced by at least one active class rank definition.</p>
CSL_SMS_CLASSRANK_DEFINITION	<p>Each <i>historical</i> CSL_SMS_CLASSRANK_DEFINITION is updated to reference the <i>unweighted</i> CSL_SMS_PR_CUM_GPA_DEFINITION named GPA 1.</p> <p>NOTE GPA 1 was created during YEP for 2007.</p> <p>Each <i>historical</i> CSL_SMS_CLASSRANK_DEFINITION is updated to reference the <i>weighted</i> CSL_SMS_PR_CUM_GPA_DEFINITION named GPA 2.</p> <p>NOTE GPA 2 was created during YEP for 2007.</p> <p>Each CSL_SMS_CLASSRANK_DEFINITION that is not historical and references a GPA definition that is not historical is updated to reference the <i>unweighted</i> CSL_SMS_PR_CUM_GPA_DEFINITION named GPA 3.</p> <p>Each CSL_SMS_CLASSRANK_DEFINITION that is not historical and references a GPA definition that is not historical is updated to reference the <i>weighted</i> CSL_SMS_PR_CUM_GPA_DEFINITION named GPA 4.</p>
CSL_SMS_GPA_DEFINITION	<p>School-level, cumulative GPA definitions are deleted. Only school-level current year GPA definitions remain in this table.</p>
CSL_SMS_ELEM_PERM_REC_SETUP	<p>Report card setup item settings are copied into this table during year-end processing.</p>
CSL_SMS_PR_STD	<p>This table is populated with secondary students from CSL_STD_HISTORICAL_YEAR.</p>

Name	Change
CSL_SMS_PR_STD_YEAR	<p>If no reporting terms are defined, this table is populated with data from the following CSL_STD_HISTORICAL_YEAR fields:</p> <ul style="list-style-type: none"> • CLASS_RANK_DATE • CLASS_RANK • CLASS_RANK_REL_POSITION • CLASS_RANK_OUTOF • CLASS_RANK_PERCENTILE • YEAR • GRADE • ID_STD_DEMO_DISTRICT
CSL_SMS_PR_STD_YEAR_SCHOOL_TERM	<p>If reporting terms are defined, this table is populated with the last term's attendance from CSL_STD_HISTORICAL_YEAR, using the Attendance Summary Type preference.</p>
CSL_SMS_PR_STD_YEAR_TERM	<p>If reporting terms are defined, this table is populated with data from CSL_STD_HISTORICAL_YEAR:</p> <ul style="list-style-type: none"> • CLASS_RANK_DATE • CLASS_RANK • CLASS_RANK_REL_POSITION • CLASS_RANK_OUTOF • CLASS_RANK_PERCENTILE
CSL_SMS_PR_CONVERSION_LOG	<p>This table logs issues that occur with student data during the conversion process.</p>
CSL_SMS_PR_CONVERSION_PROCESS_LOG	<p>This table is used for debug logging and for fault tolerance.</p>

Using Permanent Record Reporting Terms

If your district wants to manage permanent record data by term—such as cumulative GPAs, class ranks, credits, and attendance—you will need to make sure the GPA/Class Rank Reporting Term setup list is created.

If you do not currently use reporting terms, but want to do so after the conversion, you need to consider this decision carefully, as it is irreversible. If you set up reporting terms, you will always need to enter and manage data—such as attendance and class ranks—by term, rather than by year.

If GPA/Class Rank Reporting Terms are defined in your current version of Chancery SMS, during the conversion, a Permanent Record Reporting Term is created for every GPA/Class Rank Reporting Term in the database. The conversion process will copy certain data, such as attendance, into the latest term for existing Historical Info data. This means you may have to clean up your data after the conversion.

For information about setting up the GPA/Class Rank Reporting Term setup list, see the technical bulletin *Setting Up GPA/Class Rank Reporting Terms*.

NOTE

If you were using GPA/Class Rank Reporting Terms when you installed Chancery SMS version 6.6.5 or higher, Permanent Record Reporting Terms were created in your database, based on those existing GPA/Class Rank Reporting Terms. If you created additional GPA/Class Rank Reporting Terms after the upgrade to Chancery SMS 6.6.5 or higher, the appropriate additional Permanent Record Reporting Terms are created in the database during the conversion.

Entering Historical Course Details

Before the conversion process is run, all students (both active and those who have graduated in any year) who have historical year records must have historical course details entered. These details are used in Permanent Record calculations.

You can enter historical course details using methods such as working with Pearson Technical Support to create scripts for importing data, or entering the course details manually.

IMPORTANT NOTE

If you want to import historical course detail data, you must do so *before* the conversion.

After the Conversion

Post-Conversion Checklist

Use the following checklist to ensure data was converted correctly:

- Are the correct cumulative GPA definitions converted to the district level? If not, modify the district cumulative GPA definitions, then re-run cumulative GPAs and credits.
- Are the parameters of the district cumulative GPAs defined correctly? If not, correct them and re-run the cumulative GPA calculations for all students in the district.
- Are the correct cumulative GPAs assigned to the correct class rank definitions? If not, correct this and rerun class rank calculations at the school-level.
- Was the Permanent Record data copied over from the historical structure as expected? If not, repair the data or contact Pearson Technical Support.

Reindexing

After the conversion to Permanent Record is complete, it is strongly recommended that you reindex the database. You should also reindex after running PR calculations for all students in the district for the first time. Reindexing cleans up the many records created by the conversion script.