



Chancery SMS®

Version 6.3 or higher

Chancery SMS in the Classroom Guide

November 2005
CSL - 12641

The Chancery SMS Documentation Team:

Sarah Hewson, Karin Jensen, Linda MacShane, Sharon Russell, Trish Vingelis

© 2005 Chancery Software Ltd.

Information in this document is subject to change and does not represent a commitment on the part of Chancery Software Ltd. For up-to-date information, call Customer Service at 1-800-999-9931.

Win School, Mac School, eClass, Open District, Chancery SMS, and Chancery Student Management Solutions are registered trademarks of Chancery Software Ltd.

Microsoft, Windows, and Windows NT are registered trademarks of Microsoft Corporation. SQL Server and .NET are trademarks of Microsoft Corporation.

Oracle is a registered trademark of Oracle Corporation.

Apple, Mac, and Macintosh are registered trademarks of Apple Computer, Inc.

Crystal Reports is a registered trademark of Business Objects SA.

SETS is a trademark of 4GL School Solutions, Inc.

CONTENTS

About Chancery SMS	1
What You Should Know	1
Using Online Help	1
Quick Tour	3
Starting	3
Navigating	3
Breadcrumbs	5
Control Bar	5
Content Area	5
Task Bar	5
Working with Chancery SMS	5
Understanding the Interface	6
Tips & Shortcuts	6
Using Your Home Page	15
Working with Alerts	15
Subscribing to and Viewing Alerts	16
My Classes	19
Working with the My Classes Page	19
Searching for Student Records	21
Performing a Student Search	21
Performing a Quick Search	23
Performing a Basic Search	24
Performing a Detailed Search	27
Customizing How Student Search Results Display	31
Saving Your Search Results	33
Understanding Saved Lists	33
Creating and Editing a Saved List	34
Performing a Family Search	36
Finding Families	36
Viewing Family Information	38
Student Demographics in the Classroom	41
Working with Student Demographics Data	41
Opening a Student Record	41
Viewing Student Demographic Data	42

Grading in the Classroom	45
Entering or Editing Grades from a Roster	45
Entering or Editing Individual Student Grades	47
Attendance in the Classroom	49
Assigning Attendance to Students in a Roster	49
Working with a Student's Attendance Details	52
Changing the My Classes View to Period Attendance	54
Assigning Attendance to Multiple Students from Different Rosters	55
Index	57

ABOUT CHANCERY SMS

Welcome to Chancery SMS® from Chancery Software. Chancery SMS is a software tool for managing student and family information in your school district. District and school staff, such as district administrators, teachers, school counselors, and school administrators, use Chancery SMS to access important school and district data.

What You Should Know

Before you use Chancery SMS, you should be comfortable with the Windows® or Macintosh® environments and know how to use an Internet browser.

This document assumes that you already know how to:

- use a mouse
- work with scroll bars, checkboxes, and radio buttons
- select, enter, and edit text
- cut, copy, and paste text
- select options from dropdowns
- identify and click links on a web page
- refresh a web page
- print

Using Online Help

In addition to this guide, Chancery Software offers online Help to assist you with your day-to-day tasks.

- 1** On the task bar on any page, click Help.
- 2** From the Help menu, click Contents.
- 3** In the online Help, in the right-hand pane, under Contents, click the topic in which you are interested.

OR

Click Index to access the online index.

OR

Click Search and type in the word or words you want to search for.

QUICK TOUR

This section provides a quick overview of the main features of Chancery SMS.

Starting

You start Chancery SMS from Internet Explorer®. To work with Chancery SMS pages, log on using your user ID and password.

TO START CHANCERY SMS:

- 1 Open Internet Explorer.
- 2 In the Address bar, enter the address of your district web application server. Press Enter.

The Chancery SMS Log On page opens. You may want to add it to your list of Favorites in the browser.

- 3 Enter your Chancery SMS user ID and password. If your district uses a directory service, enter the domain name for Chancery SMS.
- 4 Click Log On.
- 5 If you do not have a default role, the Choose Role dialog opens. Select the default role that you would like to enter automatically each time you log on. After logging on, you can switch roles by clicking Switch Role from the Actions menu.

Navigating

You navigate in Chancery SMS much the same way as you do in a web browser. Chancery SMS pages display like a web application. You move from page to page to complete tasks and start new ones.

Each Chancery SMS page has four parts:

- breadcrumbs
- a control bar
- a content area
- a task bar

Breadcrumbs
Breadcrumbs indicate what page you're on and how you got there.

Control bar
Use these links to move to different areas within Chancery SMS.

Content area
Work with information in the content area.

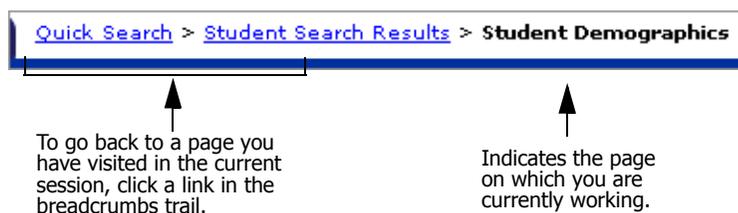
Task bar
The links across the top of the page make up the task bar. You have access to the Actions, Edit, Reports, and Help menus, along with Home and Log Off options.

The screenshot shows the Chancery SMS interface. At the top left is the logo 'Chancery SMS™'. Below it is a navigation menu with categories: STUDENT (Student Search, Quick, Basic, Detailed, Family Search), CLASS (My Classes), SCHOOL (Awards, Student Behavior, Manage Programs), and ADMIN (Scheduling, Grading, District Setup, Reports, Exports). The 'Quick' link is highlighted. At the top right, there are breadcrumbs: 'Quick Search > Student Search Results'. Below the breadcrumbs is a task bar with menus: Actions, Edit, Reports, Help, Home, and Log off. The main content area is a search results page. It has search input fields for 'Last name or ID' and 'First or preferred name', and a 'Search' button. Below the search fields is a 'Search Results' section with a dropdown menu for 'List: Grade level (current) is "8"'. Underneath is a table of search results with columns for 'Student Name', 'ID', and 'Gr'. The table contains six rows of student data, each with a checkbox in the first column.

<input type="checkbox"/>	Student Name	ID	Gr
<input type="checkbox"/>	Brown, Ken	9901285645	8
<input type="checkbox"/>	Burke, Pedro J	9901255814	8
<input type="checkbox"/>	Christian, Harrison E	9901187151	8
<input type="checkbox"/>	Collins, Jessica V	9901178235	8
<input type="checkbox"/>	Moorman, Steven D	9901262049	8
<input type="checkbox"/>	Nicholls, Dwayne	9901280670	8

Breadcrumbs

To help you keep track of where you are in the interface, refer to the breadcrumbs. Breadcrumbs display links to pages you accessed to reach the current page. Breadcrumbs are also a quick way to return to previously viewed pages.



Control Bar

The control bar is the vertical pane on the left side of the page. Click the links in the control bar to access the different areas of Chancery SMS. For example, to search for a student, click a search link, such as Student Search, Quick, Basic, or Detailed, to open the appropriate search page.

Content Area

The content area is the main part of the page. It is divided into collapsible panels that group information in logical and meaningful ways. A panel can contain any combination of fields, dropdowns, checkboxes, grids, buttons, icons, and links needed to support the particular feature area.

Task Bar

Click the task bar menus to display dropdown menus where you can select options. For example, you can use an option in the Actions menu to register and enroll a student.

Working with Chancery SMS

District and school staff, such as district administrators, teachers, school counselors, and school administrators, use Chancery SMS to access important school and district data. For example, school administrators can create the school schedule, take daily attendance, and view or edit district-wide student demographic information.

Use Chancery SMS to work with important student information in real time. For example, school staff can take attendance, enter grades and view student demographic information while in the classroom.

Understanding the Interface

Chancery SMS is a web-based application designed to be familiar to anyone who has used a web browser. The following diagram details each part of Chancery SMS. For more information about using Chancery SMS, from the Help menu, click an option such as Contents.

The screenshot shows the Chancery SMS web application interface. Annotations include:

- Breadcrumbs indicate where you are and how you got there.** (Points to the breadcrumb trail: Quick Search > Student Search Results)
- To access online help and get further information about Chancery SMS, click here.** (Points to the Help menu)
- To return to your home page, click here.** (Points to the Home link)
- To expand or collapse panels, click here.** (Points to the expand/collapse icon in the top right)
- Browser toolbar** (Points to the browser's address bar and navigation buttons)
- Highlighted text indicates where you are.** (Points to the highlighted 'Quick' menu item)
- To select all records, Click the Select All checkbox.** (Points to the 'Select All' checkbox in the table header)
- To work with an item, click the checkbox next to it. To work with multiple items, click multiple checkboxes.** (Points to the checkboxes in the table rows)
- To choose an option from the dropdown, click here.** (Points to the 'My Students' dropdown menu)
- To print the current page, click the Print icon.** (Points to the Print icon)
- To move to the next or previous page, click Prev or Next.** (Points to the Prev and Next navigation links)

Student Name	ID	Gr	HR	Gender	Birthdate
<input type="checkbox"/> Acevedo, Amanda M	9901399291	9	N/A	F	May 8, 1990
<input type="checkbox"/> Aikens, Charlene	9900839886	10	N/A	F	Sep 29, 1989
<input type="checkbox"/> Aikin, Zurisaddai	9901393180	9	N/A	F	Apr 14, 1990
<input checked="" type="checkbox"/> Allen, Ariel B	9901077974	10	N/A	F	Feb 21, 1988
<input checked="" type="checkbox"/> Anderson, Bridget D	9900611406	11	N/A	F	Dec 30, 1988
<input type="checkbox"/> Andrews, Judy N	9901008207	10	N/A	F	Jul 29, 1988

Tips & Shortcuts

This section provides tips and shortcuts to help you work more efficiently and effectively with Chancery SMS.

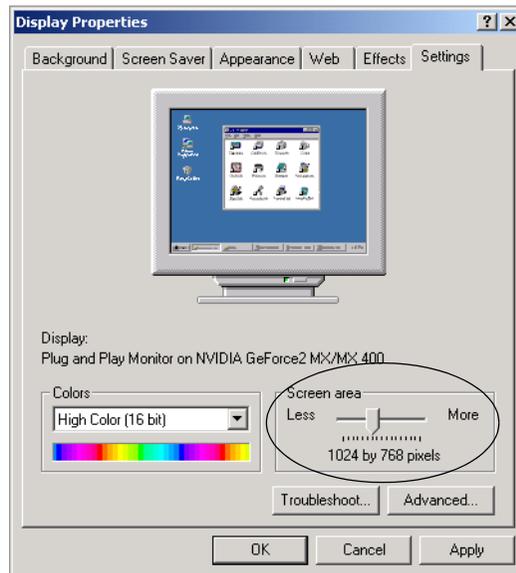
Optimizing Screen Space

Most of the pages in Chancery SMS are optimized for 800 x 600 screen resolution. You can change your computer settings to this resolution, if required.

On some pages, you'll be working with several columns that are easier to view if you set your browser to view small icons. This is especially useful when entering grades.

TO CHANGE YOUR SCREEN RESOLUTION:

- 1 Right-click your desktop and select Properties from the menu.
- 2 In the Display Properties dialog, click the Settings tab.
- 3 In the Screen area section, click and drag the marker to the appropriate setting.

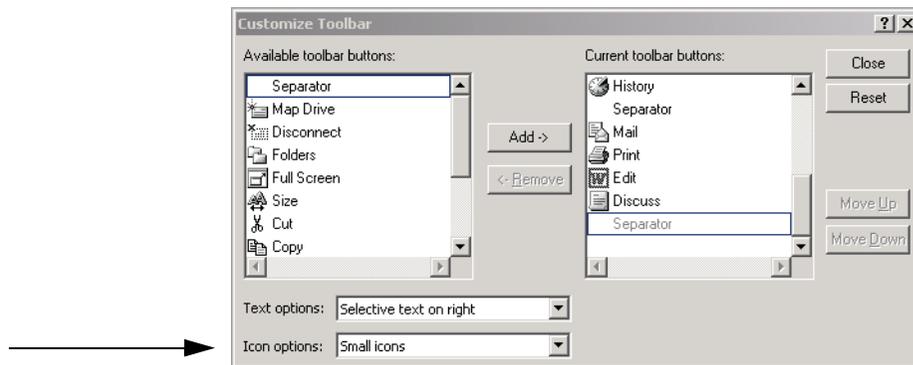


- 4 Click OK to apply the new settings. Click OK to accept the change.

TO CHANGE YOUR BROWSER ICON VIEW:

- 1 Start Internet Explorer.
- 2 From the Internet Explorer View menu, click Toolbars > Customize.

- 3 In the Customize Toolbar dialog, from the Icon Options dropdown, select Small Icons.



- 4 Click Close.

User Permissions and Scope

Not all areas of Chancery SMS are accessible to all users. Your role controls which pages you see and what data you can work with. Each role has a set of permissions and a scope that is either for a specific school or for the entire district.

For example, teachers or data entry clerks typically do not have access to the School Setup pages. School users access data for the schools to which they are assigned. District users are not associated with a school. Instead, district users access information that is district-wide, such as student demographic and enrollment information.

Alert Messages

Alert messages alert district and school staff to important information. For example, when someone marks a student absent for a future date, an alert message is immediately sent to that student's teacher. The message appears on the teacher's homepage.

When you receive a new alert, the Alerts area on your home page shows the number of new alerts, and the task bar on all pages shows an alert message icon (🔔). To view your alerts, either click the alert icon or click the new alerts link on your home page.

In order to receive alerts, you must subscribe to them. For further details, see “Working with Alerts” on page 15.

Opening a Record

You can often access the same data in different ways, depending on the task. For example, to access a student record, you can:

- Click the Roster () , Grading () , or Attendance () icon on the My Classes page, then click the student’s name on the Roster, Class Roster, Grades, or Attendance page.
- Perform a student, quick, basic or detailed search, then click the student’s name on the Student Search Results page. For detailed information about searching see “Searching for Student Records” on page 21.
- Search by family name, click the student’s family name on the Family Search page, and then click the student’s name on the Family Overview page. This is useful if a student’s siblings or guardians have different last names. For more information, see “Performing a Family Search” on page 36.
- Open a saved list and click the student’s name on the Student Search Results page. For more information, see “Saving Your Search Results” on page 33.

If Pages Don't Appear Right Away

If you click a button and the page you want does not appear right away, be patient. Do not click the button again or click any other buttons while you’re waiting for the page to open—your server might be temporarily busy.

On some secondary pages, while your request is processed, the animated Chancery icon  appears.

If you stop using Chancery SMS for a while, the software may “time out” as a security measure - meaning you are automatically logged off. If that happens, you need to log on again. If you did not save your work before leaving Chancery SMS, you might have to redo some work.

Checkboxes

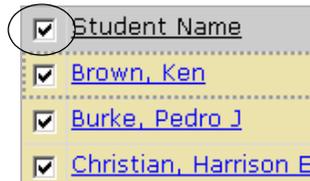
When you are working with a list of records, such as a list of students, notice the checkboxes to the left of each list item. To select an item, click the checkbox. To select multiple items, click each checkbox.



Checkbox - Select All

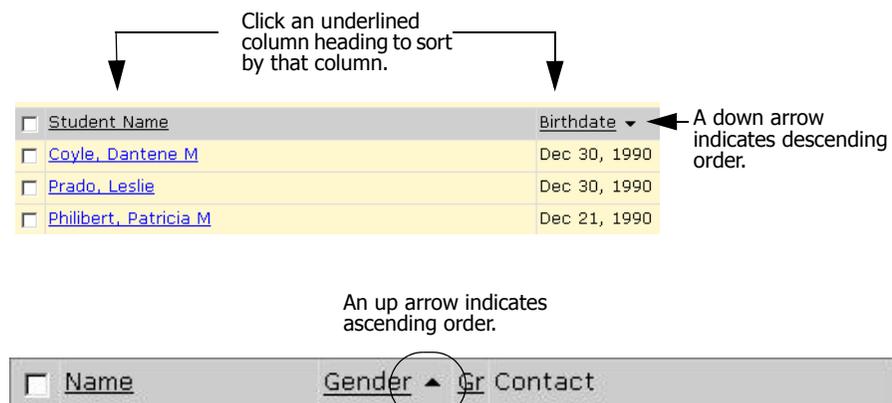
To select all records in a list that might span multiple pages, not just the records on the current page, click the Select All checkbox. For example, your Student Search Results might include more than 100 students that span multiple pages. To select all students in that list of Search Results, click the Select All checkbox.

The Select All checkbox is found at the top of a list of records.



Quick Sort

To quickly sort a list of records, such as search results, click any underlined column heading. For example, to sort by gender, click the Gender column. To change the sort order, click the column heading again. The order of the records remains the same until you change it.

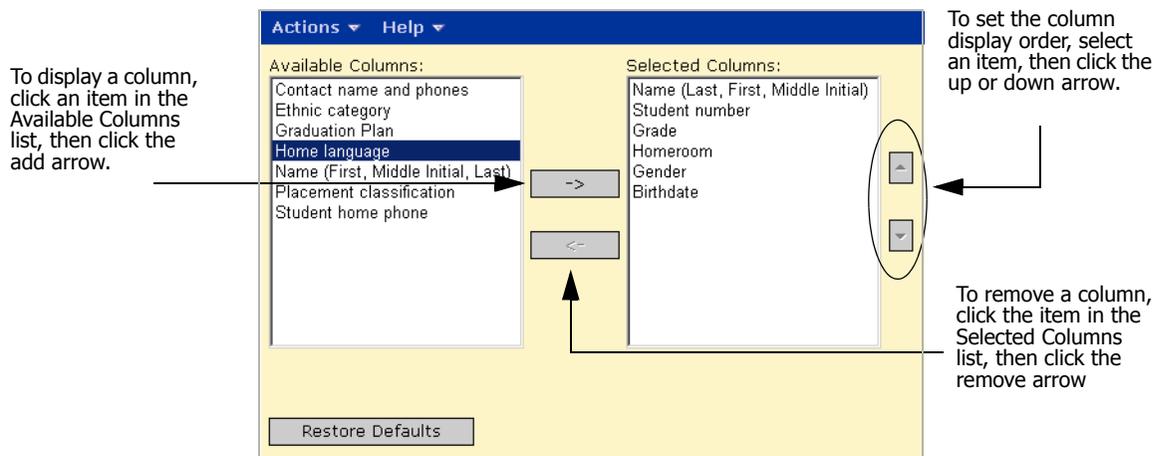


Customize Display Options

You can customize the column display to suit your needs. Changes you make remain until you change the column display again.

TO CUSTOMIZE THE COLUMN DISPLAY:

- 1 On a Student Search Results page, from the Edit menu, click Choose Columns.
- 2 In the available columns list, select the column you want to display.
- 3 Click  to move your selection to the Selected Columns list.



- 4 Use the up and down buttons to move the columns to where you want them to be on the page. The higher the column is in the list, the further to the left it is on the page.
- 5 Repeat steps 2 to 4 until you have all the columns you want and in the order you want them to display on the page.
- 6 Click OK.

Panels

Information is grouped on a page in panels that are collapsed or expanded by default based on the way the page is designed to be used. To expand or collapse a panel, click  or .

Using Keyboard Shortcuts to Move Between Fields

You can use your keyboard to move from field to field on a page.

- To move to the field on the right, press Tab.
- To move to the field on the left, press Shift+Tab.

Printing a Page

You have the option of printing one page, or printing a list of items that span multiple pages.

TO PRINT AN ENTIRE PAGE:

- Click the browser Print button.



TO PRINT A LIST OF ITEMS THAT SPAN MULTIPLE PAGES:

- 1 Click the Print icon (). The Print options page appears.
- 2 In the Print options window, make your selections.
- 3 Click Print. The report appears in the PDF Viewer.
- 4 In the PDF Viewer, click the Print button.



Printing Reports

Chancery SMS comes with many predefined reports that you can print from the Reports menu on the associated page or from the page.

Warning

When printing a report, do NOT click  to cancel the report as this will slow system performance considerably.

Logging Off

To end your current work session, log off from Chancery SMS.

Warning

For security reasons, make sure you log off from Chancery SMS when you finish your current session. Otherwise, unauthorized users are able to access the system until your session times out.

TO LOG OFF FROM CHANCERY SMS:

- In the Chancery SMS task bar, click Log Off.

Note

To close Chancery SMS, use Log Off in the task bar, do not click the  in your browser.

USING YOUR HOME PAGE

When you first log on to Chancery SMS, your home page opens. For teachers in a school using Chancery SMS, the My Classes page is the home page.

The right side of your home page includes an Alerts section to give you quick access to alerts, and a Scheduled Events section, which displays reports and exports that have been scheduled. The left side of the home page displays all the classes to which you are assigned.

To navigate back to your home page from another page, click Home in the task bar. For more information on navigating around your homepage, see “Navigating” on page 3.

If you have new alerts, the task bar shows an alert message icon (🔔).

Classes to which you are assigned.

To view your alerts, click here.

To review scheduled reports or exports, click a link.

Alert icon

Chancery SMS™ My Classes

Actions Help Log off

P Banschbach

Display by Classes

My Classes	Roster	Grading	Attendance
Homeroom - 105	👤	📊	🚫
Language Arts K (105)	👤	📊	
Mathematics K (105)	👤	📊	
Science K (105)	👤	📊	
Social Studies K (105)	👤	📊	

Alerts

[1 new alerts](#)

Scheduled Events

[Reports](#)

[Exports](#)

Upcoming Birthdays

No birthdays within this month and the next 30 days.

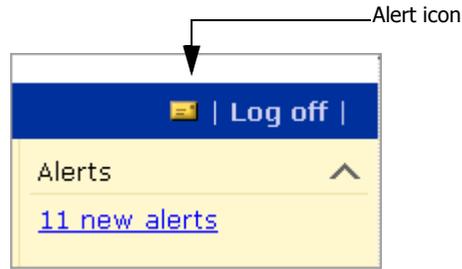
Working with Alerts

To receive alerts, you must subscribe to them. For example, if you subscribe to the Future Attendance Change alert and someone enters an absent attendance type code for a future date, an alert message is immediately sent to your home page. For further information about subscribing to alerts, see “Subscribing to and Viewing Alerts” on page 16.

When you receive new alerts, the Alerts area on your home page shows the number of new alerts and the task bar on all pages shows an alert message icon (🔔).

Chancery SMS checks for new alerts every five minutes, regardless of what page you are working on. Refreshing the page before five minutes has elapsed does not check for new alerts.

When Chancery SMS detects that you have new alerts, the alert icon appears in the task bar on every page. Once you open the Alert List page, the alert icon no longer appears, whether you read the new alerts or not.



Subscribing to and Viewing Alerts

You must subscribe to alerts to receive alert messages; however, the Alerts area always displays on your home page, even if you have not subscribed to any alerts.

TO SUBSCRIBE TO ALERTS:

- 1 Log on as a teacher.
- 2 On your home page or on the Alert List page (when you view your alerts), from the Actions menu, click Change Alert Subscription.
- 3 Select the alerts you want to subscribe to.

Alert Subscription Options		Subscribe
Future Attendance Change		<input checked="" type="checkbox"/>
Homeroom Change		<input checked="" type="checkbox"/>
'20' - Excessive absence rule	!	<input checked="" type="checkbox"/>
'10' - Excessive absence rule	!	<input checked="" type="checkbox"/>
'15' - Excessive absence rule	!	<input checked="" type="checkbox"/>
'5' - Excessive absence rule		<input checked="" type="checkbox"/>

- 4 Click OK.

TO VIEW ALERTS:

- 1 Log on as a teacher.
- 2 On your home page, click either the alert message icon (📧) or the new alerts link.

On the Alert List page, alerts display in reverse chronological order, with the most recent message first. Unread alerts display in bold.



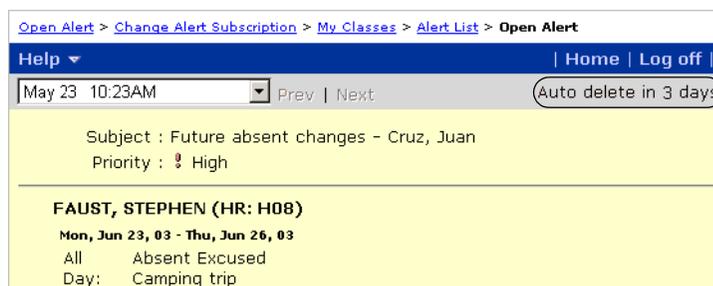
- 3 On the Alert List page, click a message to open the Open Alert page to read its contents.

OR

Select multiple alerts then, from the Actions menu, click Open Alert to read the first alert. To view another selected alert, use either the dropdown or click Prev or Next.

The top right of the Open Alert page shows when this alert will be deleted. Alerts are automatically deleted after 30 days, whether you have read them or not. You can manually delete alerts at any time.

If you selected more than one alert, you can read the other selected alerts by clicking Prev or Next or by selecting an alert from the dropdown.



TO DELETE AN ALERT IN THE ALERT LIST PAGE:

- 1 Log on as a teacher.
- 2 On your home page, click either the alert message icon or the new alerts link.
- 3 On the Alert List page, select one or more alerts.
- 4 From the Actions menu, click Delete Alert.

MY CLASSES

As a teacher, you are assigned to classes and/or homerooms in which you provide instruction to groups of students.

When you log on to Chancery SMS, your home page appears, which is the My Classes page by default. The My Classes page displays the specific classes and/or homerooms to which you are assigned.

Working with the My Classes Page

The My Classes page is the starting point of all navigation for you, as a teacher. For elementary teachers, the My Classes page displays your homeroom and other classes you are assigned to teach, as well as upcoming birthdays for students in your homeroom and classes.

For details on how to navigate around the My Classes page, see “Navigating” on page 3.

Elementary My Classes page

To view a class roster, click the Roster icon.

To enter grades, click the Grading icon.

To take attendance, click the Attendance icon.

Class	Roster	Grading	Attendance
Homeroom - 155	[Roster Icon]	[Grading Icon]	[Attendance Icon]
Cross-Content 5 (155)	[Roster Icon]	[Grading Icon]	
Foreign Language 5 (155)	[Roster Icon]	[Grading Icon]	
Health 5 (155)	[Roster Icon]	[Grading Icon]	
Language Arts 5 (155)	[Roster Icon]	[Grading Icon]	
Lunch 5 (155)	[Roster Icon]	[Grading Icon]	
Mathematics 5 (155)	[Roster Icon]	[Grading Icon]	
Science 5 (155)	[Roster Icon]	[Grading Icon]	
Social Studies 5 (155)	[Roster Icon]	[Grading Icon]	

View your student's upcoming birthdays.

To view alerts, run reports, and access Quick Links, click the appropriate link.

For secondary school teachers, the My Classes page also displays meeting patterns.

Secondary My Classes page

View class term and meeting pattern.

The screenshot shows the Chancery SMS interface. On the left is a navigation menu with categories: STUDENT (Student Search, Quick, Basic, Detailed, Family Search), CLASS (My Classes), SCHOOL (Awards, Student Behavior, Manage Programs), and ADMIN (Scheduling, Grading, District Setup, Reports, Exports). The main content area is titled 'My Classes' and shows a table for user 'J Arness'. The table has columns: My Classes, Meeting, Roster, Grading, and Attendance. Below the table is a section for 'Upcoming Birthdays' listing students and their dates.

My Classes	Meeting	Roster	Grading	Attendance
Advisement-10-1 (105)	FY:ADV			
Government-1 (100)	FY:P2			
Government-2 (100)	FY:P3			
Government-3 (100)	FY:P4			
Government-4 (100)	FY:P5			
Ancient Civilizations-1 (100)	S1:P1			
Geography-1 (100)	S1:P6			
Geography-3 (100)	S1:P7			
Geography-4 (100)	S2:P6			
Geography-2 (100)	S2:P7			

Upcoming Birthdays	
Daisy, Angel	16 on Jun 1, Wed
Burke, Pedro Junior	14 on Jun 6, Mon
Christian, Harrison Emiliano	14 on Jun 8, Wed

From the My Classes page, you can do the following:

- Access alerts, run reports, and access pages for which Quick Links have been created. For details, see “Using Your Home Page” on page 15.
- View the roster for a homeroom or class and view student demographic data. For details, see “Student Demographics in the Classroom” on page 41.
- Enter grades for classes. For details, see “Grading in the Classroom” on page 45.
- Take attendance for classes. For details, see “Attendance in the Classroom” on page 49.

SEARCHING FOR STUDENT RECORDS

There are several ways to search for students in Chancery SMS:

To	Use this search type
Select to search by demographic information (Basic) or by other specific criteria (Detail).	Student Search
View a pre-defined list of students, such as all your students in a grade level. You can also search by name or student ID.	Quick Search
Search by additional demographic information such as Phone, Birthdate, Age, and Grade.	Basic Search
Refine your search to include only those students that match specific criteria.	Detailed Search
Search for students or contacts within a family record.	Family Search

At the top of the Quick Search page or at the top of any search results page (Quick, Basic, Detailed, or Saved List):

To	Do this
Search by a student's exact student number.	Enter the number in the "Last Name or ID" field.
Search for students whose last names start with certain letters, such as "Smi".	Enter the letters in the "Last Name or ID" field.
Search for students whose first or preferred names start with certain letters, such as "Jen".	Enter the letters in the "First or Preferred Name" field.

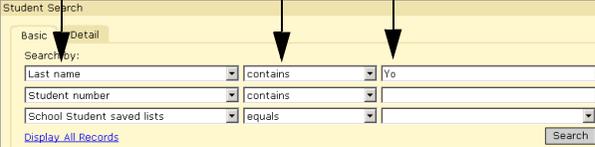
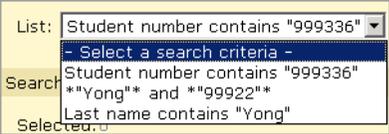
In addition, you can save your search results to Saved Lists for future use.

Performing a Student Search

The Student Search features a Basic search tab and a Detail search tab (these are separate from the Basic and Detailed searches available in the control bar). Use the Student Search Basic tab to search by common student demographic fields. Use the Student Search Detail tab to search by fields within categories, such as Personal or Enrollment.

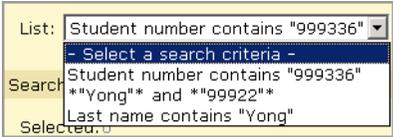
TO SEARCH FOR STUDENTS USING STUDENT SEARCH BASIC TAB:

- 1 Log on as a teacher.
- 2 In the control bar, under Student, click Student Search.
- 3 On the Basic tab, use one of the following search options:

Search Option	Description
Search by	<p>1 Enter up to three search constraints. Enter a field, an operator, and a value.</p> <div style="text-align: center; margin-bottom: 10px;"> Field Operator Value </div>  <p>Choose from common student demographics fields, such as:</p> <ul style="list-style-type: none"> • Age • Birthdate • First or Preferred Name • Last Name • Gender • Geocode • Grade Level • Home School • SSN/SIN • Student Number • Student Saved Lists <p>and so on.</p> <p>2 Click Search.</p>
Display all records	<p>Rather than search for specific students, you can display all students.</p> <p>Note Chancery SMS can display up to 1000 records. If there are more than 1000 records in the search results, you will need to narrow your search criteria.</p>
List	<p>Choose from previously-used search criteria. For example, if you recently searched for students whose first name is Colin, that search criteria is saved to this list.</p> 

TO SEARCH FOR STUDENTS USING STUDENT SEARCH DETAIL TAB:

- 1 Log on as a teacher.
- 2 In the control bar, under Student, click Student Search.
- 3 On the Detail tab, from the Category dropdown, select a category such as Enrollment or Registration.
- 4 Use one of the following search options:

Search Option	Description
Search by	<p>1 Enter your search criteria. Enter a field, an operator, and a value.</p> <p style="text-align: center;">Field Operator Value</p>  <p>2 Click Add Criteria. To narrow the search result, add additional criteria.</p> <p>3 Indicate whether to match all criteria or match any criteria. All criteria produces a narrow list that contains only those students who match all the criteria you specify. Selecting Any criteria broadens the search to include students who match any of the search criteria you specify.</p> <p>4 Click Search.</p>
Display all records	<p>Rather than search for specific students, you can display all students.</p> <p>Note Chancery SMS can display up to 1000 records. If there are more than 1000 records in the search results, you will need to narrow your search criteria.</p>
List	<p>Choose from previously-used search criteria. For example, if you recently searched for students whose first name is Colin, that search criteria is saved to this list.</p> 

Performing a Quick Search

On your home page, under Quick Search, you can view all your students, your students in a specific grade, your recently enrolled students (within the past 30 days), or any of your students who have withdrawn this year. In addition, use the “Last Name or ID” or the “First or Preferred Name” fields at the top of the Quick Search page to search for a specific student.

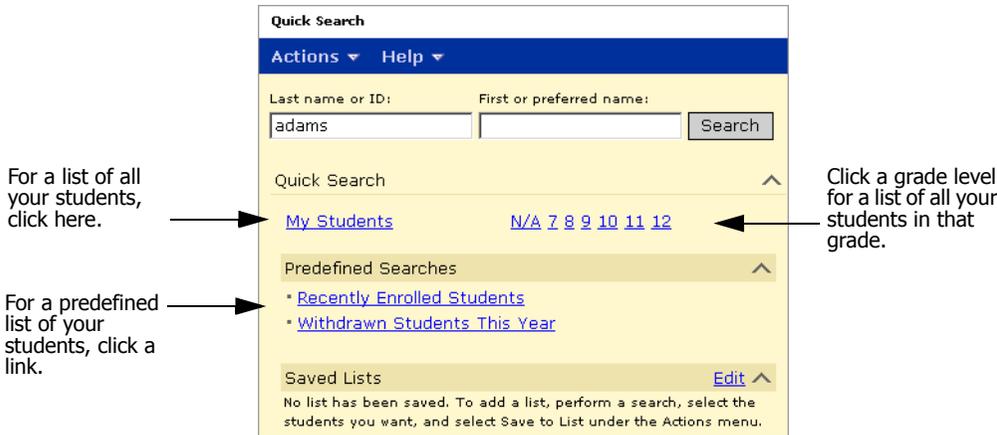
TO FIND A STUDENT USING A QUICK SEARCH:

- 1 Log on as a teacher.
- 2 In the control bar, under Student, click Quick.
- 3 On the Quick Search page, in the “Last Name or ID” field or the “First or Preferred Name” field, enter the student’s ID number, last name, or first name, or partial values of any of these.

OR

Do one of the following:

- In the Quick Search panel, click the student’s grade.
- In the Pre-defined Searches panel, click a pre-defined search.



The Search Results page displays a list of possible matches. If there are many students, you may need to scroll or click the Prev/Next paging controls to find the student you’re looking for.

- 4 To open a student record, click the student’s name.

Performing a Basic Search

A basic search is a precise way of finding students. For example, if you enter a student’s name and phone number, you’ll narrow your search results.

You don’t have to use all the search fields. Records are found that meet all the criteria you enter, while fields you leave blank are ignored. For example, if you enter a last name and a phone number, the results include only students who have both the last name and the phone number you specified.

If you're not sure of the correct spelling of a student name, enter the first few letters. The results include names beginning with those letters. Use either upper or lower case letters. For example, searching for "lancaſter" finds "Lancaſter". Enter ſpaces exactly. For example, ſearching for "delos ſantos" does not find "de los ſantos".

TO FIND A STUDENT USING A BASIC SEARCH:

- 1 Log on as a teacher.
- 2 In the control bar, under Student, click Basic.

The Basic Search page opens.

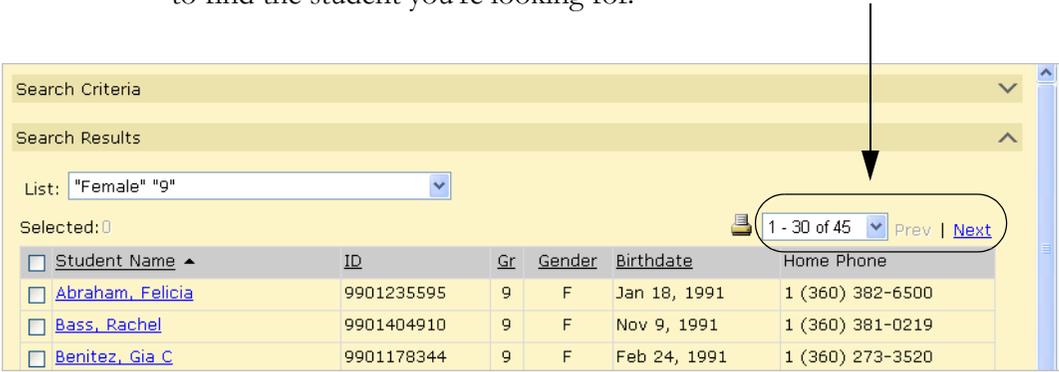
The screenshot shows the 'Basic Search' interface. At the top, there are 'Actions' and 'Help' dropdown menus. Below, the search criteria are organized into two columns. The left column contains: 'Student name: Last:' with a text input field; 'Student ID:' with a text input field; 'Phone:' with a text input field and a mask '###-####'; 'Current grade:' with a dropdown menu; 'Geocode (Planning):' with a dropdown menu; 'Birthdate:' with a text input field and a mask 'mm/dd/yyyy'; and 'Age: [checkbox] as of' with a text input field, a calendar icon, and a mask 'mm/dd/yyyy'. A 'Search' button is located at the bottom center.

- 3 On the Basic Search page, enter all or any of the following search criteria:

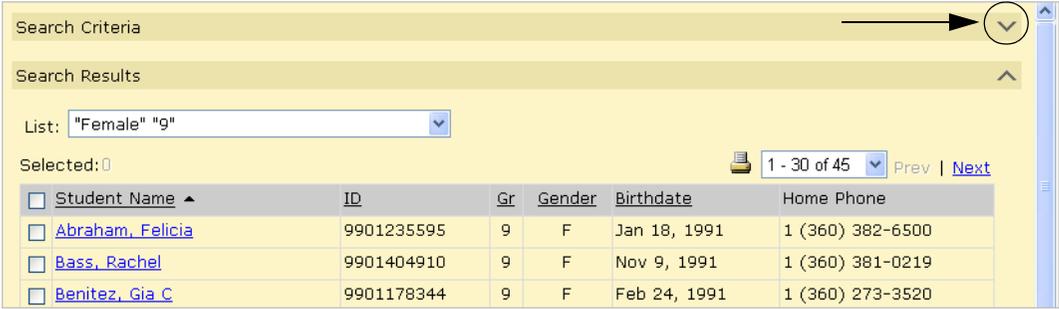
Field	Description
Student Name	Search for all students with the ſame Laſt Name or all ſtudents with the ſame Firſt or Preferred Name. If you're unſure of the ſpelling, enter the firſt two or three letters.
Student ID	Enter a complete Student ID.
Phone	Enter the ſtudent's home phone number
Current grade	Select a ſpecific grade level.
Geocode (Active) or Geocode (Planning)	Enter the ſtudent's geographical region code for the current year or the coming year.
Birthdate	Enter a birthdate in mm/dd/yyyy format.
Age/as of	Enter a ſpecific age and the date at which the age was calculated.

- 4 Click Search to diſplay your ſearch reſults.

The Search Results page displays a list of possible matches. If there are many students, you may need to scroll down the page or click Prev/Next to find the student you're looking for.



If you're not satisfied with your search results, expand the Search Criteria panel to modify your search criteria, then click Search.



To choose the columns of data you want to display and to sort the data see “Customizing How Student Search Results Display” on page 31.

- 5 To open a student record, click the student's name.

Performing a Detailed Search

A detailed search is a good way to find a range of students who match a variety of criteria that you set.

In a detailed search, each of the criteria has three parts:

- a field name
- an operator
- a value

The screenshot shows a search interface with a yellow background. At the top, there are three labels with arrows pointing to specific parts of the form: 'Field name' points to the 'Last name' dropdown, 'Operator' points to the 'starts with' dropdown, and 'Value' points to the 'Sm' text input. The form includes a 'Category:' dropdown set to 'Most Frequent', an 'Add Criteria' button, a 'Search Criteria' section with radio buttons for 'All criteria' (selected) and 'Any criteria', a large empty text area, and 'Search' and 'Remove' buttons at the bottom.

The following criteria finds students whose last name begins with “Sm” and would find Smith, Smythe, Small, and so on:

- Field Name = Last Name
- Operator = Starts with
- Value = Sm

The screenshot shows a search criteria form with a yellow background. At the top, there is a 'Category:' dropdown menu set to 'Most Frequent'. Below this is a search criteria entry area with three fields: 'Last name' (dropdown), 'starts with' (operator dropdown), and 'Sm' (value text input). An 'Add Criteria' button is to the right. Below the entry area is a 'Search Criteria' section with a 'Match:' section containing two radio buttons: 'All criteria' (selected) and 'Any criteria'. Below the radio buttons is a list box containing one item: 'Last name starts with "Sm"'. At the bottom of the form are 'Search' and 'Remove' buttons.

To find students whose last name begins with “Sm” AND who are in Grade 5, you would add the following criteria to the above search:

- Field Name = Grade Level (current)
- Operator = Is
- Value = 5

To reduce the number of students who match, select “All criteria”.

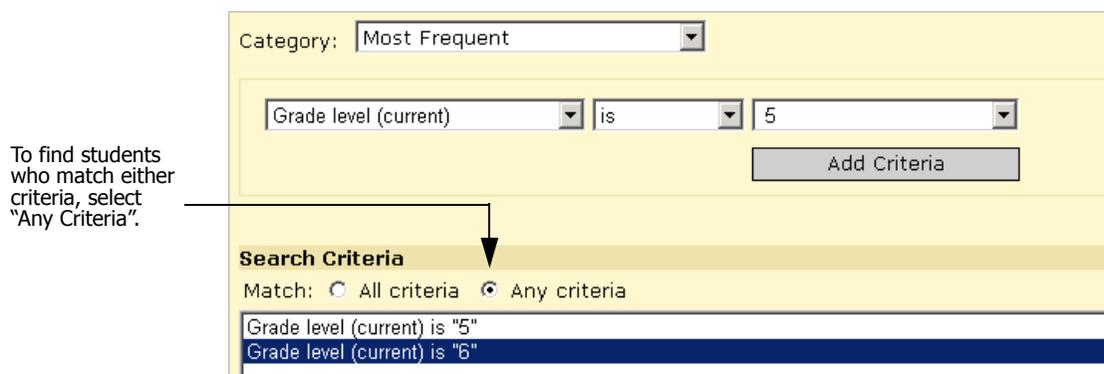
To to find only those students who match both criteria, select “All Criteria”.

The screenshot shows the same search criteria form as above, but with an additional criterion added. The 'Add Criteria' button is now disabled. The 'Search Criteria' list box now contains two items: 'Last name starts with "Sm"' and 'Grade level (current) is "5"'. The 'Match:' section still has 'All criteria' selected. The 'Search' and 'Remove' buttons are still present at the bottom.

The following criteria finds your students who are in Grade 5 OR Grade 6:

- Field Name = Grade Level (current)
- Operator = Is
- Value = 5; repeat for Value = 6

By searching for any criteria, you increase the number of students who match the criteria.



TO PERFORM A DETAILED SEARCH:

- 1 Log on as a teacher.
- 2 In the control bar, under Student, click Detailed.
- 3 From the Category dropdown, select the type of data you want to search for. Choose from:
 - Most Frequent
 - Personal
 - Student Contacts
 - Registration
 - Enrollment
 - Scheduling
- 4 From the left dropdown, select a field name.
- 5 From the middle dropdown, select an operator:

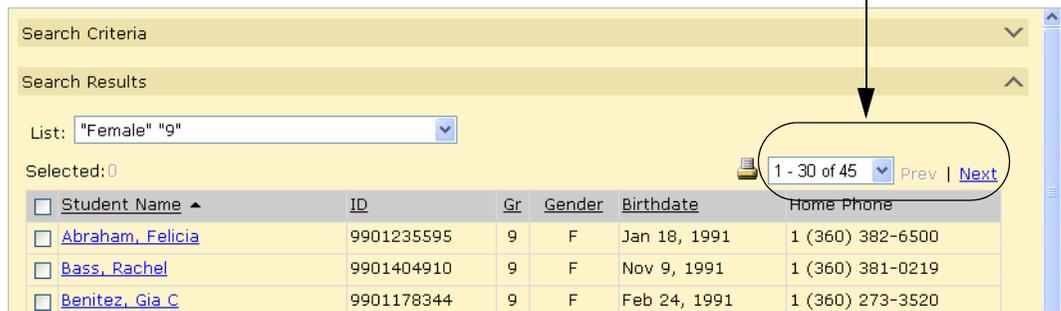
To find records where the field	Use this operator
Includes the value anywhere in the field	Contains
Ends with the value	Ends with
Exactly matches the value	Is
Is anything but the value	Is not

To find records where the field	Use this operator
Starts with the value	Starts with
Is greater than the value	Greater than
Is less than the value	Less than
Is greater than or equal to the value	> or =
Is less than or equal to the value	< or =

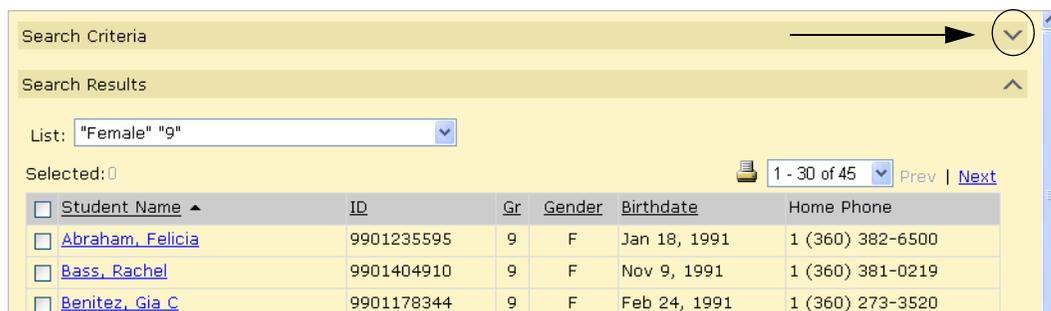
- 6 In the right field, enter or select a value from the dropdown.
Enter either upper or lowercase letters. For example, searching for “lancaster” finds “Lancaster”. Enter spaces exactly. For example, “delos santos” does not find “de los santos”.
- 7 Click Add Criteria.
- 8 To add more criteria to your search, repeat steps 3 through 7.
- 9 Select whether you want your search to match All criteria or Any criteria. Selecting All criteria produces a narrow list that contains only those students who match all the criteria you specify. Selecting Any criteria broadens the search to include students who match any of the search criteria you specify.

To remove criteria from the search, highlight the statement and click Remove.
- 10 Click Search.

The Search Results page displays a list of possible matches. If there are many students, you may need to scroll down the page, select a page from the dropdown or click the Prev/Next paging controls to find the student you’re looking for.



If you're not satisfied with your search results or no records are found, expand the Search Criteria panel, modify your search criteria, and then click Search.



To choose the columns of data you want to display and to sort the data see “Customizing How Student Search Results Display” on page 31.

- 11 To open a student record, click the student's name.

Customizing How Student Search Results Display

You can customize the columns that display on the Student Search Results page to suit your needs. You can specify the columns that display, as well as sort the data in each column.

For example, if you are compiling a list of students whose parents need to be contacted, you might choose the following columns:

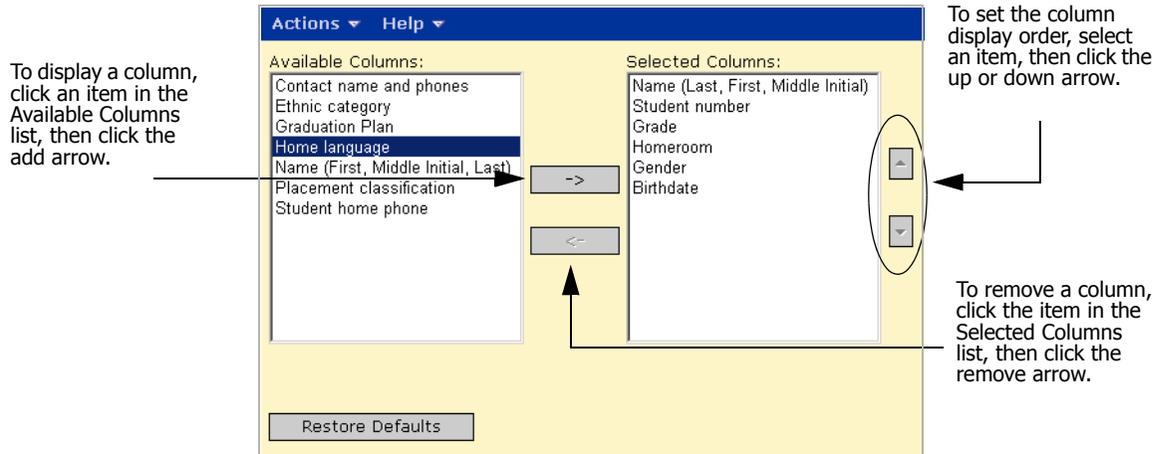
- Name
- Homeroom
- Student phone number
- Grade

You could then sort the data in the columns any way you want; for example, by Name and Student phone number, or by Grade and Homeroom, and so on.

TO SELECT COLUMNS TO DISPLAY:

- 1 Log on as a teacher.
- 2 Perform a search.

- 3 On a Student Search Results page, from the Edit menu, click Choose Columns.
- 4 In the available columns list, select the column you want to display.
- 5 Click  to move your selection to the Selected Columns list.



- 6 Use the up and down buttons to move the columns to where you want them to display on the page. The higher the column is in the list, the further to the left it is on the page.
- 7 Repeat steps 4 to 6 until you have all the columns you want and in the order you want them to display on the page.
- 8 Click OK.

TO SORT DATA IN COLUMNS:

- 1 Log on as a teacher.
- 2 Perform a search.
- 3 On the Student Search Results page, from the Edit menu, click Sort.

- On the Sort page, click the appropriate dropdown and select an option. For example, you might want to sort the list of students in ascending order by Grade, then by Homeroom.

Note

You can sort data by columns that are not visible on the screen. For example, you might not want to see the Gender column, but you can still sort by gender.

- Click OK.

Saving Your Search Results

In addition to the pre-defined searches available in Chancery SMS, you can save your custom search results to a saved list for future use. For example, you could save a list of students who are volunteering for the Food Bank. You can also create a new saved list from scratch or edit an existing saved list.

Understanding Saved Lists

A saved list is a static list of students that you manually update as needed. For example, when more students join the volunteer program, the additional students are not included in the saved list until you manually update the saved list to include those students.

In another example, if you create a saved list of grade 9 students and one or more students has a grade level change, the students remain in the grade 9 saved list until you remove them, even though their grade level is no longer 9.

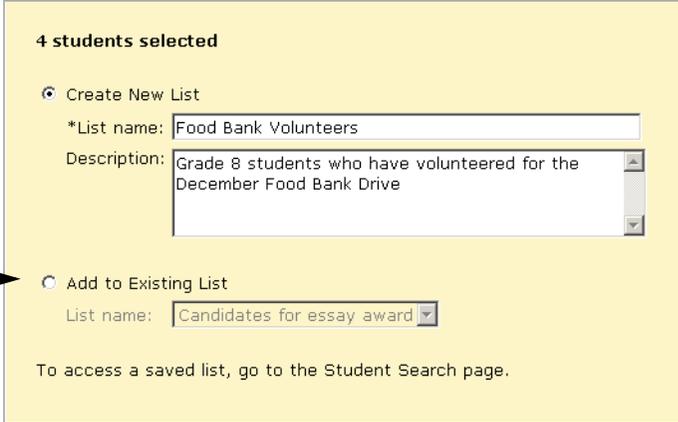
It's important to note, however, that any changes you make to a student's demographic data are automatically updated in the student record in the saved list.

TO SAVE YOUR SEARCH RESULTS AS A SAVED LIST:

- 1 Log on as a teacher.
- 2 Perform a search.
- 3 On the Student Search Results page, select the students you want to save to a list.
- 4 From the Actions menu, click Save to List.
- 5 On the Save to List page, select Create New List, and enter an appropriate list name and description.

OR

To replace an existing list, select Add to Existing List, and then select a list from the List Name dropdown.



ONLY select this option if you want your new list to replace the existing list.

Note

Add to Existing List does not append your saved list to an existing saved list; rather, it replaces the existing list. To append names to an existing saved list, edit the saved list.

- 6 Click OK.

Creating and Editing a Saved List

You can create a saved list from scratch. You can also edit any saved list, whether they are created from scratch or created from search results.

TO CREATE AND EDIT A SAVED LIST:

- 1 Log on as a teacher.

- 2 On the Quick Search page, in the Saved Lists panel, click Edit.
- 3 To create a new saved list, from the Actions menu, click Add Saved List.

OR

To edit an existing saved list, on the Saved List page, click the list name you want to edit.

- 4 Enter or change the List Name and Description.
- 5 Enter your search criteria in the Last Name and First Name fields and click Search.

The screenshot shows a web interface for managing a saved list. At the top, there is a form with a text field for '*List name:' containing 'Food Bank Volunteers' and a dropdown menu for 'Description:' with the selected option 'Grade 8 students who have volunteered for the December Food'. Below this is a search section with 'Last name:' and 'First name:' input fields, the first containing 'burke', and a 'Search' button. The search results are displayed in two columns: 'Search results:' and '*List members:'. The 'Search results:' column contains one entry, 'Burke, Pedro (9901255814)', which is highlighted in blue. An arrow points from this entry to an 'Add ->' button. The '*List members:' column shows a list of three members: 'Brown, Ken (9901285645)', 'Christian, Harrison (9901187151)', and 'Collins, Jessica (9901178235)'. Below the lists are 'Add ->' and 'Remove' buttons. At the bottom, a note states: 'To select two or more students, use Ctrl+Click or Shift+Click.' Two external annotations with arrows point to the search fields and the 'Add ->' button.

Enter the name of the students you want to include in the saved list and click Search.

Select a student and click Add.

- 6 To add the student, select the student from the Search Results list and click Add.

OR

To delete a student from the saved list, select the student from the List Members list and click Remove.

- 7 Click OK.

TO DELETE A SAVED LIST:

- 1 Log on as a teacher.
- 2 On the Quick Search page, under Saved Lists, click Edit.
- 3 On the Saved List page, select the saved list you want to delete. From the Actions menu, click Delete Saved List.
- 4 Click OK.

Performing a Family Search

If Family Management is activated when Chancery SMS is installed, students, siblings, and contacts are grouped by Family.

Finding Families

The Family Search features a Basic search and a Detail search (these are separate from the Basic and Detailed searches in the control bar). Use the Family Search Basic tab to search by common student demographic fields. Use the Family Search Detail tab to search by fields within categories, such as Student Contacts.

Here are some tips for improving your Family search results:

- The more fields you use, the more refined your search results are. You don't have to use all the search fields. Fields you leave blank are ignored.
- If you're not sure of the correct spelling of a name, enter the first few letters. Families whose names begin with the letters you type are found.
- Use either upper or lower case letters. For example, searching for "lancaster" finds "Lancaster".
- Enter spaces exactly. For example, searching for "delos santos" does not find "de los santos".

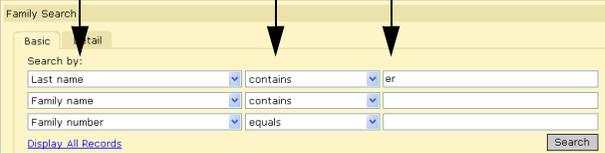
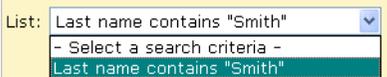
Note

You can also access a Family record when viewing the record of any students in that family. Open a student record then, in the control bar, click Family. The Family Overview page for the selected student appears.

TO SEARCH FOR FAMILIES USING THE FAMILY SEARCH BASIC TAB:

- 1 Log on as a teacher.
- 2 In the control bar, click Family Search.

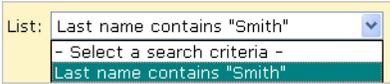
3 On the Basic tab, use one of the following search options:

Search Option	Description
Search by	<p>1 Enter up to three search constraints. Enter a field, an operator, and a value.</p> <div style="text-align: center; margin-bottom: 10px;"> Field Operator Value </div>  <p>Choose from common student demographics fields, such as:</p> <ul style="list-style-type: none"> • Contact Last Name • Contact Phone Number • Family Name • Family Number • First Name • Last Name • Student Number • Student Saved Lists <p>2 Click Search.</p>
Display all records	<p>Rather than search for specific families, you can display all families.</p> <p>Note Chancery SMS can display up to 1000 records. If there are more than 1000 records in the search results, you will need to narrow your search criteria.</p>
List	<p>Choose from previously-used search criteria. For example, if you recently searched for a family with the last name Smith, that search criteria is saved to this list.</p> 

TO SEARCH FOR FAMILIES USING THE FAMILY SEARCH DETAIL TAB:

- 1** Log on as a teacher.
- 2** In the control bar, click Family Search. On the Family Search page, click the Detail tab.
- 3** On the Detail tab, from the Category dropdown, select an option, such as Personal or Student Contacts.

4 Use one of the following search options:

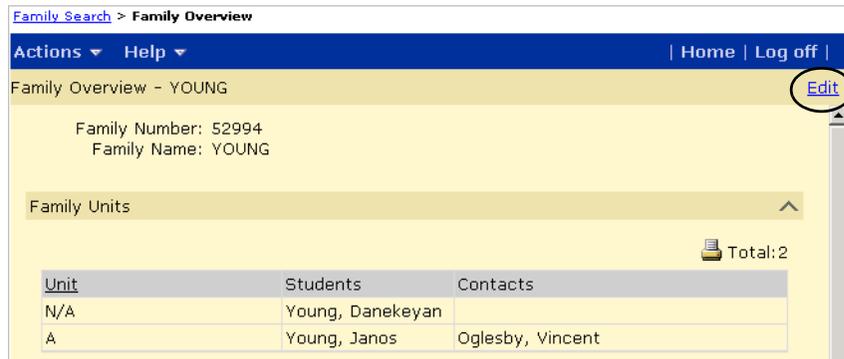
Search Option	Description
Search by	<p>1 Enter your search criteria. Select the category of data you want to search, then enter a field, an operator, and a value.</p> <div style="text-align: center; margin-bottom: 10px;"> Field Operator Value </div>  <p>2 Click Add Criteria. To narrow the search result, add additional criteria.</p> <p>3 Indicate whether to match all criteria or match any criteria. If you select All criteria, the search results include only those families who match all the search criteria you specified. Selecting Any criteria includes a list of families who match any of the criteria you specified.</p> <p>4 Click Search.</p>
Display all records	<p>Rather than search for specific families, you can display all families.</p> <p>Note Chancery SMS can display up to 1000 records. If there are more than 1000 records in the search results, you will need to narrow your search criteria.</p>
List	<p>Choose from previously-used search criteria. For example, if you recently searched for a family with the last name Smith, that search criteria is saved to this list.</p> 

Viewing Family Information

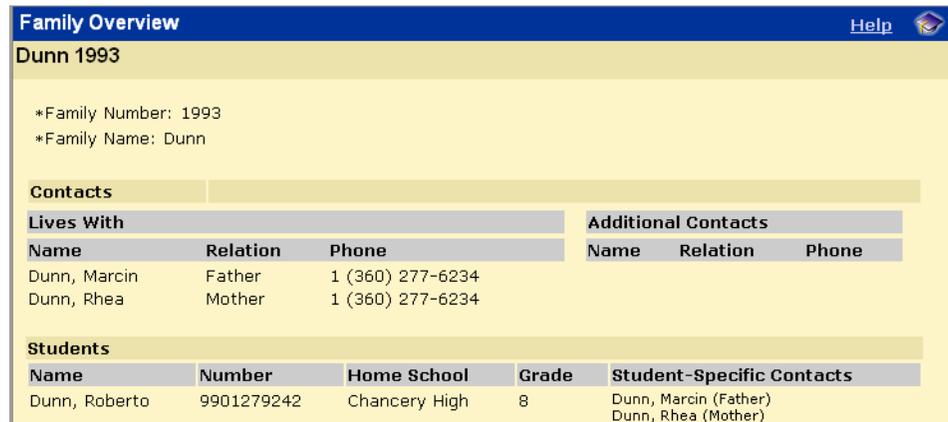
On the Family Overview page and the Family Overview dialog, you can view information about a family, such as siblings, contacts and phone numbers.

- 1 Log on as a teacher.
- 2 Perform a family search.
- 3 On the Family Search results page, click the link for a family.

- 4 On the Family Overview page, in the header, click Edit to view family details.



The Family Overview dialog opens.



- 5 When you have finished viewing the family data, close the Family Overview dialog.

STUDENT DEMOGRAPHICS IN THE CLASSROOM

As a teacher, you can view demographic data for your students, such as age, grade, homeroom, address, phone number, family information and so on.

Working with Student Demographics Data

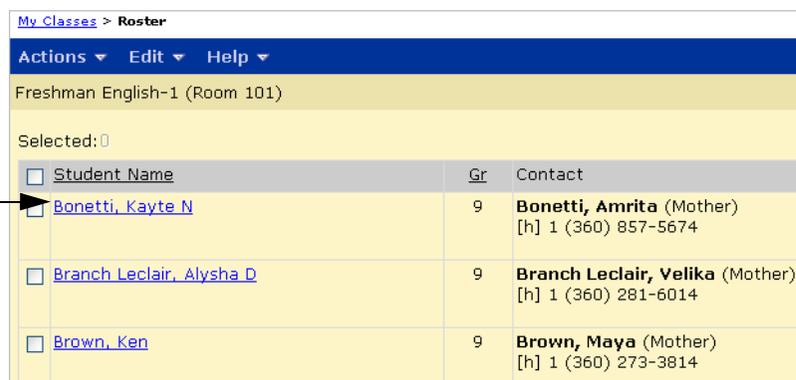
From the Student Demographics page, you can view basic student information as well as open other pages, such as the student's attendance, grades or schedule page.

Opening a Student Record

You can open a student record in several ways:

- Click the Roster () , Grading () , or Attendance () icon on the My Classes page, then click the student's name on the Roster, Class Roster, Grades, or Attendance page.

Click a student's name to open their student record.



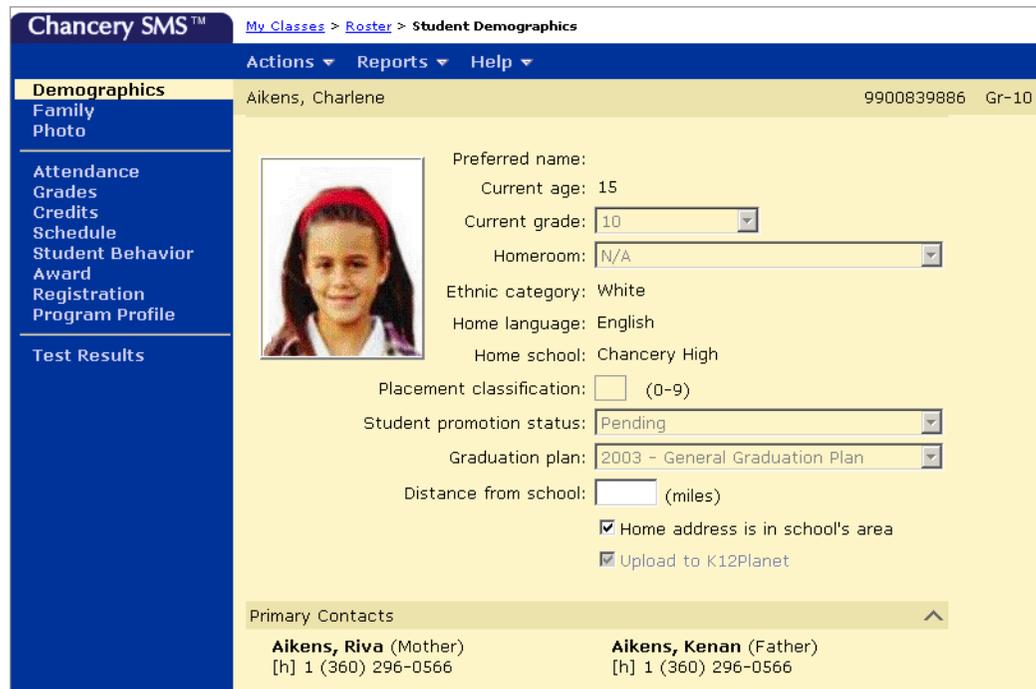
<input type="checkbox"/> Student Name	Gr	Contact
<input type="checkbox"/> Bonetti, Kayte N	9	Bonetti, Amrita (Mother) [h] 1 (360) 857-5674
<input type="checkbox"/> Branch Leclair, Alysha D	9	Branch Leclair, Velika (Mother) [h] 1 (360) 281-6014
<input type="checkbox"/> Brown, Ken	9	Brown, Maya (Mother) [h] 1 (360) 273-3814

- Perform a student, quick, basic or detailed search then click the student's name on the Student Search Results page. For details about searching for student records, see “Searching for Student Records” on page 21.
- Search by family name, click the student's family name on the Family Search page, and then click the student's name on the Family Overview page. This is useful if a student's siblings or guardians have different last names. For details about searching by family, see “Performing a Family Search” on page 36.

- Open a saved list and click the student’s name on the Student Search Results page. For information on saved lists, see “Saving Your Search Results” on page 33.

Viewing Student Demographic Data

On the Student Demographics page, view the student’s age, grade level, language spoken at home, as well as student data specific to your school, such as current grade level and homeroom. You can also view the student’s primary contact names and phone numbers. Scroll down the page to see the student’s phone number and address.



- To view additional student information, click the following links in the control bar:

Link	Description
Family	This link opens the Family Overview page. This page displays the family number and name, and includes the following panels: <ul style="list-style-type: none"> • Students – student name, home school, grade, and student-specific contacts • Contacts – family contacts
Photo	This link opens the Student Photo page. This page displays the student’s photo.
Attendance	This link opens the student’s attendance page. For details, see “Attendance in the Classroom” on page 49.

Link	Description
Grades	This link opens the students' Grades page. For details, see "Grading in the Classroom" on page 45.
Credits (secondary only)	This link opens the Student Credits page. This page displays the credits the student has received, including the associated grade item, grade, potential credits, credits earned, an override indicator, and override reason, if applicable.
Schedule	This link opens the Student Schedule page. This page displays the term, meeting pattern, class name, teacher, and room for the student's classes.
Student Behavior	This link opens the Student Behavior page, which displays the student's behavior incidents.
Award	This link opens the Award page. This page lists all the awards the student has received, including the date on which the award was presented.
Registration	This link opens the Registration page. This page displays the student's registration information, such as the grade the student was in when he or she registered and the student's registration status.
Program Profile	This link opens the Program Profile page. This page displays information about programs the student is enrolled in, as well as programs to which the student has applied.
Test Results	This link opens the Student Test Results page. This page displays a list of all the student's test results that have been entered, including the test date, school at which the test was taken, the student's grade level, whether the test was waived, and any comments.

GRADING IN THE CLASSROOM

Chancery SMS provides two ways for you to capture grades for students in the classroom:

- Enter grades for all the students on a homeroom or class roster. See “Entering or Editing Grades from a Roster” on page 45.
- Enter grades for an individual student. See “Entering or Editing Individual Student Grades” on page 47.

Entering or Editing Grades from a Roster

If you enter grades by homeroom, you enter grades for all subjects taught to all students in the homeroom. If you enter grades by subject or class, you enter grades for specific class rosters.

The method for entering grades is the same whether you are entering grades for an elementary school or a secondary school.

To select the subject or class you want to enter grades for, select a subject or class from the dropdown, or click the Prev or Next link.

To select a grading period, click the dropdown.

To indicate the number of grading columns you want to display on the page, click the dropdown.

To enter a comment for the grading period, click the Comment icon.

To assign a grade, select a code from the dropdown.

Student Name	1 Language Arts	2 Subject Comment	3 Listeni & Speakin	4 Listens attenti while	5 Speaks audibly
<input type="checkbox"/> Alexander, James					
<input type="checkbox"/> Cox, Deondras					
<input type="checkbox"/> Crawford, Rikki					
<input type="checkbox"/> Flynn, Jaclyn					
<input type="checkbox"/> Howard, Jennifer					
<input type="checkbox"/> Johnson, April					

TO ENTER OR EDIT GRADES BY ROSTER:

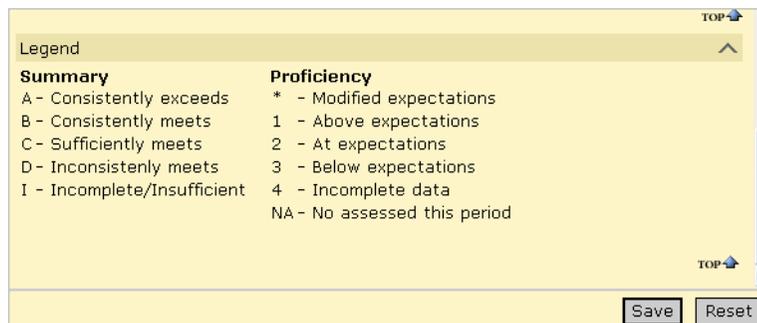
- 1 Log on as a teacher.
- 2 On the My Classes page, click the grading icon () for a homeroom or class.
- 3 On the Grades page, configure the onscreen display by doing any of the following:

To	Do this
Select the subject or class you want to enter grades for	<ul style="list-style-type: none"> • Click the Next or Prev links or select a subject or class from the dropdown.
Change the number of grade columns	<ul style="list-style-type: none"> • From the “No. of grade columns” dropdown, select the number of columns.
Enter grades for a different grading period	<ul style="list-style-type: none"> • Select a different grading period from the dropdown. <p>Note The display defaults to the current grading period.</p>
Change the columns displayed	<ol style="list-style-type: none"> 1 From the Edit menu, click Choose Columns. 2 On the choose columns page, highlight a column in the Available Columns list and click the arrow button to move columns to the Selected Columns list. 3 To determine the display order of the columns, use the up and down arrows. 4 To return to the Grades page, click OK.

- 4 You can enter grades on the Grades page using two methods:

To	Do this
Enter or edit grades for one student at a time	<ul style="list-style-type: none"> • From the dropdown in each grade column, select a grade.
Enter or edit the same grade for multiple students	<ol style="list-style-type: none"> 1 If you want to enter the same grades for selected students only, select the students. If you want to enter the same grades for all students in the roster, skip to step 2. 2 From the Edit menu, click Fill Columns. 3 Select whether you want to assign grades to selected students or all students on the Grades page. 4 Select whether you want to enter grades where no grades are specified or overwrite any existing grades.

To determine which grades you are assigning, refer to the Legend at the bottom of the Grades page.



4 Click Save.

Entering or Editing Individual Student Grades

You can enter grades for an individual student from the Student Demographics page.

- 1 Log on as a teacher.
- 2 On the My Classes page, click a Roster icon.
- 3 On the Roster page, click the student's name.
- 4 On the Student Demographics page, in the control bar, click Grades.

The Student Grades page opens.

The screenshot shows the Student Grades page for James Alexander. Annotations include: 'Select a grading period from the dropdown.' pointing to the 'Report Card 2' dropdown; 'Select the number of grading columns you want to display.' pointing to the 'No. of grade columns: 6' dropdown; and 'To assign a grade, select a code from the dropdown.' pointing to the grade dropdowns in the table.

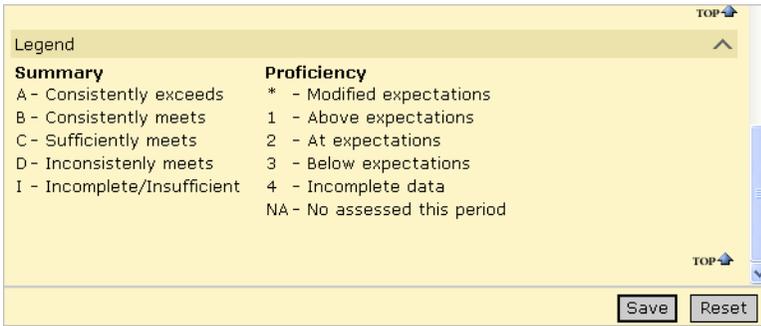
Item Description	RC1	RC2	RC3	PR1	PR2	PR3
LANGUAGE ARTS						
Subject Comments						
Listening & Speaking						
Listens attentively while others speak						
Speaks audibly						

5 On the Grades page, configure the onscreen display by doing any of the following:

To	Do this
Change the number of grade columns	<ul style="list-style-type: none"> From the “No. of grade columns” dropdown, select the number of columns.
Enter grades for a different grading period	<ul style="list-style-type: none"> Select a different grading period from the dropdown. <p>Note The display defaults to the current grading period.</p>
Enter grades for courses from a different grade level	<ul style="list-style-type: none"> Click the tab for the grade level.

6 For each subject or class, enter or select grades from the dropdown.

To determine which grades you are assigning, refer to the Legend at the bottom of the Grades page.



To add a comment for a specific subject or class, click the Comment icon enter the comment, and then click OK.



7 Click Save.

ATTENDANCE IN THE CLASSROOM

In Chancery SMS, attendance is taken by assigning an “attendance code” to each student’s attendance record. An attendance code describes a student’s attendance for either a day, a morning and afternoon, or a class (depending on whether your school takes attendance once daily, twice daily or by class).

Chancery SMS provides three default attendance codes - Present, Absent Unexcused and Tardy Unexcused - and your school can add further attendance codes as required.

Depending on how your school is set up, the default attendance code that displays when you first open the attendance page is either Present or Absent.

Chancery SMS provides several ways for you to work with attendance in the classroom:

- Assign attendance to students in a homeroom or class roster. For details, see “Assigning Attendance to Students in a Roster” on page 49.
- Assign attendance to an individual student using the Student Demographics page. For details, see “Working with a Student’s Attendance Details” on page 52.
- Assign attendance by period. For details, see “Changing the My Classes View to Period Attendance” on page 54.
- Assign attendance to a group of students in a school where daily or twice-daily attendance is taken. For details, see “Assigning Attendance to Multiple Students from Different Rosters” on page 55.

As a teacher, you can assign current attendance and view past attendance. By default, only school administrators can assign attendance for future dates or modify past attendance, attendance entered by office staff, or submitted attendance.

Assigning Attendance to Students in a Roster

You can take attendance for your homeroom or class rosters for the current date. You can also update attendance for individual students, such as when a student is absent or late for school.

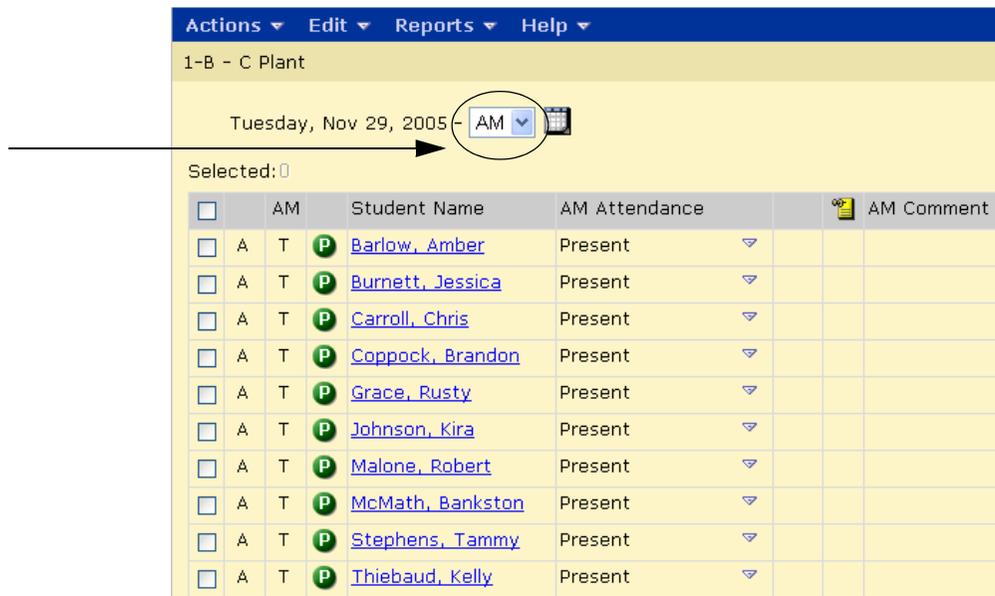
Your school can set up attendance so that it is taken for individual classes, independent of homeroom attendance. This is called supplementary attendance. If supplementary attendance is set up for a class, an attendance icon appears beside it on the My Classes page.

TO ASSIGN ATTENDANCE TO STUDENTS IN A ROSTER:

- 1 Log on as a teacher.
- 2 On the My Classes page, click the Attendance icon() for a homeroom or class, as appropriate.

The Attendance page opens. The Attendance page is slightly different, depending on the type of attendance your school takes:

- If your school takes twice-daily attendance, a dropdown is available for selecting AM and PM attendance. Before you begin entering attendance, be sure to indicate whether you are taking AM or PM attendance.



- If your school takes class attendance, the class you are taking attendance for appears at the top of the page:



Click the dropdown to select a different class or use Prev and Next to take attendance for the previous or next class.

The steps for entering attendance are the same no matter which attendance type your school uses.

Default attendance code is either Present or Absent, depending on how your school is set up.

If your school calculates minutes absent, enter that information here.

Indicates whether attendance has been submitted to the office.

Selected: 1 Total: 10

<input type="checkbox"/>			Student Name	Code	Min. Abs.		Comment
<input type="checkbox"/>	A	T		Bonilla, Thomas	P	0	
<input type="checkbox"/>	A	T		Diaz, Dariommy	P	0	
<input type="checkbox"/>	A	T		Douglas, Aphrodite A	P	0	
<input type="checkbox"/>	A	T		Hastings, Justin	P	0	
<input type="checkbox"/>	A	T		Lucas, Brandi N	P	0	
<input type="checkbox"/>	A	T		Mcduffie, Michelle A	A	0	Michelle is ill as per her mother
<input type="checkbox"/>	A	T		Montgomery, Cassandra E	T	10	Bus late
<input type="checkbox"/>	A	T		Nicolaisen, George A	P	0	
<input type="checkbox"/>	A	T		Perdue, Carlos A	P	0	
<input checked="" type="checkbox"/>	A	T		Persian, Janeal M	P	0	Back from family holiday

*Required Submit Submit & Logoff

To mark a student as absent or tardy, click a Quick Entry button.

To enter a comment, click a checkbox or click in the Comment column.

To submit attendance to the office, click here.

To submit attendance to the office and log off from Chancery SMS, click here.

3 On the Attendance page, do any of the following:

To	Do this
Change the date, time of day, or meeting pattern for which you are taking attendance	<ul style="list-style-type: none"> Click the calendar icon and select a different date (by default, teachers can only enter attendance for the current date). OR For twice-daily attendance, select AM or PM from the dropdown. OR For period attendance, select a different meeting pattern from the dropdown.
Mark a student as absent	<ul style="list-style-type: none"> Click the A Quick Entry button.

To	Do this
Mark a student as tardy	<ul style="list-style-type: none"> Click the T Quick Entry button.
Assign a non-default attendance code	<ul style="list-style-type: none"> From the Attendance column dropdown, select a code.
Enter a comment	<ul style="list-style-type: none"> Click in the Comment column, or click the checkbox.
View comments	<ul style="list-style-type: none"> Pause your cursor over the Comment icon () for that student.

Note

Attendance can be automatically entered as a result of certain student behavior action steps. For example, a student who receives an out-of-school suspension may be automatically marked Absent for the suspension date range. Only users with specific permissions can override this attendance code.

- Once you have entered the appropriate attendance information, do one of the following:

To	Do this
Complete attendance for the selected time period and not submit it	From the Actions menu, click Save.
Send final attendance for the selected time period to the office and continue working in Chancery SMS	Click Submit.
Send final attendance for the selected time period to the office and log off	Click Submit & Logoff.

Note

If you have not submitted attendance by the end of the specified attendance collection time for your homeroom or class, you will receive an overdue attendance alert.

Working with a Student's Attendance Details

You can enter attendance details for an individual student by accessing the Attendance page from his or her Student Demographics page.

- On the My Classes page, click a Roster icon.
- On the Roster page, click a student's name.
- On the Student Demographics page, in the control bar, click Attendance.

OR

On any Student Search Results page, select a student and from the Actions menu, click Open Student > Attendance.

The Student Attendance page opens and displays attendance data for the selected student.

The screenshot shows the Student Attendance page for Ken Brown. At the top, there are navigation links for 'Prev' and 'Next', and student information: '9901289645 Gr-8 Male Jul 18, 1991'. A 'Date range:' dropdown is set to 'Feb 01, 2005 - Jun 23, 2005'. Below this is a 'Daily Attendance Summary' section with a dropdown arrow. The main area is 'Attendance Details', which includes a calendar for March, April, and May 2005. A legend on the right indicates 'Daily Absent' (red), 'Daily Tardy' (blue), 'Unexcused' (orange), and 'Today in bold' (checkbox). Below the calendar is a table for the selected date range 'Feb 01, 2005 - Jun 23, 2005' with a dropdown for 'All days'. The table has columns for 'Date', 'Daily', and periods 'P5', 'P6', and 'P7'. A 'Total: 103' is shown at the bottom right.

To select a different date range (e.g., year to date), select an option from the dropdown.

To change the current date range, click here.

To expand the panel and view a summary of daily attendance for the specified date range, click here.

Displays the months in the specified date range. To view the next and previous three months, click the Next or Prev controls.

If your school takes class attendance, attendance codes for each period display in separate columns.

To change the current date range, click here.

To view attendance codes for All days or Exception days only, select an option from the dropdown.

- 4 From the Date range dropdown, select the date range you want to edit or view.
- 5 Do any of the following:

To	Do this
Enter an attendance code for the entire day	<ul style="list-style-type: none"> For the appropriate date, in the Daily column, select the attendance code from the dropdown.
Enter an attendance code for a specific period	<ul style="list-style-type: none"> For the appropriate date, in the specific period column or cell, select the attendance code from the dropdown.
View the student's period schedule for the day	<ul style="list-style-type: none"> For the appropriate date, pause the cursor over the Schedule icon.

To	Do this
View attendance-related comments	<ul style="list-style-type: none"> For the appropriate date, pause the cursor over the Comment icon.
Add a comment	<ol style="list-style-type: none"> For the appropriate date, click the Comment icon. In the Comments dialog, in the appropriate period field, enter the comment. Click OK.
View the student's absenteeism and related staff comments	<ul style="list-style-type: none"> In the date range header above the grid at the bottom of the page, select Exception Days Only.
Print the student's summarized attendance information	<ul style="list-style-type: none"> From the Actions menu, click Print Daily Summary.
Print the student's detailed attendance information	<ul style="list-style-type: none"> From the Actions menu, click Print Details.

The Student Attendance page also displays Schedule icons (if your school takes class attendance) and Comment icons you can use to review additional information.

The screenshot shows a grid of dates with columns for Date, Daily, A, and icons for Schedule and Comment. Below the grid, a detailed view for ACOSTA, ALEJANDRA on Monday, December 08, 2003, shows her schedule for Period A (7:00 AM - 7:55 AM) and other periods. A comment box for Tuesday, December 09, 2003, is also shown, containing a comment about a signed note from her mother.

Annotations with arrows point to the icons in the grid:

- To view a comment, pause the cursor over a Comment icon.
- To view schedule information, pause the cursor over a Schedule icon.

6 To record any changes, click Save.

Changing the My Classes View to Period Attendance

If your school takes daily or twice-daily attendance, skip this section.

The default view for the My Classes page is by class. You can change this view to show a list of the periods in which you are scheduled for classes for the current day. You can then take attendance for those periods.

When you change the My Classes page from the class view to the period attendance view, the Roster and Grading icons are no longer available; however, you can see these icons and access these pages any time by switching back to the default My Classes view.

TO CHANGE THE MY CLASSES VIEW:

- 1 Log on as a teacher.
- 2 On the My Classes page, from the Display by dropdown, select Day & Period (Attendance only).
- 3 From the Day dropdown, select the current day.

The screenshot shows the 'My Classes' page for user 'L. Aden'. The 'Display by' dropdown is set to 'Day and Period (Attendance only)' and the 'Day' dropdown is set to 'Day A'. A table lists the following classes and their attendance status:

Period	Term	Class	Attendance
9:00 AM - 9:55 AM	Yr	CRD-Art-1	
10:00 AM - 10:55 AM	Yr	CRD-Chemistry-1	
11:00 AM - 11:55 AM	Yr	CRD-Chemistry-2S-2	
	Yr	CRD-English-1	
12:00 PM - 12:55 PM	Yr	CRD-Physical Ed-1	
1:00 PM - 1:55 PM	Yr	CRD-Mathematics-1	
2:00 PM - 2:55 PM	Yr	Prep Period-1	

Below the table, a note states: 'Submitted attendance is calculated for today only'. An 'Upcoming Birthdays' section lists:

- CRK2-Winters, Jonathan Keith 14 on Aug 13, Sat
- CRK2-ZetaJones, Cathy Matilda 13 on Aug 13, Sat
- Guillen, Marquis 17 on Aug 22, Mon

To take attendance, click the Attendance icon() for the class. For detailed information about how to take attendance, see “Assigning Attendance to Students in a Roster” on page 49.

To switch back to the classes view, on the My Classes page, in the Display By dropdown, select Classes.

Assigning Attendance to Multiple Students from Different Rosters

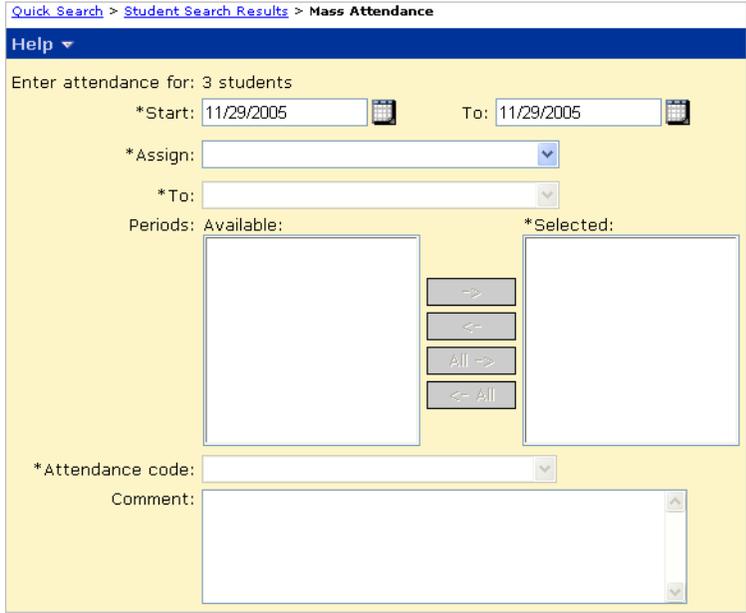
If your school takes class or period attendance, skip this section.

If your school takes once-daily or twice-daily attendance, you can assign the same attendance code to multiple students from different rosters. You can assign the group of students attendance for today or for a past date.

TO ASSIGN THE SAME ATTENDANCE TO MULTIPLE STUDENTS

- 1** Perform a search to locate the students you want to assign attendance to.
- 2** In the Search Results panel, select the applicable students and, from the Actions menu, click Mass Attendance.

The Mass Attendance page opens.



- 3** In the Start and To fields, enter a date range. By default, teachers can only enter attendance for today or past dates.
- 4** Depending on what type of attendance you’re entering, do one of the following:

To	Do this
Assign homeroom attendance	<ol style="list-style-type: none"> 1 From the Assign dropdown, select Homeroom Attendance. 2 From the To dropdown, select Full Day, AM or PM. 3 From the Attendance code dropdown, select the applicable attendance code. 4 In the Comments field, enter any applicable comments. 5 Click OK, then OK again in the confirmation dialog.
Assign daily attendance	<ol style="list-style-type: none"> 1 From the Assign dropdown, select Daily Attendance. 2 From the Attendance code dropdown, select the applicable attendance code. 3 In the Comments field, enter any applicable comments. 4 Click OK, then OK again in the confirmation dialog.

INDEX

A

- alerts 15, 16
 - message icon 8, 15, 16
 - subscribing to 16
- attendance
 - AM/PM dropdown, explanation of 50
 - and student behavior 52
 - assigning and viewing 49
 - assigning attendance codes to different rosters 55
 - assigning to roster 49
 - attendance codes 49
 - class attendance dropdown, explanation of 50
 - class dropdown, explanation of 50
 - details, entering 52
 - explanation of 49
 - overdue attendance alert 52
 - steps for entering 51
 - taking for individual classes 49
 - working with 49

B

- basic search 25
- browser settings, changing 6

C

- Chancery SMS
 - about 1
 - exiting 12
 - interface, using 6
 - logging off 12
 - logging on 3
 - overview of 3
 - starting 3
 - tips and shortcuts 6
 - working with 6
- checkboxes
 - explanation of 10
 - select all 10
- classes, teacher list 19
- columns
 - display order 46
 - sort options 11
- comment icon, explanation of 54
- content area, explanation of 5
- control bar, explanation of 5
- custom display options 31

D

- data
 - opening records 9
 - school and district 1, 5
- default attendance codes 49
- display options
 - custom 11, 31

- sorting columns 33
- district data 1, 5

E

- entering grades
 - different ways of 45
 - for individual students 47
- envelope icon 8, 15, 16

F

- families, searching for 36
- finding
 - families 36
 - students using a basic search 25
 - students using a detailed search 29
 - students using a quick search 24

G

- grades
 - entering by class 45
 - entering by homeroom 45
 - entering by subject 45
 - legend, refer to 47, 48
 - method for entering, elementary and secondary 45
 - roster, entering and editing from 45

H

- home page 15, 16

K

- keyboard shortcuts, using 11
- keyboard, navigating with 11

L

- links
 - on home page to reports 15, 16
 - Quick Links on home page 15, 16

lists, printing 12
logging off 12

M

my classes 19
My Classes Page, working with 19

O

order of columns 46

P

pages, printing 12
panels, explanation of 11
Print View icon 12

Q

Quick Links 15, 16
quick search 24
quick sort 10

R

records, opening 9
reports, links on home page 16

S

saved lists
 deleting 35
 explanation of 33
schedule icon, explanation of 54
school data 1, 5
screen space, optimizing 6
search
 basic search 21, 25
 detailed search 21
 family search 21
 quick search 21, 24
 results 21
 using a detailed search 27
search results 21
 saving 34
 saving to list 33
sort
 display options 11, 33
 quick sort 10
student demographics
 explanation of links on page 42
 viewing data 41
 working with data 41
student grades, entering and editing individual 47
students
 searching for 23, 27
 searching for using a basic search 25
 searching for using a quick search 24
 updating records 9

T

task bar 15
task bar, explanation of 5

U

updating data 33
user permissions, about 8
user roles, switching 3
user scope, about 8
using a quick search 23

W

what you should know 1