Houston Independent School District SIS-Academic Portfolio Chancery SMS Report Instructions 2013 – 2014 H_Cumulative Learning Profile PK – 8

This document details the Chancery SMS process to access, filter, schedule, save and print the $H_Cumulative$ Learning Profile – Grades PK - 8 report. When appropriate data exists, basic student demographics, special programs indicators, grades, assessments, and other information items are preprinted.

PROCESS

To learn about the purpose of and how to complete the Cumulative Learning Profile (CLP) documents, visit Curriculum departmental <u>web site</u>. Blank CLP forms and completion instructions are available at <u>http://www.houstonisd.org/Page/91086</u>.

ACCESS

Users must be able to access to Chancery SMS and login under one of the following school-user roles:

Attendance Grade Reporting Principal R/E/W w/ Attendance R/E/W w/Grade Reporting Register/Enroll/Withdraw School Counselor SIS Data Special Ed Special Pops Special Pops Special Pops w/Sp. Ed. Student Scheduling Teacher

If none of these roles are available to the user and appropriate trainings are complete, a new security form may be submitted with the Principal's approval. Campus-based employees designated in PeopleSoft as "Teacher" are automatically granted access to Chancery. Teachers must also have active students scheduled in their classroom. The Principal's signature is required on all security requests for staff assigned to their campus. Instructions for access and the security form are available on the SIS Help portal. <u>http://sishelp/site/Security/SecurityForms.aspx</u>

PROMOTION STANDARDS

The Chancery Promotion Standards nightly calculation begins Wednesday evening, May 21, 2014 and continues through Friday, June 20, 2014. Prior to Thursday, May 22, 2014, no calculated promotion status data exists. For information about Promotion Standards visit http://www.houstonisd.org/Page/41759.

CREATE CLP in CHANCERY

Log into Chancery SMS using network login credentials

Ch	ancery SMS - Sign In - Windows Intern	net Explorer
	🕥 🗢 🙋 https://hsis.hisd.org/ChancerySM	IS/User/Login.aspx
	Chancery S	MS
Г	Sign In	
	Username	
L	Password	
L	Sign In	
	21	7.6.0.020005

From the HOME screen, select Actions>Switch Role...

Chancery SMS™	Quick Search				
	Actions 🐨 Help 🔻				
SEARCH	Register/Enroll Student				
Student Family	Change Alert Subscription	Advanced Search		Alerts 0 new alerts	^
SCHOOL Student Behavior	Switch Pole		^	Scheduled Events	~
School Into School Transfers	Change Default Role		^	Reports	
ADMIN User Settings District Setup	Switch Calendar				
Reports Exports	Saved Lists • <u>20112012 PRS</u>		Edit ^		
PROGRAMS Manage Programs	609 PRS records Pugh New				

Select one of the following campus-based roles:

Attendance

Grade Reporting

Principal R/E/W w/ Attendance R/E/W w/Grade Reporting Register/Enroll/Withdraw School Counselor SIS Data Special Ed Special Pops Special Pops w/Sp. Ed. Student Scheduling Teacher

elp	The second se
Jse	this role:
	Role
۲	_District Admin (SIS Team) (Current)
0	_Federal & State Compliance
0	Academy of Biotechnology - School Administrator
0	Academy of Engineering and Architectural Design - School Administrator
0	Advanced Virtual Academy - School Administrator
0	Advanced Virtual Academy at Scarborough HS - School Administrator
0	Advantage East End High School - School Administrator
0	Alcott Elementary School - Data Quality Mgr / SpcIst
0	Alcott Elementary School - Discipline Edit
0	Alcott Elementary School - Federal & State Comp DataQuality
0	Alcott Elementary School - Health
0	Alcott Elementary School - Magnet
0	Alcott Elementary School - Mst Sched / Sbj Framework
0	Alcott Elementary School - Principal
0	Alcott Elementary School - R/E/W w/ Attendance
0	Alcott Elementary School - R/E/W w/ Grade Reporting
0	Alcott Elementary School - School Administrator
0	Alcott Elementary School - Special Pops w/ Sp.Ed.
0	Alcott Elementary School - Teacher
0	All-Girls School - School Administrator

Click OK. Cancel

On the left menu panel, click the Reports link.

Chancery SMS™	Quick Search
	Actions 👻 Help 👻
SEARCH Student Family	Student name or ID
CLASS Homerooms Classes	Quick Search All Students
SCHOOL Awards Student Behavior School Info Manage Programs	Predefiner Search • Recently Enrolle
ADMIN User Settings School Setup Scheduling Grading Attendance	My Javorite Searc
Reports	No list has been saved and select Save to List

Scroll down to the *Grade Reports* category and **click** the *H_Cumulative Learning Profile – PreK-*8 link.



On the Report Options screen, **select the group** of students to include in the report. Promoted, Retained, Unassigned, or All. The Promoted/Retained status displayed on the report is determined by the student's promotion status in Chancery. Students withdrawn on or prior to the last day of school are **excluded** from the report. This information is not available before the nightly Promotion Standards calculations begin.

Preferences		^
Select Active Student Group:	Retained Promoted Unassigned All	
Filters		~
Scheduling Ontions		v

To prepare the report for a specific subset of students, use the appropriate filters. A Saved List may also be used to filter the group of students included. **Always** verify the results, especially when using filters.

NOTE: The *SP0001 Chancery SMS Basics* online training describes multiple, time-saving features. Viewing the *Creating a Saved List* and *Printing a Report* modules is recommended prior to initiating the CLP report. SIS Online trainings are viewable by all staff with Network and Portal login IDs.

Log into the HISD portal and visit <u>http://sishelp/site/</u>. Click the Online Training icon. To access eTutor, enter NETWORK login credentials. Click the Online Courses link. Locate the SP0001 training (page 2) and click the link. Following the introduction, multiple lessons are listed. Review all or select relevant topics. Successful completion of the entire module AND the Skill Test is recorded on the user's PeopleSoft transcript.

2013 – 2014 H_Cumulative Learning Profile PK – 8 Chancery SMS Report Instructions

SIS	HISD - Student Information System
Select	t a Lesson
Log On/Off Chancery SMS	Creating a Saved List
Understanding the Interface	Printing a Report
• Roles	Skill Test
Conducting a Search	
Advanced Search (Basic Tab)	
Using the "Is In List" Feature	
Group Search	
Saving Searches to Your Favorites	
Show/Hide Incoming & Withdrawn Students	
Personal User Settings	

Although this and other reports should be scheduled to run **during non-school hours** and retrieved later, this report may be processed during the school day.

NOTE: Please refrain from running any non-attendance related reports during the significant period.

~ ~ ~		Category: General School Studor Saved Hats Category: Cat
× <	1	School Student soved Hats e auxie e availe e ava
~		Add Criteria Molch: © All Criteria O Any Criteria Grado Lovel (Active) equals "2"
^		Match: © All Criteria O Any Criteria Grado Level (Active) equals "2"
		Grade Level (Active) equals "2"
_		
rta	2	- Firstorel
_		Scheduling Options
		Run now ¹⁰ One time **Date: 50502013 at: 01 10 at: 01 10
		n Cancel

When all Report Options are set, click Run or Save and Run.

Save Save + Run	Run	Cancel
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NOTE:

- **Save** Prompts user to name the report options selected, for future use, without running the report. At runtime, the user selects the saved options name instead of re-entering the options.
- Save + Run Same features as Save plus the report starts processing (or is scheduled).
- Run Initiates processing (or schedules) the report immediately. User selected runtime options are NOT saved.
- Cancel Returns to the list of reports without saving selected options and does not run the report.

When the Report Status screen appears, click the "X" and close this window.



NOTE: Although the window is closed, the report is processing in the background, allowing users to continue working, whether in Chancery or not. Closing the Report Status window triggers a Chancery function to save the report results. Closing the Report Status window is not required. The CLP report is larger than most and can take several minutes to render on screen even after successful completion. When the window is NOT closed and the results finally render, they are not saved. Power interruption, user system error, or unintentional click can also discard the result. Infrequently, reports will indicate successful completion but never render. Closing the Report Status window after initiating the process is good practice.

Return to the Home screen. On the right under Alerts, click the Reports link. This link only appears when the Report Status window is closed prior to report completion or if a report is scheduled.

Chancery SMS™	Quick Search				
	Actions 👻 Help 👻				
SEARCH Student Family	Student name or ID	Advanced Search		Alerts 0 new alerts	^
CLASS Homerooms	Quick Search		~	Scheduled Events	~
SCHOOL Attendance	All Students Predefined Searches	PE PK K 1 2 3 4 5	~	Reports	
Awards Student Behavior School Info Manage Programs	<u>Recently Enrolled Student</u>	<u>5</u>			
ADMIN User Settings School Setup School Setup	My Favorite Searches		^		
Grading Attendance District Setup Reports	Saved Lists No list has been saved. To add a list and select Save to List under the Ac	t, perform a search, select the students tions menu.	Edit 🔨		

On the Report Management screen the user can verify scheduled reports, check the status of submitted reports, and open the completed report (click the link). In the image below, the first line shows a completed report ready to review/save/print. The second line shows a scheduled report, while lines three and four show reports in progress.

Quick Search > Report Management							
Actions • Help • Home Log C							
Selected:0 Total:							
Report	Status	Schedule	Recurrence	First Executed	Last Executed	File Name	
H Cumulative Learning Profile - Grades PK - 8	Complete	N/A	N/A	N/A	N/A	N/A	
H_Cumulative Learning Profile - Grades PK - 8	Not Started	One time	Once	Monday, April 29, 2013 9:00:00 PM	N/A	N/A	
 H_Cumulative Learning Profile - Grades PK - 8 	In Progress	One time	Once	N/A	Monday, April 29, 2013 12:08:00 PM	N/A	
 H_Cumulative Learning Profile - Grades PK - 8 	In Progress	One time	Once	N/A	Monday, April 29, 2013 12:08:00 PM	N/A	
If you previously scheduled reports that do not appear above, the report may have been modified or deleted. Reschedule your report or contact your district administrator for more information.							

REPORT RESULTS

When run under any approved role other than Teacher, the report result is grouped by homeroom/teacher of record/class, and displays in alphabetic order by student name (last, first). When submitted by a user logged in with a Teacher role, only students in that teacher's active schedule will display, ordered by student last and first names.

VALIDATE, SAVE, PRINT

ALWAYS review this and other report results to validate accuracy. If the results are correct, save, and/or print the report as usual.

HELP

If a data error is suspected, verify the student's record in Chancery **first**. Then, if the system data does not match the reported information, please contact the Help Desk by email or phone and submit a request for assistance. Provide details about the error and two or more affected students' IDs. If a report fails to complete, please attach as screenshot of the entire error message to the Help Desk email.

Always include the Server Reference number when submitting **ANY** Chancery-related trouble ticket. Prior to login, it is available on the panel. When logged in, the Server Reference number is located under *Help>About Chancery SMS*....

Chancery SMS			Chancery SMS
	Chancery SMS™	Quick Search	Web Server Information
Sign In		Actions 👻 Help 👳	Version: 7.6.0.020005
Username Password	SEARCH Student Family	Student n Contents	Compile Date: Aug 18, 2011 Server Reference: 6
Sign in	SCHOOL Student Behavior School Info School Transfers	Quick St Support Website My Fav About Chancery SMS	Database Server InformationVersion:7.6.0.020005Localization:PE
6 7 6 0.020005 Copyright & 2000-2011, Pleasant Education, Inc. or its alfiliate(s). All rights reserved.	ADMIN User Settings District Setup	- Select - 💙	Close

Instructions for completing the Cumulative Learning Profiles are available at <u>http://www.houstonisd.org/cms/lib2/TX01001591/Centricity/Domain/8050/CLP_Instructions_For_Complet</u> ing.pdf.