Chancery SMS

Counselor Training

(Part 2)

Table of Contents

Switching from Active to Planning Calendar 3
Entering Course Requests for Students 4
Add request by course name 5
Add request by course number 7
Entering Alternate Course Requests for Students 8
Add alternate request by course name 9
Add alternate request by course number 11
Entering Course Request Overrides 13
Deleting Course and Alternate Requests for Students 13
Different techniques in Entering Course Requests 15
Using Notepad to Enter Student Courses 15
Entering Course and Alternate Request for Multiple Students 17
Copying Course Requests from One Student to Another 20
Create a Saved List of Courses 22
Using Saved Lists to Assign Course Requests 23
Assign Course Requests for a Saved List of Courses 23

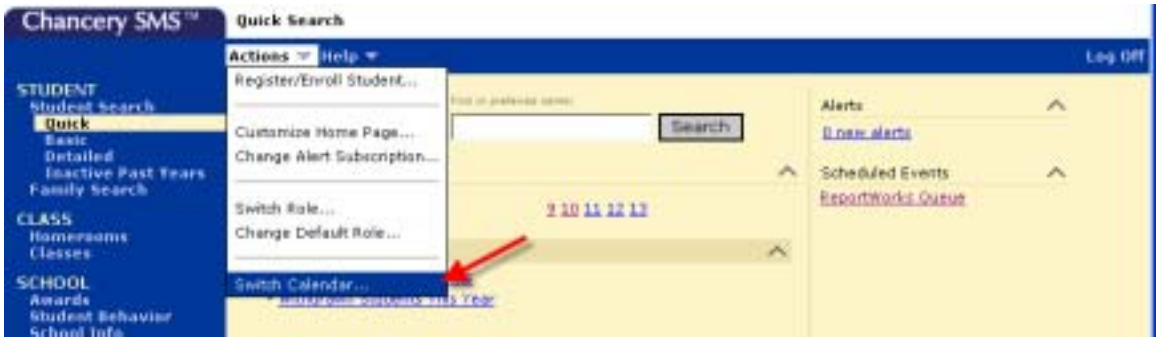
Switching from Active to Planning Calendar

Chancery has a Planning and an Active Calendar. The Active Calendar is the current year and the planning calendar is for the next year. As the word "Planning' pertains, use the Planning Calendar for next year preparation.

To switch from Active to Planning calendar:

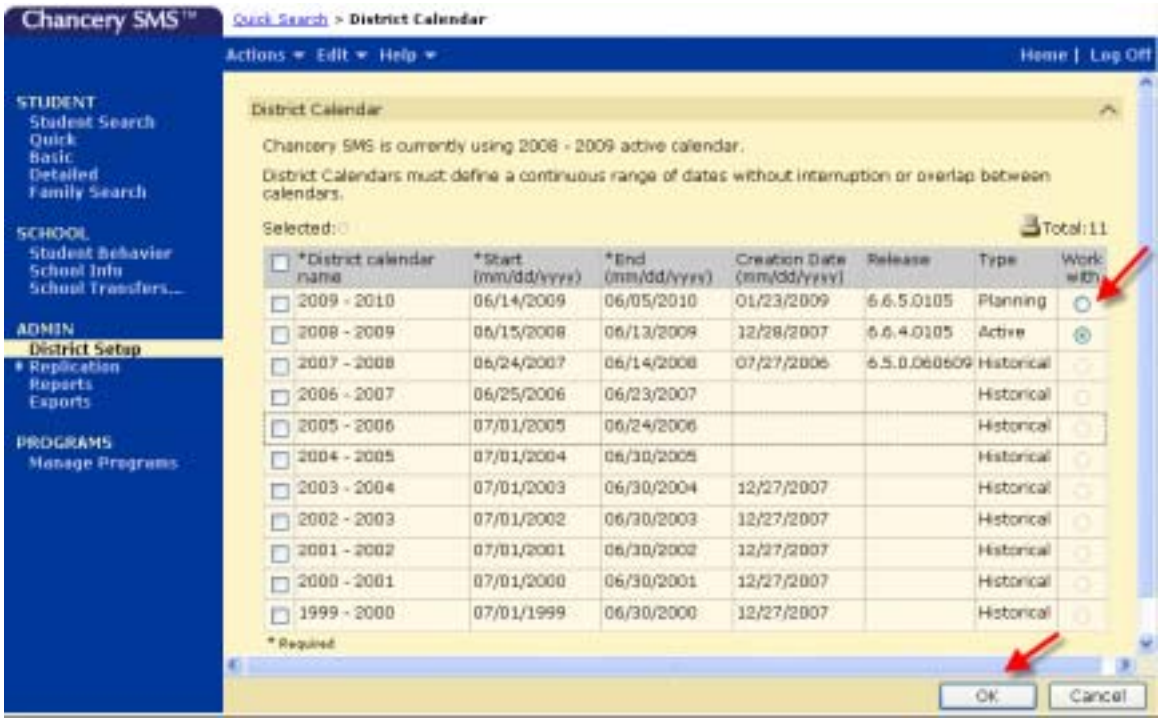
STEP1: Go to Actions

STEP 2: Select "Switch Calendar"



STEP 3: Select the radio button for "Planning" calendar under the *Work with* column

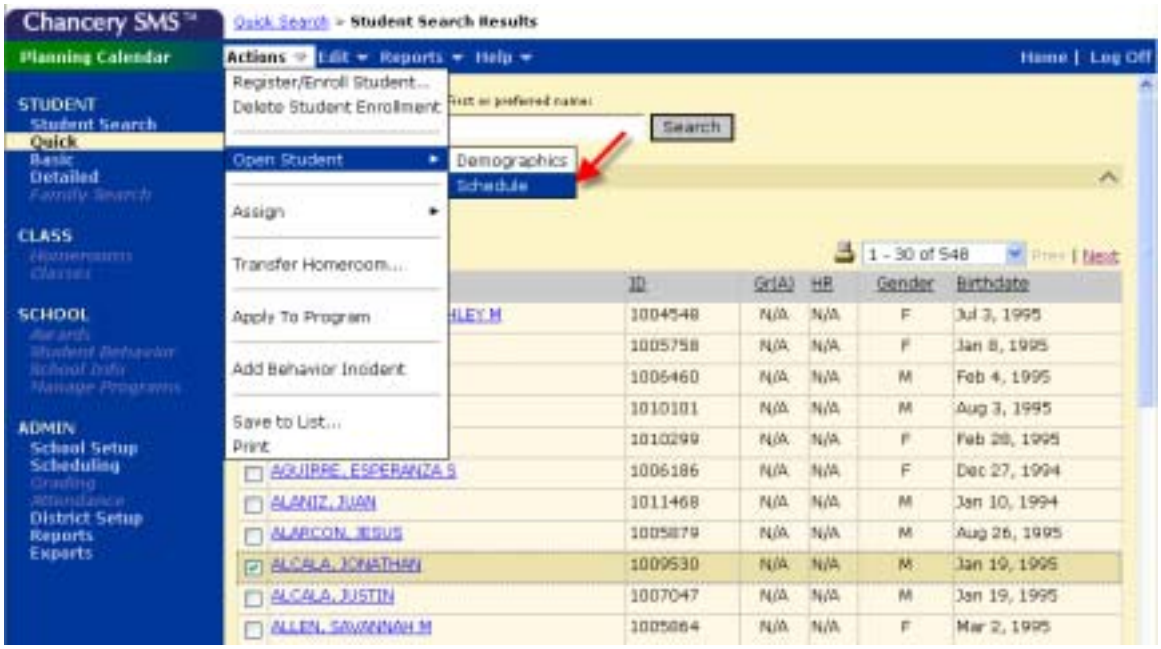
STEP 4: Click OK



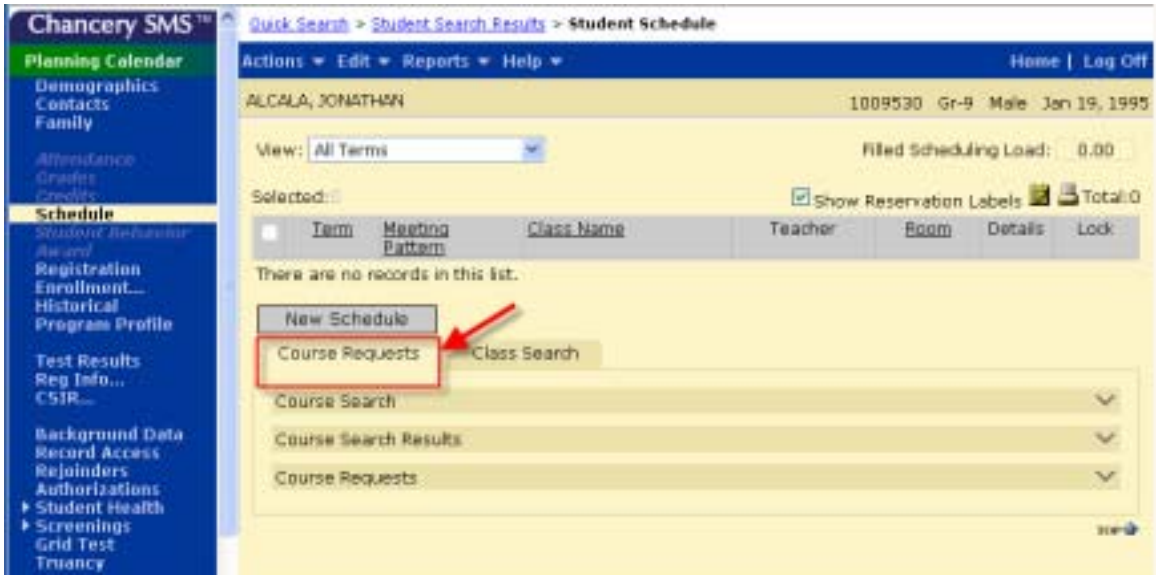
Entering Course Requests for Students

To assign course requests to students:

STEP 1: Open the student's schedule



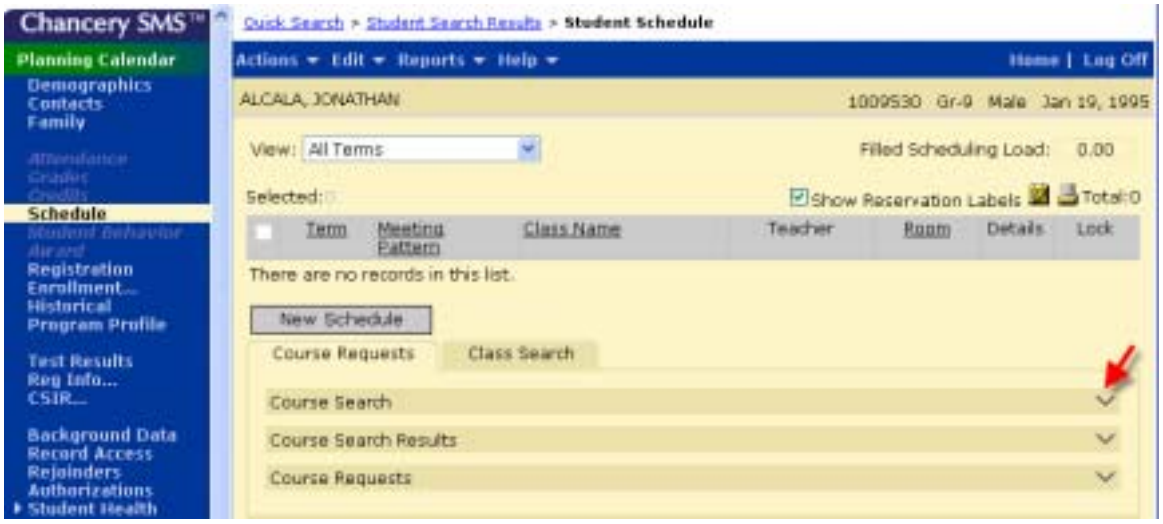
STEP 2: On the Student's Schedule page, click the Course Request tab



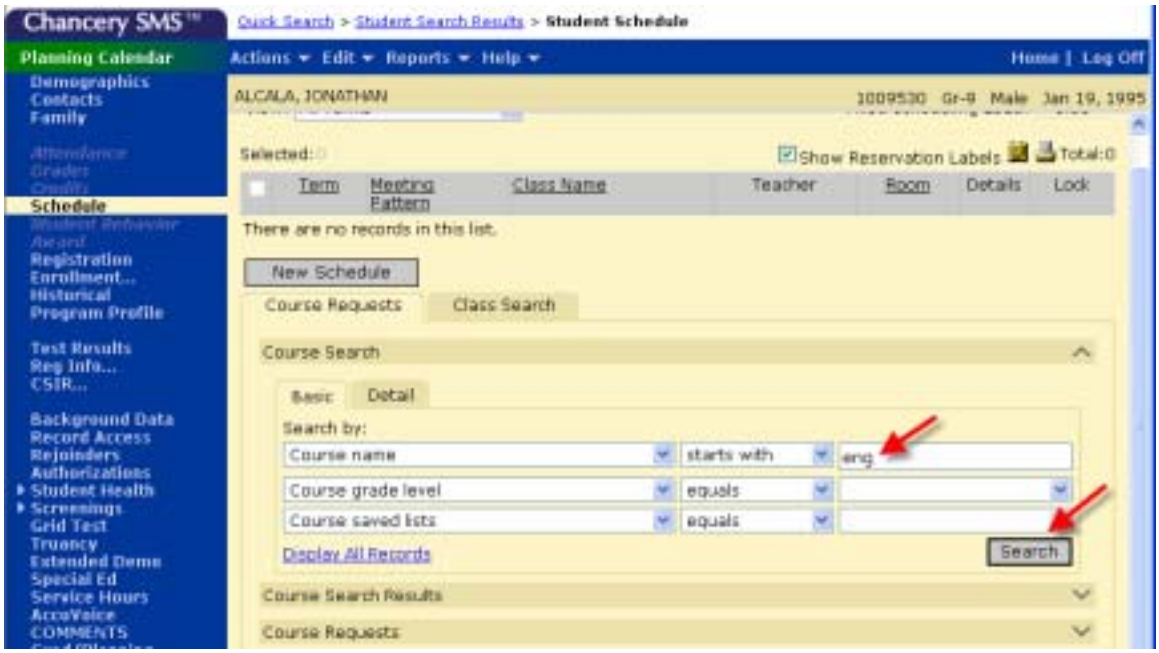
STEP 3: Add course request by "searching by course name" or "by course number"

Add request by <u>course name</u>

a. Click on the down-arrow panel

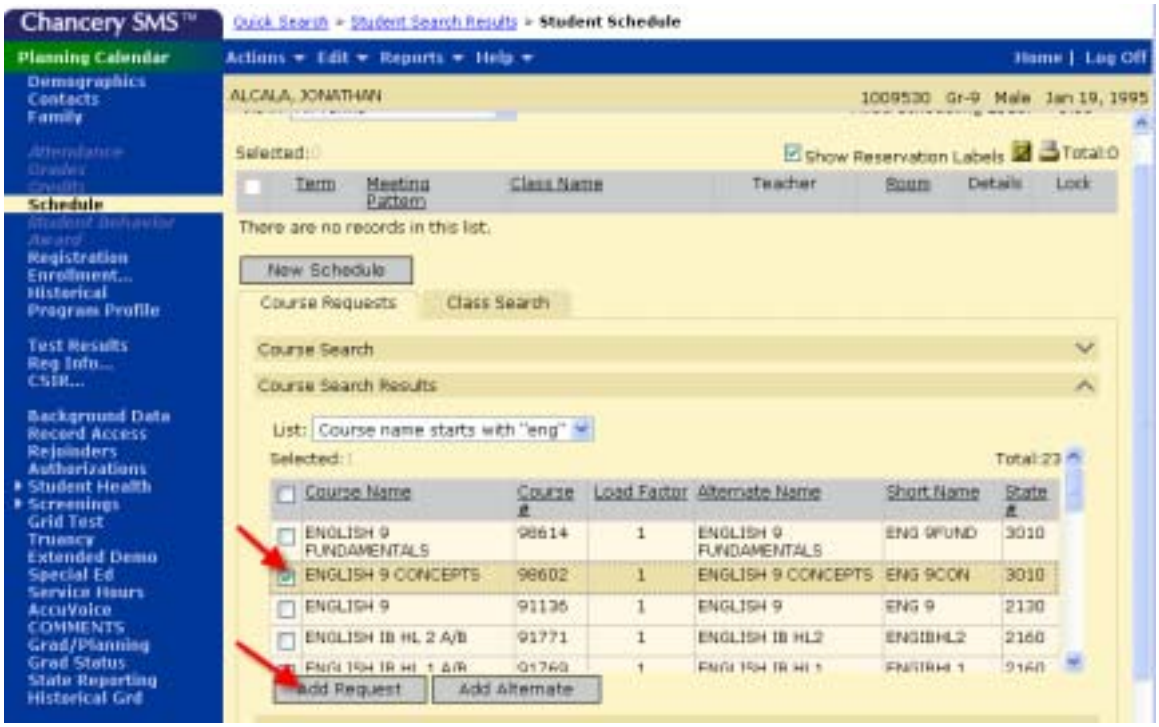


b. Enter Criteria for Course Search (i.e. course name)
c. Click on Search



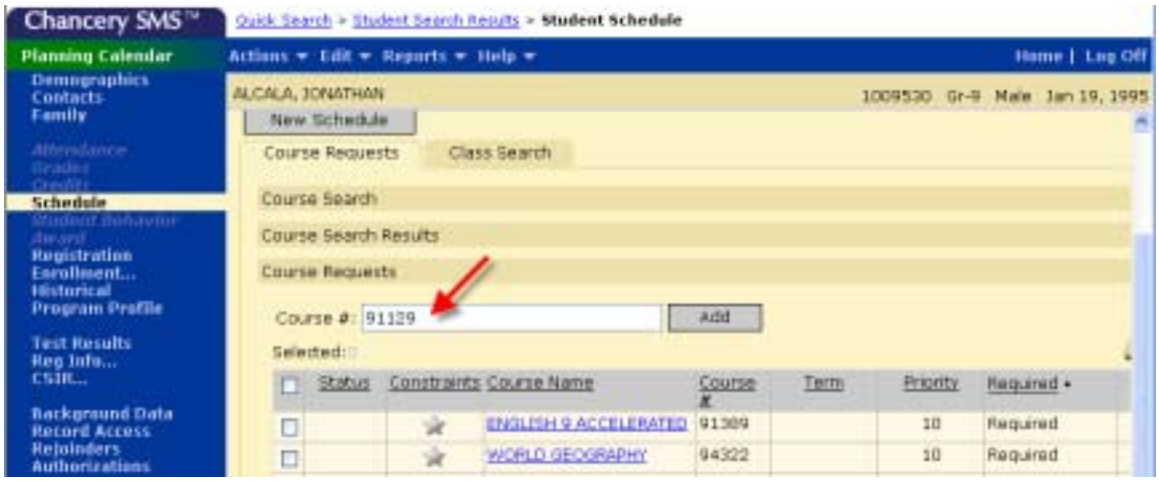
d. Select the course you would like to Add

e. Click on Add Request.

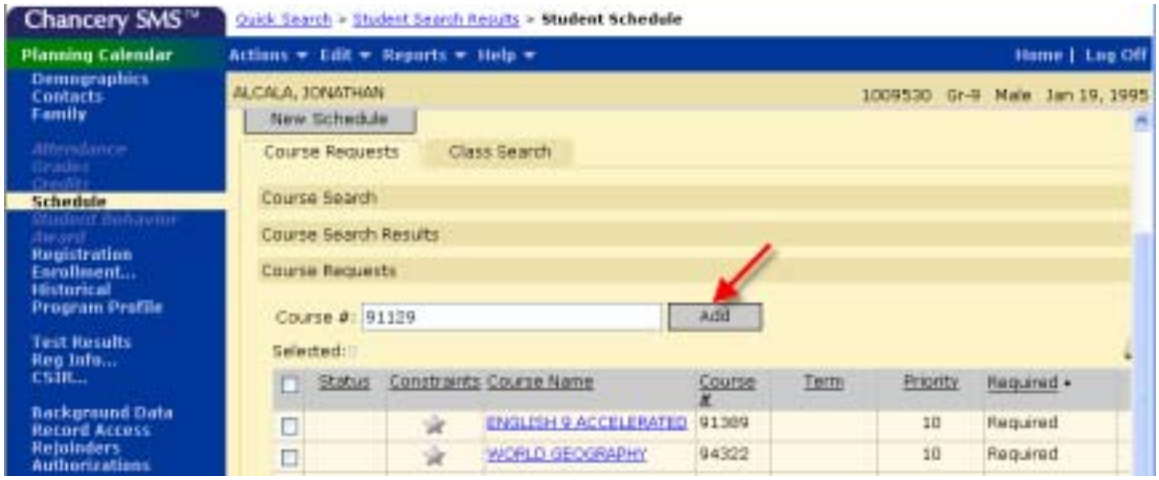


Add request by course number

a. Type the Course Number on the Course Request field.

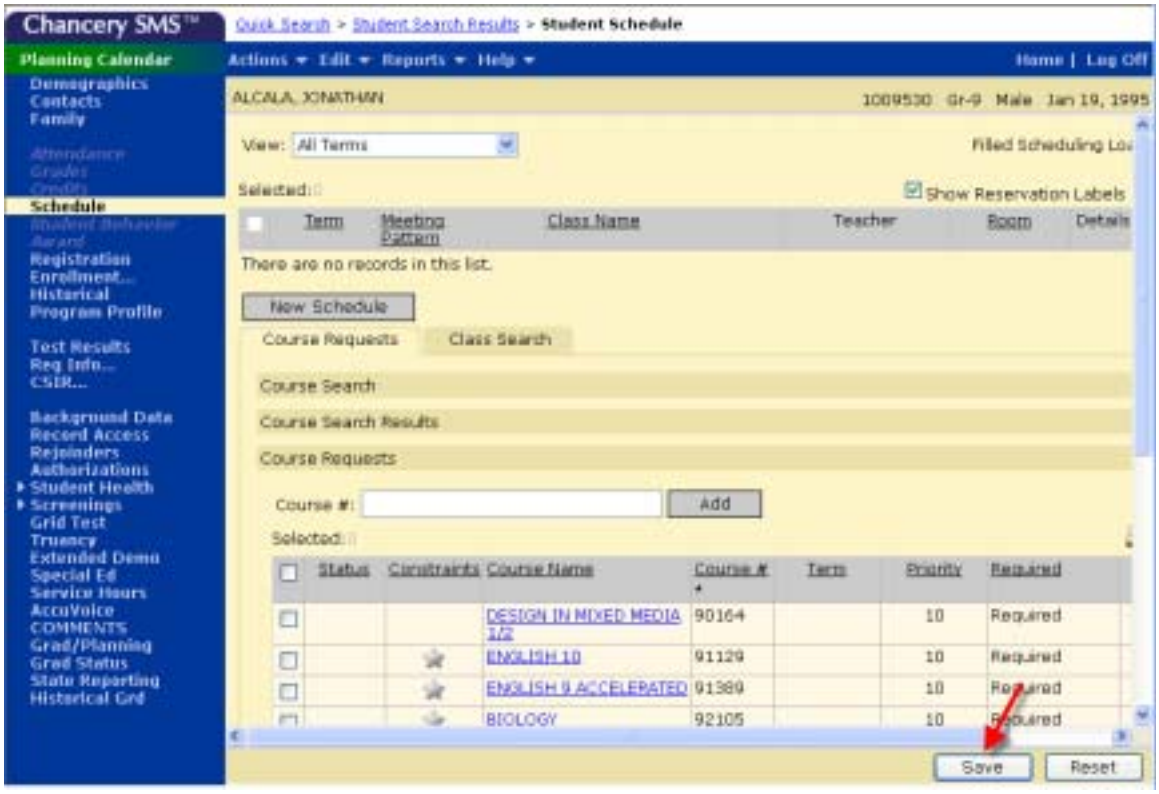


b. Click on Add Course Number.



NOTE: More than one course number can be added by separating each course number by a comma.

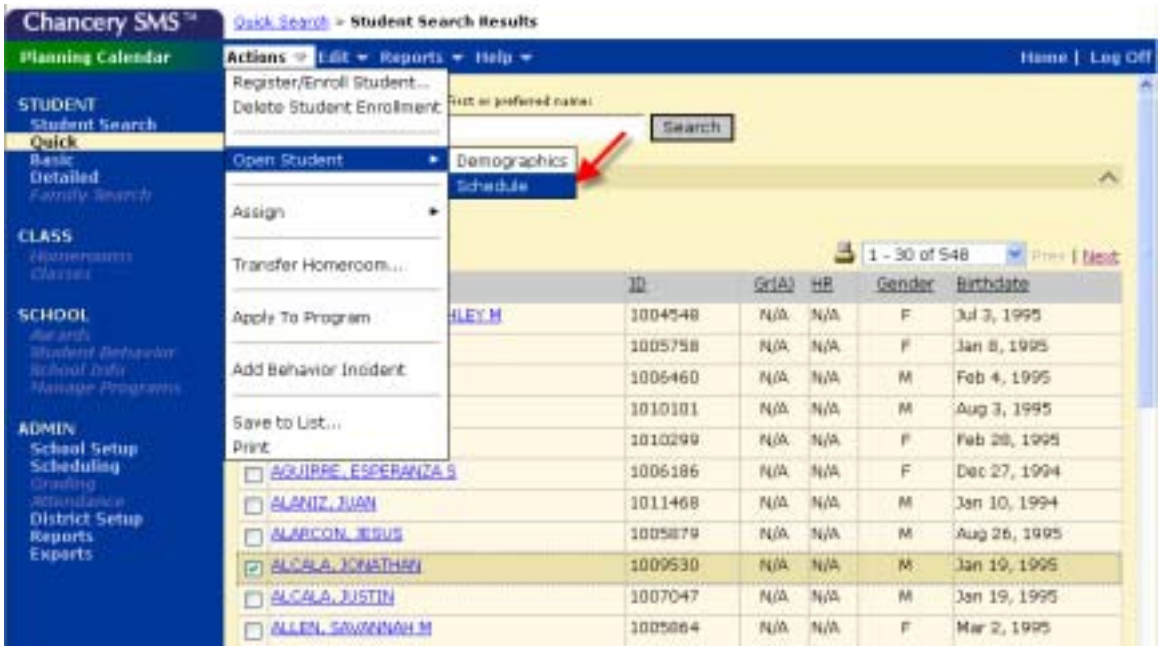
STEP 4: Click Save.



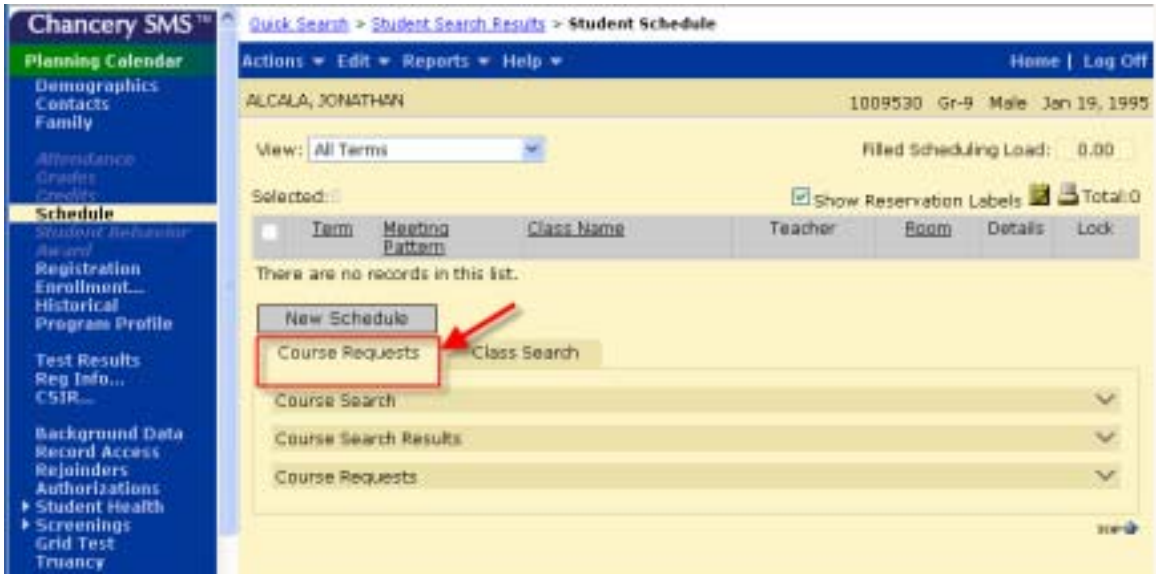
Entering Alternate Course Requests for Students

To assign alternate course requests to students:

STEP 1: Open the student's schedule



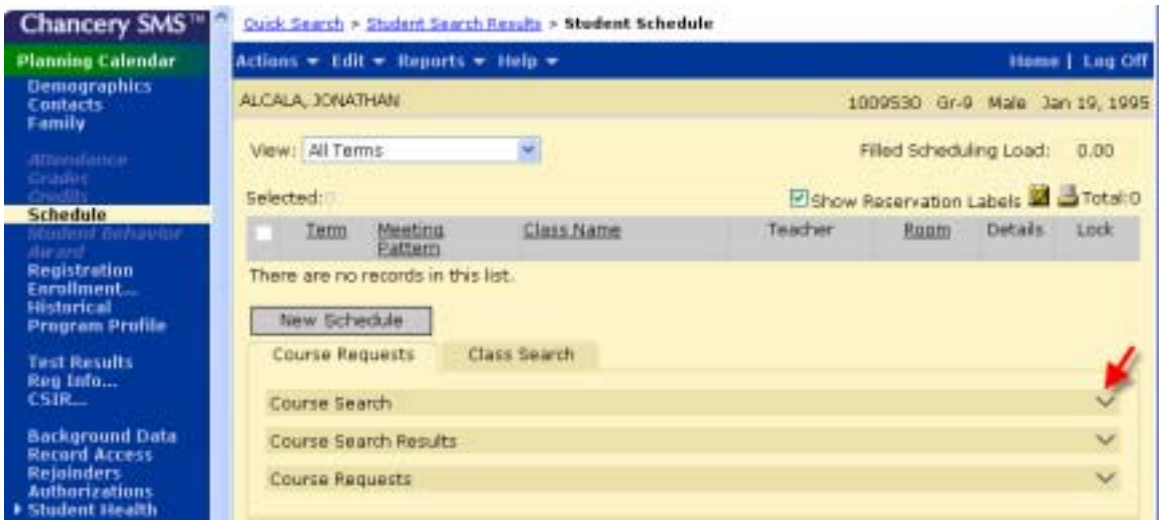
STEP 2: On the Student's Schedule page, click the Course Request tab



STEP 3: Add alternate course request by "searching for course name" or "by course number"

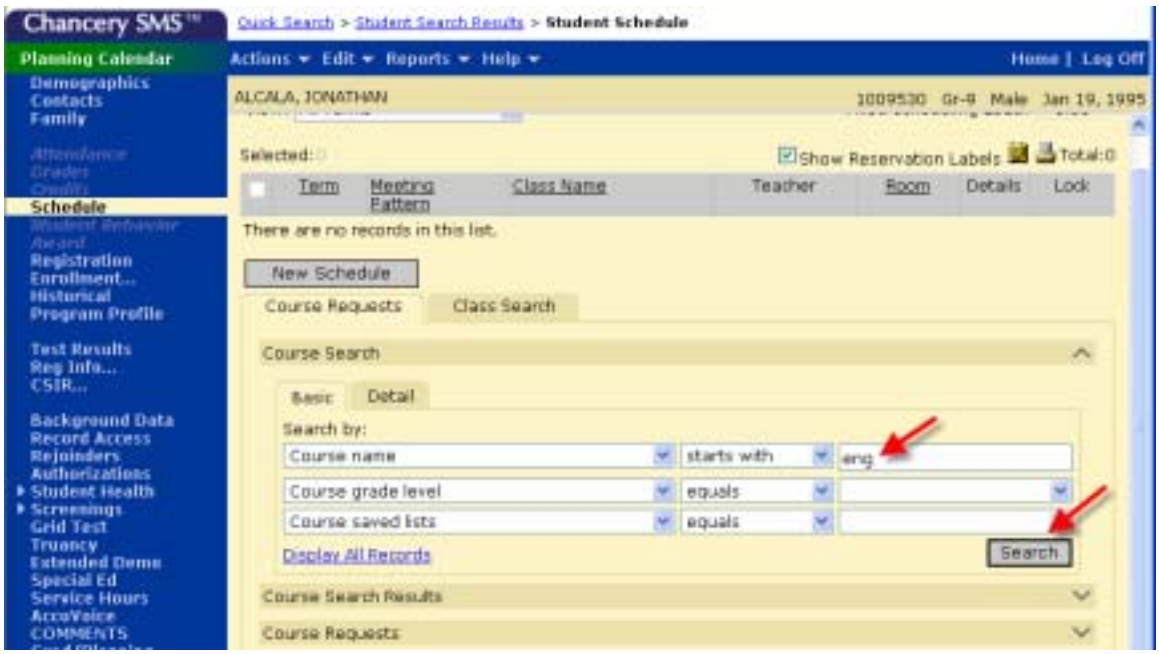
Add alternate request by <u>course name</u>

a. Click on the down-arrow panel



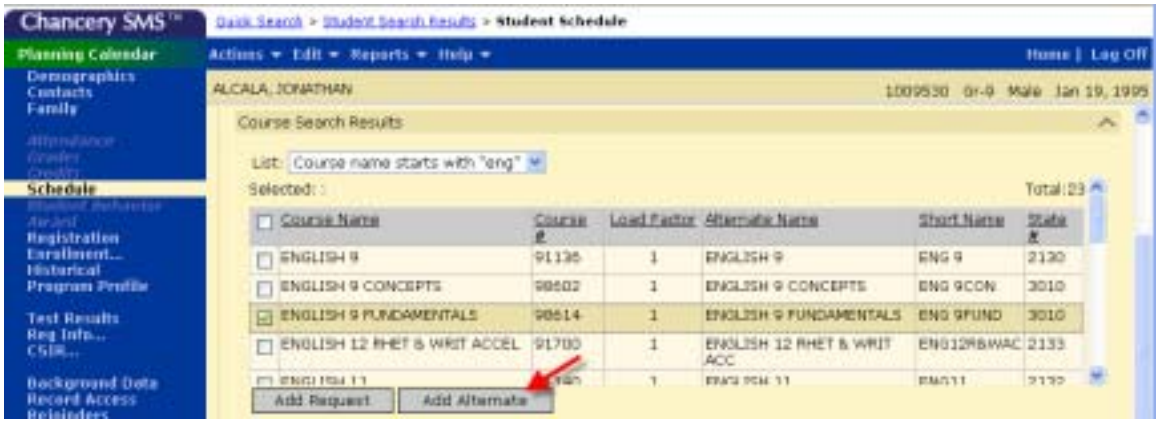
b. Enter Criteria for Course Search (i.e. course name)

c. Click on Search



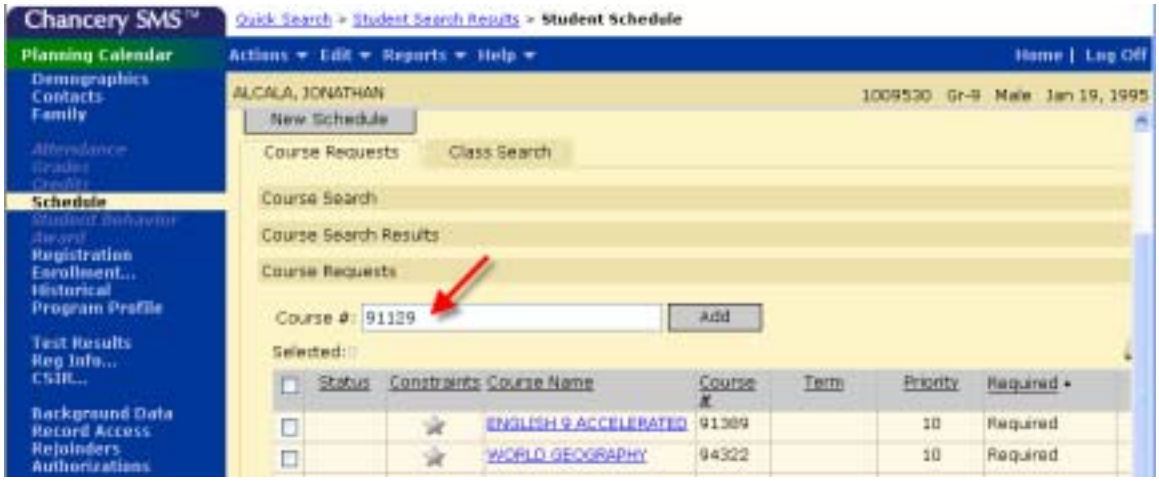
d. Select the alternate course you would like to Add

e. Click on Add Alternate.

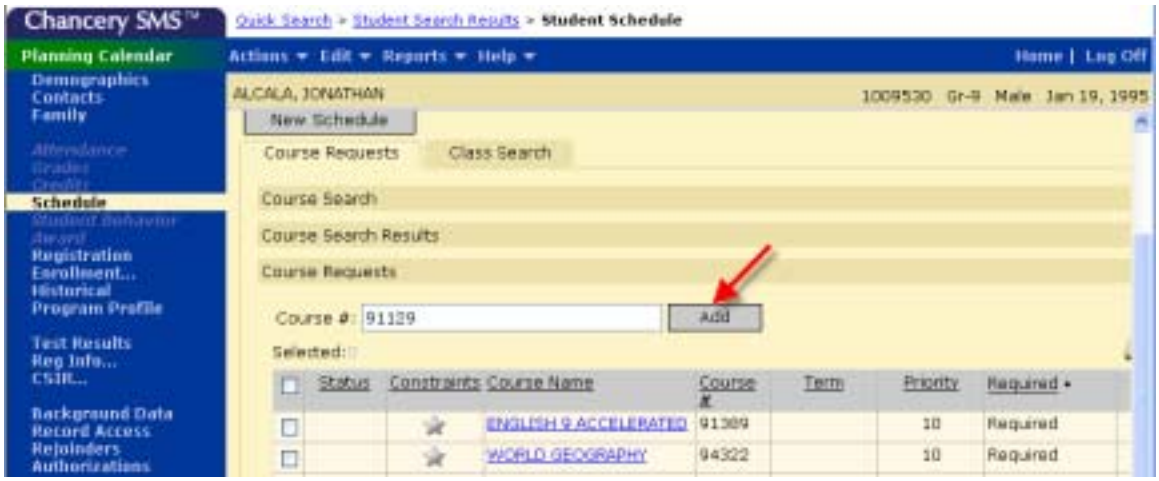


Add alternate request by <u>course number</u>

a. Type the Course Number on the Alternate Course Request field.

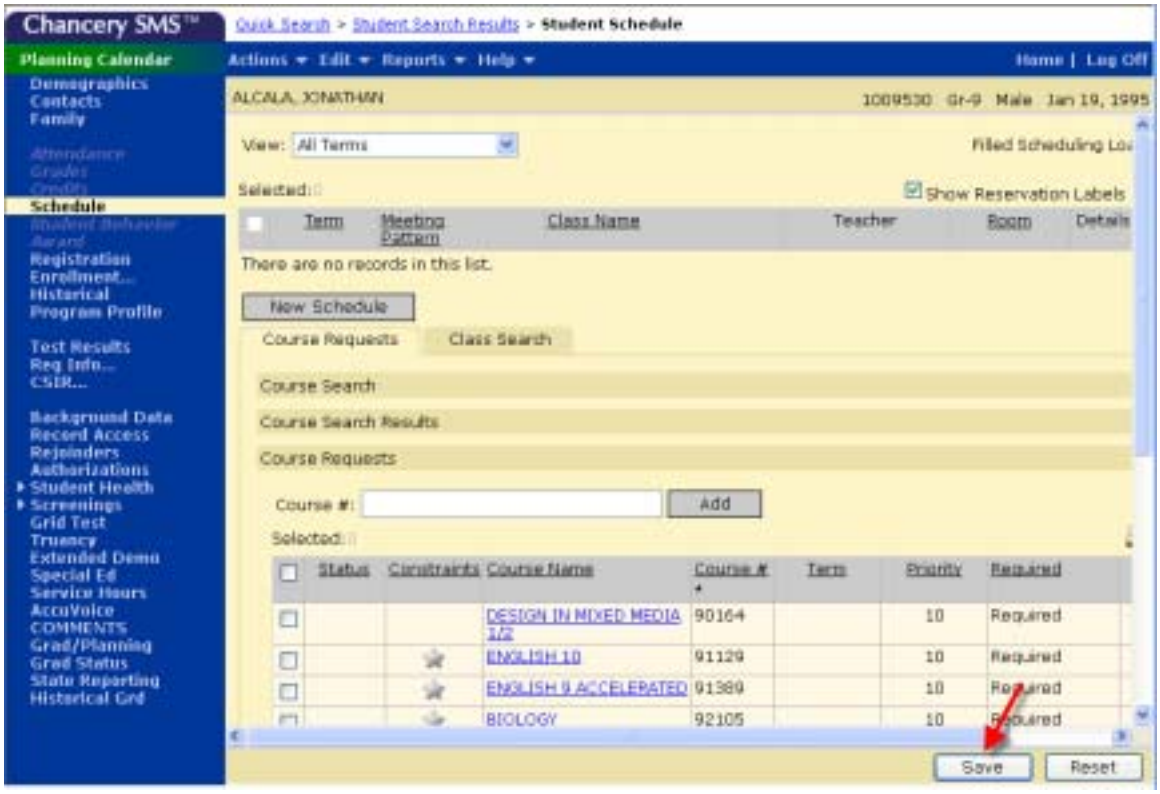


b. Click on Add Alternate Course Number.



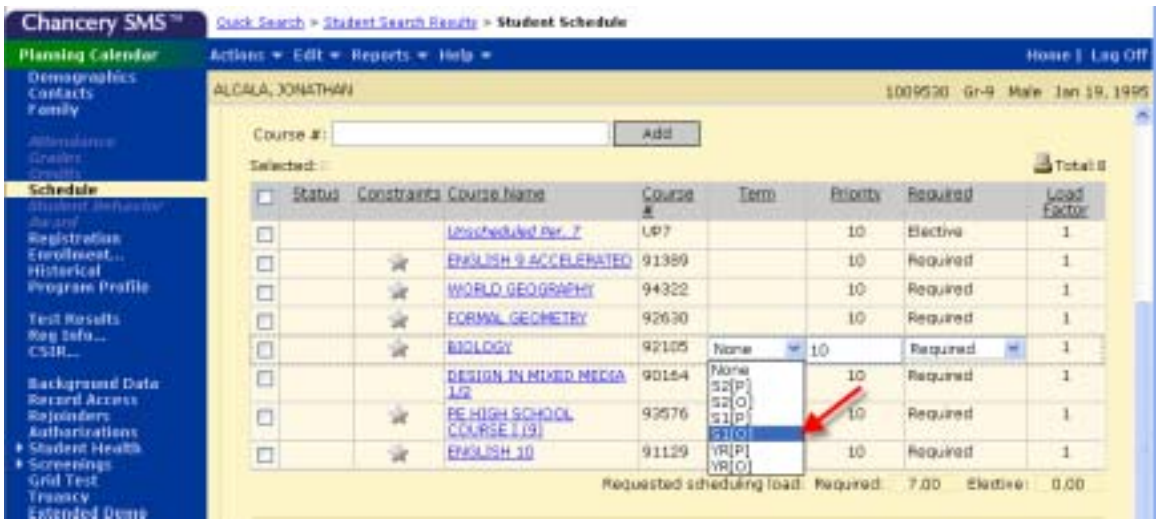
NOTE: More than one course number can be added by separating each course number by a comma.

STEP 4: Click Save.



Entering Course Request Overrides

If a student wants to take a year long course for only a semester, you can enter an override in the course request.



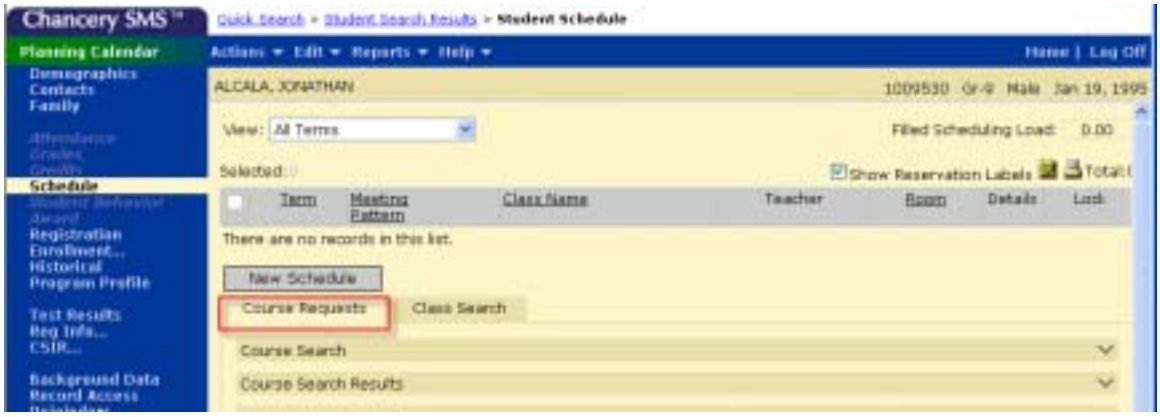
Then overrides that are currently used in Chancery are the following:

a. S1 [O] – for Semester 1 override of Year courses
b. S2 [O] – for Semester 2 override of Year courses.

NOTE: S1 [P] and S2 [P] are semester 1 and semester 2 PREFERRED. Currently this feature is available but not used in our district. **Overrides** are not needed for semester only courses. It is used **<u>only</u>** for repeat courses.

Deleting Course and Alternate Requests for Students

1. *Open* a Students Schedule.
2. *Click* **Course Requests** tab.



3. *Select* Course or Alternate Request to delete.

4. Go to **Actions** >> **Delete Course Request** (or **Delete Alternate Request**).

Different techniques in Entering Course Requests

In Chancery, there are multiple ways/tools available for the user to use in entering course requests. Besides the basic adding a course request by course name or by course number, the following are available techniques in entering student course requests.

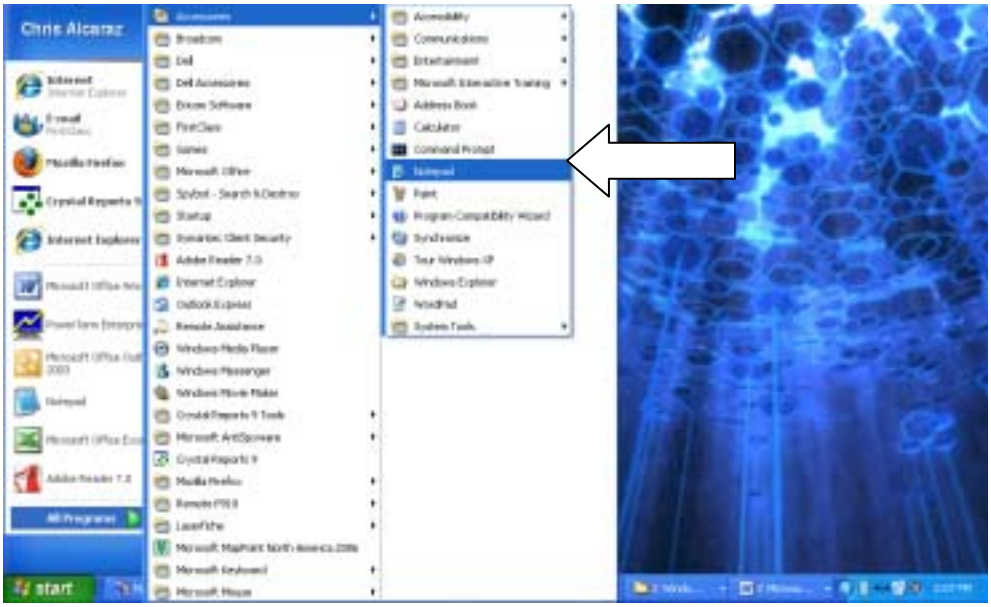
- Using Notepad to More Efficiently Enter Student Courses
- Entering Course Requests for Multiple Students
- Copying Course Requests from One Student to Another
- Creating Course Saved List
- Using Course Saved List to Assign Course Request

Using Notepad to Enter Student Courses

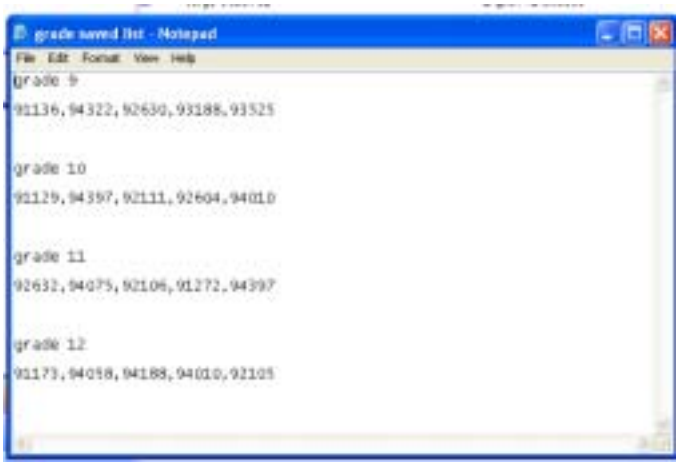
Certain groups of students generally request the same courses; you can use Notepad to enter student course requests.

To use a Notepad file to enter student course request:

STEP 1: Open a Microsoft Notepad file. (Click on Start → All Programs → Accessories → Notepad),



STEP 2: In Notepad, enter a comma-delimited list of courses. (Save the file to your desktop or other easy access location)



STEP 3: With the Notepad file open on your desktop, Open Chancery SMS.

STEP 4: Open a student schedule.

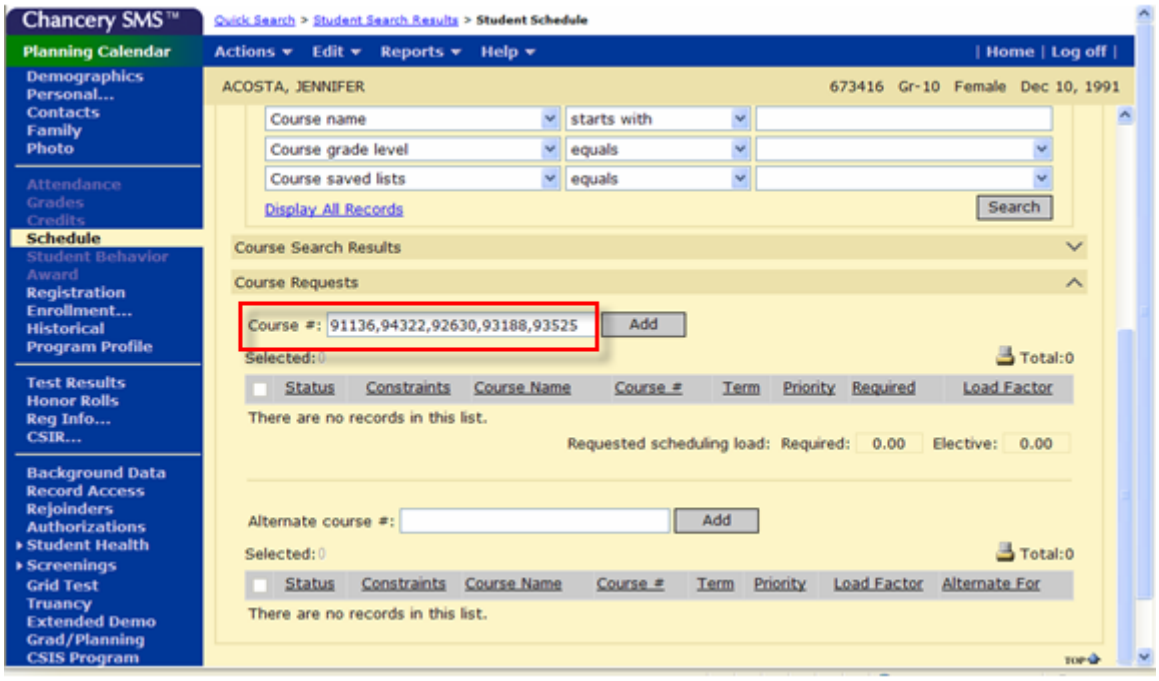
STEP 5: On the Student Schedule page, click on Course Request tab.

STEP 6: Press Alt+Tab to switch to the Notepad program. (You can also click on the notepad window in the Windows taskbar)

STEP 7: Select the course list applicable to the student. Press Ctrl-C to copy the course list

STEP 8: Press Alt+Tab to switch to Chancery SMS.

STEP 9: Click the Course # field. Press Ctrl-V to paste the course list into the field.



STEP 10: Click Add.

STEP 11: Click Save.

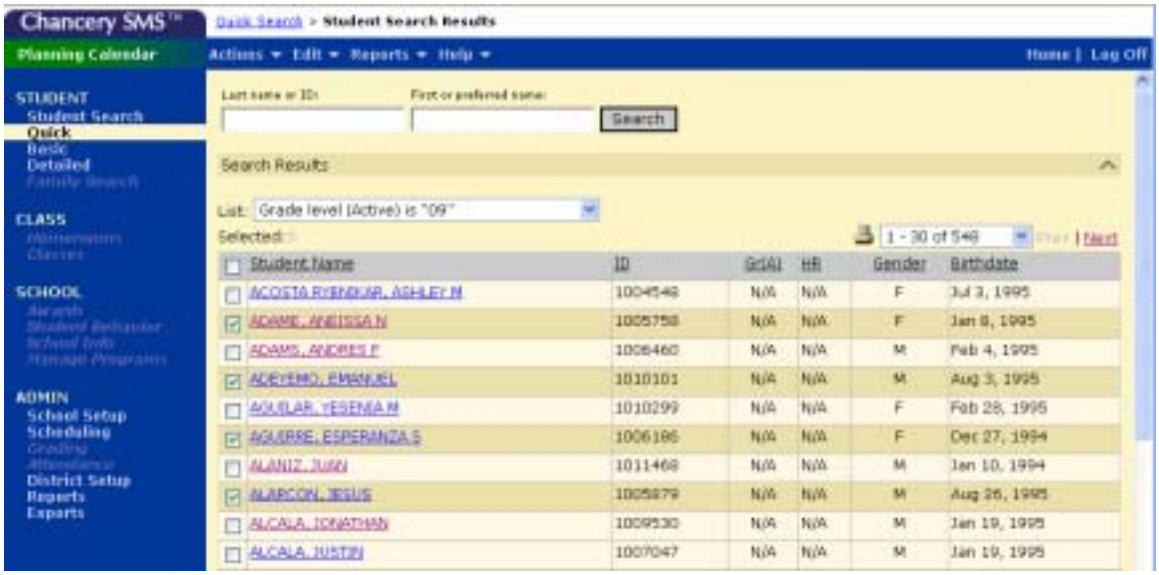
Entering Course and Alternate Request for Multiple Students

If you need to assign the same course and alternate requests to multiple students, you can assign course requests from any Student Search Results page.

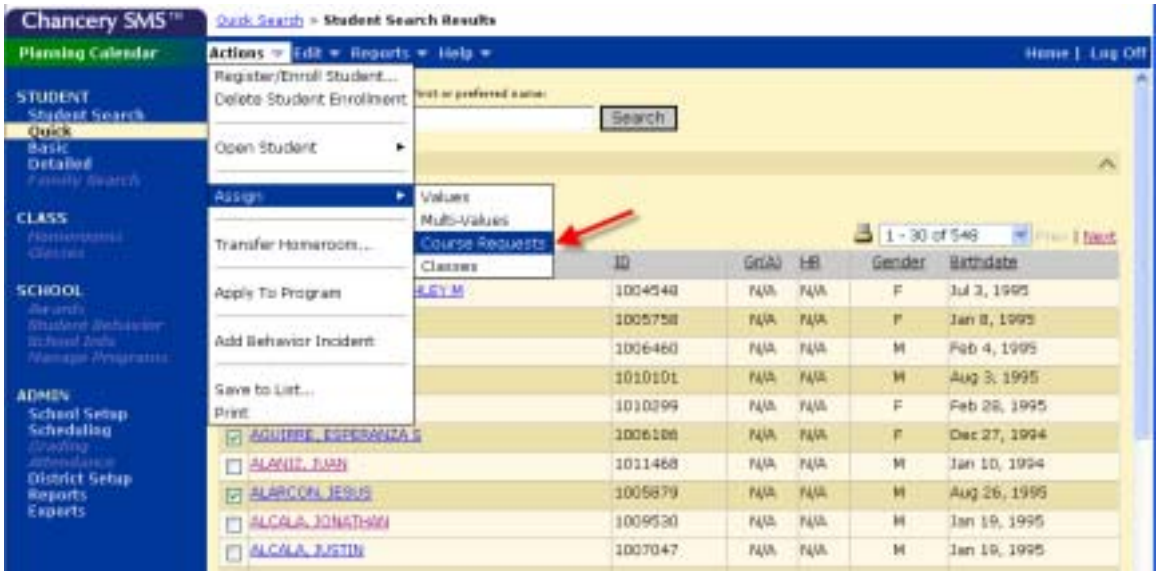
To enter course request for multiple students:

STEP 1: Search for the students.

STEP 2: On the Student Search Results page, select the students you want to assign the course requests. (Select the students by assigning a check mark on the check box beside the student's name)

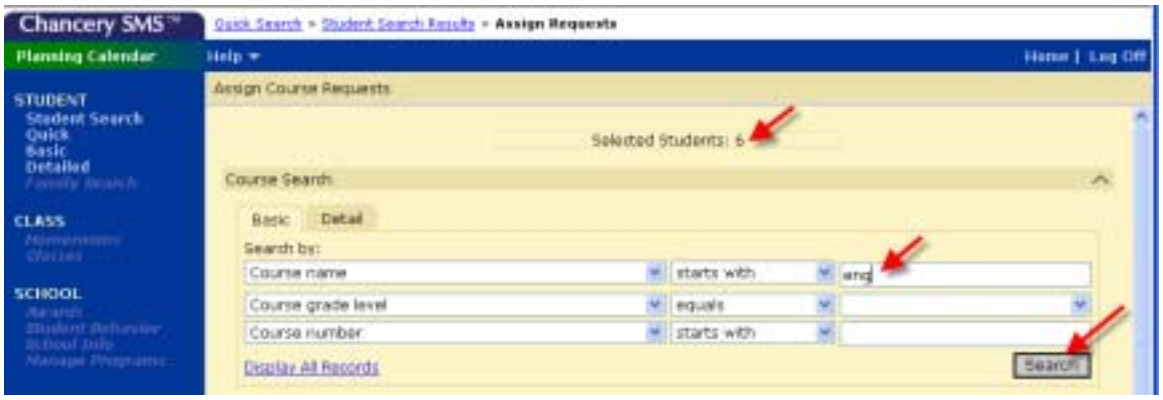


STEP 3: From Actions menu, click Assign → Course Requests.



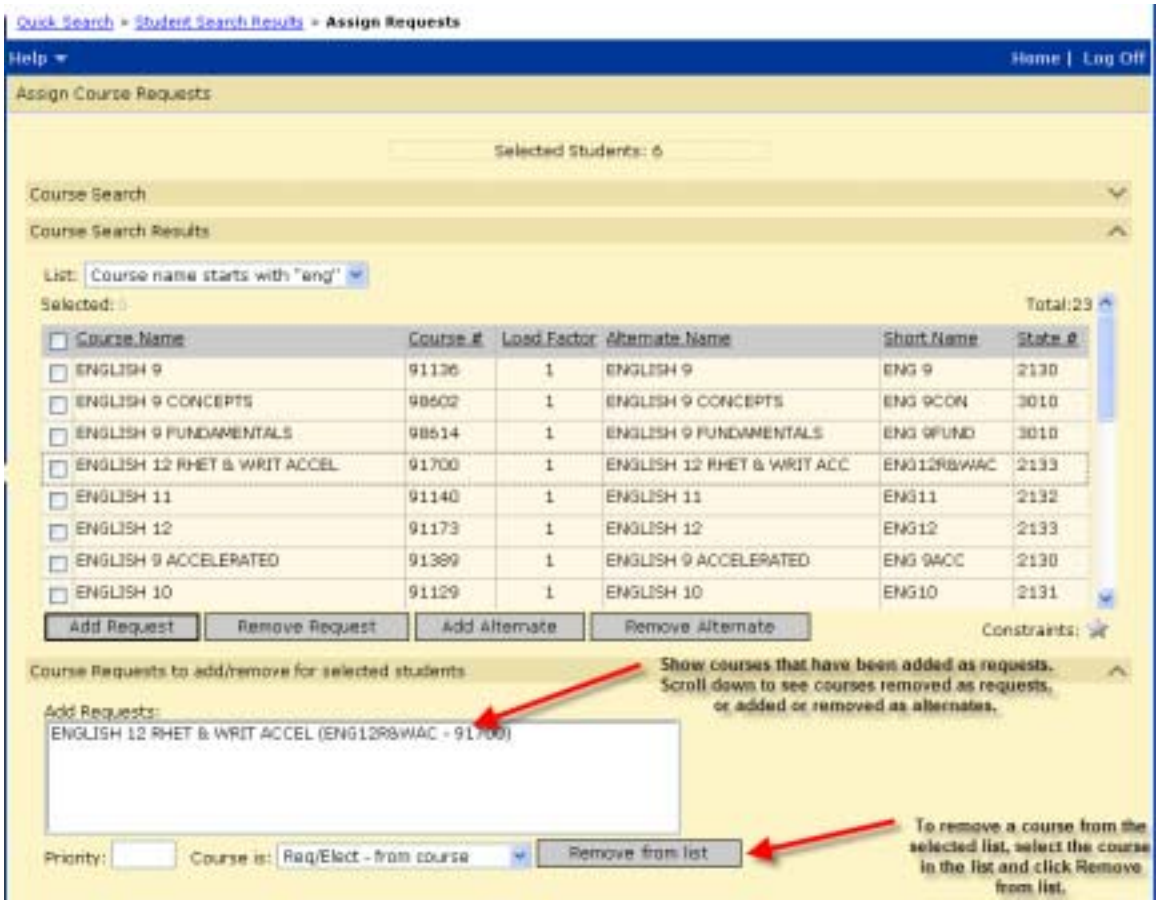
STEP 4: On the Assign Requests page, search for the courses you want to assign as requests to the selected students.

NOTE: If you created a saved list of courses, you can open the saved list by selecting Course Saved Lists in the first dropdown and the name of the saved list in the third dropdown.



STEP 5: From the course search results, select the course and do one of the following:

a. Click Add request – to add a course request to the students' schedules
b. Click Remove request – to remove a course request from the students' schedules
c. Click Add Alternate – to add an alternate course request to the students' schedules
d. Click Remove Alternate – to remove an alternate course request from the students' schedules



STEP 6: To assign other course requests and alternates, repeat steps 4 and 5.

STEP 7: Click Apply. (The selected course requests and alternates are applied to all the selected students.

Copying Course Requests from One Student to Another

If a student is already assigned the course requests you want to assign to a new student, you can copy course requests from the existing student's Student Schedule page. When you copy course requests from one student to another, the following course request settings are also copied:

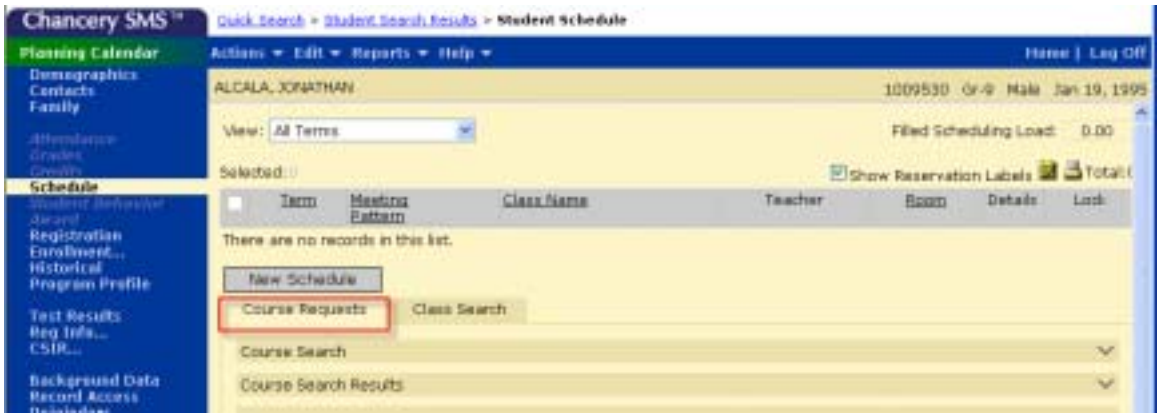
- Required/elective status
- Priority
- Term and when whether the requested term is a preference or required

NOTE: You cannot copy alternate requests.

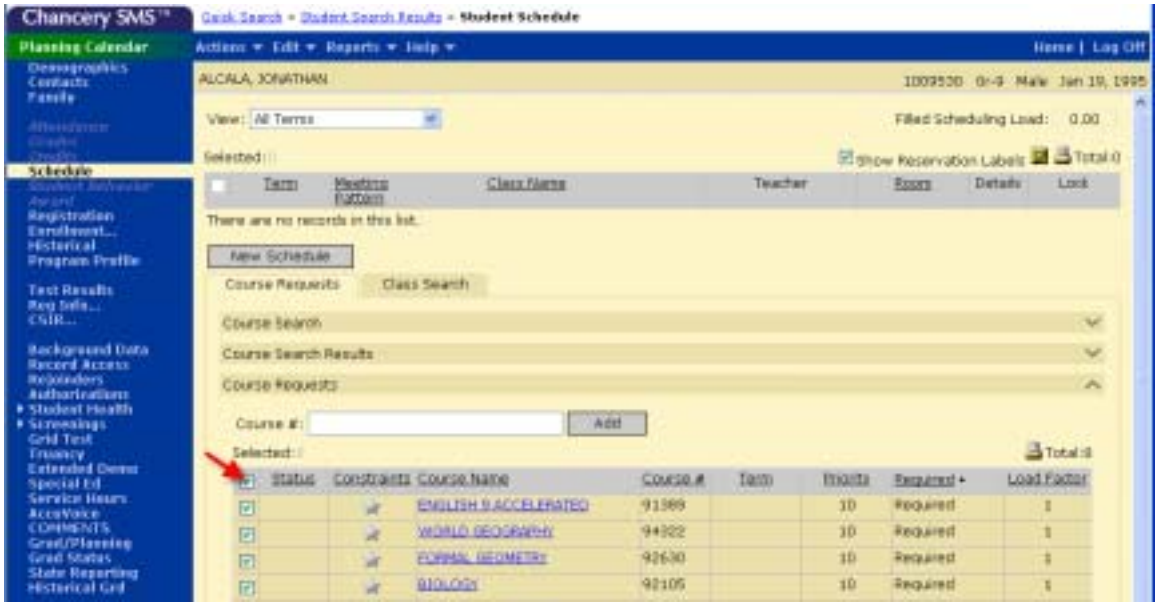
To copy course requests from one student to another:

STEP 1: Open the student schedule for the existing student.

STEP 2: Click on the Course Request tab.

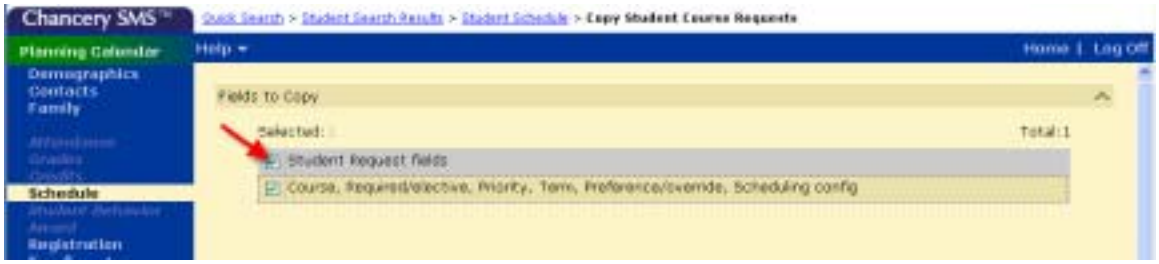


STEP 3: On the Course Request panel, select the course requests you want to copy to the new student.

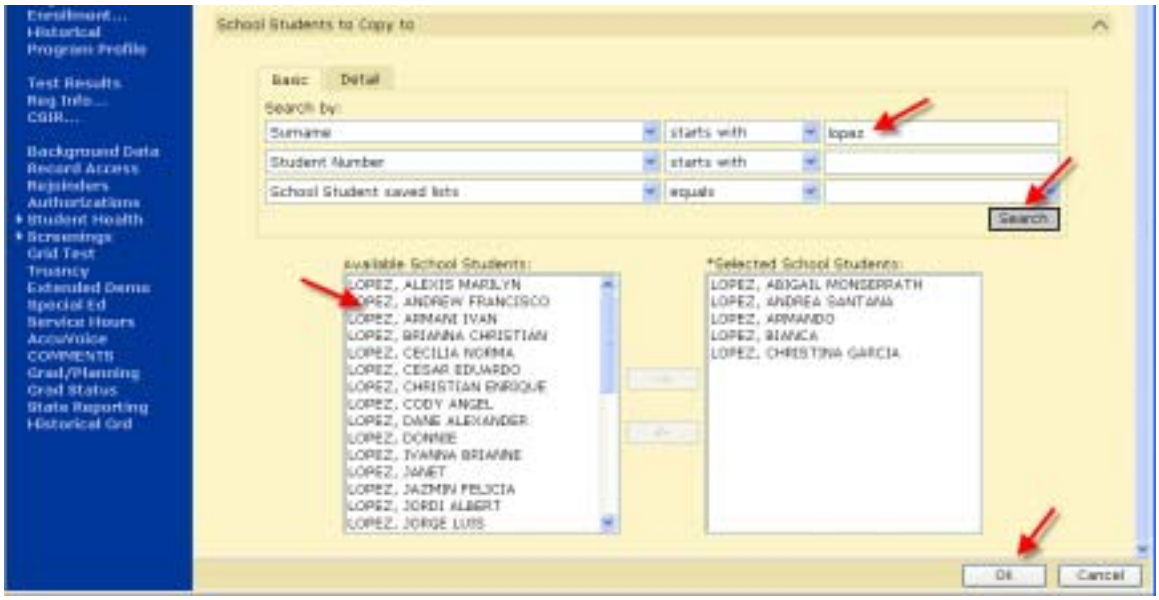


STEP 5: From “Edit”, select “Copy Fields” and then select “Course Requests…”

STEP 4: On the Copy Student Course Request page, under Fields to Copy, select “Course, Required/elective, Priority, Term, Preference/ override. Scheduling config”



STEP 5: Under “School student to copy to”, search and select the students you want to copy the course requests to and move them to the selected Students list.



STEP 6: Click OK.

Create a Saved List of Courses

STEP 1: In the control bar, click Scheduling. On the Scheduling page, under Step 1, click Course Setup

OR

In the control bar, click School Setup. On the School Setup page, under School, click courses

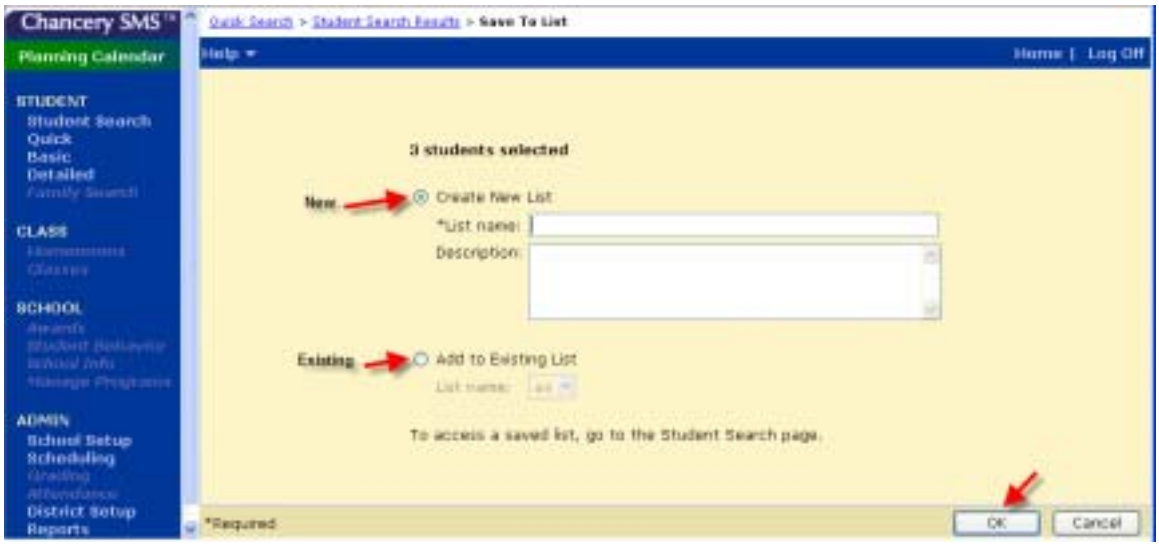
STEP 2: On the Course List page, search and select the courses you want to add to the saved lists.

STEP 3: From the Actions menu, click Saved to List.

STEP 4: To save the courses to a new list, select Create New List and enter a name and description for the list.

OR

To add the courses to an existing list, select Add to Existing List and select the list name.



STEP 5: Click OK.

Using Saved Lists to Assign Course Requests

If you want to assign the same course requests to multiple students, you can also create saved lists of courses and then assign course requests for those courses to selected students. If desired, you can even assign the course requests to a saved list of students.

Assign Course Requests for a Saved List of Courses

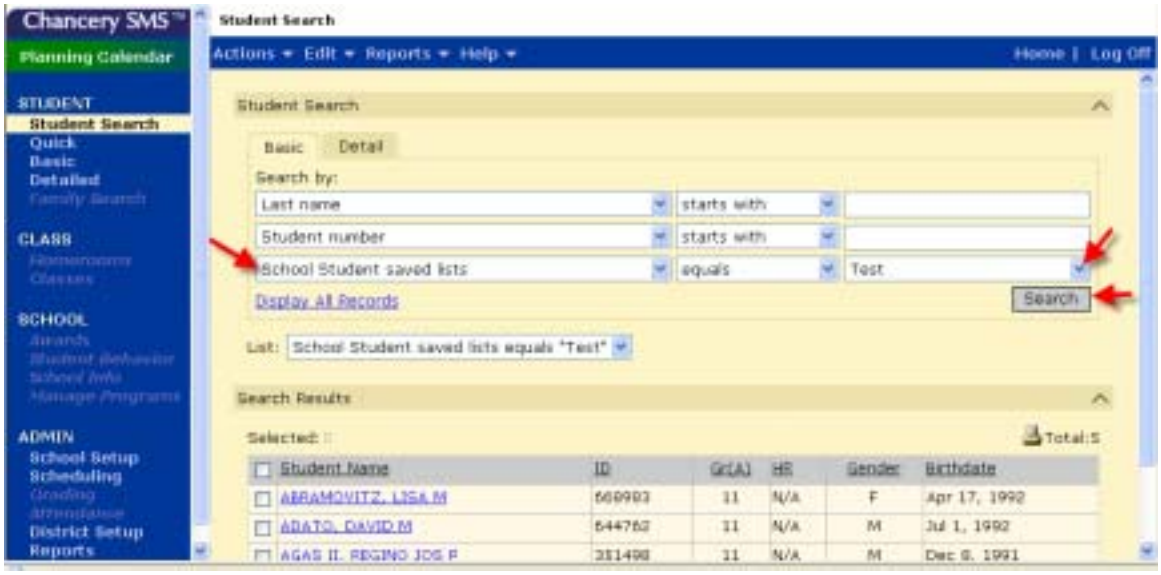
Once you create a saved list of courses, you can retrieve the Course Saved List from any Course Search page and then assign those courses as you would any course. When you retrieve a Course Saved List, you can work with the individual courses in the list; for example, you do not need to assign all the courses in the list to all students.

The following procedure illustrates how you might use a course saved list along with a student saved list to assign course request to specific students.

To Assign Courses from a Saved List as Requests to Students in a Saved List

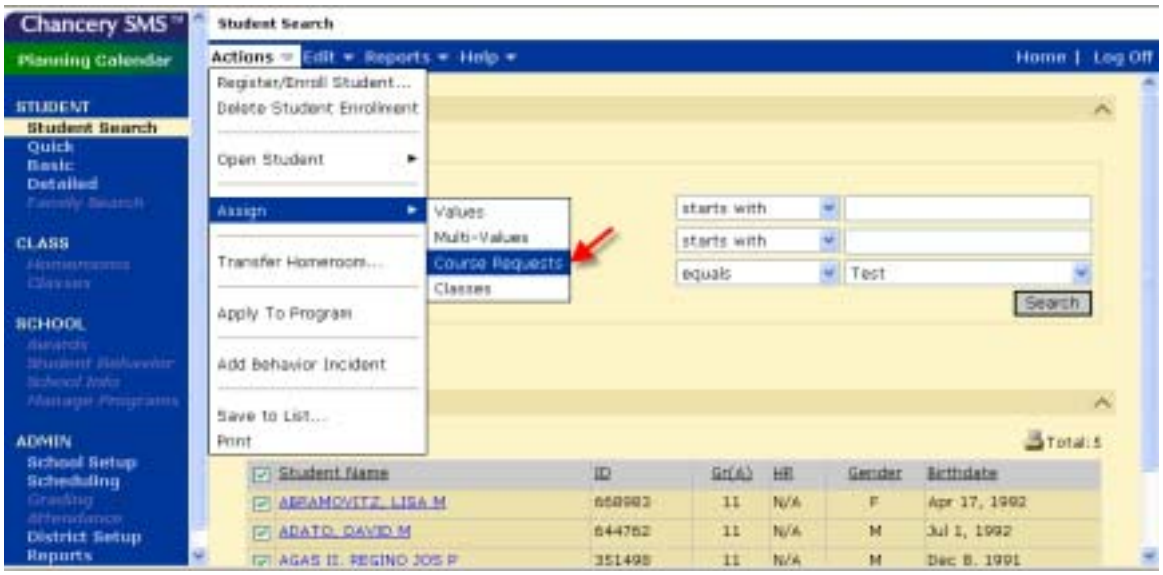
STEP 1: Search for the students you want to assign the course request to.

STEP 2: To open a student saved list, in the control bar, click Student Search. In the first "Search by" dropdown, select School Student Saved List, and in the third "Search by" dropdown, select the name of the saved list. Click Search.

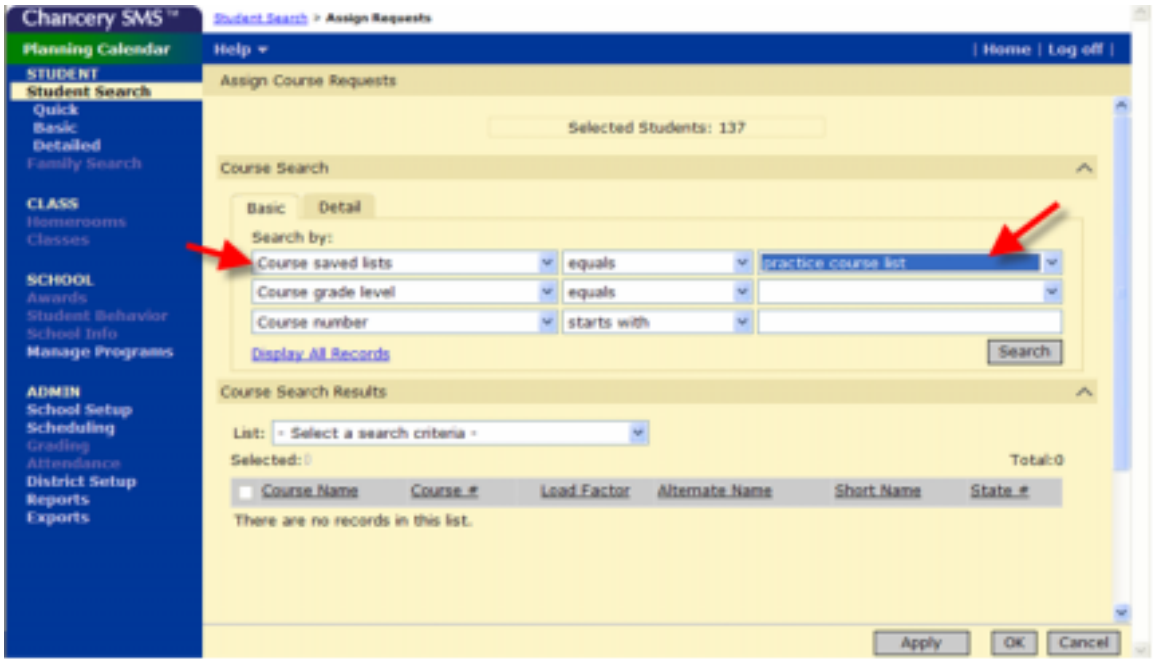


STEP 3: From the Student Search Results, select the students you want to assign the course request to.

STEP 4: From the Actions menu, click Assign → Course Request.

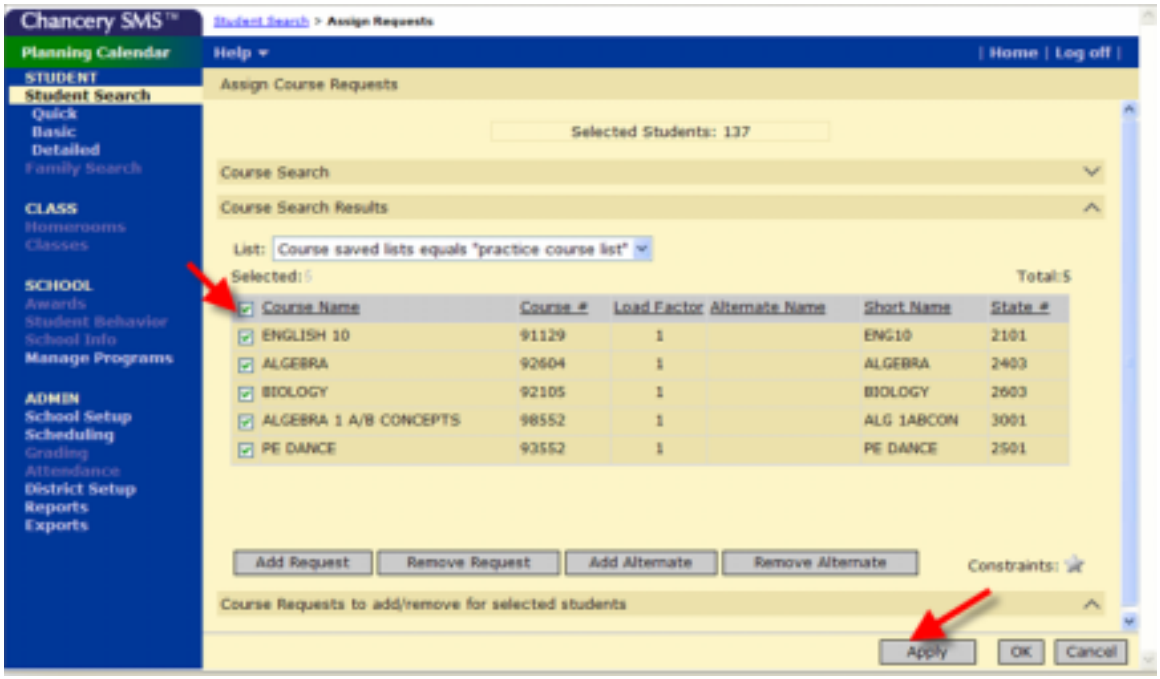


STEP 5: On the Assign Requests page, from the first Search by field, select Course Saved List. In the third "Search By" field, select the name of the course saved list. Click Search.



STEP 6: From the course search results, select courses and do one of the following:

- Add a course request to the student's schedules by clicking "Add Request
- Remove a course request from the students' schedules by clicking " Remove Request"
- Add an alternate request to the students' schedules by clicking "Add Alternate"
- Remove an alternate course request from the students' schedules by clicking " Remove Alternate Request"



STEP 7: Click Apply.

The selected course requests and alternates are applied to all the selected students.