



CENTRAL SUSQUEHANNA INTERMEDIATE UNIT

Getting Started

Basic Navigation Learning Guide



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INTRODUCTION

The CSIU Student Information System (SIS) is a single, comprehensive, fully integrated, web-based Student Information System.

The software is workflow-oriented, and contains Registration, Attendance, Grading, Scheduling, Special Education, Discipline, Transportation, Health, Gradebook, as well as parent and student portal functionality. The software is fully integrated, so you have real-time information available at all times.

During this introduction, we will cover:

1. Structure and Navigation of the system
2. Household and Student information
3. Icons used throughout the application

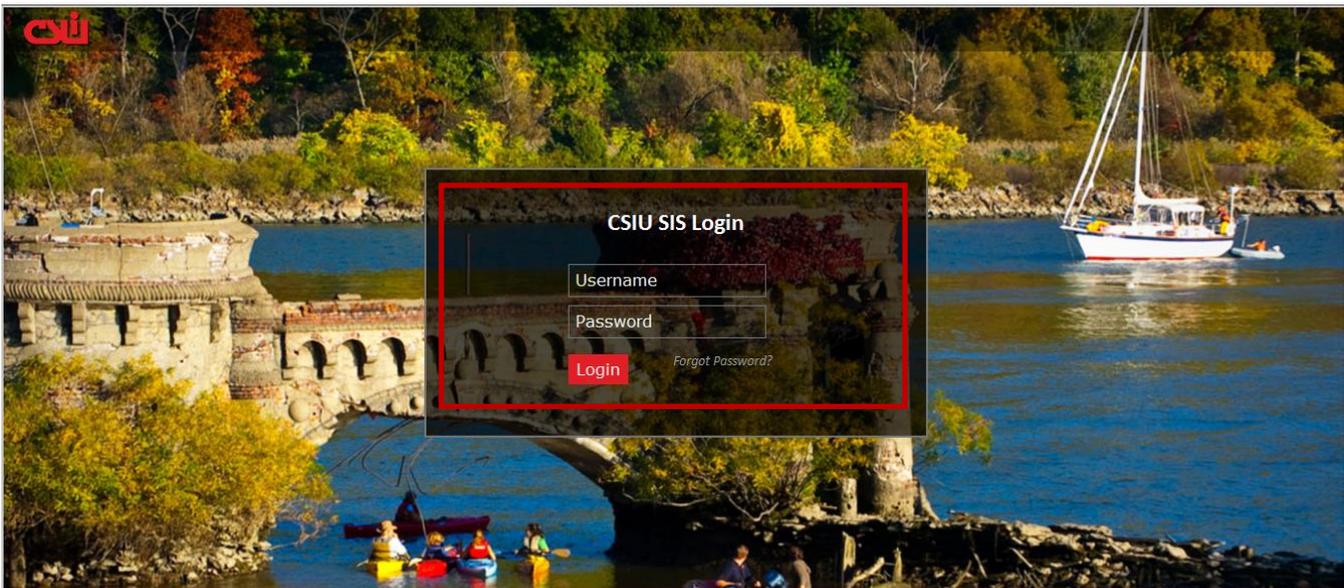
LOG IN TO THE SYSTEM

The CSIU Student Information System is accessible on the Internet at <https://sis.csiu-technology.org/>. This is an "https" site, meaning communication of the information is securely encrypted.

The software is written to operate on Internet Explorer, Safari or Google Chrome. Please refer to the SIS-Getting Started Learning guide for minimum browser requirements.

CSIU also recommends that each user install Microsoft Office 2003 or newer (Word, Excel, Access) and the latest version of Adobe Acrobat Reader.

Login Page



NOTE: The CSIU SIS Login screen image may vary with the seasons.



CSIU STUDENT INFORMATION SYSTEM LOGIN SCREEN

Login: Enter your **Username** and **Password** in the required fields.

Username must be between four and twenty characters long. Typically, a user name is structured by the school district. For example, a district might decide that every **Username** must begin with a three character district identifier, followed by the last name and then first initial. Username is not case sensitive.

Password must be between 8 and 12 characters, with characters from at least two of the following categories: uppercase letters, lowercase letters, special characters, and numerals. Passwords ARE CASE SENSITIVE. **NOTE:** Staff members can change their passwords through the **MY PAGE > PREFERENCES: CHANGE PASSWORD** option.

After logging in, a home page displays. The default home page (Announcements and Events) displays information from a school's calendar ("Fall Fair" or "Boys Basketball at home" for example), as well as system announcements from the administrative staff (for example "Happy Mother's Day"). This default home page can be accessed at any time either by clicking on the  icon in the upper left corner, or by clicking on the  home icon in the upper right corner

Users can select a personal home page. For example, most teachers will set **Today's Personal Schedule** as a homepage. Guidance counselors might set the Student Profile page as their home page. See the section "Customizing Your System: My Page" below for more details. The default home page is shown below on the left and a teacher's home page is on the right.

Default homepage

Teacher's default page

Screen Size

The screen size can be controlled by pressing the **CTRL** key and using the **scroll dial** on the mouse. If the mouse does not have a scroll wheel, then use the browser's Zoom controls.



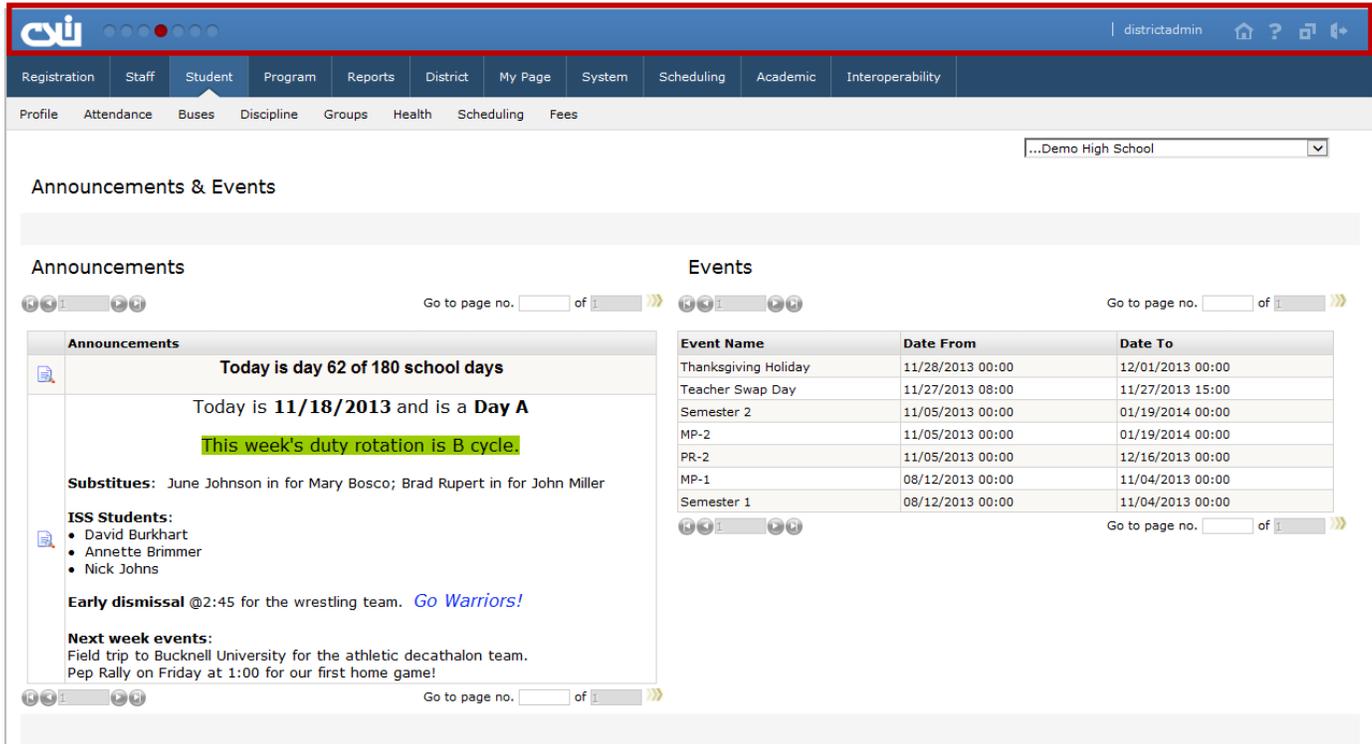
PERMISSIONS

The CSIU Student Information System includes an extensive security system, allowing for groups and users to access functions based on permissions. Only features accessible to a particular user will appear on the screen. Therefore, each user's screen may look slightly different. If a Learning Guide or Quick Reference Guide makes reference to a menu, button, or icon that does not appear on a user's screen, it means that user is not authorized to access that feature. If an individual needs a particular feature, he or she should contact the district's System Administrator. The System Administrator will be able to reconfigure the permission settings accordingly.

NAVIGATION

Banner

The Banner section allows each user to customize the color scheme throughout the system by selecting one of the six color blocks from the color pallet in the center of the banner. The banner section also indicates the current user's login and the current system date. At the building level, following the system date, the current Day Pattern code also displays.



Current User: Top right corner of the screen.

Home (🏠): Click on the Home icon to display the default home page Announcements & Events.

Help (🔍): Click on the Help icon to gain access to the Online Support Center. The Online Support Center contains Learning Guides, Quick Reference Guides, Videos, and Release Notes that contain important information about how the system works and what is new in the latest release. Refer to the "Getting Help" section below for more information.

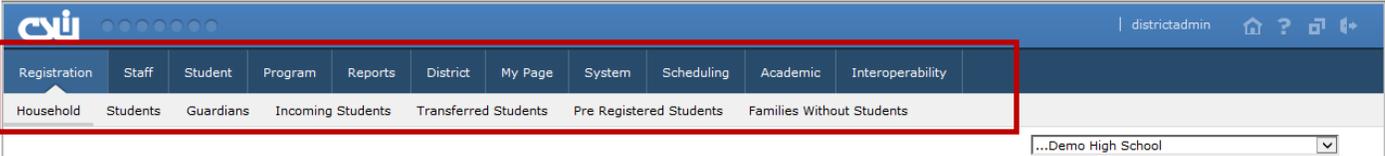


Proxy Login (👤): Click on the Proxy Login icon to log in as another staff member. This allows System Administrators to see the same screens as a specific user to troubleshoot/assist others. Most users will not have access to this icon.

Sign Out (🚪): Click on the Sign Out icon to sign out of a session. **Always remember to sign out of the session** when finished working. The CSIU strongly recommends that users be trained to close the browser window to complete a secure logout.

Primary and Secondary Menus

The top of the screen provides an easy-to-use menu framework to help navigate within the CSIU Student Information System. The various features of the system appear on these menus.



The system has only two tab levels: the first level is for the main module tabs and the second, sub menu level, is for functional areas within each main module. Below the sub menu tabs is a breadcrumb trail to assist users in tracking their location within the system. The figure above illustrates the Main menu with the Registration module selected, and the Household sub menu selected within the Registration module.

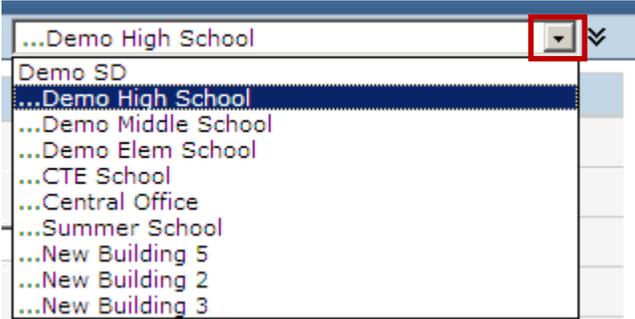
Main menu: Registration, Staff, Student, Program . . .

Sub menu: Household, Student, Guardians, Incoming Students . . .

Breadcrumb trail: REGISTRATION > HOUSEHOLD.

District/Schools Selection

In the upper right corner, on the same line as the breadcrumb trail, users select the district level or the school level. Depending on a user's security, the drop-down list might include the School District or one or more specific schools to which the user has access. Typically, at the district level, all students within the district will be visible. Normally, at the school level, only students from the selected building will display. In general, only active students currently enrolled will display.



Navigation Menu

Some screens offer a third level of options: the Navigation menu. The figure below illustrates the Grade Reporting Navigation menu.

The screenshot displays the SIS interface for the 'Report Card Wizard'. At the top, the breadcrumb trail is highlighted with a red box and labeled 'Breadcrumb trail', showing the path: Reports > Grade Reporting > Report Card. On the left side, the 'Navigation Menu' is highlighted with a red box and labeled 'Navigation Menu', showing a list of options including 'Report Card', 'Transcript', 'Assignment Grades', 'Administrative Reports', and 'Standards-Based Reports'. The main content area contains various filters and options for generating the report card, such as 'School Year', 'Student Type', 'Last Name', 'Course', 'Student Status', 'Program Status', 'Group', 'Counselor', 'Grades', 'Calendar Event', 'Report Type', 'Order by', and 'Include Transcript Eligible Courses Only'. There are also buttons for 'Search', 'Clear', 'Options', 'Run', and 'Final Run'.

When looking at the breadcrumb trail the full path is **Main Menu tab > Sub Menu tab > Navigation**. In the example above the complete breadcrumb trail would be **REPORTS > GRADE REPORTING > REPORT CARD**.

The Navigation Menu can be displayed on either the left side or the right side of the screen depending on the Preferences specified in the My Page module. (See the section "Customizing Your System: My Page" below for more details.) Some Modules also have a Side Menu, which users can hide using the Collapse icon  to the right of the School field (or if hidden, can Expand ).

FILTERS, SORTS, AND EXPORT OPTIONS

Filters

After a building and menu path is selected, data is normally returned in a list format. At the top of the page search criteria are available to filter the data. Below is an example of various ways student information can be filtered (First Name, Last Name, ID Number, Homeroom, Counselor, Gender, Race, or Grade). To apply the filters, click the **Search** button. To remove all filters use the **Clear** button. For example, if you specify "Brett" in the Search field and select the First Name filter, students with that first name will be listed. If you clear the filter and specify "Brett" in the Search field with the ALL option in the filter drop-down, the system displays students with Brett as their first, last, or middle names.

The screenshot shows the SIS Student List page. At the top, there is a navigation bar with tabs for Registration, Staff, Student, Program, Reports, District, My Page, System, Scheduling, Academic, and Interoperability. Below this is a sub-navigation bar with Profile, Attendance, Buses, Discipline, Groups, Health, Scheduling, and Fees. The main content area is titled "Student List" and includes a search form with the following fields: Home District (dropdown), Counselor (dropdown), Fully Scheduled (dropdown), Search (text input), Student Group (dropdown), and Current Location (dropdown). A dropdown menu is open over the Search field, listing search criteria: First Name, Last Name, ID Number, Homeroom, Counselor, Gender, Race, and Grade. Below the search form are "Search" and "Clear" buttons. A red text prompt below the search form reads "Choose Search Criteria Above".

Sorts

The Result section will display the results of the filtered search. The records can then be sorted by clicking on any underlined column heading. In the example below, the records can be sorted by **ID Number, Last Name, First Name, MI, Gender, Grade, Homeroom, Race, Hispanic, Date of Birth, Current Location or Counselor**. The sort can be either in ascending or descending sequence. (Click the column heading a second time to reverse the sequence.)

The screenshot shows the SIS Student List page with a table of student records. The table headers are: LEF, ID Number, Last Name, First Name, MI, Gender, Grade, Homeroom, Race, Hispanic, Date Of Birth, Current Location, and Counselor. The first six headers (ID Number through MI) are underlined, indicating they are sortable. The table contains six rows of student data. Below the table, there is a pagination control that says "Go to page no. [] of []".

LEF	ID Number	Last Name	First Name	MI	Gender	Grade	Homeroom	Race	Hispanic	Date Of Birth	Current Location	Counselor
	20071	Abboud	Jane		Female	11	104	Multiracial	Yes	06/08/1995		Cindy Fow
	99865	Abboud	Thomas		Male	9	LGI	Asian	No	07/10/2005		Cindy Fow
	10588	Abramson Jr.	Arlis	Grant	Male	12	207	White	No	01/13/1996	Blue Team	Cindy Fow
	998547	Abramson	Joan		Female	12	213	White	No	05/26/1996		Cindy Fow
	456789321	Ace	Tanya		Female	12	202	White	No	02/14/1996		Cindy Fow
	20152	Adorante	John		Male	9	HL3	White	No	07/04/2000		Cindy Fow



Excel Export

Click the Excel icon (📄) at the far right of the Result banner to export the data to Microsoft Excel. When the File Download screen displays, select Open to view the data immediately in Excel on the computer screen. Click Save to save the file without opening Excel, or click Cancel to cancel the export process.

Registration Staff **Student** Program Reports District My Page System Scheduling Academic Interoperability

profile Attendance Buses Discipline Groups Health Scheduling Fees

tudent > Profile ...Demo High School

Student List

Home District --Select--
 Counselor --All-- Fully Scheduled --Select--
 Search --All-- Current Location --Select--
 Student Group --Select--

Search Clear

Result

Go to page no. of 4

LEP	ID Number	Last Name	First Name	MI	Gender	Grade	Homeroom	Race	Hispanic	Date Of Birth	Current Location	Counselor
	20071	Abboud	Jane		Female	11	104	Multiracial	Yes	06/08/1995		Cindy Fow
	99865	Abboud	Thomas		Male	9	LGI	Asian	No	07/10/2005		Cindy Fow
	10588	Abramson Jr.	Arlis	Grant	Male	12	207	White	No	01/13/1996	Blue Team	Cindy Fow
	998547	Abramson	Joan		Female	12	213	White	No	05/26/1996		Cindy Fow
	456789321	Ace	Tanya		Female	12	202	White	No	02/14/1996		Cindy Fow
	20152	Adorante	John		Male	9	HL3	White	No	07/04/2000		Cindy Fow

Do you want to open or save Report.xls from portaldemo.csiu-technology.org?

Open Save Cancel

After data has been exported, all Excel functions are available, including filtering, sorting and printing.

CUSTOMIZING YOUR SYSTEM: MY PAGE

Through the MY PAGE module, users can customize some of their basic settings.

Use the Mail Inbox tab to send and receive internal emails within the building. The Personal Pages tab allows each user to bookmark websites frequently used by the staff member. Use the Preferences tab to select a personal Home Page, specify the side of the screen where the navigation pane should appear, specify the number of records per page to display, and change passwords. The Web Page tab can be used to design a personal web page. The Document Library tab is used to store documents.

Registration Staff Student Program Reports District **My Page** System Scheduling Academic Interoperability

Mail Inbox Personal Pages Preferences Web Page Document Library

My Page > Preferences > Preferences ...Demo High School

Preferences

Save Change Password Change Security Questions

The following question helps security administrators verify your identity when manually resetting a forgotten password. Please choose an Authentication Question and Authentication Answer that is memorable but not easily guessed.

* Authentication Question * Authentication Answer

Home Page --Select--
 Staff Schedule Views
 Attendance Profiles
 Student Profile

Records per page

Select Style

Modern style with left-side menu
 Modern style with right-side menu
 Classic style with left-side menu
 Classic style with right-side menu

Save Change Password Change Security Questions

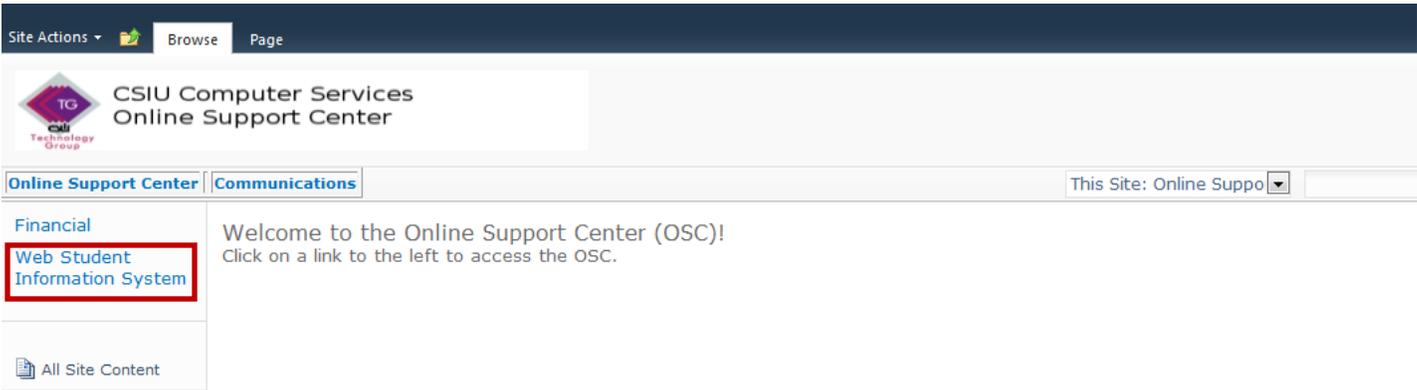


GETTING HELP

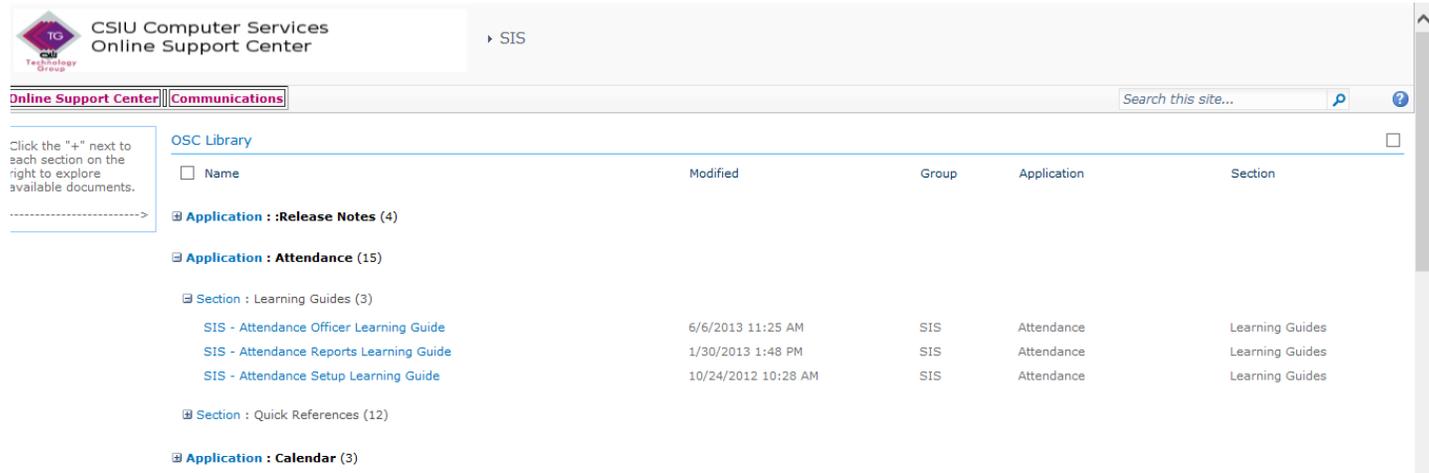
Help is always available when using the CSIU Student Information System.

The Online Support Center is accessed by clicking on the Help icon in the upper right corner of the screen (?) and selecting the "Web Student Information System" link. Topics are listed by area so to find information about Attendance, expand the Attendance section by clicking the (+) icon, scheduling section, and so on. Release notes describing changes to the software are also contained in the Online Support Center.

NOTE: The Online Support Center also houses documents for CSIU Financial applications.



Online assistance is available at softhelp@csiu.org. Additionally, phone support is available at 570-523-1155 ex 2128.



The documents are further separated into Learning Guides and Quick References.

LEARNING GUIDES: Provide detailed instructions for using system features. They vary in size depending on the complexity of the topic.

QUICK REFERENCE GUIDES: Are short documents that quickly cover small processes.

All documents are in PDF format and are arranged alphabetically. The date to the right of the documents displays when the material was last updated.

RELEASE NOTES: Highlight the changes made for each release. Release notes are arranged by version number, with the largest number being the most recent.



FUNCTIONS AVAILABLE IN EACH MODULE

Registration: The Registration module is where the student's enrollment, mobility, and contact information is maintained. The data is divided into Household, Student, and Guardian screens, and screens that record student transfers. The CSIU SIS is a household-based system, which means that guardians, students, and emergency contacts are tied together through a household unit identified by a surname. The main advantage of this type of system is that information about a person is only stored once. For example, if a guardian's phone number changes, the system will automatically update all related student contact information at once.

Staff: This module provides access to the teacher's Gradebook. Teacher's use this module to access class rosters, attendance, and grades.

Student: This module stores student-related information. This includes the student profile (entire student folder); attendance entered by the attendance secretary, bus transportation, student discipline, health records, student and staff schedules, and student fees. The Student Profile is described in detail below because this is where all student information can quickly be viewed by staff.

Program: The Program module maintains data about special student programs such as Academic Intervention Services and Special Education. The Program module is also where student information can easily be updated in mass. For example, students can be assigned to special services through the **Mass Update Student Status** option. Students' homerooms, their counselors, graduation plans, etc. can be updated through the **Mass Student Info Update** tab.

Report: Select this module to generate most reports. The reports are divided primarily by system modules. This is also where users can generate export files, including PIMS and data queries.

District: This module is where district and school announcements are updated, calendars are maintained, departments, grades, lockers, and rooms are defined. It is also where information about each school is stored and transportation information is established.

My Page: This is the area for staff members to send and receive internal messages, set up webpage favorites, and customize their system. In addition, staff members can create their own web pages, store documents in a library, and update their own passwords.

System: This module is used by System Administrators to build drop-down lists, establish attendance codes and letters, and set up staff security.

Scheduling: This module is where all course and section information is maintained. It is also where all annual scheduling functions are performed, such as recording course requests, running the master schedule builder, and assigning students to classes. The system has a drag and drop feature similar to an electronic blackboard. It allows scheduling personnel to quickly move a class or view conflicts by simply dragging a class from one timeslot on the schedule to another.

Academic: This module is used by guidance and grading personnel to maintain standardized testing results for PSSA, SAT, and AP exams. It is also where marking period averages, honor rolls, and grading statistics are calculated. Grading parameter information for each course can be viewed on the Course Weight screen.

Interoperability: This module is where exports to third party vendors are established and parent/student portal settings are established.

NOTE: Access to these functions is controlled by the System Administrator. To gain access to any module or function covered in this guide, please contact him or her.



STUDENT PROFILE

To view the complete student portfolio go to **STUDENT > PROFILE**, search for student(s), and then click on the appropriate student.

The student portfolio includes the following information (listed alphabetically for reference only):

Tab	Description
504 Upload	Displays uploaded 504 student information. NOTE: Section 504 is an anti-discrimination, civil rights statute that requires the needs of students with disabilities to be met as adequately as the needs of the non-disabled are met.
Achievements	Displays Achievements and indicates whether the achievement should print on student transcripts. National Honor Society, Eagle Scout, and Student of the Month are examples of Achievements.
AIS Plans - Academic Intervention Services	Displays AIS referrals the student might have and allows for the creation of a new AIS Referral. This could be used for PSSA remedial students, or students who need a little extra work in their math class. NOTE: AIS stands for Academic Intervention Services . These are students who are struggling academically or behaviorally.
Archive Report Editing	Final Grade Reports are stored in an xml format. After these reports are archived, they can still be viewed on the Archive Report Editing screen.
Assessments	Displays assessments, dates the assessments were given, assessment scores, and test modifications. New assessments can also be added on this screen. SAT, ACT, PSSA, Keystone Exam, and AP exams are all examples of assessments.
Attendance Report	Displays the student's Daily / Weekly / Monthly & Cumulative attendance. Custom attendance queries can also be run from this interface.
Buses	Displays student bus assignments. Allows for adding/editing student bus information.
Course Requests	Displays the student's current schedule and course requests, and provides the ability to enter new course requests.
Credential Type	Displays the Credential Type the student receives. NOTE: The Credential Type is a state required field for graduating seniors.
Daily Attendance	Displays student daily attendance for the current academic year.
Discipline	Displays student discipline records and provides the ability to enter a new discipline incident and action. Discipline letters can also be generated from this interface.
Edit Portfolio	Enables a user to update a student's homeroom, scheduling schools, scheduling grades, shifts, priorities, and location codes.
ERC - Elementary Report Cards	Displays students' standards based report cards called an ERC. Screen displays the final runs that have been generated.
Fees	Displays student Fees for items such as books, sports fees, and band fees.

Tab	Description
Guidance Log	Displays career planning journal entries and other guidance notes.
Health	Displays the student's health information, including Allergies / Height & Weight, Immunizations, etc.
IEP Upload	Displays the student's IEP and access log. Users with appropriate permissions can also upload new IEPs from this interface.
Performance Map	Displays a student's progress toward fulfilling their graduation requirements or other performance indicators that the district may define such as students at risk of failure.
PGP (Post Graduate Plan)	Displays the student's Post Graduate Plan and provides for editing that plan.
Phone Journal	Provides an opportunity to enter phone journal comments. Caution: This feature is designed to be treated as an official record. Entries made in this journal cannot be deleted. Please use caution when entering comments in this area.
Previous Course	Displays student's course history. Users can use this interface to record course history for students entering the district for the first time.
Profile	Displays basic enrollment information.
Progress Report	Displays the Progress Reports that have been created for the student and allows a user to generate a new Progress Report for the student.
Registration	Links to the Student Registration screen where demographic details and enrollment records are stored.
Report Card Override	<p>If required, lets a user edit a portion of a past report card for a student.</p> <p>This can be used by the guidance counselor or principal, for example, when grades are reported incorrectly and adjustments are necessary. This tab can be used to change a reported grade.</p> <p>Example: Change a grade by first unlocking the course (by clicking the Unlock icon), make the change, and then go to the Report Card tab to rerun the report card.</p>
Report Cards	Displays the Report Cards that have been generated for the student and allows a user to generate a new Report Card for the student. NOTE: When a student is enrolled in more than one building during the school year, both are viewable on the Student Profile screen.
RTI Referrals (Response to Intervention)	<p>Displays RTI referrals for students.</p> <p>NOTE: RTI is an academic intervention used to provide early, effective assistance to children who are having difficulty learning.</p>
Schedule	Displays student schedules. Users can add classes, drop classes, copy other students' schedules, utilize the walk in scheduler, and print schedules in three different formats.
Special Education	Displays student's special education information including the Special Ed Data Record, IEP, Procedural Dates, and Discipline.

Tab	Description
Standards-Based Progress Report	Allows users to view standards-based progress reports, run new reports, delete existing reports, or publish and un-publish progress reports on the parent and student portals.
Standards-Based Report Card	Allows users to view standards-based report cards, run new report cards, delete existing report cards, or publish and un-publish them on the parent and student portals.
Status	Displays a composite view (including status history) of Student Status, Program Status, Disability Status, and Poverty level. This interface can also be used to edit or add status details.
Student Field Trips	Displays the entire list of a student's past field trips, and field trip attendance.
Student Groups	Displays all groups associated with the student and provides the ability to add or remove students from groups.
Student Lockers	Displays the student's current locker, its location, and its current combination. A student's locker information can also be edited from this interface.
Student Upload	Allows users to post documents that will appear on the student portal.
Teacher Log	Similar to the Guidance Log and the Phone Journal tab. This allows teachers to record academic notes, conversations with parents, etc.
Today's Schedule	Displays the student's schedule for the specified day.
Transcript	Allows users to run and print a single transcript for the student. Three print styles are available.
Transcript Comments	Provides the ability to add comments that will appear on the student's transcript.
Transportation	Displays student bus assignments, and allows for adding/editing student bus information. Use this tab only if the district is using the CSIU Transportation module.
XML Runs	Displays all Grading Final Reports for a student, including Progress reports, Report Cards, Transcripts, PRCs, and ERCs.



ICONS USED IN CSIU STUDENT INFORMATION SYSTEM

Most of the following icons provide screen tips describing the meaning of the icon. The table below is sorted first by module and then by Description

Icon	Description	Modules
	Add a new category	All
	CSV Document	All
	Delete a field (such as an assignment, or a phone number, etc.)	All
	Display a calendar from which a date can be selected	All
	Display default Home page	All
	Edit	All
	Expand or collapse	All
	Export to a web based Excel format	All
	Fill Empty Text box	All
	Help	All
	HTML document	All
	Logout	All
	Open current page in a new window. Located on Student Profile page.	All
	Phone/Contact	All
	Print Preview	All
	Proxy - Note: only district level System Administrator will see this icon	All
	State Reporting	All
	Student has a 504	All



Icon	Description	Modules
	Student has a Disability	All
	Student Information System Color Selector	All
	View	All
	View Schedule.	All
	Word Document	All
	XML Document. Is universal format, other programs can interoperate.	All
	Opens Student Assessment Screen Search	Academic>Assessments
Mini	Mini course	Attendance
	Truancy Alert	Attendance
	Lock Student on Transcript override	Grading
	Dropped Course	Grading (Report Card Override)
/	Medical Alert. A Red means one medical condition or health alert. A Blue means multiple medical conditions or health alerts.	Health, Teacher Gradebook
	Inactive Household	Registration
	Guardian Alert	Registration
	Preregistered Student	Registration
	Student does not reside in the same home as contact	Registration
	Student's Current School	Registration
	Summer School	Registration
	Switch Student's Current School	Registration



Icon	Description	Modules
	Guardian Alert (Red Phone)	Registration, Student
	Run	Reports>Custom Reports
	Filter a search field	Reports>Custom Report
	Add/Drop icon.	Scheduling
	Course Request - Special Request from student.	Scheduling
	No Merge	Scheduling
	Scheduling Icon	Scheduling
	User Linked	Security
	The district uses the CSIU Special Education module, and student has or has had an IEP at one point.	Special Education
	Add Comment	Teacher Gradebook Classic View
	Add/Delete Assignment Category	Teacher Gradebook Classic View
	Calculate student Grades	Teacher Gradebook Classic View
	Co-teacher	Teacher Gradebook Classic View
	Guardian Alert	Teacher Gradebook Classic View
	Internal Mail	Teacher Gradebook Classic View
	New Student	Teacher Gradebook Classic View
	Roster Report	Teacher Gradebook Classic View
	Show Average Formula calculation	Teacher Gradebook Classic View

Icon	Description	Modules
	Show or Hide Stats (Course) information	Teacher Gradebook Classic View
	Student absent for the day (Blue A)	Teacher Gradebook Classic View
	Student absent from previous class (Red A)	Teacher Gradebook Classic View
	Student was dropped from the class/course during the last 5 school days	Teacher Gradebook Classic View (Attendance page)
	Exclude Students	Teacher Gradebook Classic View, Scheduling
	Attendance has not yet been taken	Teacher Gradebook Classic View, Attendance
	Attendance Lock	Teacher Gradebook Classic View, Attendance
	Merged Class	Teacher Gradebook Classic View, Scheduling
	Partial Schedule	Teacher Gradebook Classic View, Scheduling