WCBS

3sysACADEMIC

Getting Started

User Guide

3sys®
ACADEMIC

CONTENTS

Getting Started

Welcome to the *3sysACADEMIC Getting Started User Guide.* This guide describes the software's key functions and provides details of how to navigate and use it to complete a range of tasks. We hope this guide will give you the essential tools you need to get started using 3sysACADEMIC. If you have any questions, support services are available which will help answer them, including training opportunities and our online Customer Centre.

This chapter discusses the following:

CHAPTER 1

Where do I Begin?

Welcome to the *3sysACADEMIC Getting Started User Guide*. If you are a new or inexperienced user of 3sysACADEMIC, this guide aims to provide you with the key information you need to find your way around and begin using the product. It gives you a starting point from which you can move on to more specialist or complicated tasks relevant to your role.

> **Note:** This guide's content and more is available via the *3sysACADEMIC Online Help*. To access the *Online Help*, log in to 3sysACADEMIC and click ? at the top of any screen. For more information, see "3sysACADEMIC Online Help Tips and Tricks" on page 8.

Support Services

3sysACADEMIC is a specialist MIS software package, which you can use to undertake a variety of data management tasks. When you are ready to use it, you may benefit from the following support services:

TRAINING

WCBS offers an extensive programme of training and workshop opportunities, covering a wide range of topics, expertise levels and locations. We also offer bespoke training. Sessions can take place at your school, our offices or at a session near you.

To find out about our events, please contact the Events team on +44 (0) 1458 833 344, email trainingevents@wcbs.co.uk or visit www.wcbs.co.uk. For more information about bespoke on-site or online training sessions, please contact your Customer Account Manager on +44 (0) 1458 833 344 or email sales@wcbs.co.uk. Training event information is also available on our Customer Centre.

WCBS CUSTOMER CENTRE

The Customer Centre is our dedicated client website, where you can:

» Download software updates and related notes and guides.

» Log support issues.

» Find information about using our software, including user guides and answers to FAQs.

» View our Product Road Map and request specific software enhancements.

» Vote on proposed software enhancements, helping us identify the improvements that you want the most.

» Sign up for training and other events.

» Request quotes for bespoke services, such as training sessions, report design and pre-printed stationery.

You can access our Customer Centre directly from 3sysACADEMIC by clicking ⚐, making finding the information you need at the time you need it quicker and easier. If you do not currently have a login, you can create one via the link.

> **Note:** For more information, see the *Customer Centre User Guide*. available from the *3sysACADEMIC Online Help* **PDF Guides** page.

PDF GUIDES

You can access PDF user guides from the *3sysACADEMIC Online Help*. These provide information about a range of tasks and functions in 3sysACADEMIC. For a full list, see **Getting Started > PDF Guides** in the *3sysACADEMIC Online Help* or refer to the WCBS Customer Centre.

> **Note:** The PDF guides and *Online Help* provide the same content in different formats.

About 3sysACADEMIC

3sysACADEMIC is a tailored software solution specifically designed to help teaching and support staff at independent and international schools to successfully manage academic data.

3sysACADEMIC and our schoolADMIN (PASS) software are integrated systems that share the same source database, working together to ensure the smooth completion of both MIS and finance tasks within each of our client schools.

> **Note:** schoolADMIN (PASS) refers to non-finance functionality within passFINANCE.

The software makes inputting, capturing and analysing pupil assessment, attendance, behaviour and performance data simpler for users, meaning that teachers can focus on teaching and all staff can find completing MIS-related tasks quicker and easier.

For senior staff, the excellent reporting and analysis tools help support school strategy and performance management.

Features

Created with you, the user, in mind, key features include:

» An uncluttered design that is easy to navigate and very intuitive.

» A range of user-friendly features, such as search dialogs, drop lists and auto complete, that makes adding records and finding data quicker and simpler.

» Accessibility via the web 24/7 from any device.

» Compatibility with all leading browsers.

» Ground-breaking tools and customisation features, such as WCBS schoolPORTAL.

» Seamless integration with third party systems, meaning you only need to maintain one, secure database.

» Suitability for a wide range of curriculum structures, both in the UK and around the world.

» Adaptability for any language, so it can be used globally.

With access to 3sysACADEMIC and our dedicated support teams, routine MIS activities can be completed more effectively and efficiently at your school, with important, up-to-date information always available when you need it.

This means you have the time and tools to concentrate on what is really important; improving young minds and providing a pathway to a successful future.

Find out more

For more information about other products and services available from WCBS, including passFINANCE / schoolADMIN (PASS), WCBS schoolPORTAL, WCBS API, MIS Link and HUBapply, and training and bespoke options, visit www.wcbs.co.uk.

3sysACADEMIC Online Help Tips and Tricks

3sysACADEMIC Online Help has been created to help users at all levels find out how to use 3sysACADEMIC, supporting them to become more adept at using the software and getting the most out of it.

To access the *3sysACADEMIC Online Help*, click ? at the top of any screen in the software. The *3sysACADEMIC Online Help* appears in a separate tab, so you can return to the software at any time by clicking on the relevant tab.

For key *Online Help* tips and tricks, see:

» "Searching 3sysACADEMIC Help Online" below.
» "Using Menus in the Online Help" below.
» "More Details" on the facing page.
» "Expanding Images" on the facing page.

Searching 3sysACADEMIC Help Online

SEARCHING 3sysACADEMIC HELP ONLINE

To begin with, the easiest way to find conceptual information about a 3sysACADEMIC module / function or how to undertake a specific task using the software is to search the *Online Help* for key words or phrases.

You will find **Search** bars at the top of each screen and on the *3sysACADEMIC Online Help* home page.
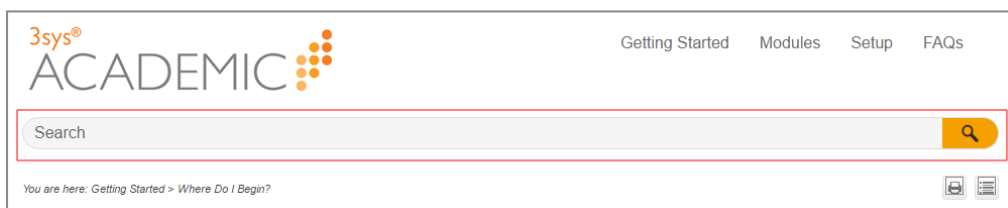
Enter your search criteria and click 🔍 to see a list of pages that may help answer your query. Click on a result to go to that page.

> **Note:** The *Online Help* search engine widens / extends the search the more criteria you enter .

Using Menus in the Online Help

USING MENUS IN THE ONLINE HELP

You can also find information via the *Online Help*'s drop menus. At the top of each screen is a list of menu options reflecting the structure of the software and providing easy access to specialist sections for new users ('Getting Started') and System Administrators ('Setup').
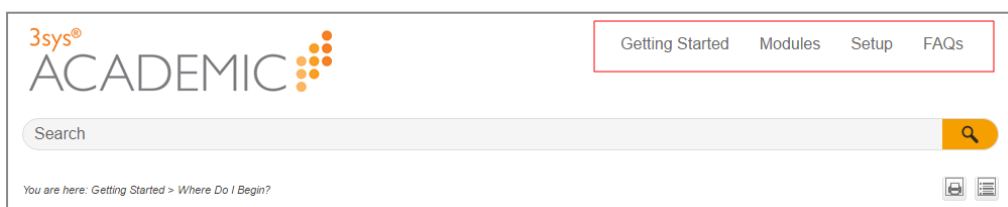
Getting Started provides essential information for new users or those who have not used the software recently and need to refresh their knowledge. **Modules** includes details about each 3sysACADEMIC module and how to use and configure each module / function. **Setup** covers how to find information about how to set up 3sysACADEMIC ready for use, while the **FAQs** section contains answers to users' questions.

To access the information, hover your mouse over a heading to see a menu of options. Repeat this sequence and click on the heading you want when it appears.

Example: In this example, the user has hovered over **Modules**, then **Academic Management** and is about to click on **Baselines Module**.
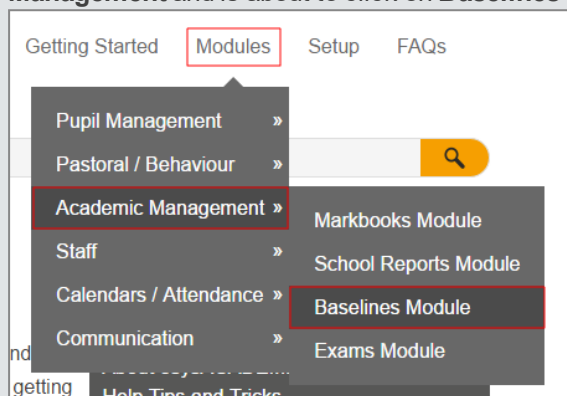
Note: If you cannot see the *3sysACADEMIC Online Help* menu options at the top of your screen, they may be minimised. Click 🟧 in the top right-hand corner of the screen to expand the menu.

More Details

MORE DETAILS

When reading pages in *3sysACADEMIC Online Help*, look out for expanding headings and **More Details...** options. These normally have arrows next to them, e.g. ▶ or ⊙. When you click on the text, it expands to show more information about the topic or how to complete fields. (In the PDF guides, these sections are expanded automatically.)

Note: Click on 🟦 in the top right-hand corner under the **Search** bar to expand or contract all the expanding text sections on a screen.

Expanding Images

EXPANDING IMAGES

If you click on a thumbnail image in the *3sysACADEMIC Online Help*, a full size image appears, enabling you to see the screen or dialog in more detail. To minimise the image, click on it again.

Contact Us

If you need any help or support, get in touch with our helpful team. We are always here if you need us.

Please feel free to contact us in the following ways:

CALL OR EMAIL SALES OR YOUR ACCOUNT MANAGER ON

Call: +44 (0) 1458 833 344 (Option 3)

Email: sales@wcbs.co.uk

LOOKING FOR TECHNICAL SUPPORT?

Call: +44 (0) 1458 833 055

Email: support@wcbs.co.uk

Visit our Customer Centre: Go to www.wcbs.co.uk and click **SIGN IN**.

WANT TO FIND OUT ABOUT TRAINING OPPORTUNITIES?

Call: +44 (0) 1458 833 344

Email: trainingevents@wcbs.co.uk

Navigating 3sysACADEMIC

CHAPTER 2

This chapter discusses the following:

About Navigating 3sysACADEMIC

The 3sysACADEMIC workspace has been designed to simplify completing a range of essential MIS tasks quickly and efficiently. Before you begin using the software, spend some time exploring the software and finding your way around.

Key workspace areas

The key areas of the workspace you should familiarise yourself with are:
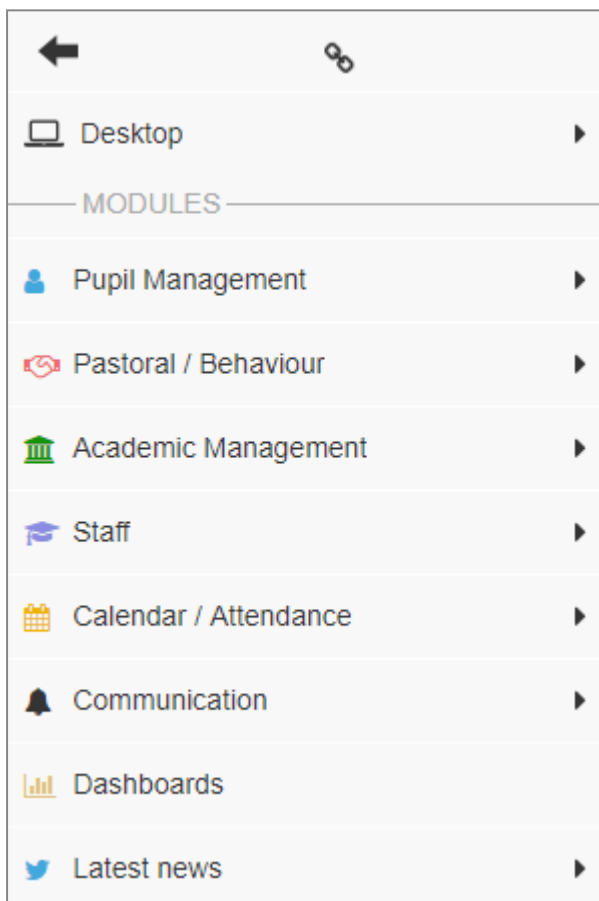
THE HEADER ROW

The header row appears at the top of every 3sysACADEMIC screen and provides links to useful functions, such as the **Search** field, **Setup** options and the *3sysACADEMIC Online Help*.

For more information, see "About the Header Row" on page 15.

THE NAVIGATION MENU

The **Navigation** menu appears on the left-hand side of each screen.

Via the **Navigation** menu, you can access:

» **Desktops** - Desktops are additional home page-type screens which help users access modules relevant to particular roles or functions. For more information, see "About Desktops" on page 31.

» **History** - Click ⬅ to see a list of links to items you have viewed recently, making returning to them straightforward.

» **Links** - Click 🔗 to open your list of quick links. For details of how to set up your links, see "About Custom Links" on page 81.

» **Modules and Functions** - Modules include **Pupil Management**, **Pastoral / Behaviour**, **Academic Management**, **Staff**, **Calendar / Attendance** and **Communication**. For more information, see "About the Navigation Menu" on page 16.

» **Data Dashboards** - Data Dashboards display useful graphs and charts, such as pupil counts.

» **Latest News** - Click this option to open our official WCBS Customer Care Twitter feed. This provides easy access to support and product information updates.

If you are using a tablet to access 3sysACADEMIC, the menu may be minimised. You can also choose to minimise the menu by clicking ◁. To expand the menu again, click ▷.
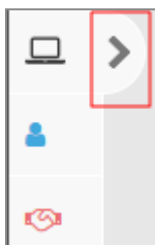
THE HOME PAGE

Users can navigate 3sysACADEMIC from their home page. It is the first screen you see when you log in and is usually tailored to schools and specific users by the System Administrator. More advanced users can alter their own home pages, however. For more information, see "About the Home Page" on page 19.

REFINE SEARCH PANEL

At the top of many screens there is a **Refine Search** panel which allows you to filter the records in that section based on relevant criteria. Complete one or more fields and click **Search**.

> **Note:** If you cannot see this section in the software, it may be minimised. Click ▶ next to the relevant heading to expand it.

VIEWS

Where appropriate, some modules and functions include a **Views** drop list which allows you to filter records and save searches for repeated use. This appears at the top of the screen, above the **Refine Search** panel. For more information, see "About Views" on page 46.

About the Header Row

The header appears on each 3sysACADEMIC screen and provides links to a number of helpful functions and resources.
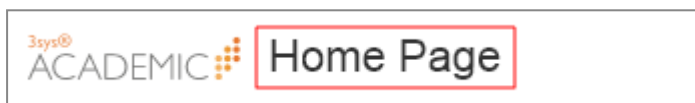
When minimised for smaller screens, it appears as:

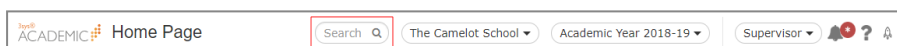The header incorporates features including:

THE SCREEN NAME

The screen name appears beside the logo on the left-hand side of the header, ensuring that you know exactly where you are in the software.

SEARCH FIELD

In the **Search** field, type the key word(s) that you would like to filter by and click.

If the header is minimised, click to open the **Search** field. To close this **Search** field and return to the minimised header, click.

SCHOOL AND ACADEMIC YEAR DROP LISTS

These drop lists allow you to move easily between records for different schools within your organisation and years. They are located side-by-side in the header. Click and select which school and academic year you would like to explore.
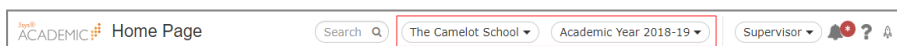
USER DROP LIST

The **User** drop list shows the name of the current / logged in user. Click to access **Setup** or to sign out of the software. **Setup** includes the **My Account**, **Change My Password** and **Custom Links** screens, as well as system administration options. For more information, see "About My Settings" on page 78.
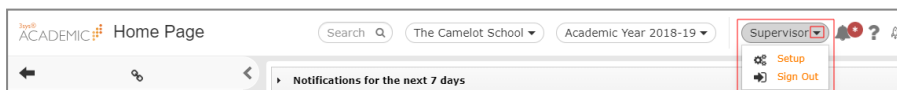
NOTIFICATIONS ICON

Click to see a **Notifications** popup. When there are notifications waiting for you, an alert appears with this icon, i.e. .

HELP ICON

If you would like advice or guidance on using 3sysACADEMIC, click to access the *3sysACADEMIC Online Help*. For more information, see "3sysACADEMIC Online Help Tips and Tricks" on page 8.

CUSTOMER CENTRE LINK ICON

To access our Customer Centre directly from the software, click . For more information about this useful resource, see "Support Services " on page 6.

About the Navigation Menu

The left-hand, navigation menu includes links to each of the different modules / functions available to you in 3sysACADEMIC. Which modules appear depends upon the package your school has purchased and what your user settings allow you to access.
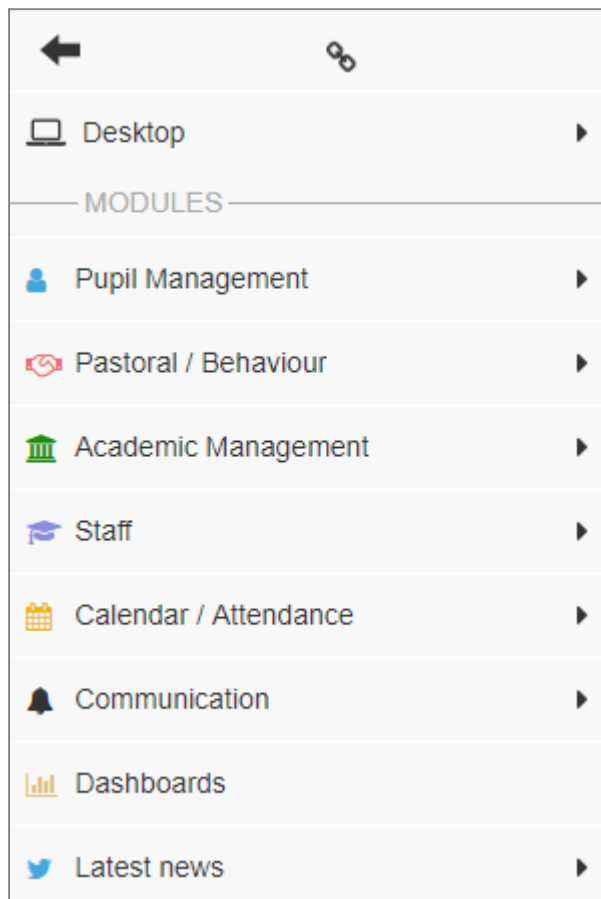
Note: The options you see depend upon the permissions set by your System Administrator.

To expand an option, click ▶ next to it.
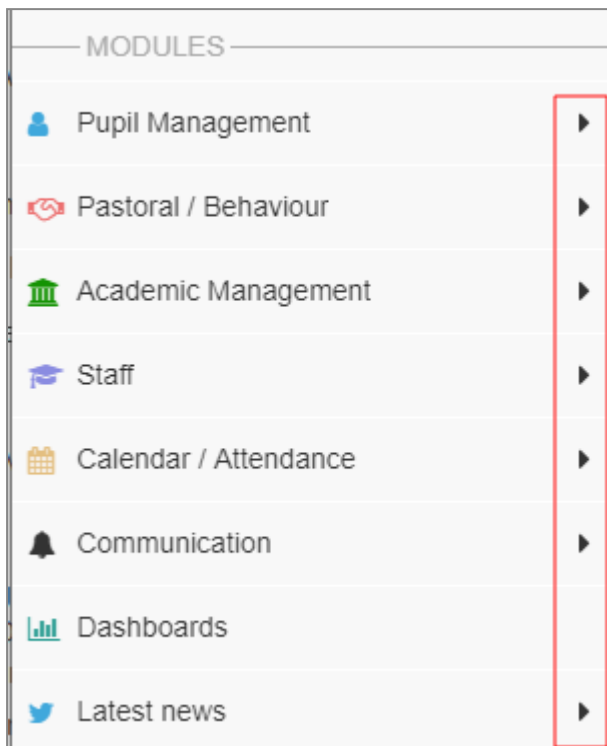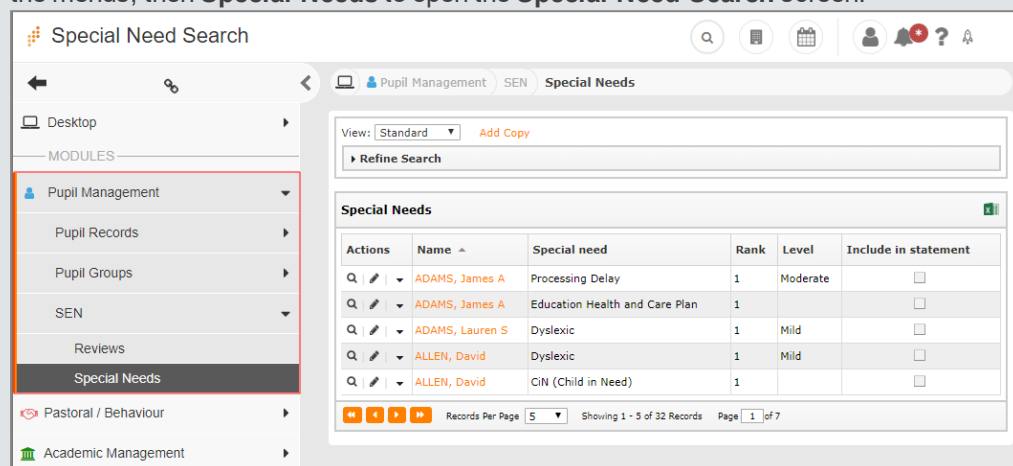
When a menu is expanded, an orange bar appears along its left-hand side.
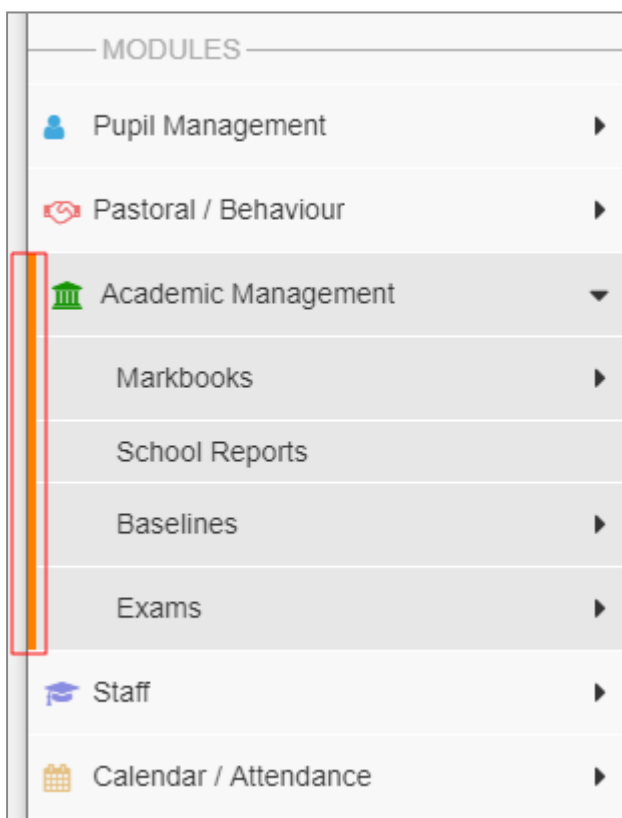
Each ▶ indicates that you can see more options, e.g. if you click **Markbooks**, **Baselines** or **Exams**.

When you have selected a module / function and the relevant screen is opened, it appears dark grey in the **Navigation** menu, ensuring that you know exactly where you are in the software.

Example: In this example, the user has clicked on **Pupil Management** and **SEN** to expand the menus, then **Special Needs** to open the **Special Need Search** screen:

About the Home Page

Users can navigate 3sysACADEMIC from their home page. It is the first screen you see when you log in and features a range of widgets. A widget is a mini-application which performs a very specific task, such as showing you your calendar, a list of absentees from your form group or a chart of outstanding reports you have to complete. System Administrators select which widgets should appear on each home page, tailoring home pages to schools and specific users.

> **Note:** Advanced users may be given access to manage their own home pages and desktops. If users have been granted this access, they can add, edit and create globally available and / or personal home pages / desktops.

> **Note:** The options you see depend upon the permissions set by your System Administrator.

About Available Widgets

Widgets represent a block of data within 3sysACADEMIC.

> **Note:** The following widgets are appropriate for any user: **Favourite Reports**, **Absences All**, **Special Needs**, **My Searches** and **Notifications for the next 7 days**. The remaining widgets detailed below are only appropriate for teaching staff, and as such the relevant schoolADMIN (PASS) user record must be linked to a teaching member of staff for data to be returned within the widget. (This link is optional in schoolADMIN (PASS), as not all staff are teachers.) If a teacher-specific widget is added against a non-teaching member of staff, then data will not be displayed within it.

The available widgets include:

Widget	Action
Favourite Reports	Lists Report Builder templates which have been marked as favourites by the user (if they have the required permission settings) or by the System Administrator.
Absences - My Current Lesson	Draws from the timetable, current time and today's registration data to list pupils who should be absent from the user's current lesson.
Absences - My Form	Lists pupils in the user's form (if they are a Form Tutor) who have been marked as absent at today's morning or afternoon registration.
Absences - My House	Shows which pupils in a user's house (where they are a House Master / Mistress) have been marked absent at today's morning or afternoon registration.
Absences - My Form Year	Designed to show Heads of Year which pupils in the user's form year were marked absent at today's morning or afternoon registration.
Absences - My Section	Lists pupils in the user's school section (where the user is a Head of Section) who have been marked absent today at morning or afternoon registration.
Absences - All	Details ALL pupils who have been marked absent at this morning or this afternoon's registration.

Widget	Action
Calendar	Shows the user's timetable. Attendance, subject set inquiry and Markbook functions can be launched from the calendar.
Markbooks	Displays a summary of 'outstanding' Markbook data, i.e. Markbook data which has not been marked as 'Complete'. It also displays a summary of completed Markbook entries. The completed and outstanding Markbook entries are clearly distinguished by the use of different colours.
School Reports	Displays a pie chart showing outstanding school report entries and provides a shortcut to writing reports, via clicking on the relevant sectors within the pie chart.
Subject Set	Lists all pupils in the user's current lesson, with a summary of today's attendance and a link to each pupil's full record.
Special Needs	Provides a breakdown of the SEN requirements of pupils in the user's current lesson.
My Searches	A configurable widget which allows users to access a variety of information.
Notifications for the next 7 days	Displays notifications for the next seven days.

For further information, see:

» "Accessing your Home Page" below.
» "Creating a Home Page" on the facing page.
» "Editing a Home Page" on page 27.
» "Deleting a Home Page" on page 29.

Accessing your Home Page

HOW TO ACCESS YOUR HOME PAGE

Do ONE of the following:

» Log in to 3sysACADEMIC. Your home page is the first screen that appears.
» If you are using the software, click on the logo in the top, left-hand corner of the screen.

Creating a Home Page

HOW TO CREATE A HOME PAGE

> **Note:** The options you see depend upon the permissions set by your System Administrator.

1. Go to the **User** drop list in the **Header** and select **Setup**.
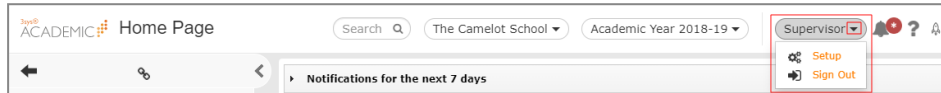
The **Users Detail** screen appears.

2. Go to **Desktop Management > Home Pages**.

The **Home Pages** screen appears.
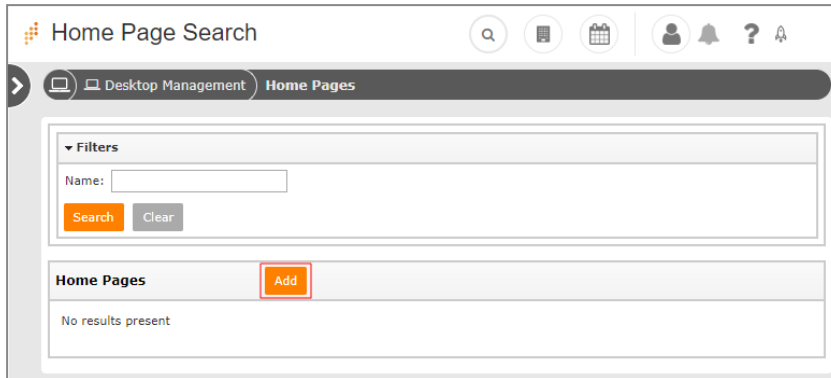
3. Click **Add**.

The **Home Page Designer** screen appears.
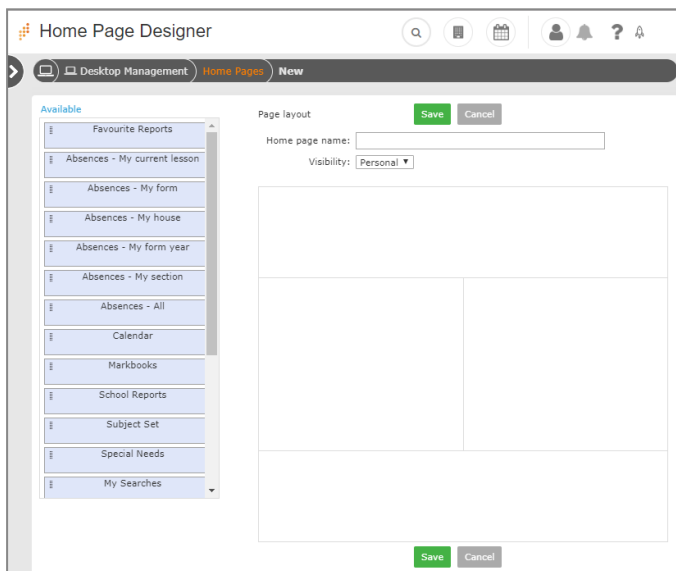
4. Complete the **Home Page Name** field.
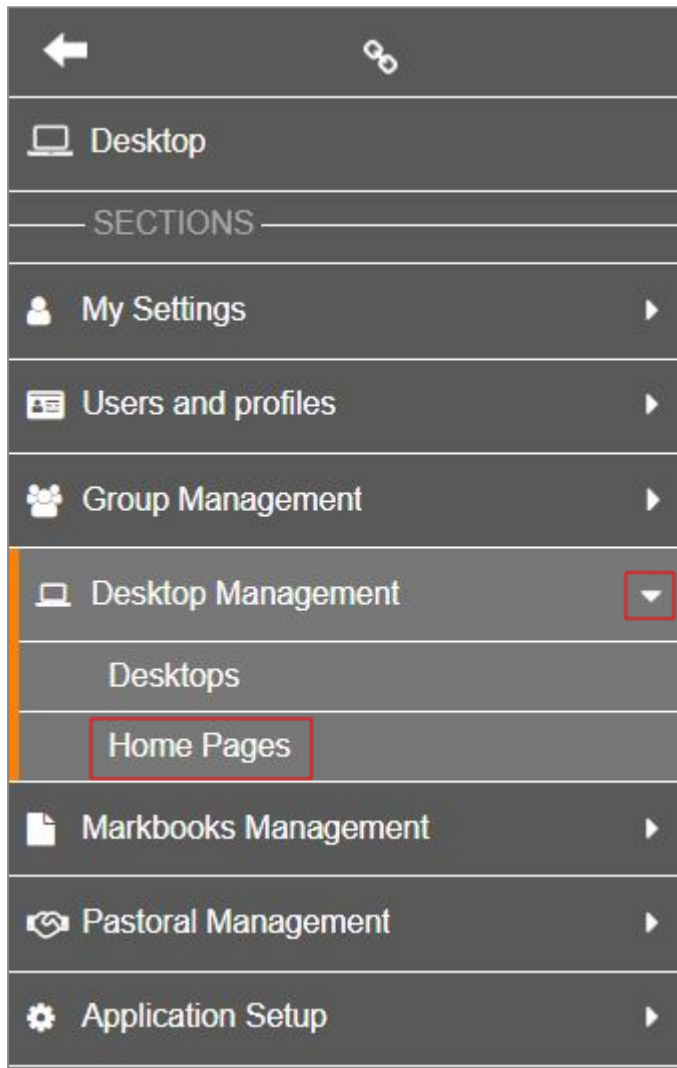
5. Using the **Visibility** drop list, select 'Personal' if only you should be able to see this home page, OR 'Global' if multiple users can access it.

> **Note:** If the visibility for the home page is set as 'global', then only those users whose profile allows them to access the desktop that the home page is associated with will be able to view it.

> **Note:** The options you see depend upon the permissions set by your System Administrator.

6. Design your home page layout by dragging functions or 'widgets' from the **Available** list on the left-hand side of the screen and dropping them into the blank **Page Layout** on the right-hand side.

More details: For details regarding the available widgets, see "About Available Widgets" on page 19.
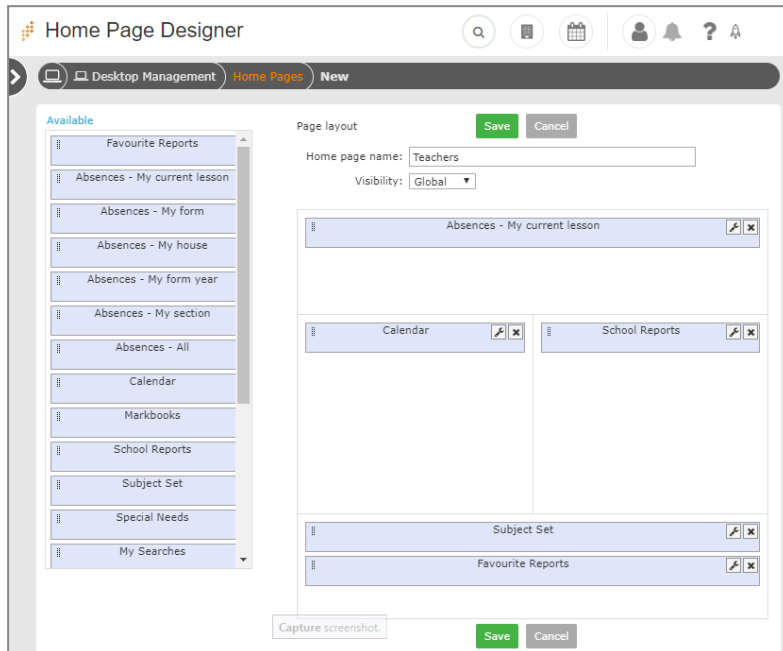
> **Note:** If you add a widget in error, click [x] to remove it.

7. (Optional) Edit the widgets' size and colour, and set whether or not a widget is removed from the home page when there is no relevant data to show.

More details...

a. Click [✎] in the widget you would like to edit.

The **Options** dialog appears.
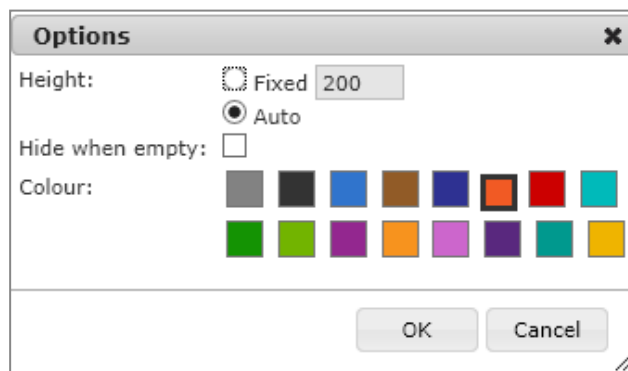
b. State a fixed height for the widget on your home page OR check **Auto** for the size to adjust according to the content.

c. Select the **Hide when empty** check box to remove the widget from the home page when there is no relevant data to show.

d. Select a coloured square to colour code the widget.

e. Click **OK**.

8. (Optional) Set specific options for the **Markbooks** widget.

More details...

The **Markbooks** widget has extended functionality that enables you to control which Tasks appear within the widget. You can restrict Tasks by Task Profiles and who the Tasks are for. The **Order By** drop lists determine the order in which Tasks are displayed within the widget. If you tick the **Group tasks** check box, the ordered list of Tasks is also grouped by the option selected in the first **Order By** drop list.

You can choose to include the **Markbooks** widget on a home page more than once, with each one configured to display different Task Profiles.

Example: In this example, the user has selected to order by 'Task Date' and ticked the **Group tasks** check box, so the Tasks have been ordered by date and are also grouped within dates. (These dates expand to show the relevant Tasks, as shown in the following screenshot.)

Main Marker				General
Pupil Group	**Task**	**Task Date**	**Required**	**Outstanding**
▼ 13/02/2020 (3)			21	0
English2	GESM Classwork	13/02/2020	7	0
English2	GESM Coursework	13/02/2020	7	0
English2	GESM Homework	13/02/2020	7	0
▶ 17/02/2020 (4)			49	3

9. (Optional) Set specific options for the **Favourite Reports** widget.

More details...

The **Favourite Reports** widget enables you to specify that the reports displayed within the widget are grouped by report type.

10. (Optional) Set specific options for the **Calendar** widget.

More details...

The **Calendar** widget enables you to specify which timetable is used to display timetable data for this particular widget. You can include more than one **Calendar** widget within a home page.

11. (Optional) Set specific options for the **My Searches** widget.

More details...

The **My Searches** widget enables you to make selections so that you can access a specific view easily from the home page. For more information about views, see "About Views" on page 46.

12. Click **Save**.

Editing a Home Page

HOW TO EDIT A HOME PAGE

> **Note:** The options you see depend upon the permissions set by your System Administrator.

1. Find the home page you would like to edit.

   More details...

   a. Go to **Setup > Desktop Management > Home Pages**.

   The **Home Page Search** screen appears showing a complete list of existing home pages.

   > **Note:** You can re-order a grid by single-clicking on fields in the header row. If ⬆ is displayed, the list is ordered from A to Z / lowest to highest. If ⬇ appears, the list is ordered from Z to A / highest to lowest.

   b. Enter all or part of the home page name into the **Name** field at the top of the screen, and click **Search**. Your search results populate the grid.

   c. (Optional) Use the **Page** icons beneath the grid to navigate between pages of records and change the number of records shown per page.

2. In the **Actions** column, click ✎ next to the home page you would like to change.

The relevant **Home Page Designer** screen appears.
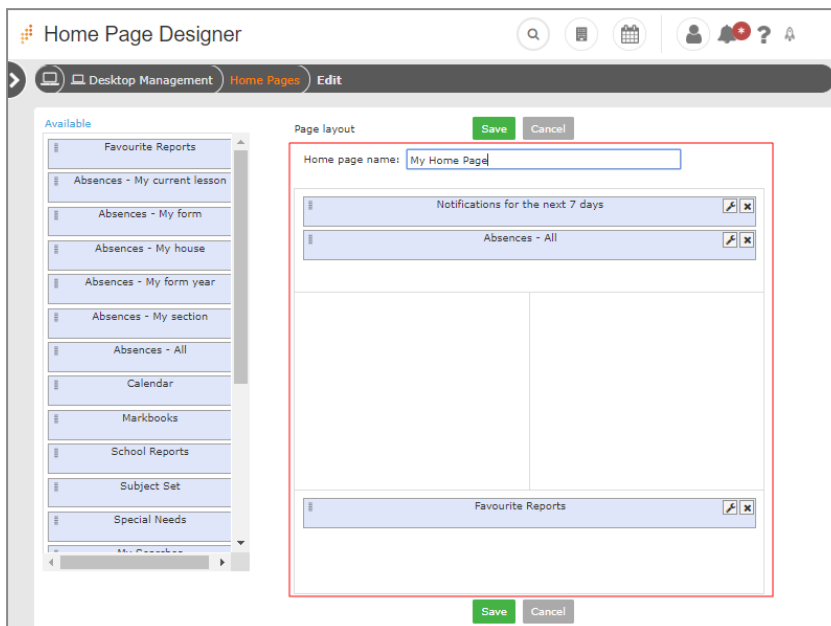
3. Design your home page layout by dragging functions or widgets to where you want them on the **Page Layout** on the right-hand side of the screen. New widgets can be added from the **Available** panel on the left-hand side.

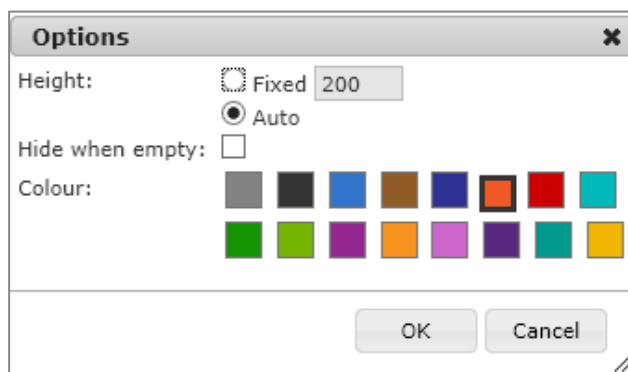> **Note:** If you add a widget in error, click ⊠ to remove it.

More details: See "About Available Widgets" on page 19.

4. (Optional) Edit the widgets' size and colour, and set whether or not a widget is removed from the home page when there is no relevant data to show.

More details...

a. Click 🔧 in the widget you would like to edit.

The **Options** dialog appears.

b. State a fixed height for the widget on your home page OR check **Auto** for the size to adjust according to the content.

c.   Select the **Hide when empty** check box to remove the widget from the home page when there is no relevant data to show.

d.   Select a coloured square to colour code the widget.

e.   Click **OK**.

5.   (Optional) Make the necessary changes to the following widgets: **Markbooks**, **Favourite Reports**, **Calendar** and **My Searches**.

More details: If you are unsure how to do this, see steps 7 to 11 of "Creating a Home Page" on page 21.

6.   Click **Save**.

Deleting a Home Page

HOW TO DELETE A HOME PAGE

> 📋 **Note:** The options you see depend upon the permissions set by your System Administrator.

1.   Find the home page you would like to delete.

More details...

a.   Go to **Setup > Desktop Management > Home Pages**.

The **Home Page Search** screen appears showing a complete list of existing home pages.

> 📋 **Note:** You can re-order a grid by single-clicking on fields in the header row. If ⬆ is displayed, the list is ordered from A to Z / lowest to highest. If ⬇ appears, the list is ordered from Z to A / highest to lowest.

b.   Enter all or part of the home page name into the **Name** field at the top of the screen, and click **Search**. Your search results populate the grid.

c.   (Optional) Use the **Page** icons beneath the grid to navigate between pages of records and change the number of records shown per page.

2. In the **Actions** column, click 🗑 next to the relevant home page.

    The **Confirm Home Page Delete** screen appears.

    > 📋 **Note:** You cannot delete a home page that is linked to one or more desktops.

3. Click **Delete**.
    The relevant home page is deleted, and you are returned to the **Home Page Search** and **Home Pages** screen with the relevant home page removed from the grid.

About Desktops

Desktops are supplementary home page-type screens which help you access widgets relevant to specific roles or functions. For example, if you have a range of responsibilities, e.g. teaching, administrative or managerial, it may be more practical to create supplementary desktops for each role to keep the number of widgets on your home page more manageable.

> **Example:** A Head of Year profile's home page could include more generic widgets, such as calendar and notifications, while an additional 'Head of Year' desktop could provide widgets summarising information about pupils in their year.

The following screenshot shows an example desktop for a teacher. It has been designed using widgets that show details of the user's calendar, subject set, lesson and form absences, outstanding school reports and favourite reports.

The following screenshot is an example desktop for a Director of Studies, which shows the user's forthcoming notifications, their calendar / diary, report completion progress, markbooks and information about pupil detentions, attendance and absences.

Desktops are usually designed and allocated to users by System Administrators.

> **Note:** Advanced users may be given access to manage their own home pages and desktops. If users have been granted this access, they can add, edit and create globally available and / or personal home pages / desktops.

For further information, see:

» "Accessing Desktops" on the facing page.
» "Creating Desktops" on page 34.
» "Editing Desktops" on page 35.
» "Deleting Desktops" on page 36.

What are widgets[1]?

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[1] A widget is a mini-application which performs a very specific task, such as showing you your calendar, a list of absentees from your form group or a chart of outstanding reports you have to complete.

Accessing Desktops

HOW TO ACCESS A DESKTOP

» In the left-hand **Navigation** menu, click [▸] next to **Desktop** and select the desktop you would like to use from the list that appears.
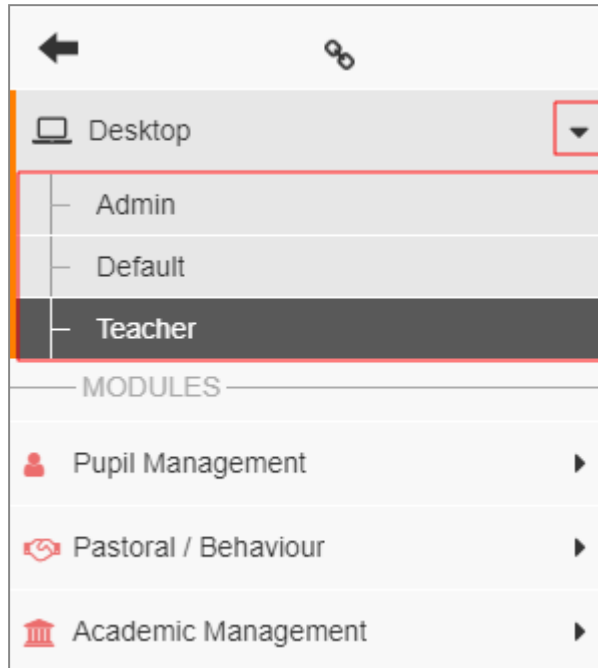
The screen updates automatically.

Creating Desktops

HOW TO CREATE A DESKTOP

1. Go to **Setup > Desktop Management > Desktops**.

   The **Desktop Search** screen appears.

2. Click **Add**.

   The **Edit Desktop** screen appears.

3. Complete the **Name** field and use the **Home page** drop list to select the home page users should see.

   > **Note:** For more information about how to create a home page, see "Creating a Home Page" on page 21.

4. (Optional) To make this desktop available to other users, tick the **Global** check box.

5. Click **Save**.

Editing Desktops

HOW TO EDIT A DESKTOP

> **Note:** For information about how to change the home page that appears when a desktop is selected, see "Editing a Home Page" on page 27.

1. Find the desktop you would like to edit.

    More details...

    a. Go to **Setup > Desktop Management > Desktops**.

   The **Desktop Search** screen appears.

    b. In the **Title** field, type all or part of the title of the desktop you want.

    c. Click **Search**.

    The **Desktops** grid is updated appropriately.

2. In the **Actions** column, click ✎ next to the desktop you would like to change.

    The relevant **Edit Desktop** screen appears.

3. Make the required changes.

4. Click **Save**.

Deleting Desktops

HOW TO DELETE A DESKTOP

1. Find the desktop you would like to delete.

   More details...

   a. Go to **Setup > Desktop Management > Desktops**.

      The **Desktop Search** screen appears.
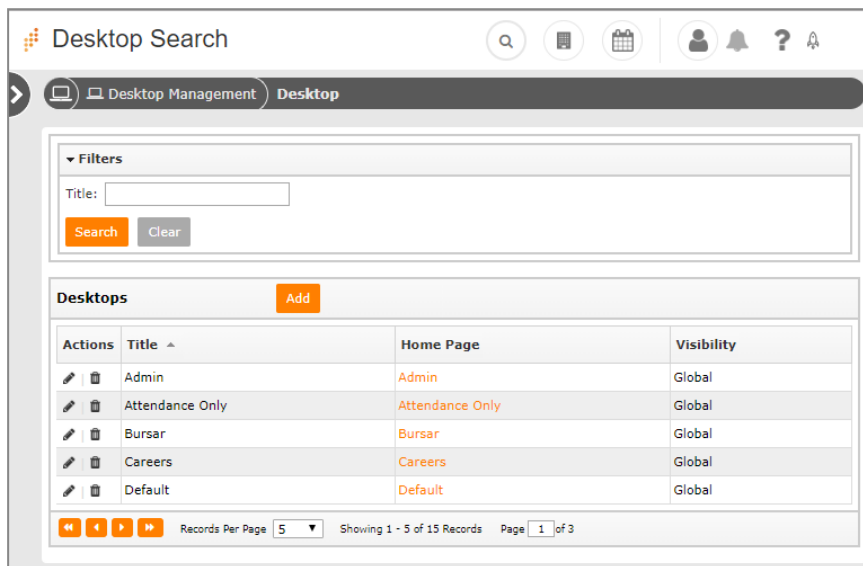
   b. In the **Title** field, type all or part of the title of the desktop you want.

   c. Click **Search**.

      The **Desktops** grid is updated appropriately.

2. In the **Actions** column, click 🗑 alongside the name of the desktop that you would like to delete.

   The **Confirm Desktop Delete** screen appears listing the profiles linked to the desktop.
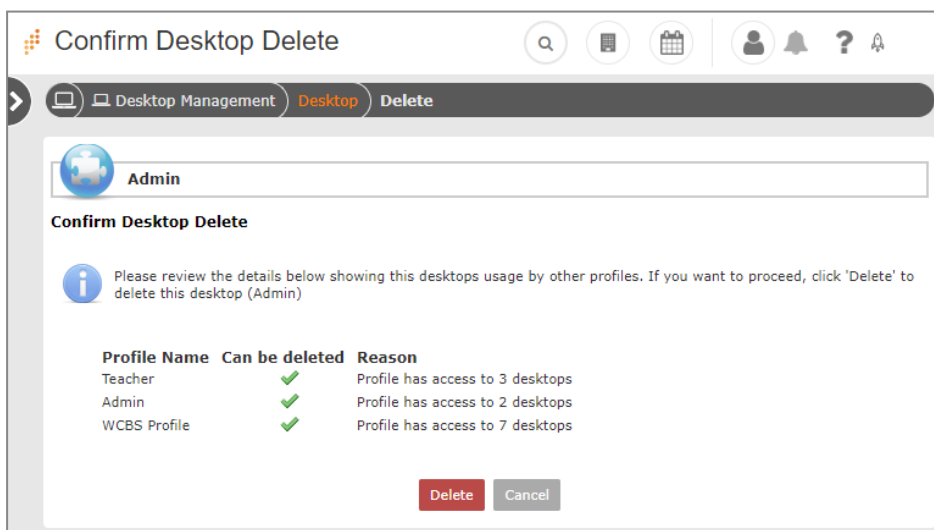
> **Note:** User profiles MUST be linked to at least one desktop. If a profile is ONLY linked to one desktop, that desktop cannot be deleted. To link a user profile to a different desktop, contact your System Administrator.

3. Do ONE of the following:

   » If you can delete this desktop, click **Delete**.

   » If you cannot delete this desktop, click **Cancel** and contact your System Administrator.

   Once the desktop is deleted, the **Desktop Search** screen reappears.

This page has been left blank intentionally.

Grids and Dashboards

This chapter discusses the following:

CHAPTER 3

About Grids and Dashboards

Grids and dashboards appear throughout 3sysACADEMIC. In simple terms, they are tables used to present, add or extract information through the system.

For details, see:

» "About Grids and Dashboards Presenting Data" below.

» "About Grid Row Colour Coding" on the facing page.

» "Exporting Grid / Dashboard Data to MS Excel" on the facing page.

» "About Pupil Dashboards" on page 42.

About Grids and Dashboards Presenting Data

The aim of these grids is to present data in an orderly fashion that makes its interpretation and navigation more straight forward for users. An example of this is the way data is presented on **Search** screens and the **Pastoral Management** dashboard.

> **Note:** You can re-order a grid by single-clicking on fields in the header row. If ▲ is displayed, the list is ordered from A to Z / lowest to highest. If ▼ appears, the list is ordered from Z to A / highest to lowest.

About Grid Row Colour Coding

In newer modules, when editing data in some grids (e.g. the **Pastoral Management** module's **Record Reasons** grid), coloured dots show you each row's status.

	Colour	Indicated
⬜	White	No changes have been made.
🟣	Purple	That this is the row to which you are currently adding data.
🔵	Blue	That this is a newly created row and you have not saved it.
🟡	Yellow	That you have amended this row, but not saved the changes.
🔴	Red	That this row will be deleted when you save changes. The row contents are also crossed through with a red line.

Note: This functionality is available in the following module: Pastoral Management.

Exporting Grid / Dashboard Data to MS Excel

When you see 📊 above a grid or dashboard, it means that its contents can be exported and saved as an MS Excel file.

HOW TO EXTRACT GRID DATA AS AN MS EXCEL FILE

a. Click 📊.

   A popup appears asking what you would like to do with the file.

b. Do ONE of the following:

   » Click **Open** to open the spreadsheet.

   » Click **Save** to save the file to your computer and **Open** to see it once it has been downloaded.

   » Click ▾ and **Save as** to save the spreadsheet in your preferred location.

   » Click ▾ and **Save and open** to save and automatically open the file.

   » Click **Cancel** or ☒ to abort the export.

About Pupil Dashboards

Pupil Dashboards enable you to view key information about individual pupils in one, easy-to-view popup window without having to access the full record.

Pupil Dashboard Tabs

The Pupil Dashboard consists of a number of tabs, each showing data on a specific topic. Every tab shows the pupil's photograph, sex and email address. You can access the pupil's complete record from any tab by clicking **Full Pupil Record**.

> **Note:** If you do not have permission to access sensitive pupil data, you may not see all the data or tabs described below. For example, if you cannot access medical or healthcare information, you will not be able to see the **Medical** tab. In addition, if there is no relevant information for the pupil, widgets on the Pupil Dashboard do not appear. For example, if the pupil has no special needs, the **Special Needs** tab will not appear.

The tabs can include:

» *Summary tab* - This tab shows key personal data, such as date of birth, contact details (including address and parents' telephone numbers) and email addresses, today's calendar for the pupil, subject sets and notes. You can also view attendance data. A drop list enables you to filter this data for different time periods (day, week, year, etc).

» *Medical tab* - This tab provides the pupil's health number, blood type, recent medical notes, medical requirements and medical contact. The first two lines of each medical note are shown. To see the rest of longer notes, hover your cursor over the text. You can also export the medial notes as an Excel spreadsheet by clicking .

» **Behaviour tab** - This tab shows summaries of the pupil's rewards and sanctions. You can use the drop lists to filter the data by 'All', 'Negative' or 'Positive' and by week, term or year. Click on a record to see more details. To add a new behaviour record from this tab, click **Add Behaviour**.

> **Note:** For more information about adding and managing behaviour records, see the *3sysACADEMIC Behaviour Management User Guide* or the *3sysACADEMIC Online Help*.

» **Pastoral tab** - This tab lists open pastoral records. If you have the relevant permission settings, you can view, edit or delete records from this dashboard.
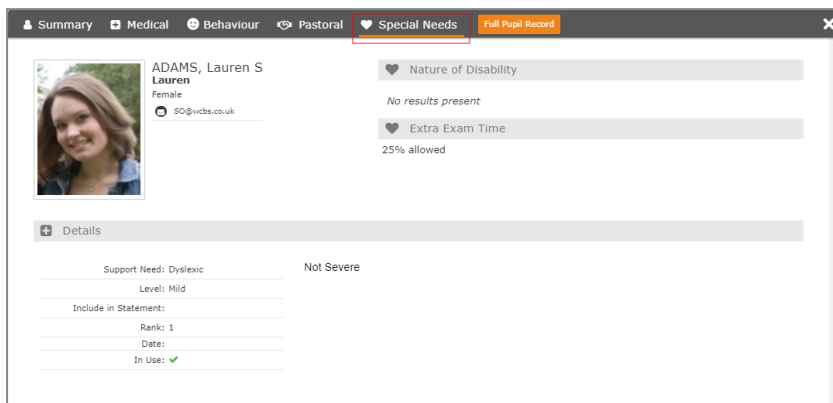

> **Note:** For more information about adding and managing pastoral records, see the *3sysACADEMIC Pastoral Management User Guide* or the *3sysACADEMIC Online Help*.

» *Special Needs tab* - Detailing any disabilities or special educational needs that the pupil has.

Accessing Pupil Dashboards

You can access a Pupil Dashboard from anywhere in 3sysACADEMIC by clicking on the relevant pupil's name. The link is context sensitive, so if you click on a name in the **Pastoral Management** module, you will go directly to **Pastoral** tab.

In addition, you can access the Pupil Dashboard via the following icons on the **Pupils** screen.

	Click on this icon to go to the Pupil Dashboard **Summary** tab for the adjacent pupil.
	Click on this icon go to the Pupil Dashboard **Medical** tab for the adjacent pupil.
	Click on this icon to go to the Pupil Dashboard **Special Needs** tab for the adjacent pupil.

Filtering Grids using Views

CHAPTER 4

This chapter discusses the following:

About Views

3sysACADEMIC has a powerful and configurable search feature, called 'Views', that enables your school to configure the criteria available within search screens, and to sort and group the data in different ways.

For selected grids of information presented in 3sysACADEMIC, users can use existing views or create alternative search views to filter, sort and group the data. These search views can be saved for later use, either by the person that created them or by other users.

> **Note:** You can only create and edit views for others if you have the relevant permission settings. All users can create views for their personal use.

Views are available wherever you see the **View** drop list at the top of a screen.

Example: Views are available on various screens, including the **Pupils** screen.

Select a view using the **View** drop list and the page's grid refreshes with the relevant data.

As a System Administrator, or as a user with the relevant permissions, you are able to set the fields by which users are able to search for specific records. These fields are then included as columns in the search results grid.

Default 'standard' search views are provided. You are unable to alter the standard views, but you can create your own search views or copy and then edit the standard search views. These views can be saved for later use, either by the person who created them or by other users, if you have the relevant permission settings.

For further information, see:

» "Example: 'Allergies' Search View" on the facing page.
» "Accessing Search Views" on page 48.
» "Adding Search Views" on page 49.
» "Editing Search Views" on page 52.
» "Copying Search Views" on page 53.
» "Deleting Search Views" on page 54.
» "Adding the My Searches Widget to your Home Page" on page 55.

Example: 'Allergies' Search View

For example, in the **Pupil** function, you could define an 'Allergies' search view, in which you specify all those pupils with a known allergy. If you have the required permissions, you could then make this search view visible for other members of staff, ensuring that they also have a quick and easy method of retrieving a list of pupils with known allergies. In the search view, if you include the relevant fields for a range of methods in which pupils are grouped, such as academic houses, boarding houses, forms and years, then staff will be able to filter the list based on these criteria. For example, if a school trip is taking place for a specific form year, one would want to filter the 'Allergies' search view by form year for a complete list of known allergy sufferers.

The following examples show the settings for an 'Allergies' view and what users see when they select the 'Allergies' search view from the **Views** drop list.

Example: Configuring an 'Allergies' Search View

Example: Resultant 'Allergies' Search View with Data

The screenshot below shows the resultant search view. Note that the fields available in the grid are those selected when configuring the view (see the previous screenshot). You are also able to filter the search results displayed by the configured fields. To do this, click ▶ next to **Refine Search** to display the filtering fields and options.

Note: Once a user has created a new search view, it is possible to embed it into a user's home page using the **My Searches Widget**. For details, see "Adding the My Searches Widget to your Home Page" on page 55.

Accessing Search Views

HOW TO ACCESS A SEARCH VIEW

1. Via the **Navigation** menu on the left-hand side of the screen, go to the relevant module or function.

2. Use the **View** drop list at the top of the screen to select the search view you want.

The grid beneath refreshes to show the selected search view's results.

3. Enter further criteria to refine your search results.

    More details

    a. If not already expanded, click ▶ **Refine Search** to display the fields by which you can further restrict your search.

    b. Enter filtering criteria in the relevant fields, and click **Search**. The grid is refreshed to display those records that match the selected view and the data entered in the **Refine Search** fields.

48

Adding Search Views

HOW TO ADD A SEARCH VIEW

1. Via the **Navigation** menu on the left-hand side of the screen, go to the relevant module or function, e.g. **Pupils**.

2. Click **Add** next to the **View** drop list at the top of the screen.

The relevant **Create View** screen appears.

3. Complete the **View name** and **Description** fields.

4. Specify how the search view should filter the records.

   More details...

   a. Use the **New Filter** drop list to select the field you would like to filter by and click **Add**. Additional fields appear beneath the **New Filter** drop list in the **Specify Filters** section of the screen.

   b. (Optional) Repeat step a to select more fields to filter by, as required.

   c. Using the **Operator** drop list for each selected field, choose an option to describe the contents of each field in the required records. Operators include:

   » 'equals', i.e. that the field contains the value specified.

   » 'contains', i.e. that the field includes the value you set plus other content.

   » 'Greater Than', i.e. the field contains a figure or date higher than the value you search for.

   > **Example:** In the example below, the user is looking for records of pupils with allergies, birth dates between '01/09/2006' and '31/08/2007' and who are in 'Jupiter' academic house.
   >
   >

   d. Complete the relevant **Value** field(s) with the required search criteria. You may be able to select this from a drop list or simply type in the relevant value.

   > **Note:** Operators such as 'Is Blank', 'Is Not Blank' and 'Is My Academic House' do not require values to be set.

   e. (Optional) If you would like to search for records with different values in the same field, e.g. pupils who are in 'Jupiter' OR 'Mars' academic houses, click **Add OR Condition** after adding the first filter line. This allows you to specify a second operator and value for the same field, meaning that the software looks for both and presents records containing either of them in the search results grid.

Example: In the example below, the user is looking for pupils with a peanut OR a milk allergy. They have selected the 'Allergy Information' field and added a line stating 'Allergy Information' 'Contains' 'Peanuts'. Next, they clicked **Add OR Condition** and specified 'Allergy Information' 'Contains' 'Milk'. The resultant search view will contain records of pupils with allergies to peanuts, allergies to milk or allergies to both.

5. In the **Select Columns to Display** section, select the columns to display in the view's **Refine Search** section and the search results grid.

More details...

a. In the **Available** list, click on the name of the column you want to highlight.

> **Note:** To select multiple options, hold the CTRL button down on your keyboard as you click on each column name. To select consecutive columns, hold the SHIFT button down on your keyboard and click on the first and last item you want to highlight.

b. Click ▶ to move the highlighted column name(s) to the **Selected** list.

c. (Optional) In the **Selected** list, columns are listed in the order they will appear in the grid when the view is selected. To change the column order, select a column and use the icons to move it in the list. Repeat for other columns, as required.

   » Click ▲ or ▼ to move the column up or down the list.
   » Click ⭱ or ⭳ to move the column to the top or bottom of the list.

6. Use the **Choose Column To Order By** drop lists to select which field to sort the data by and whether it should be in ascending or descending order.

7. (Optional) Use the **Choose Column To Group By** drop list to select which field the results should be grouped by, e.g. form, and whether the list should be in ascending or descending order.

Choose Column To Group By		
Group by column:	▼	▼

8. Set who can see this search view using the **Visibility of View** drop list.

Visibility of View
Visible to: Me ▼

> **Note:** If you do NOT have permission to create 'Global' views, this drop list is unavailable. Please proceed to step 9.

9. Click **Save**.

Editing Search Views

HOW TO EDIT A SEARCH VIEW

1. Via the **Navigation** menu on the left-hand side of the screen, go to the relevant module or function, e.g. **Pupils**.

2. Select the search view you would like to edit using the **View** drop list.

🖥 👤 Pupil Management 〉 Pupil Records 〉 **Pupils**

View: All ▼ Edit Add Copy Delete

▸ Refine Search

Pupils Add Add Event Cre

Actions	☐	Code ▾	Name
🔍 | ✏ | ▾	☐	ZAC002	ZACHARIUS, Amy

> **Note:** You CANNOT edit the **Standard** view. To change it, copy the view first and edit the copy.

3. Click **Edit** next to the **View** drop list. The relevant **Edit View** screen appears.

> **Note:** The options you see depend upon the permissions set by your System Administrator.

4. Amend the search view settings, as required. See "Adding Search Views" on page 49 for details.

5. Click **Save**.

Copying Search Views

HOW TO COPY A SEARCH VIEW

1. Via the **Navigation** menu on the left-hand side of the screen, go to the relevant module or function, e.g. **Pupils**.

2. Select the search view you want to copy from the **View** drop list and click **Copy**.

> **Note:** The options you see depend upon the permissions set by your System Administrator.

The relevant **Copy View** screen appears.

3. Enter a new name and view description. See "Adding Search Views" on page 49 for details.

4. Amend the search view settings, as required. See "Adding Search Views" on page 49 for details.

5. Click **Save**.

Deleting Search Views

HOW TO DELETE A SEARCH VIEW

1. Via the **Navigation** menu on the left-hand side of the screen, go to the relevant module or function, e.g. **Pupils**.

2. Select the search view you want to delete from the **View** drop list.
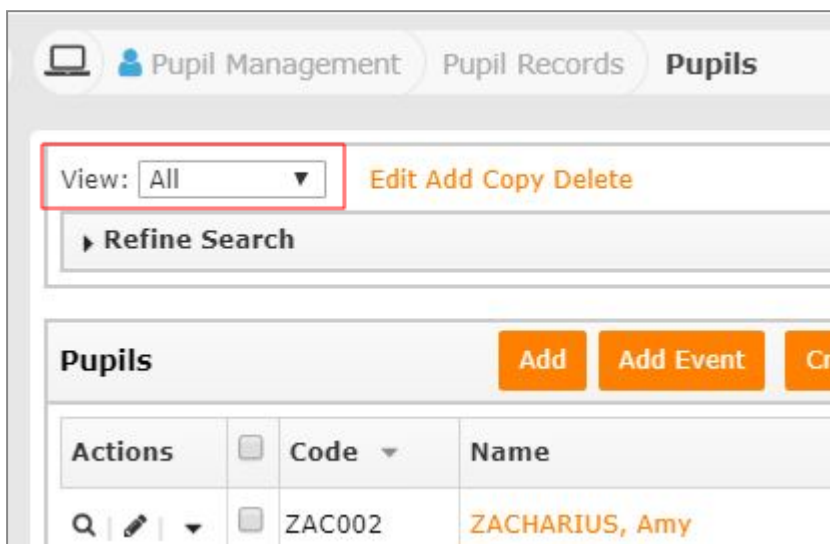
3. Click **Delete** next to the **View** drop list.

> **Note:** The options you see depend upon the permissions set by your System Administrator.

The **Confirm Delete** pop up appears.
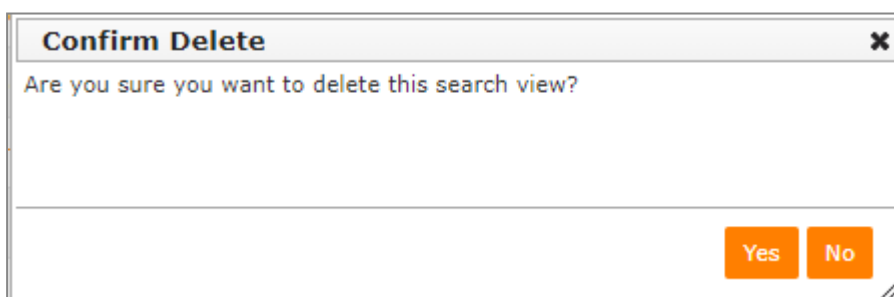
4. If you are sure that you want to delete the search view, click **Yes**.

Adding the My Searches Widget to your Home Page

HOW TO ADD THE MY SEARCHES WIDGET TO YOUR HOME PAGE

1. Go to **Setup > Desktop Management > Home Pages**.

2. Find the home page you would like to update.

   More details...

   a. Go to **Setup > Desktop Management > Home Pages**.

   The **Home Page Search** screen appears showing a complete list of existing home pages.

   > **Note:** You can re-order a grid by single-clicking on fields in the header row. If ▲ is displayed, the list is ordered from A to Z / lowest to highest. If ▼ appears, the list is ordered from Z to A / highest to lowest.

   b. Enter all or part of the home page name into the **Name** field at the top of the screen, and click **Search**. Your search results populate the grid.

   c. (Optional) Use the **Page** icons beneath the grid to navigate between pages of records and change the number of records shown per page.

3. Click ✎ next to the relevant home page.

The **Home Page Designer** screen appears.
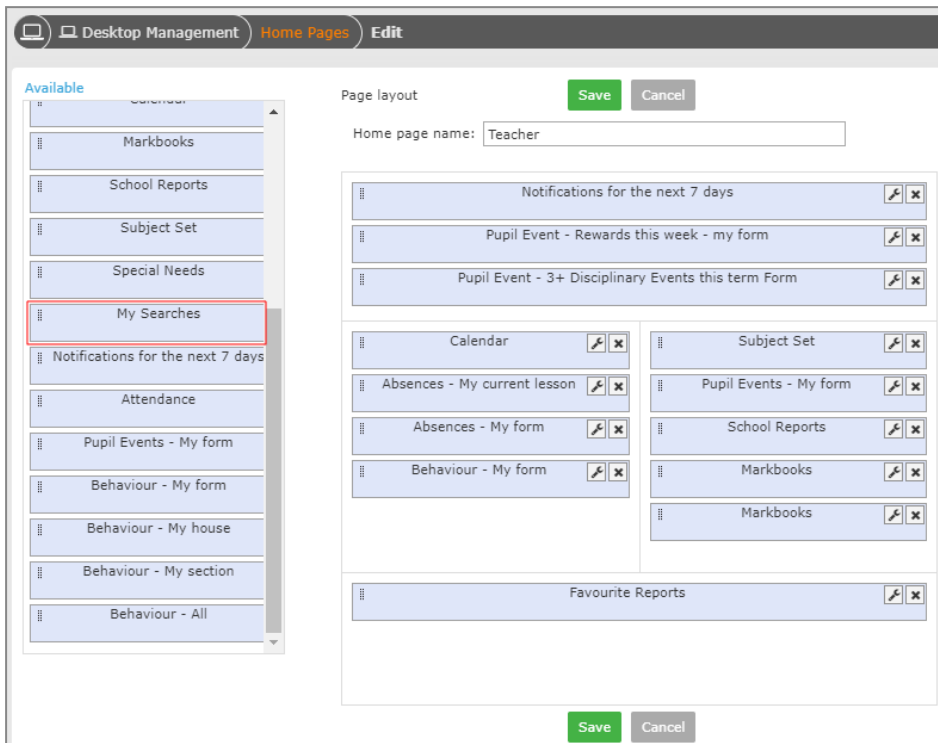
4. Single-click on the **My Searches** widget in the **Available** list and drag it to your preferred location on the **Page Layout** template on the right-hand side of the screen.

The **Options** pop up appears.
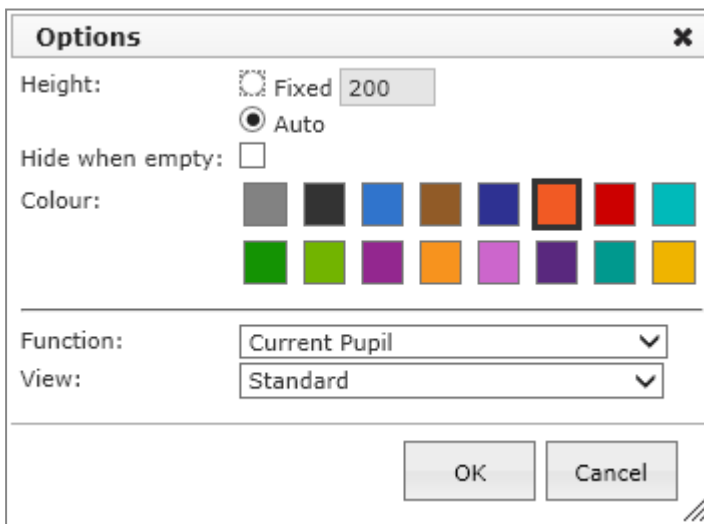
5. Edit the widget's settings.

   More details...

   a. State a fixed height for the widget on your home page OR check **Auto** for the size to adjust according to the content.

   b. Select the **Hide when empty** check box to remove the widget from the home page when there is no relevant data to show.

   c. Select a coloured square to colour code the widget.

   d. Use the **Function** and **View** drop lists to select which search view the widget should link to.

   e. Click **OK**.

6. Click **Save**.

> **Note:** You can add as many **My Searches** widgets to your home page as you like, each representing a different search view.

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Adding Data to 3sysACADEMIC

This chapter discusses the following:

CHAPTER 5

Adding Data to 3sysACADEMIC

Developers at WCBS have created a number of simple ways to add, update and remove data from 3sysACADEMIC which are largely standardised across the software. This means that once you have mastered the basic principles, you will be able to complete a wide range of tasks in any of the modules.

COMPLETING FIELDS

To add information to records in 3sysACADEMIC, you need to complete the fields on the relevant screens. Ways to do this include drop lists, calendar popups, auto complete and search dialogs. For an overview of how to use these, see "Completing Fields" on the facing page.

GRIDS

Grids appear throughout 3sysACADEMIC. In simple terms, they are tables used to present, add or extract information from the system. For more information, see "About Grids and Dashboards" on page 40.

SEARCHING FOR PUPILS

To attach pupils to records using 3sysACADEMIC, you need to select them from drop lists or search for them using special search dialogs. For details about how to do this, see "Searching for Pupils" on page 66.

SEARCHING FOR STAFF

To attach staff to records using 3sysACADEMIC, you need to search for them using special search dialogs. For details, see "Searching for Staff" on page 72.

NAVIGATING PAGES OF SEARCH RESULTS

Records can be listed over several pages. You use the **Page** icons to change the number of records shown per page and to navigate between them:

» Click ◀ or ▶ or on the numbers underneath the grid on the left-hand side to move between pages.

» Click ◀◀ to go to the first page or ▶▶ to go to the last page.

» Use the **Records Per Page** drop list to see more records on each page.

Records Per Page 25 ▾

» Click in the **Page** field and type the number of the page you want. Page 1 of 1

Completing Fields

To add information for records in 3sysACADEMIC, you need to complete the fields on the relevant screens. To make the software user-friendly, functionalities are replicated across the program so that once you learn how to complete one section, you will find you also know how to complete many others.

> **Note:** Improvements and enhancements are made to 3sysACADEMIC with each release. As such, recently updated modules may offer slightly different features. Please see each release's accompanying release notes for more details. These are available from the Customer Centre.

For details on how to:

» Use drop lists and auto complete, see "Drop Lists and Auto Complete" on the next page.

» Select a date and / or time, see "Calendar Popups" on page 63.

» Find and add specific details, such as room numbers or record types, see "Search Dialogs" on page 64.

» Attach electronic files to a record, see "Uploading Files" on page 65.

> **Note:** You MUST complete any mandatory fields marked with a red bar on the left-hand side. If you do not complete a mandatory field, a message appears describing the error and the relevant fields are highlighted. You cannot save records that have empty mandatory fields.
>
> | Pupil Name(s): | |
> | Record Type(s): | |
> | Staff Name: | |
> | Date: | |

Drop Lists and Auto Complete

ABOUT DROP LISTS AND AUTO COMPLETE

A drop list is a list of pre-defined options from which you can select. These options are usually set as part of the software, such as mandatory requirements specified by Government or set by your System Administrator as part of the configuration process.

Drop lists normally appear when you click on an arrow at the end of a field.

Newer modules also allow you to select drop list items using auto complete. Begin typing the option you want into a field and select it from the list that appears.

> **Note:** This functionality is available in the following module: Pastoral Management.

HOW TO USE A DROP LIST OR AUTO COMPLETE

To select an item in a drop list, do ONE of the following:

» Click ⌄ and click on an option in the list that appears.

» Click in the field and type all or part of the item you require. Select from the items that appear in the drop list. This is known as auto complete.

Calendar Popups

ABOUT CALENDAR POPUPS

Calendar popups are an alternative to typing a date into a field and are used throughout 3sysACADEMIC.

HOW TO USE A CALENDAR POPUP

Do ONE of the following:

» Click in the field and click ☒ to delete the existing date. Type the required date in the field using the format DD/MM/YYYY.

» Click 🗓 to display a **Calendar** popup and select your preferred date. (To go to other months, use the arrows in the top left and right-hand corners of the calendar OR use the month and year drop lists.)

◀	Mar ▼		2020 ▼			▶
Mo	Tu	We	Th	Fr	Sa	Su
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					
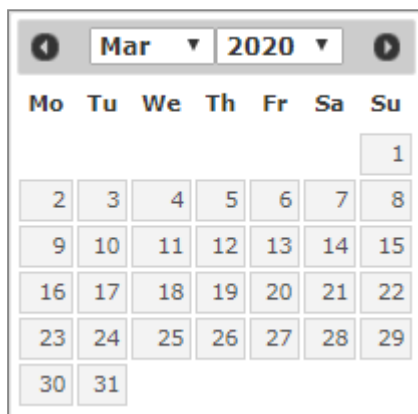
> **Note:** You MUST click on a date in the calendar to select it.

Search Dialogs

ABOUT SEARCH DIALOGS

There are a variety of search dialogs included in 3sysACADEMIC to help you complete fields with information such as staff names, pupil names, rooms, subjects and more. If a field has ⌕ or [Search] at the end of it, then it has an associated search dialog. Although each dialog is tailored to the data you are searching, the basic principles remain the same throughout.

For specific information about staff and pupil name search dialogs, see "Searching for Pupils" on page 66 and "Searching for Staff" on page 72.

HOW TO USE A SEARCH DIALOG

1. Click ⌕ or [Search] at the end of the relevant field.

> **Note:** You can also use auto complete to fill a field with an associated search dialog in newer modules and functions.

The relevant search dialog appears.

> **Example:** This example shows a **Record Reason Search** dialog.

2. Enter your search criteria in the field(s) at the top of the dialog to narrow down the list of results.
3. Click **Search**.

> **Note:** To see a complete list of results, click **Search** WITHOUT entering any criteria.

4. Select the option you want in the list that appears and click **OK**.

The previous screen reappears with your selection in the relevant field.

Uploading Files

ABOUT UPLOADING FILES

For some records, 3sysACADEMIC gives you the option of attaching supporting documents to records, such as statements, evidence or additional information. To do this, files are uploaded to 3sysACADEMIC. Where this option is available, you can attach ANY file type, including Word documents, JPGs, MP3 sound recordings and film clips.

HOW TO UPLOAD A FILE

Do ONE of the following:

» Click **Browse** and find the file(s) you would like to add. Double-click on each file to add them one at a time OR hold the CTRL button down on your keyboard and click on each file once to select it, then click **Open** to add one or more simultaneously.

» In another window, open the folder containing the file(s). Left-click once on the file's icon OR hold the CTRL button down on your keyboard and left-click on each file's icon if you want to add multiple documents. Hold the mouse button down and, without letting go, drag the file(s) towards the **Documents** section. An **Upload Files** dialog appears. Let go of the mouse button and a copy of the document(s) attach to the record. Repeat for each file(s) you would like to add.
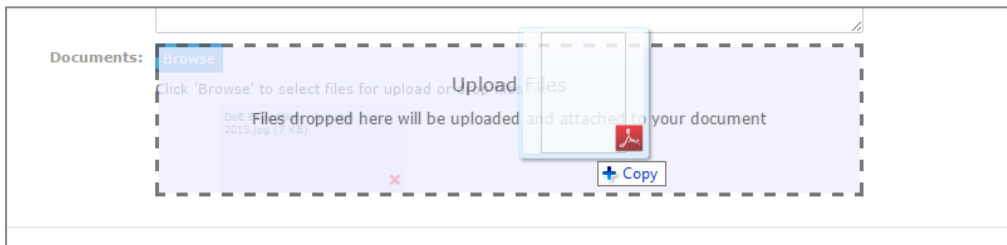
Note: You can attach ANY file type to the record, including MP3s and film clips.

Searching for Pupils

To attach pupils to records using 3sysACADEMIC, you need to search for them using special search dialogs. You may need to find individual pupils, e.g. a person who has received an award, or assemble a group, for example to create a pastoral record. The procedures below detail these key search types.

For details on how to:

» Find pupil names, see "Searching for Pupils" below.

» Find pupil names in the **Pastoral Management** module, see "Searching for Pupils in the Pastoral Management Module" on page 70. (Different pupil search dialogs are available in newer modules, such as the **Pastoral Management** module.)

> **Note:** For generic information about using search dialogs, see "Completing Fields" on page 61.

Searching for Pupils

HOW TO SEARCH FOR PUPILS

a. Click **Search**.

The **Search** dialog appears.

b. At the top of the dialog, enter your search criteria.

» **To Search for a Group of Pupils** - From the first drop list, select the group type you want, e.g. 'Form', 'Subject Set' or 'Pupil Custom Group', and from the second drop list, select the person's specific group, e.g. 'Form 10A', 'Lower Sixth', 'Ski Trip 2019' etc. Your selection in the first drop list alters the options available in the second drop list.

Example: In the example below, 'Form' has been selected in the first drop list. Consequently, a list of forms in the school appears in the second drop list.

» **To Search by Pupil Name** - Use the first drop list to select 'Pupil Name', then type all or part of the pupil's name into the second field OR leave the second field empty to retrieve a complete list of all pupils.

Example: In the example below, the user is searching for pupils by name using the key word 'Smith'.

c. Click **Search**.

A list of available pupils appears in the top half of the dialog.

d. Do ONE of the following:

» To select ALL the pupils in the list, tick the check box in the header row.

» To select specific individuals, tick the check box on the left-hand side of each relevant name.

e. Click **Select**.

The selected pupils appear on the **Pupils** tab in the bottom half of the screen.

f. (Optional) To remove any erroneous pupils, tick the check box next to their name and click **Remove**.

g. Click **OK**.

You are returned to the previous page with the selected pupil(s) added to the relevant field.

![3sys® ACADEMIC logo]

Searching for Pupils in the Pastoral Management Module

HOW TO SEARCH FOR MULTIPLE PUPILS IN THE PASTORAL MANAGEMENT MODULE

In the **Pastoral Management** module, you can search for pupil names and add them to records using auto complete OR via a search dialog. To find a name, do ONE of the following:

» Click in the relevant field and type the first letters of the name you require. Select your choice from the options that appear in the drop list. This is known as auto complete. Repeat this sequence until you have selected all the names you require.

» Click 🔍 at the end of the field to search for the required record.
A **Pupil Search** dialog appears.

    a. In the top part of the dialog, enter your search criteria and click **Search**. You can filter by:

        » *Group* - From the first **Group** drop list, select the group type you want, e.g. 'Boarding House', 'Form' or 'Subject Set', and from the second **Group** drop list, select the person's specific group, e.g. 'Form 10A', 'English' etc.

        » *Pupil Status* - To include past pupils in the results, tick the **Include Past Pupils** check box.

        » *Name* - Type all or part of the pupil's name in the **Pupil Name** field.

Note: To see a complete list of results, click **Search** WITHOUT entering any criteria.

A list of available pupils matching your search criteria appears on the left-hand side of the screen.

b. Click on each individual you require in the left-hand, **Available** column to move them to the right-hand, **Selected** column.

Pupil Search							✖
Group	Form ▾		Form 9A ▾				
Include Past Pupils	✔						
Pupil Name							
	Search						

Name	Code	Form		Name	Code	Form	
ASHFIELD, Gemma Frances	ASH003	09A	❯	ASLETT, Fletcher	ASL001	09A	❮
				BRYANTON, William G	BRY001	09A	❮
BRANGWEN, Ursula	BRA001	09A	❯	LAWRENCE, Helen	LAW001	09A	❮
BROOKS,Maria	BRO001	09A	❯				
GUTHRIE, Kate	GUT001	09A	❯				
HOLT,James	HOL001	09A	❯				
MITCHELL, Rebecca	MIT002	09A	❯				
NORGROVE, Mary	NOR001	09A	❯				

13 Results   OK   Cancel

Note: To deselect a name, click on the ❮ next to the relevant name in the right-hand, **Selected** column.

c. Repeat the search process until you have found and moved all the names you need into the right-hand column listing selected pupils. When you are finished, click **OK**.

You return to the previous screen with the pupil(s) added to the relevant field.

Searching for Staff

To attach staff to records using 3sysACADEMIC, you either select them from a drop list or need to search for them using dedicated dialogs. You may need to find individual staff, e.g. the name of a person who has given a pupil an award, or assemble a group of personnel, for example to assign them tasks on a pastoral management record.

> **Note:** For generic information about using search dialogs, see "Completing Fields" on page 61.

Searching for Staff in the Pastoral Management Module

If you are completing a staff field in the **Pastoral Management** module, you also have the option to add a person by their role rather than their name. This means that the record is linked to the role rather than the individual, so that if the person in that role changes, the record remains correct and does not need amending. You can select from roles including 'Form Tutor', 'Group Tutor', 'Head of Academic House', 'Head of Boarding House', 'Head of Section' and 'Head of Year'.

> **Note:** A specific, named individual must own each pastoral management record. Therefore, you cannot select a role for the **Staff name** field when adding / editing a record.

In addition, this module provides two different dialogs as you may need to enter the name of a single individual / role OR a list of several names / roles, depending on the context.

For details, see:

» "Searching for Individual Staff in the Pastoral Management Module" below.
» "Searching for Multiple Staff in the Pastoral Management Module" on page 74.

Searching for Individual Staff in the Pastoral Management Module

HOW TO SEARCH FOR INDIVIDUAL STAFF IN THE PASTORAL MANAGEMENT MODULE

In the **Pastoral Management** module, you can search for staff names and add them to records using auto complete OR via a search dialog.

Do ONE of the following:

» Click in the relevant field and type all or part of the name / role you require. Select from the options that appear in the drop list. This is known as auto complete.

» Click ⌕ at the end of the field to search for the required record. A **Staff Search** dialog appears.

```
Staff Search                                            ✖

        Group    [ Please Select  ▾ ]  [ Please Select     ▾ ]

     Staff Type  [ Please Select  ▾ ]

     Staff name  [                                        ]

                 [ Search ]

   Staff name      Staff Code      Staff name      Staff Code



                                                  [ OK ] [ Cancel ]
```

a. In the top part of the dialog, enter your search criteria and click **Search**. You can filter by:

» *Group* - From the first **Group** drop list, select the group type you want, e.g. 'Boarding House', 'Form' or 'Subject Set', and from the second **Group** drop list, select the person's specific group, e.g. 'Form 10A', 'English' etc.

» *Staff Type* - From the **Staff Type** drop list, select the required type of staff, such as 'Academic', 'Non-Academic' or 'Both'.

» *Name* - Type all or part of a staff member's name / role in the **Staff Name** field.

> 📄 **Note:** To see a complete list of results, click **Search** WITHOUT entering any criteria.

b. Click on the option you want in the list that appears.

You are returned to the previous screen with the required staff name / role entered in the relevant field.

Searching for Multiple Staff in the Pastoral Management Module

HOW TO SEARCH FOR MULTIPLE STAFF IN THE PASTORAL MANAGEMENT MODULE

In the **Pastoral Management** module, you can search for staff names and add them to records using auto complete OR via a search dialog.
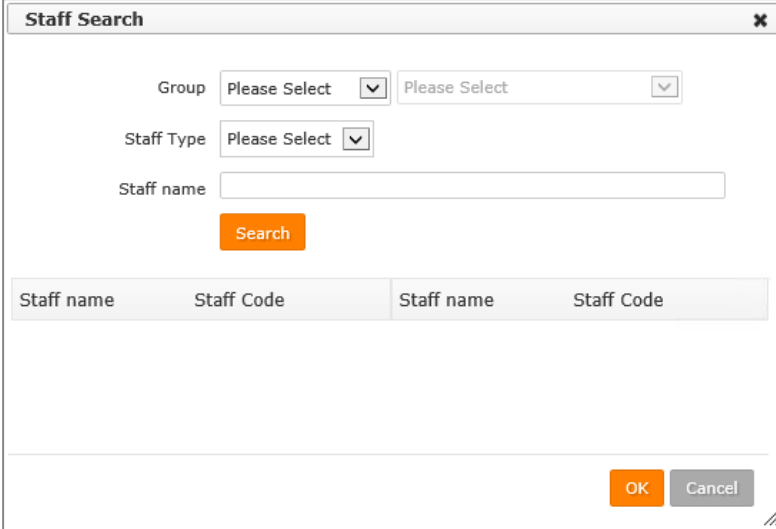
Do ONE of the following:

» Click in the relevant field and type all or part of the name / role you require. Select from the options that appear in the drop list. This is known as auto complete. Repeat this sequence until you have added all the names / roles that you require.

» Click [🔍] at the end of the field to search for the required record. A **Staff Search** dialog appears.

a. In the top part of the dialog, enter your search criteria and click **Search**. You can filter by:

» *Group* – From the first **Group** drop list, select the group type you want, e.g. 'Boarding House', 'Form' or 'Subject Set', and from the second **Group** drop list, select the person's specific group, e.g. 'Form 10A', 'English' etc.

» *Staff Type* – From the **Staff Type** drop list, select the required type of staff, such as 'Academic', 'Non-Academic' or 'Both'.

» *Name* – Type all or part of a staff member's name / role in the **Staff Name** field.

> **Note:** To see a complete list of results, click **Search** WITHOUT entering any criteria.

A list of available staff / roles matching your search criteria appears on the left-hand side of the screen.

b. Click on each option you require in the left-hand, **Available** column to move them to the right-hand, **Selected** column.

> **Note:** To deselect a name / role , click on the ◎ next to the relevant name in the right-hand, **Selected** column.

c. Repeat the search process until you have found and moved all the names / roles you need into the right-hand column listing selected staff. When you are finished, click **OK**.

You return to the previous screen with the staff name(s) / role(s) added to the relevant field.

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Managing your Settings

This chapter discusses the following:

CHAPTER 6

About My Settings

Via the **My Settings** screen in 3sysACADEMIC, you can:

» Change your language and culture settings. See "Changing your Language and Culture Settings" on the facing page.

» Change your password. See "Changing your Password" on page 80.

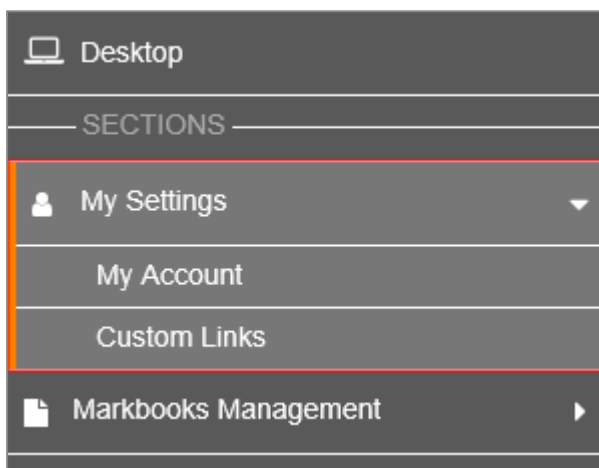» Add and edit your custom links. See "About Custom Links" on page 81.

> **Note:** The options you see depend upon the permissions set by your System Administrator.

Accessing My Settings

HOW TO ACCESS MY SETTINGS

» Via the **User** drop list in the header, go to **Setup > My Settings** and select an option from the sub-menu.
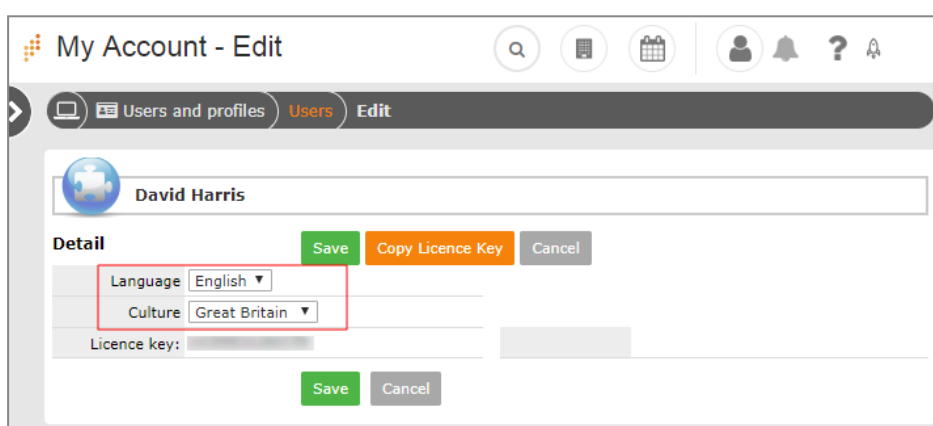
Changing your Language and Culture Settings

Non-administrative users can change their 3sysACADEMIC language and culture settings, as required. Users can select from English or Chinese language versions of 3sysACADEMIC. Culture options include 'Great Britain', 'International' and 'United States'. Your choice affects the date format used throughout the software.

Changing your Language and Culture Settings

HOW TO CHANGE YOUR LANGUAGE AND CULTURE SETTINGS

1. Via the **User** drop list in the header, go to **Setup > My Settings > My Account**.

   The **Users Detail** screen appears.

2. Click **Edit**.

   The **My Account - Edit** screen appears.

3. Make selections using the **Language** and **Culture** drop lists, as required.

4. Click **Save**.

   Changes take effect immediately.
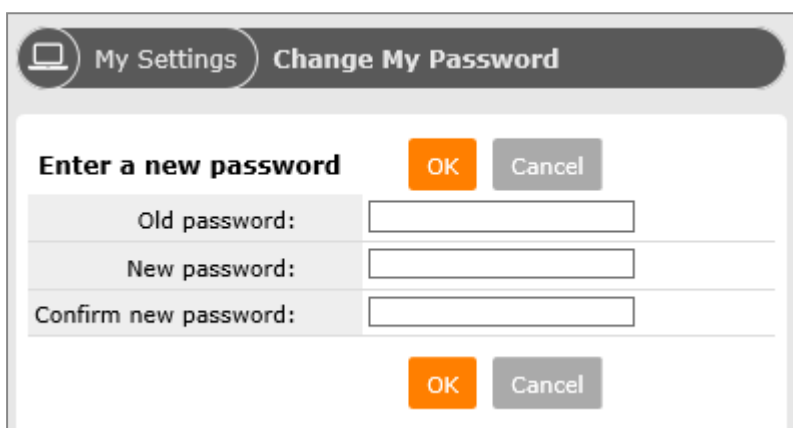
Changing your Password

You can change your 3sysACADEMIC password in the **My Settings** options.

Changing your Password

HOW TO CHANGE YOUR PASSWORD

1. Via the **User** drop list in the header, go to **Setup > My Settings > My Account**.

   The **My Account** screen appears.

2. Click **Change Password**.

   The **Change My Password** screen appears.

> **Note:** System Administrators can also access this screen by going to **Setup > My Settings > Change My Password**.

3. Type your current password in the **Old password** field.
4. Type your replacement password in the **New password** field.
5. Type your replacement password again in the **Confirm new password** field.
6. Click **OK**.

About Custom Links

The 3sysACADEMIC **Custom Links** option allows you to save links to other websites so that you have easy access to them from within the software. You can control their visibility so that they can be accessed by other users or you alone.

For further details, see:

» "Accessing Custom Links" below.

» "Adding Custom Links" on the next page.

» "Editing Custom Links" on the next page.

» "Deleting Custom Links" on page 83.

Accessing Custom Links

HOW TO ACCESS CUSTOM LINKS

» Click ⚭ in the left-hand **Navigation** menu and click on one of the links in the **Quick Links** menu that appears.
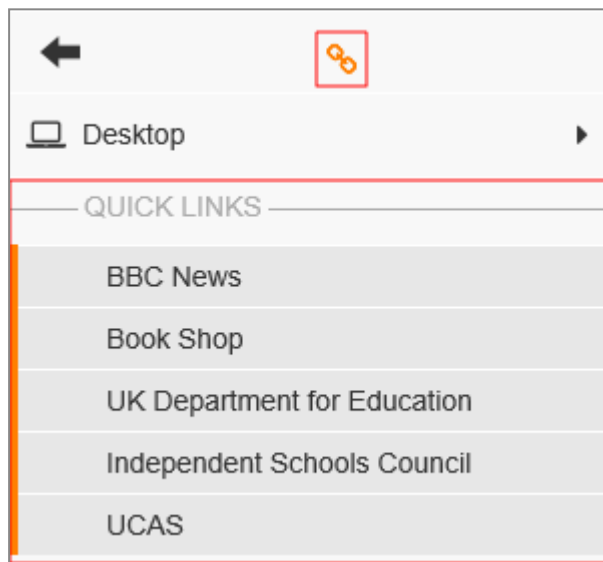
Adding Custom Links

HOW TO ADD A CUSTOM LINK

1. Via the **User** drop list in the header, go to **Setup > My Settings > Custom Links**.

   The **Custom Links** screen appears.

2. Click **Add**.

3. Complete the **Title** field.

4. Put the link URL (e.g. www.wcbs.co.uk) in the **Link** field.

5. Use the **Visible To** drop list to select whether the link is available to just you, a user group or everyone ('Global').

6. Click **Save**.

Editing Custom Links

HOW TO EDIT A CUSTOM LINK

1. Find the custom link you would like to edit.

   More details...

   a. Via the **User** drop list, go to **Setup > My Settings > Custom Links**.

      The **Custom Links** screen appears showing a list of existing custom links.

   > **Note:** You can re-order a grid by single-clicking on fields in the header row. If ▲ is displayed, the list is ordered from A to Z / lowest to highest. If ▼ appears, the list is ordered from Z to A / highest to lowest.

   b. Enter all or part of the link's name in the **Title** field and click **Search**.

   c. Use the **Page** icons beneath the grid to navigate between pages of records and change the number of records shown per page.

2. Click ✎ next to the relevant custom link.

3. Make your amendments.

4. Click **Save**.

Deleting Custom Links

HOW TO DELETE A CUSTOM LINK

1. Find the custom link you would like to delete.

   More details...

   a. Via the **User** drop list, go to **Setup > My Settings > Custom Links**.

      The **Custom Links** screen appears showing a list of existing custom links.

      > **Note:** You can re-order a grid by single-clicking on fields in the header row. If ▲ is displayed, the list is ordered from A to Z / lowest to highest. If ▼ appears, the list is ordered from Z to A / highest to lowest.

   b. Enter all or part of the link's name in the **Title** field and click **Search**.

   c. Use the **Page** icons beneath the grid to navigate between pages of records and change the number of records shown per page.

2. Click 🗑 next to the custom link you would like to remove.

   A **Message from webpage** pop up appears.

3. If you are sure that you want to delete the link, click **OK**.

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FAQs

This chapter discusses the following:

CHAPTER 7

FAQs

This section details Frequently Asked Questions (FAQs) asked by users about 3sysACADEMIC and its associated *Online Help*. Answers to FAQs will continue to be shared on the *3sysACADEMIC Online Help*, as they arise.

> **Note:** For FAQs about earlier versions of 3sysACADEMIC, please visit our Customer Centre.

WHY DO RED LINES SOMETIMES APPEAR NEXT TO FIELDS IN 3sysACADEMIC?

Mandatory fields have a red line on their left-hand side. If you do not add data to one or more mandatory fields, a message appears highlighting which fields you still need to complete.

HOW DO I FIND INFORMATION ABOUT HOW TO USE 3sysACADEMIC VIA THE ONLINE HELP?

Click [?] at the top of any 3sysACADEMIC screen and you can access the *3sysACADEMIC Online Help*. You can find information in the *Online Help* by searching the site or clicking on links named after specific topics. For more details, see "3sysACADEMIC Online Help Tips and Tricks" on page 8.

CAN I STILL ACCESS PDF USER GUIDES?

Of course! To see the latest PDF user guides, do ONE of the following:

» Click [?] on any 3sysACADEMIC screen and click on the **PDFs** roundel on the right-hand side of the screen.

> **Note:** If you cannot see the PDFs roundel, click [◄] or [►] to scroll to other roundel options.

» Go to **Help > Getting Started > PDF Guides**.

> **Note:** If you cannot see the *3sysACADEMIC Online Help* menu options at the top of your screen, they may be minimised. Click [≡] in the top right-hand corner of the screen to expand the menu.

Other PDF documents, including release notes, some training guides and year end guides, can be found on our Customer Centre. For more about how to access the Customer Centre, see "Support Services " on page 6.

HOW DO I EXPAND / MINIMISE AN IMAGE IN 3sysACADEMIC ONLINE HELP?

If you click on a thumbnail image in the *Online Help*, then a full size image appears, enabling you to see the screen or dialog in detail. To reduce the image back to a thumbnail, click on the image again. For more tips and tricks for using the *3sysACADEMIC Online Help*, see "3sysACADEMIC Online Help Tips and Tricks" on page 8.

WHY CAN'T I SEE A SECTION ON A SCREEN?

Is the section minimised? 3sysACADEMIC is designed for use on a variety of devices, including PCs, laptops and tablet computers. As such, each screen's layout adjusts automatically for screens of different sizes. In addition, users can choose to minimise sections they are not using.

Users click on arrows to minimise and expand different sections.

> **Example:** For example, the **Navigation** menu appears on the left-hand side of the screen throughout 3sysACADEMIC. Users can minimise or expand the whole panel or sections within the panel by clicking on ☐ and ☐ respectively.
>
>
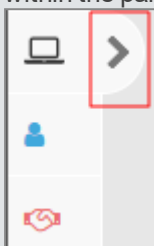
If you cannot see a particular section, look for an arrow where you would normally expect to see it or next to the section's heading, and click on it.

WHY CAN'T I SEE A MODULE / FUNCTION DESCRIBED IN THE HELP?

The options you see in 3sysACADEMIC depend upon the permissions set by your System Administrator and the modules / functions your organisation has purchased. If you cannot see something that you think you should have access to, please speak with your System Administrator. If you are a System Administrator with a query, please contact your Account Manager.

HOW DO I ACCESS THE CUSTOMER CENTRE?

Click ☐ on any 3sysACADEMIC screen. For more information, see "Support Services " on page 6.

HOW DO I CONTACT THE WCBS SUPPORT TEAM?

Our helpful and knowledgeable Support team can answer a range of queries about WCBS software. For more information about how to get in touch, see "Contact Us" on page 10.

WHERE CAN I FIND INFORMATION ABOUT WHAT'S NEW IN THE SOFTWARE?

Each new release usually includes some enhancements to the 3sysACADEMIC software. For details about additions or changes:

» Go to **Getting Started > What's New** in the *3sysACADEMIC Online Help*.

> 📋 **Note:** If you cannot see the *3sysACADEMIC Online Help* menu options at the top of your screen, they may be minimised. Click ☐ in the top right-hand corner of the screen to expand the menu.

» Download the relevant release notes from the Customer Centre. For details, see "Support Services " on page 6.

Each release includes all the enhancements made in previous releases, so if you are upgrading from an older version, e.g. 4.6.0, to the latest version, you may like to check the release notes for each version released in between so you are fully informed about new functionalities.

I NEED TO SET UP 3sysACADEMIC FOR MY SCHOOL - WHERE DO I START?

WCBS has created a document especially for System Administrators like you. It is called the *3sysACADEMIC Setup User Guide* and is available for download from the Customer Centre For details, see "Support Services " on page 6. If you have any queries, please contact our Support team.