WCBS

3sysACADEMIC

Staff

Overview Guide

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CHAPTER 1

Introduction

Welcome to the 3sysACADEMIC **Staff** Overview Guide. This Guide summarises the **Staff** module and the available functions:

- Staff module.
- Staff Cover function.
- Staff Custom Groups function.

For details on each area, please refer to the relevant chapter.

Note: schoolADMIN refers to non-finance functionality within passFINANCE.

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CHAPTER 2

Staff

This chapter discusses the following:

About the Staff Module

The **Staff** module allows you to complete various tasks relating to staff members, including:

- Viewing details about staff, such as staff calendars.
- Arranging staff cover to cope with staff absences.
- Adding staff to existing Staff Custom Groups and creating new Staff Custom Groups.

For details about each function within the **Staff** module, see:

- "About Staff" on the facing page.
- "About Staff Cover" on page 10.
- "About Staff Custom Groups" on page 11.
- "Managing Staff Custom Groups" on page 12.

HOW TO ACCESS THE STAFF MODULE AND FUNCTIONS

- Go to **Staff** and click on the relevant function.

About Staff

> **Note:** You are only able to view the **Staff** module if your school has granted you the relevant permissions via profiles and users. (For data security reasons, most users are unable to access this information, or will have access to a limited set of data only.) For further details or queries, please consult your System Administrator.

The **Staff** module enables you to search for and view details about existing staff members, and perform certain actions against selected staff member(s) from within the search results grid. You can also view a details page for each member of staff, from which you can view their calendar and add cover requirements. Staff records are added to the database using passFINANCE/schoolADMIN.

You can view and complete a range of tasks using the **Staff Search** screen, depending upon permission settings, including the ability to perform the following tasks against the selected staff members simultaneously:

- Email the selected staff.
- Add a note against the selected staff.
- Add a staff document for the selected staff member(s).
- Add cover requirements to the selected staff.
- Create a new Staff Custom Group with the selected staff member(s).
- Add selected staff to an existing Staff Custom Group.

If you have the relevant permissions, you are able to use the **Staff** screen to view specific detail about individual members of staff, such as personal and employment details, and the pupils tutored. In addition, if you have the appropriate permissions, you can perform the following tasks:

- View staff members' calendars, enabling you to quickly locate an individual. (You can also change the date range and the timetable of the calendar viewed.)
- Email staff members.
- Add notes against staff members' records.
- Add individual staff documents.
- Set staff cover requirements.

In addition, if you have the relevant permissions, using the **Staff** screen you are able to perform these tasks against the pupils tutored by the selected staff member:

- View pupil details.
- Add medical notes and notes against pupil records.
- Create a Pupil Custom Group for the selected pupils.
- Email the selected pupils.
- Add pupil documents to the selected pupil record(s).
- Add an event against the selected pupil(s).
- Add the selected pupils to an existing Pupil Custom Group.

> **Note:** At the top and bottom of this screen, there is a set of 'Quick Links', which enable you to jump to information further down or up the page.

HOW TO ACCESS STAFF

- Go to **Staff > Staff**.

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About Staff Cover

Every school has to cope with staff absences, both scheduled and unplanned. The **Staff Cover** function is designed to reduce the administrative burden that organising cover places on academic staff.

Staff Cover integrates seamlessly with teachers' timetables and utilises the same intuitive user interface. It has been designed around the school's operational need to simply and swiftly allocate staff cover in an effective and fair manner.

The **Staff Cover** function allows allocation of lesson cover for academic staff who are absent, for whatever reason. Allocation of cover provision is firmly in the hands of the school. However, in the first instance staff cover is allocated to teaching staff that the system deems as being free and who teach the subject of the absent teacher. If a same subject teacher cannot be assigned within the system, then allocation will be allotted purely by availability. Furthermore, distribution of cover to teaching staff can be apportioned fairly over the course of a school day or week, etc.

The school decides upon, and sets up, the individual wording for each type of staff absence, in line with school protocol (e.g. sickness, holiday, training course, etc.) In addition, allocation of cover for absences can be set per lesson, day-by-day, for absent academic staff member(s). The allocated staff member(s) will be informed of their requirement to cover in their personal 3sysACADEMIC calendar, via pop-ups (when logging onto 3sysACADEMIC) and also via email. This ensures academic staff are informed immediately after **Staff Cover** has been allocated as to when and where they are required to provide cover. In addition, the room in which the lesson is set to be covered can also be changed; allowing further convenience for all concerned.

An additional feature of **Staff Cover** is that the absence information recorded can also be extrapolated using the reporting functions and used for statistical and analytical purposes, as and when it is required.

Related Documents

For details, refer to the Staff Cover Training Manual, available via the 3sysACADEMIC Online Help.

HOW TO ACCESS STAFF COVER

» Go to **Staff > Staff Cover**.

About Staff Custom Groups

The **Staff Custom Groups** function allows you to create customised groups of staff and manage them. Using the software, you can:

- Add Staff Custom Groups, via both the **Setup** and **Staff** modules.
- View existing Staff Custom Groups.
- Export lists or details of Staff Custom Groups to MS Excel.
- Edit Staff Custom Groups.
- Add members to Staff Custom Groups, via either the **Setup** or **Staff** modules.

HOW TO ACCESS STAFF CUSTOM GROUPS

Do ONE of the following:

- Go to **Staff > Staff Custom Groups**.
- Go to **Setup > Group Management > Staff Custom Groups**.

Managing Staff Custom Groups

The **Staff Custom Groups** function allows you to create customised groups of staff and manage them. Using the software, you can:

- Add Staff Custom Groups, via both the **Setup** and **Staff** modules.
- View existing Staff Custom Groups.
- Export lists or details of Staff Custom Groups to MS Excel.
- Edit Staff Custom Groups.
- Add members to Staff Custom Groups, via either the **Setup** or **Staff** modules.

Adding Staff Custom Groups

HOW TO ADD A STAFF CUSTOM GROUP

1. Do ONE of the following:
   - Go to **Setup > Group Management > Staff Custom Groups**.
   - Go to **Staff > Staff Custom Groups**.

   Note: You can also create a staff custom group via **Staff > Staff**.
2. Click **Add**.

   The **Staff Custom Group Search** and **Staff Custom Groups** screen appears.
3. Complete the **Group Name** field.
4. Select the members of the new group.

   More details...

   a. Do one or both of the following:
      - Use the two **New Member Search** drop lists to select existing groups of staff. Your selection in the first drop list alters the options available in the second drop list.
      - Use the first drop list to select 'Staff Name' and type all or part of an individual's name in the second **New Member Search** field OR leave the second field empty to retrieve a complete list of all staff.

   b. Click **Search**.

      The **Select Items From Search Results** dialog appears.

   c. Do ONE of the following:
      - Click **All** to select everyone on the list.
      - Click on each of the names you want to add to your group.

   d. Click **OK**.
5. Use the **Visible To** drop list to specify who can see this custom group.

   Selecting 'Global' gives all users with the relevant permissions access, while 'Me' means only the group owner has access. Other user groups also appear in this list.
6. Use the **Group Membership Editors** drop list to specify who can make changes to this list.
7. (Optional) If required, change the group owner. (The logged in user appears automatically.)

   More details...

   a. Click **Search**.

The **Find a User to set as Owner** dialog appears.

b. Click ☒ next to the currently set group owner's name to remove it.

> **Note:** If the ☒ is not showing, click on the name.

c. Do ONE of the following:
   - Type all or part of the name you are looking for in the field to find a specific person.
   - Leave the field blank to see a list of all options.

d. Click **Search**.

   Relevant matches appear in a list in the dialog.

e. Click on the name that you want.

f. Click **OK**.

   The previous screen reappears with the group owner updated.

8. Click **Save**.
9. (Optional) Do ONE of the following:
   - Click **Edit** to amend the group's name, members, visibility, editors or owner.
   - Click Up to return to the **Staff Custom Group Search** and **Staff Custom Groups** screen.

Adding a New Staff Custom Group via Staff

HOW TO ADD A NEW STAFF CUSTOM GROUP VIA STAFF

1. Find the staff you would like in your group.

   More details...

   a. Go to **Staff > Staff**.

   The **Staff Search** and **Staff** screen appears, showing a full list of staff recorded on the system.

   > **Note:** Staff searches allow you to select staff with records created in 3sysACADEMIC or passFINANCE/schoolADMIN. As such, you may need to check that selected staff have access to 3sysACADEMIC, if required. To do this, go to **Setup > Users and profiles > Users** and check that the relevant individual's **Is Active** check box is ticked.

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

   b. Enter your search criteria in one or more of the fields at the top of the screen, as detailed below, and click **Search**.

   Relevant matches appear in the grid.

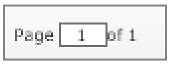
Field	Action
Staff Code	Type all or part of a staff code into this field.
Name	Type all or part of a staff member's name into this field.
Section	Type all or part of a person's section into this field.
Category	Type all or part of a person's category, such as 'Teacher', 'Governor' or 'Administrator', into this field.
Department	Type all or part of a department's name into this field.
Main Subject / Subsidiary subject 1 / Subsidiary subject 2	Type all or part of the person's main subject into this field.
House	Type all or part of the individual's house name into this field.
Status	Type all or part of the person's status (usually 'Academic' or 'Non-academic') into this field.
Full time?	Use the drop list to select 'Yes' to see all full-time staff and 'No' to see any part-time staff.
Working day	Type all or part of the name(s) of the day(s) when the staff member works into this field.
Location	Type all or part of the place where the staff member works into this field.
In use?	Use this drop list to select 'Yes' for active staff accounts or 'No' for dormant staff accounts.
Last amended by	Type all or part of the name of the last person to amend the staff record into this field.
Last amended on	Click in this field or to see a calendar. Click on the date the relevant staff record was amended.

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

c. (Optional) Use the icons beneath the grid to navigate between results.

- 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.

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



2. Do ONE of the following:
   » Tick the check box in each relevant member of staff's row to select them.
   » Tick the check box in the header row to select ALL the staff in the grid.
3. Click **Create Staff Custom Group**.

   The **Create Staff Custom Group** dialog appears.
4. Complete the **Group Name** field.
5. Use the **Visible To** drop list to select who can see this custom list.

   Selecting 'Global' gives all users with the relevant permissions access, while 'Me' means only the group owner has access. Other user groups also appear in this list.
6. Use the **Group Membership Editors** drop list to specify who can make changes to the list.

   Note: The contents of this list change depending on who can see it.
7. (Optional) Click **Advanced** to go to the **Staff Custom Group** screen and amend the group membership and group owner. See "HOW TO ADD A STAFF CUSTOM GROUP" on page 12 for details.
8. Click **OK**.

Viewing Staff Custom Groups

HOW TO VIEW A STAFF CUSTOM GROUP

1. Find the group you would like to view.

   More details...

   a. Do ONE of the following:
      » Go to **Setup > Group Management > Staff Custom Groups**.
      » Go to **Staff > Staff Custom Groups**.

   The **Staff Custom Group Search** and **Staff Custom Groups** screen appears showing a complete list of available staff custom groups.

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

   b. Enter your search criteria in one or more of the fields at the top of the screen, and click **Search**. Your search results populate the grid. You can search by:

Field	Action
Group Name	Type all or part of the name of the group you are looking for into this field.
Owner	Type all or part of the group's owner's name into this field.
Visibility	Type who is able to see the list you are looking for into this field.

c. (Optional) Use the icons beneath the grid to navigate between pages of records.

- 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.

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2. Click **View** next to the relevant group.
3. (Optional) Download the details as an Excel spreadsheet.

More details...

a. Click .

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.

Exporting a List of Staff Custom Groups to Excel

HOW TO EXPORT A LIST OF STAFF CUSTOM GROUPS TO EXCEL

1. Do ONE of the following:
   - Go to **Setup > Group Management > Staff Custom Groups**.
   - Go to **Staff > Staff Custom Groups**.

   The **Staff Custom Group Search** and **Staff Custom Groups** screen appears, showing a full list of staff custom groups.
2. Export the data in the **Staff Custom Groups** grid to MS Excel.

More details...

a. Click .

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.

Editing Staff Custom Groups

HOW TO EDIT A STAFF CUSTOM GROUP

1. Find the staff custom group that you would like to edit.

   More details...

   a. Do ONE of the following:

      » Go to **Setup > Group Management > Staff Custom Groups**.

      » Go to **Staff > Staff Custom Groups**.

      The **Staff Custom Group Search** and **Staff Custom Groups** screen appears showing a complete list of available staff custom groups.

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

   b. Enter your search criteria in one or more of the fields at the top of the screen, and click **Search**. Your search results populate the grid. You can search by:

Field	Action
Group Name	Type all or part of the name of the group you are looking for into this field.
Owner	Type all or part of the group's owner's name into this field.
Visibility	Type who is able to see the list you are looking for into this field.

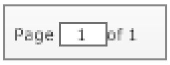
   c. (Optional) Use the icons beneath the grid to navigate between pages of records.

      » 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.

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



2. Click **Edit** next to the record you would like to amend.

   The relevant **Staff Custom Group** screen appears.

3. Make your changes.
4. Click **Save**.

Adding Staff Members to Staff Custom Groups via Staff

HOW TO ADD A STAFF MEMBER TO A STAFF CUSTOM GROUP VIA STAFF

1. Find the staff member(s) you would like to add to an existing group.

   More details...

   a. Go to **Staff > Staff**.

      The **Staff Search** and **Staff** screen appears, showing a full list of staff recorded on the system.

> **Note:** Staff searches allow you to select staff with records created in 3sysACADEMIC or passFINANCE/schoolADMIN. As such, you may need to check that selected staff have access to 3sysACADEMIC, if required. To do this, go to **Setup > Users and profiles > Users** and check that the relevant individual's **Is Active** check box is ticked.

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

b. Enter your search criteria in one or more of the fields at the top of the screen, as detailed below, and click **Search**.

   Relevant matches appear in the grid.

Field	Action
Staff Code	Type all or part of a staff code into this field.
Name	Type all or part of a staff member's name into this field.
Section	Type all or part of a person's section into this field.
Category	Type all or part of a person's category, such as 'Teacher', 'Governor' or 'Administrator', into this field.
Department	Type all or part of a department's name into this field.
Main Subject / Subsidiary subject 1 / Subsidiary subject 2	Type all or part of the person's main subject into this field.
House	Type all or part of the individual's house name into this field.
Status	Type all or part of the person's status (usually 'Academic' or 'Non-academic') into this field.
Full time?	Use the drop list to select 'Yes' to see all full-time staff and 'No' to see any part-time staff.
Working day	Type all or part of the name(s) of the day(s) when the staff member works into this field.
Location	Type all or part of the place where the staff member works into this field.
In use?	Use this drop list to select 'Yes' for active staff accounts or 'No' for dormant staff accounts.
Last amended by	Type all or part of the name of the last person to amend the staff record into this field.
Last amended on	Click in this field or to see a calendar. Click on the date the relevant staff record was amended.

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

c. (Optional) Use the icons beneath the grid to navigate between results.

» 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.

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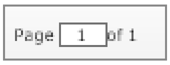
- Click in the **Page** field and type the number of the page you want.



2. Do ONE of the following:
   - Tick the check box in each relevant staff member's row to select them.
   - Tick the check box in the header row to select ALL the staff listed in the grid.
3. Click **Add Staff to Staff Custom Group**.

   Note: If you cannot see this option, click **More Actions**.

   The **Add Staff to Group** dialog appears.
4. Do ONE of the following to find the group to which you would like to add the staff member or members.
   - Type all or part of the group name into the **Group Search** field and click **Search**.
   - Leave the **Group Search** field empty and click **Search** to see a full list of available options.
5. Click on the group you want in the **Select Group** list.

   The **Staff In Selected Group**, **Selected Group Owner** and **Selected Group Visible To** fields are populated automatically.
6. Click **OK**.

Deleting Staff Custom Groups

HOW TO DELETE A STAFF CUSTOM GROUP

1. Find the staff custom group that you would like to delete.

   More details...

   a. Do ONE of the following:
      - Go to **Setup > Group Management > Staff Custom Groups**.
      - Go to **Staff > Staff Custom Groups**.

      The **Staff Custom Group Search** and **Staff Custom Groups** screen appears showing a complete list of available staff custom groups.

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

   b. Enter your search criteria in one or more of the fields at the top of the screen, and click **Search**. Your search results populate the grid. You can search by:

Field	Action
Group Name	Type all or part of the name of the group you are looking for into this field.
Owner	Type all or part of the group's owner's name into this field.
Visibility	Type who is able to see the list you are looking for into this field.

   c. (Optional) Use the icons beneath the grid to navigate between pages of records.

- 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.
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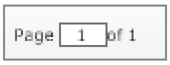

2. Click **Delete** next to the relevant staff custom group.

Note: If you cannot see this option, click or to expand the list.

The **Confirm Staff Custom Group Delete** screen appears, showing the relevant staff custom group.

3. Confirm that you want to delete the custom group by clicking **Delete**.

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