3sysACADEMIC

Communication

User Guide

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CHAPTER 1

Introduction

Welcome to the 3sysACADEMIC Communication Overview Guide.

3sysACADEMIC **Communication** enables you to undertake a range of tasks, using the following modules: **Email / Notifications** and **Data / Reporting**. A summary of each is given below.

Email / Notifications Module

3sysACADEMIC includes an integrated email routine which allows you to send messages to any individual known to the school. It also includes a more sophisticated 'related list' option which means you can send emails to people associated with selected pupils, e.g. form tutors or parents, without having to look up each individual's details and enter them manually. Emails are sent directly from 3sysACADEMIC's web server and use a generic 'from' email address that has been set up by your System Administrator.

Notifications can be used to remind individuals or groups of users about forthcoming events, such as meetings. For example, a notification could be used to call and remind attendees of an urgent staff meeting, or a teacher could use a notification to remind them when a pupil is on a final warning regarding homework.

Data / Reporting Module

The **Data / Reporting** module consists of the following functions, as detailed below:

- **Documents** function.
- **Reports** function.
- **Names** function.

Messaging Module

The **Messaging** module is designed to enable you to send a message to an individual or group of Weixin / WeChat users who have registered to receive updates from the school. This means that you can take advantage of the groups you already have recorded in your database, e.g. form groups, year groups or pupil or staff custom groups for specific projects.

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

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

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CHAPTER 2

Email and Notifications

This chapter discusses the following:

About the Email / Notifications Module

The **Email / Notifications** module consists of the following functions:

- Email
- Notifications
- Notification Categories

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

Email

3sysACADEMIC includes an integrated email function which allows you to send messages to any individual known to the school. It also includes a more sophisticated 'related list' option which means you can send emails to people associated with selected pupils, e.g. form tutors or parents, without having to look up each individual's details and enter them manually. Emails are sent directly from 3sysACADEMIC's web server and use a generic 'from' email address that has been set up by the System Administrator. Emails can be sent via:

- The **Email** function (**Communication > Email / Notifications > Email**).

  For more information, see the *3sysACADEMIC Online Help* or the *3sysACADEMIC Communication User Guide*.
- The **Pupils** module.
- The **Staff** module.

Notifications and Notification Categories

Notifications can be used to remind individuals or groups of users about forthcoming events or appointments. For example, a notification could be used to call and remind attendees of an urgent staff meeting, or a teacher could use a notification to remind them when a pupil is on a final warning regarding homework.

Before notifications can be added to 3sysACADEMIC, notification categories must be created. Categories are used to identify and group specific notifications.

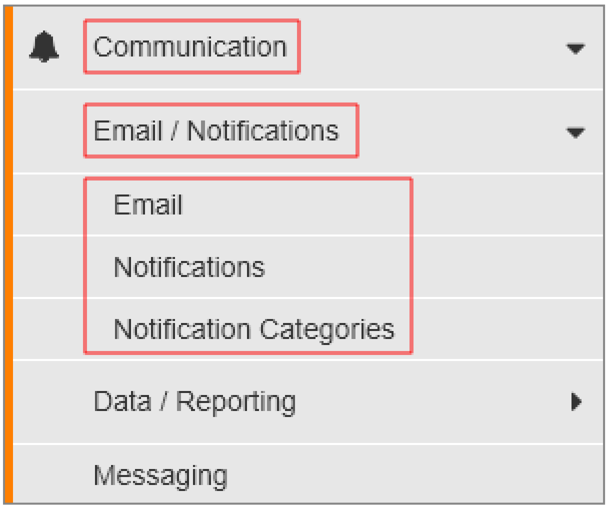
For more information, see "Using Notifications" on page 31 and "Configuring Notification Categories" on page 44.

Note: Users MUST be logged in to receive notifications.

Accessing the Email / Notifications Module

HOW TO ACCESS THE EMAIL / NOTIFICATIONS MODULE

» Go to **Communication > Email / Notifications** and click on the relevant function.



Using Email in 3sysACADEMIC

3sysACADEMIC includes an integrated email routine which allows you to send messages to any individual known to the school and saved on the database. It also includes a more sophisticated 'related list' option which means you can send emails to people associated with selected pupils, e.g. form tutors or parents, without having to look up each individual's details and enter them manually. Emails are sent directly from 3sysACADEMIC's web server and use a generic 'from' email address that has been set up by your System Administrator.

Sending Emails to Pupils and/or their Related Contacts

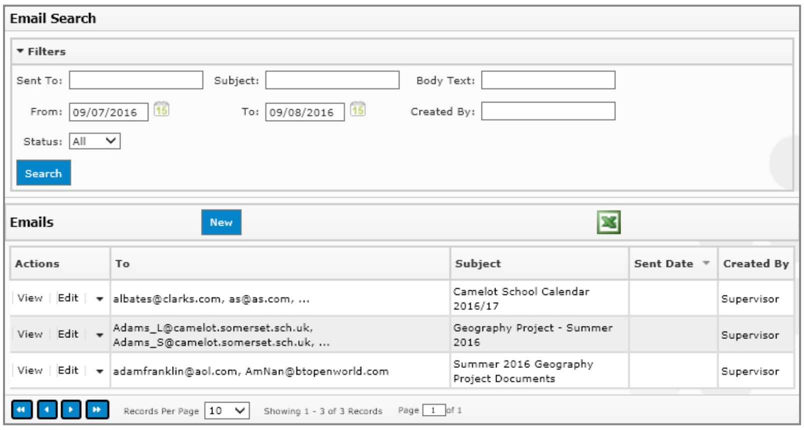
HOW TO SEND EMAILS TO PUPILS AND/OR THEIR RELATED CONTACTS

1. Do ONE of the following:
   - Select your recipients via **Communication > Email > Add**.

     More details...

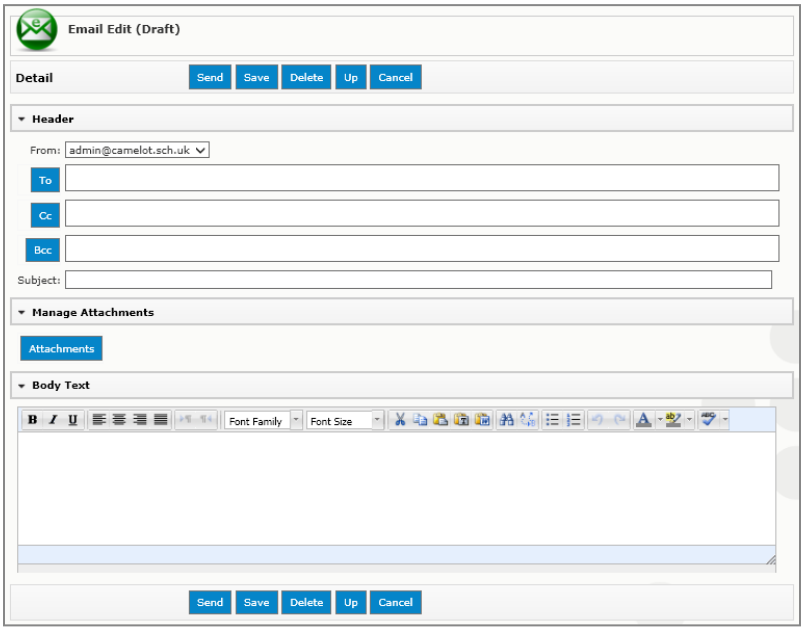
     a. Go to **Communication > Email**.

        The **Email Search** and **Emails** screen appears.



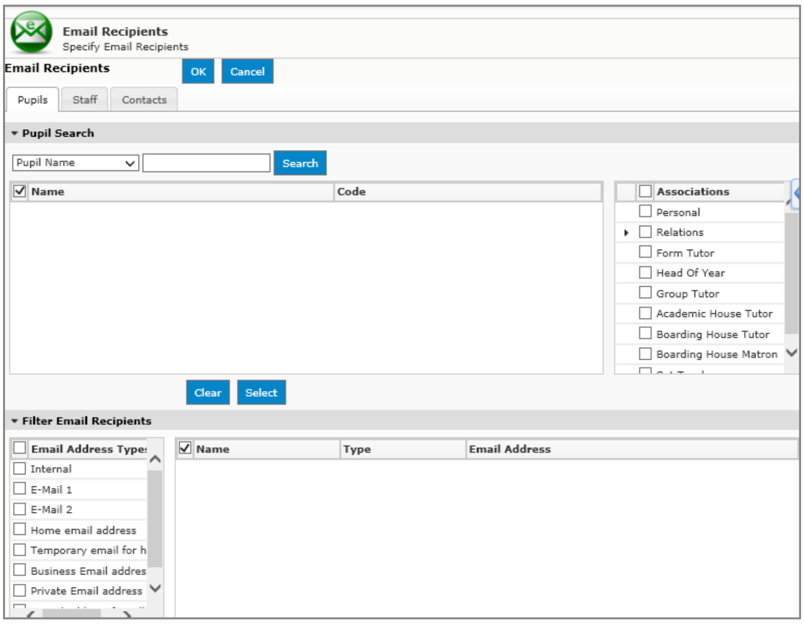
b. Click **New**.

The **Email Edit (Draft)** screen appears.



c. Click **To**, **Cc** or **Bcc** depending upon where you want your recipients to appear.

The **Email Recipients** screen appears.



d. Find the recipients of your email.

More details...

a. Use the first drop lists to refine your search. Your selection in the first drop list alters the options available in the second drop list.

Do ONE of the following:

» In the first drop list, select 'Pupil Name'. In the second field, type all or part of the name of the pupil you want.

» Select a group from the first drop list. Use the second drop list to select the specific group you want, e.g. 'Form 10A', 'Year 8' or a tutor group.

b. Click **Search**.

The selected names appear on the **Email Recipients** screen.

» Select your recipients via **Pupil Management > Pupils**.

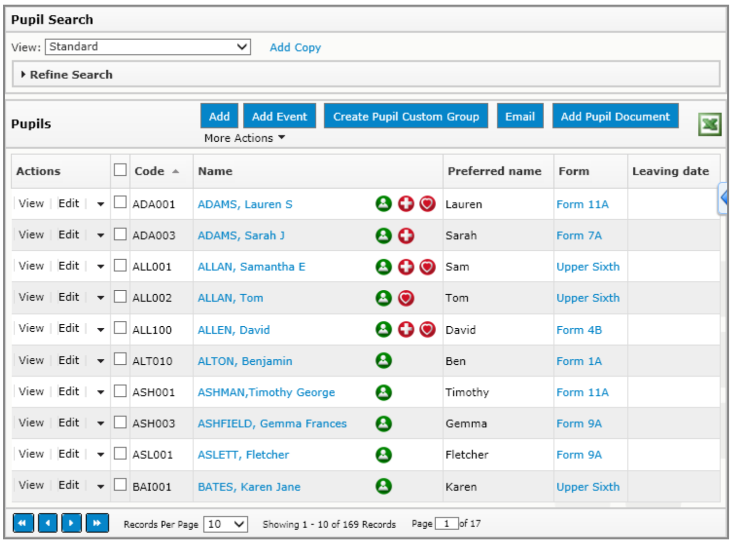
More details...

a. Find the pupils you want to email.

More details...

a. Go to **Pupil Management > Pupil Records**.

The **Pupil Search** and **Pupils** screen appears, showing a complete list of all pupils.



Actions	Code	Name	Preferred name	Form	Leaving date
View Edit	ADA001	ADAMS, Lauren S	Lauren	Form 11A	
View Edit	ADA003	ADAMS, Sarah J	Sarah	Form 7A	
View Edit	ALL001	ALLAN, Samantha E	Sam	Upper Sixth	
View Edit	ALL002	ALLAN, Tom	Tom	Upper Sixth	
View Edit	ALL100	ALLEN, David	David	Form 4B	
View Edit	ALT010	ALTON, Benjamin	Ben	Form 1A	
View Edit	ASH001	ASHMAN,Timothy George	Timothy	Form 11A	
View Edit	ASH003	ASHFIELD, Gemma Frances	Gemma	Form 9A	
View Edit	ASL001	ASLETT, Fletcher	Fletcher	Form 9A	
View Edit	BAI001	BATES, Karen Jane	Karen	Upper Sixth	

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 from highest to lowest.

b. In the **Refine Search** section, enter your search criteria in one or more of the fields and click **Search**. Your results populate the grid. You can search by:

Field	Action
Code	Type all or part of a code in this field.
Name	Type all or part of a name in this field.
Preferred name	Type all or part of a pupil's preferred name in this field.
Form	Type all or part of a form name into this field.
Leaving date	Click and click on the relevant date in the calendar popup that appears.

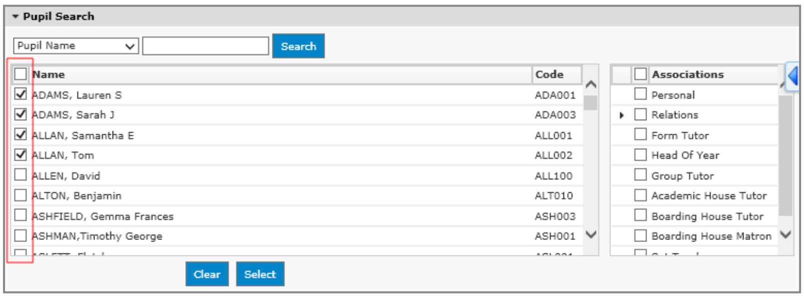
Note: If you cannot see this section in the software, it may be minimised. Click next to the relevant heading to expand it.

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

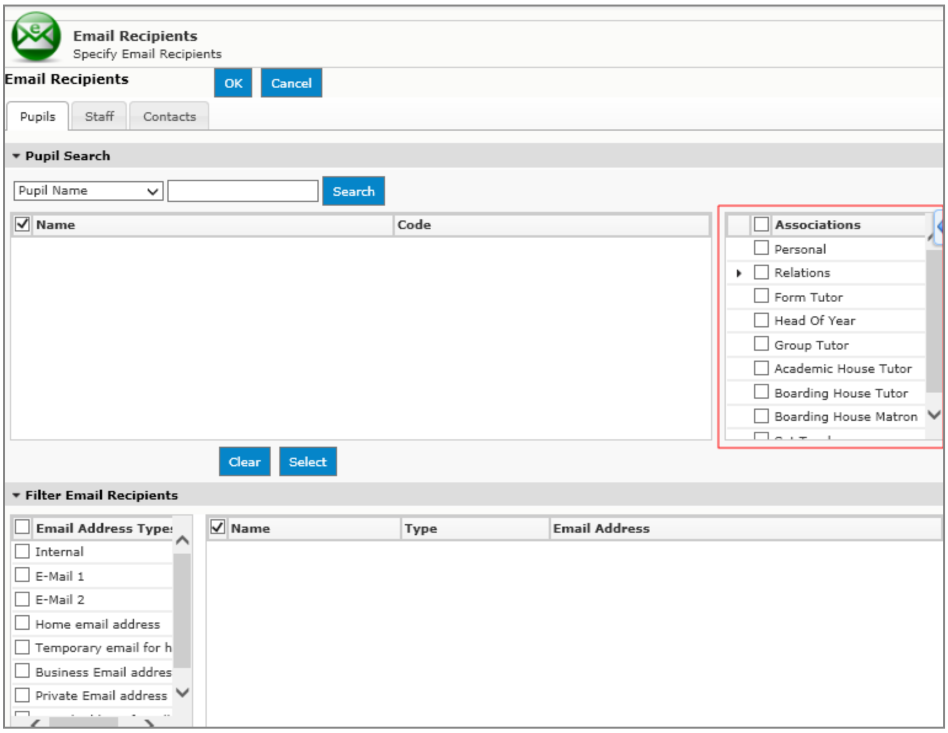

b. Tick the check box(es) next to the name(s) you would like to include.



c. Click **Email**.

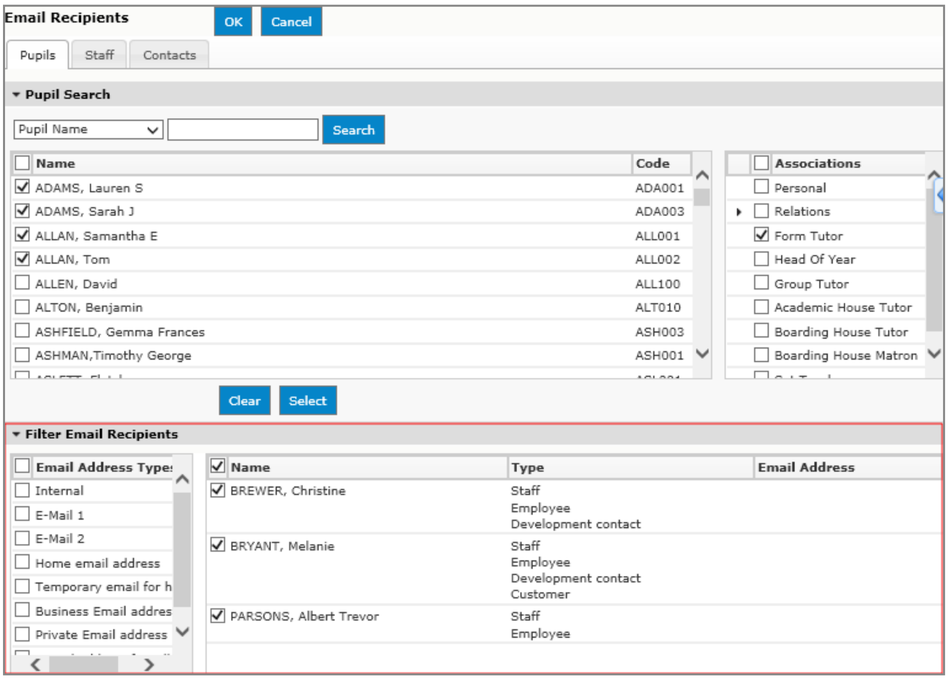
The **Email Recipients** screen appears with the selected pupils listed.

2. Tick the relevant **Associations** check box.
   - To send the email to the selected pupils, tick the **Personal** check box.
   - To send the email to contacts related to each pupil, tick the **Relations** check box.
   - To send the email to members of staff associated with the pupils, tick the relevant role's check box, e.g. 'Form Tutor', 'Academic House Tutor' or 'Head of Year'.



3. Click **Select**.

The recipients appear in the **Filter Email Recipients** section.



4. Use the **Email Address Types** check boxes to select which email addresses should be used.

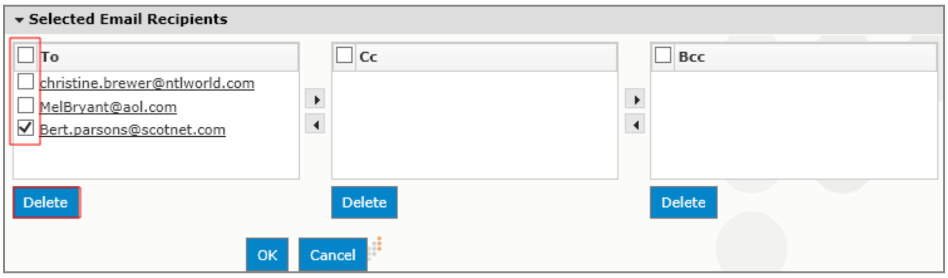
Note: If no email addresses appear, none are logged on the system for this contact. Invalid addresses are highlighted in yellow. Corrections are made in schoolADMIN (PASS) by your System Administrator.

5. Click **To**, **Cc** or **Bcc** depending upon whether you would like the emails to be sent directly, copied to or blind-copied to the recipients.

   The email addresses appear in the relevant box at the bottom of the screen.

Note: Emails to parents are automatically sent Bcc. It is recommended that emails sent to pupil contacts are sent Bcc.

6. (Optional) To remove a recipient, tick the check box next to their email address in the **Selected Email Recipients** section and click **Delete** beneath the relevant panel.



7. Click **OK**.

   The **Email Edit (Draft)** screen appears.

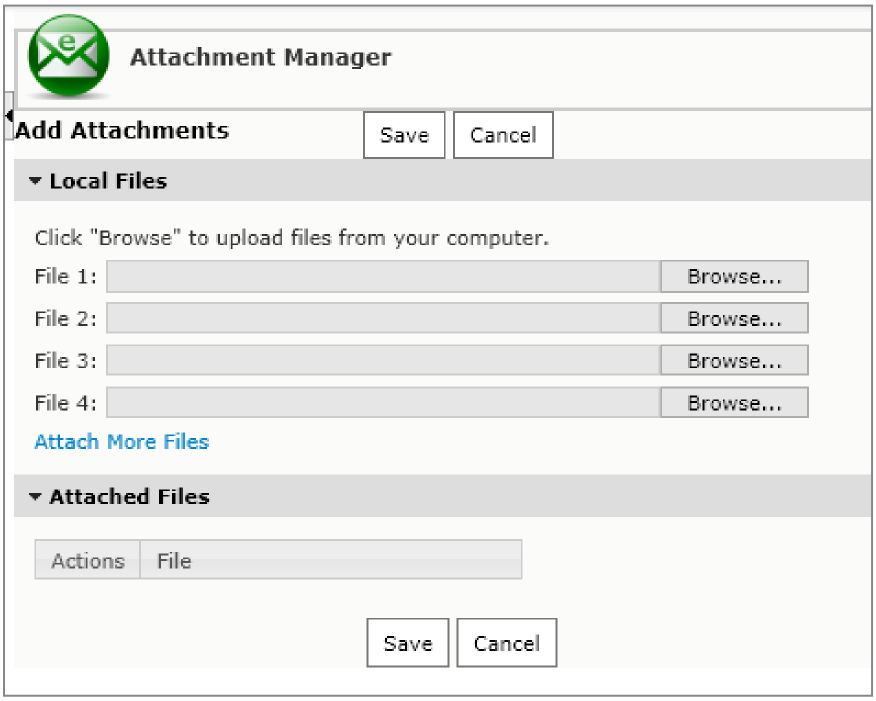
8. Complete the **Subject** field, as required.

9. Click **Attachments** to send documents with the email.

   More details...

   a. Click **Attachments**.

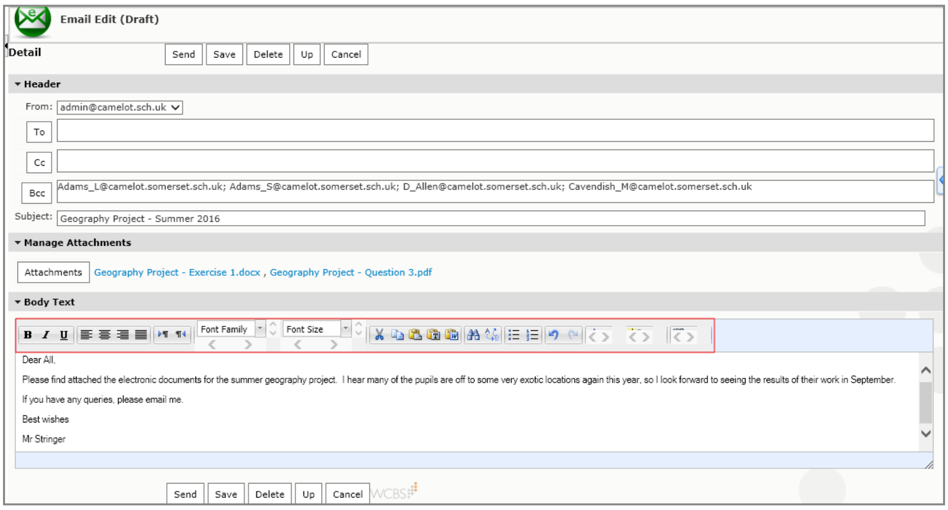
      The **Attachment Manager** screen appears.



   b. Click **Browse** and find the file you want to attach.

   c. Click on the file and click **Open**.

10. Click in the **Body Text** field and type your message. Use the text editor options above the field, as required.



11. Do ONE of the following:
    - To send the email, click **Send**.
    - To save the email and send it later, click **Save**.
    - To remove the email, click **Delete**.
    - To return to the previous screen, click **Up**.
    - To leave the email process, click **Cancel**.

Sending Emails to Staff

HOW TO SEND EMAILS TO STAFF

1. Do ONE of the following:
    - Select your recipients via **Staff > Staff**.

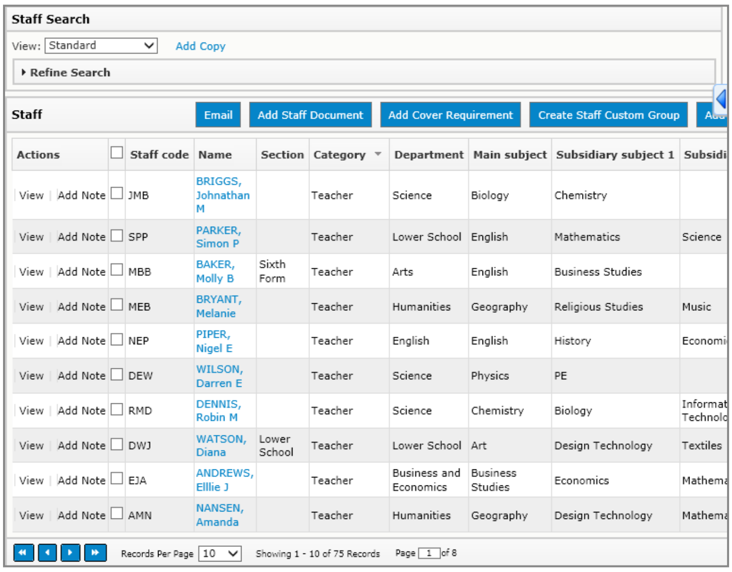
      More details...

      a. Find the staff you want to email.

         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 schoolADMIN (PASS). 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 from highest to lowest.

b. In the **Refine Search** section, 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.

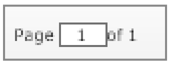
Field	Action
Staff Code	Type all or part of a staff code into this field.
Name	Type all or part of a staff member's name into this field.
Section	Type all or part of a person's section into this field.
Category	Type all or part of a person's category, such as 'Teacher', 'Governor' or 'Administrator', 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.

Field	Action
Last amended on	Click in this field or and click on the date the relevant staff record was amended in the calendar popup that appears.

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 **Page** 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. 

b. Tick the check box(es) next to the name(s) you would like to include.

c. Click **Email**.

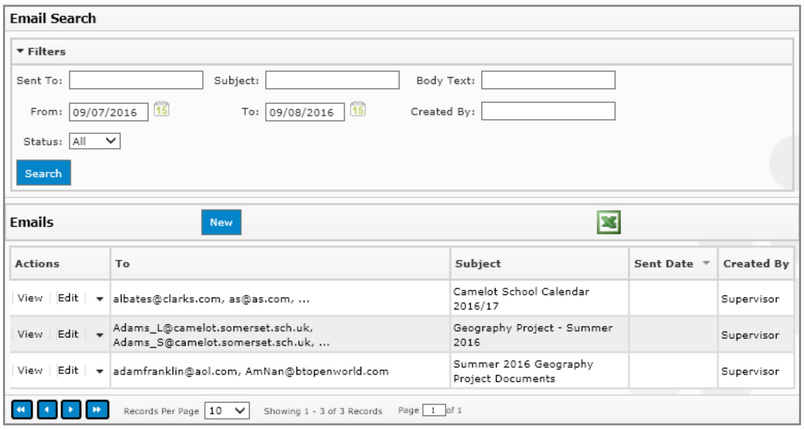
The **Email Recipients** screen appears with the selected staff listed.

» Select your recipients via **Communication > Email > Add**.

More details...

a. Go to **Communication > Email**.

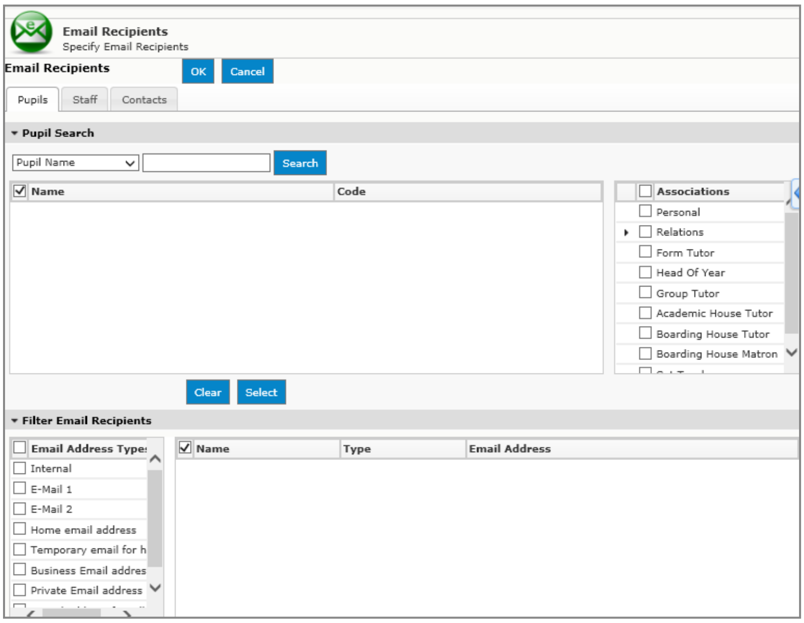
The **Email Search** and **Emails** screen appears.



b. Click **New**.

c. Click **To**, **Cc** or **Bcc** depending upon where you want your recipients to appear.

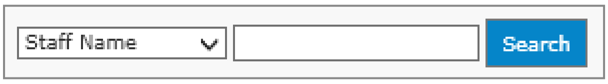
The **Email Recipients** screen appears.



d. Click on the **Staff** tab and find the recipients of your email.

More details...

a. Use the drop lists to refine your search. Your selection in the first drop list alters the options available in the second drop list.



Do ONE of the following:

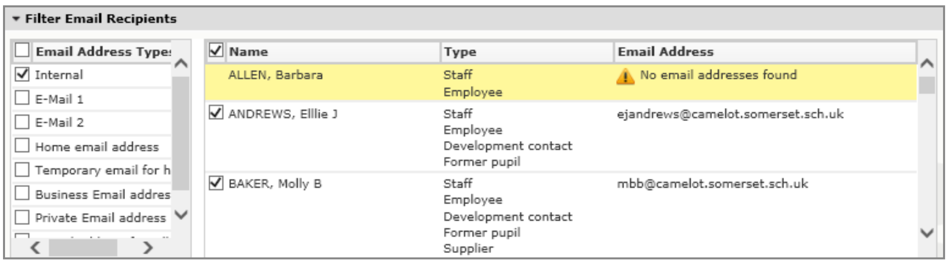
» In the first drop list, select 'Staff Name'. In the second, field, type all or part of the name of the member of staff that you want.

» Select a group from the first drop list. Use the second drop list to select the specific group you want, e.g. 'Form 10A', 'Year 8' or a tutor group.

b. Click **Search**.

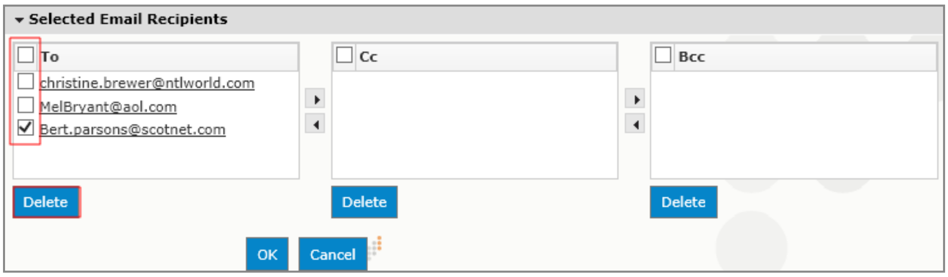
The selected names appear on the **Email Recipients** screen.

2. Use the **Email Address Types** check boxes to select which email addresses should be used.



Note: If no email addresses appear, none are logged on the system for this contact. Invalid addresses are highlighted in yellow. Corrections are made in schoolADMIN (PASS) by your System Administrator.

3. Click **To**, **Cc** or **Bcc** depending upon whether you would like the emails to be sent directly, copied to or blind-copied to the recipients.
4. (Optional) To remove a recipient, tick the check box next to their email address in the **Selected Email Recipients** section and click **Delete** beneath the relevant panel.

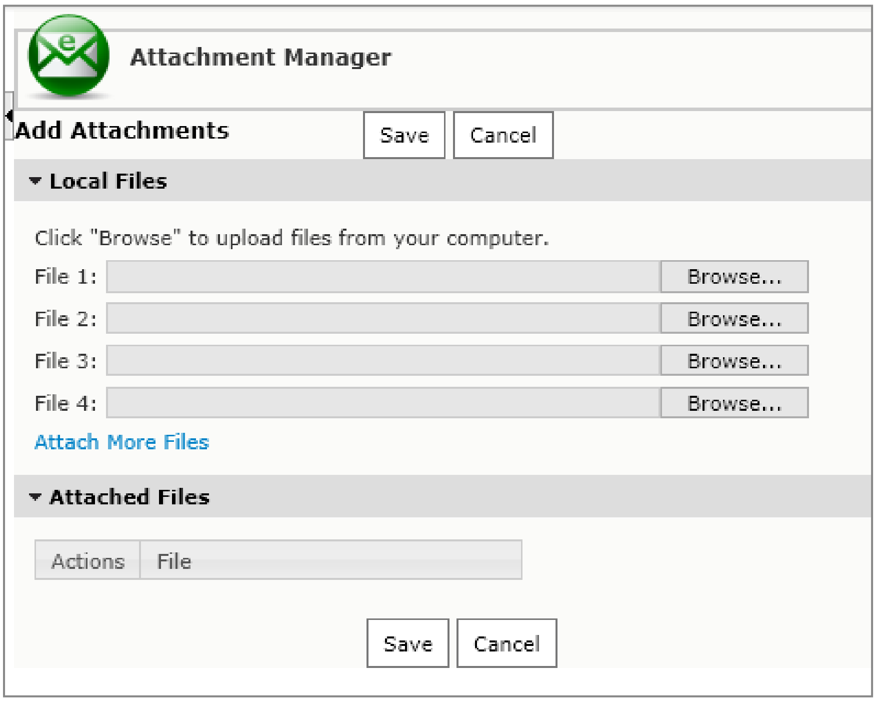


5. Click **OK**.
6. The **Email Edit (Draft)** screen appears.
7. Complete the **Subject** field, as required.
8. Click **Attachments** to send documents with the email.

More details...

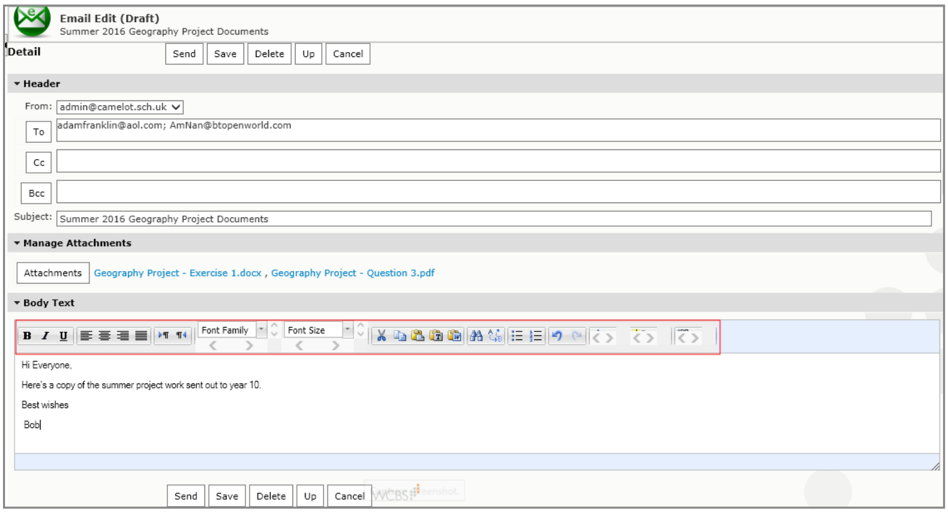
   a. Click **Attachments**.

   The **Attachment Manager** screen appears.



   b. Click **Browse** and find the file you want to attach.
   c. Click on the file and click **Open**.

9. Click in the **Body Text** field and type your message. Use the text editor options above the field, as required.



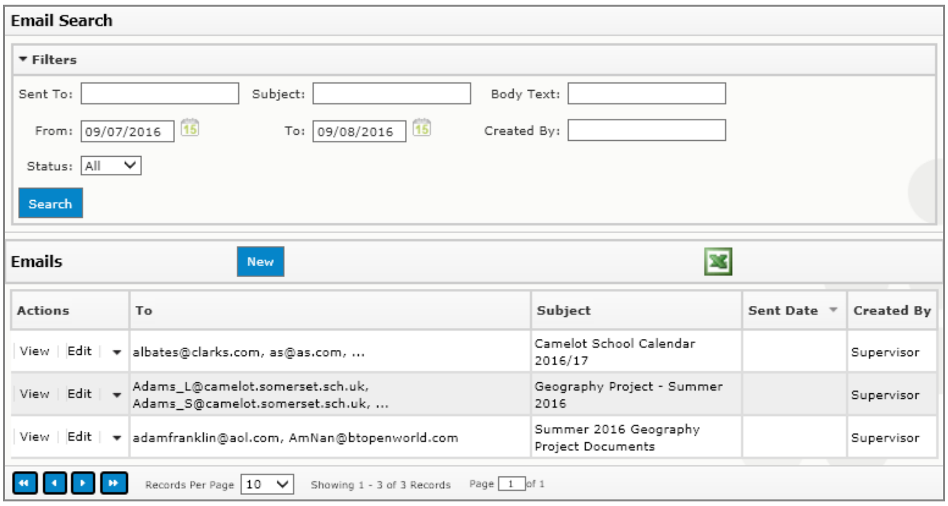
10. Do ONE of the following:
    - To send the email, click **Send**.
    - To save the email and send it later, click **Save**.
    - To remove the email, click **Delete**.
    - To return to the previous screen, click **Up**.
    - To leave the email process, click **Cancel**.

Sending Emails to Contacts

HOW TO SEND EMAILS TO CONTACTS

1. Go to **Communication > Email**.

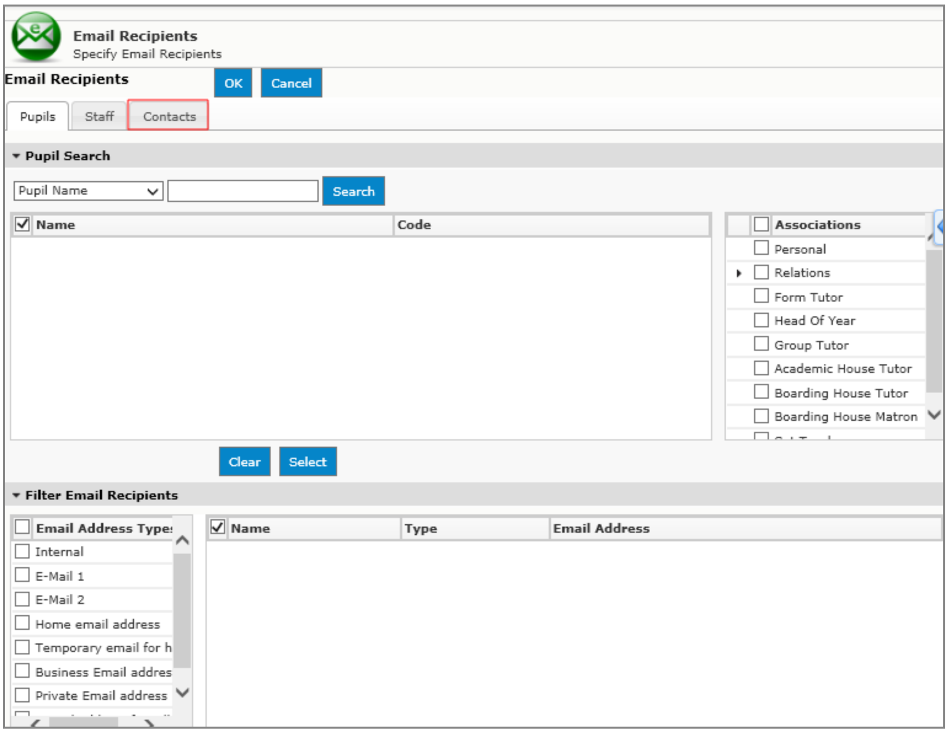
   The **Email Search** and **Emails** screen appears.



2. Click **New**.

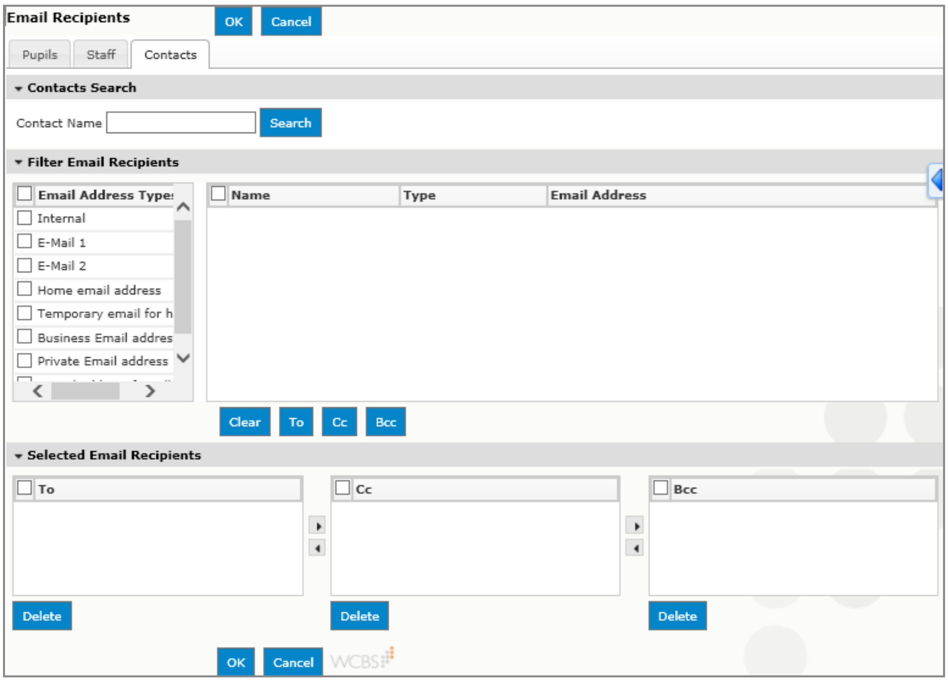
3. Click **To**, **Cc** or **Bcc** depending upon where you want your recipients to appear.

   The **Email Recipients** screen appears.



4. Click the **Contacts** tab.

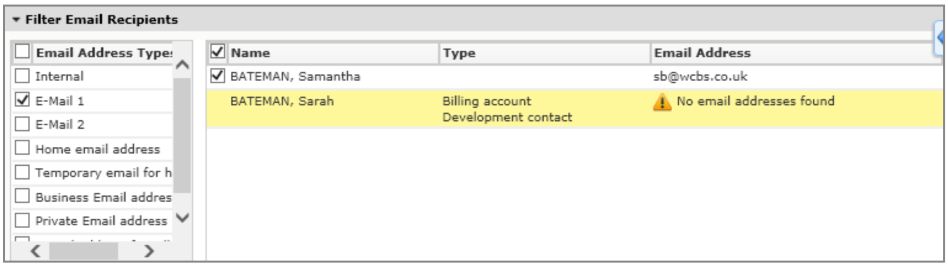
   The **Contacts** tab appears.



5. Type all or part of the name of the contact you want to send an email to in the **Contact Name** field and click **Search**.

   The matching contact(s) are listed in the **Filter Email Recipients** section.

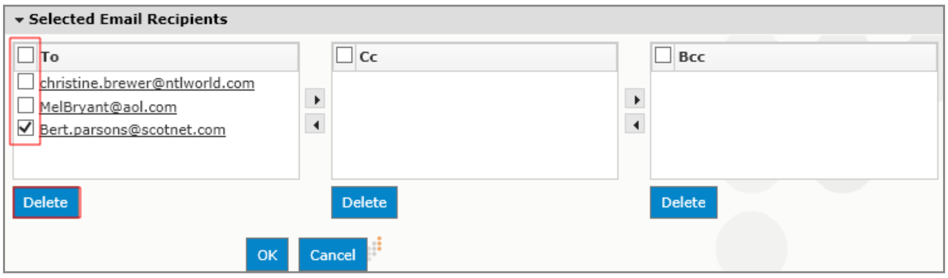
6. Use the **Email Address Types** check boxes to select which email addresses should be used.



Note: If no email addresses appear, none are logged on the system for this contact. Invalid addresses are highlighted in yellow. Corrections are made in schoolADMIN (PASS) by your System Administrator.

7. Click **To**, **Cc** or **Bcc** depending upon whether you would like the emails to be sent directly, copied to or blind-copied to the recipients.

8. (Optional) To remove a recipient, tick the check box next to their email address in the **Selected Email Recipients** section and click **Delete** beneath the relevant panel.



9. Click **OK**.

   The **Email Edit (Draft)** screen appears.

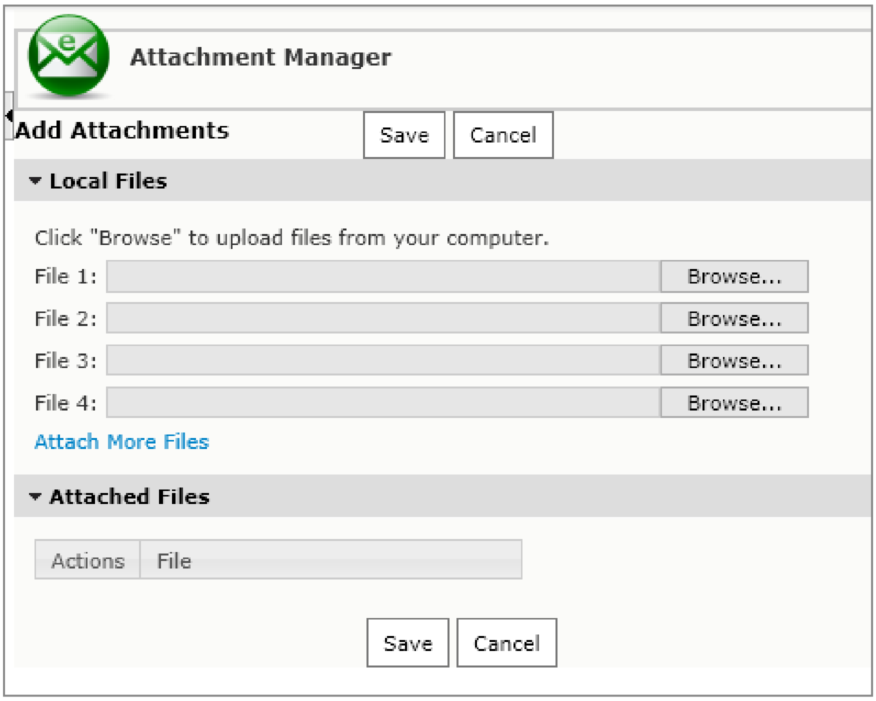
10. Complete the **Subject** field, as required.

11. Click **Attachments** to send documents with the email.

More details...

a. Click **Attachments**.

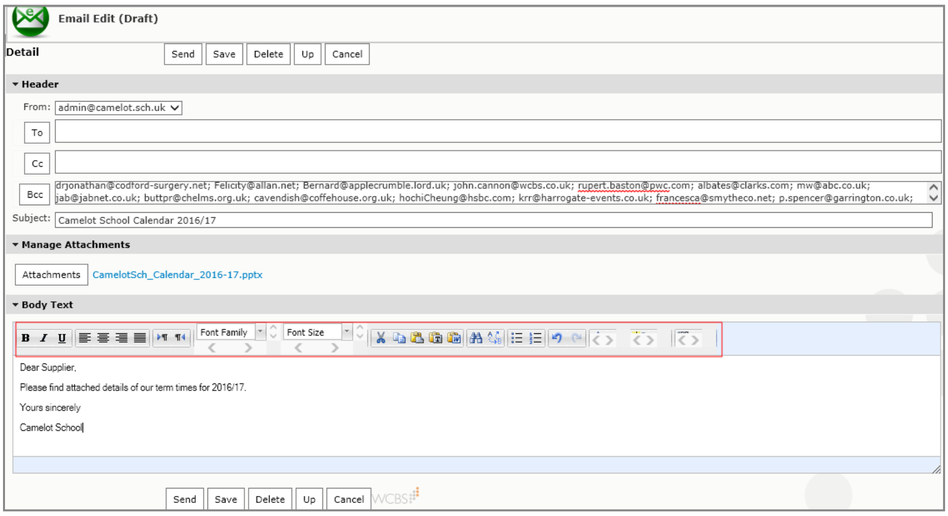
The **Attachment Manager** screen appears.



b. Click **Browse** and find the file you want to attach.

c. Click on the file and click **Open**.

12. Click in the **Body Text** field and type your message. Use the text editor options above the field, as required.



13. Do ONE of the following:
    - To send the email, click **Send**.
    - To save the email and send it later, click **Save**.
    - To remove the email, click **Delete**.
    - To return to the previous screen, click **Up**.
    - To leave the email process, click **Cancel**.

Viewing Saved Emails

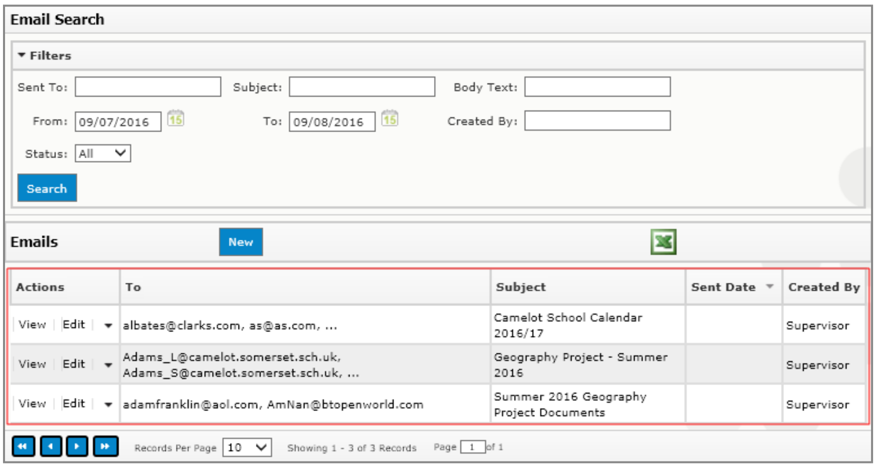
HOW TO VIEW SAVED EMAILS

1. Find the email you want to view.

   More details...

   a. Go to **Communication > Email**.

   The **Email Search** and **Emails** screen appears, showing a grid of saved emails.



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 from highest to lowest.

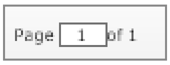
   b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Action	Field
Sent To	Type all or part of the name of the email's recipient into this field.
Subject	Type all or part of the email's subject into this field.
Body Text	Type all or part of keywords in the email's main text into this field.
From / To	Either click in the field and replace the existing date(s) OR click the calendar icon and select a date in the calendar.
Created By	Type all or part of the name of the person who created the email into this field.
Status	Use this drop list to select 'All', 'Draft' or 'Sent'.

c. (Optional) Use the icons beneath the grid to navigate between pages of 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. Click **View** next to the email that you want to see in more detail.

   The relevant **Email Detail (Draft)** screen appears.

3. Do ONE of the following:
   - Click **Up** to return to the previous screen.
   - Click **Edit** to make changes to the saved email.
   - Click **Delete** to delete the saved email.

Editing Saved Emails

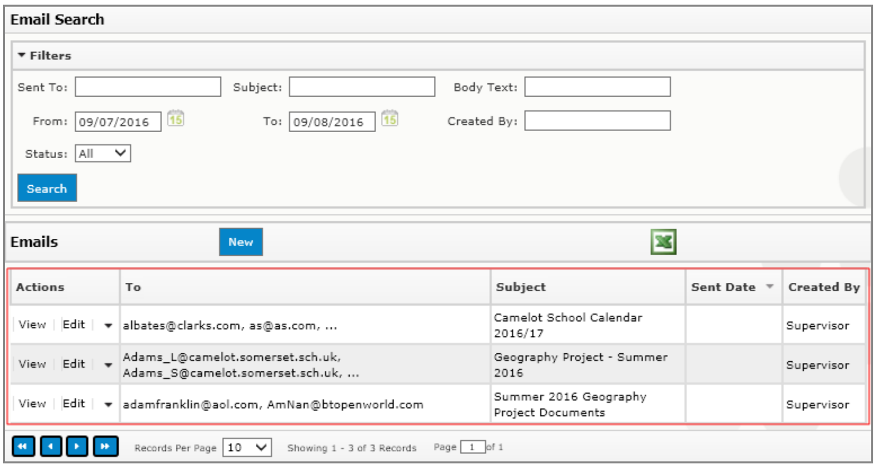
HOW TO EDIT SAVED EMAILS

1. Find the email you want to edit.

   More details...

   a. Go to **Communication > Email**.

   The **Email Search** and **Emails** screen appears, showing a grid of saved emails.



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 from 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 results populate the grid. You can search by:

Action	Field
Sent To	Type all or part of the name of the email's recipient into this field.
Subject	Type all or part of the email's subject into this field.
Body Text	Type all or part of keywords in the email's main text into this field.
From / **To**	Either click in the field and replace the existing date(s) OR click and select a date in the calendar.
Created By	Type all or part of the name of the person who created the email into this field.
Status	Use this drop list to select 'All', 'Draft' or 'Sent'.

c. (Optional) Use the icons beneath the grid to navigate between pages of 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. Click **Edit** next to the email that you want to amend.

   The relevant **Email Edit (Draft)** screen appears.

3. Make your changes, as required.
4. Do ONE of the following:

   » To send the email, click **Send**.

   » To save the email and send it later, click **Save**.

   » To remove the email, click **Delete**.

   » To return to the previous screen, click **Up**.

   » To leave the email process, click **Cancel**.

Deleting Saved Emails

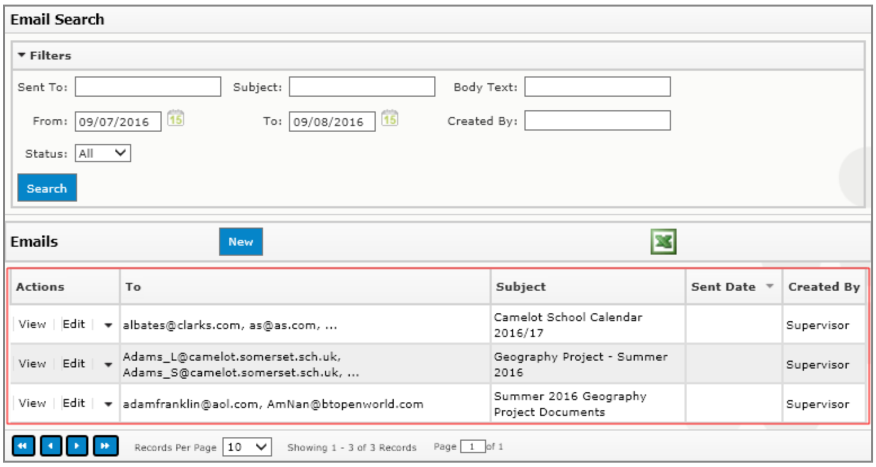
HOW TO DELETE A SAVED EMAIL

1. Find the email you want to delete.

   More details...

   a. Go to **Communication > Email**.

   The **Email Search** and **Emails** screen appears, showing a grid of saved emails.



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 from 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 results populate the grid. You can search by:

Action	Field
Sent To	Type all or part of the name of the email's recipient into this field.
Subject	Type all or part of the email's subject into this field.
Body Text	Type all or part of keywords in the email's main text into this field.
From / To	Either click in the field and replace the existing date(s) OR click the calendar icon and select a date in the calendar.
Created By	Type all or part of the name of the person who created the email into this field.
Status	Use this drop list to select 'All', 'Draft' or 'Sent'.

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

Records Per Page 25

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

Page 1 of 1

2. Click **Delete** next to the email that you want to remove.

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

3. If you are sure that you want to delete the saved email, click **OK** when the message popup appears.

   The email is deleted.

Exporting the Emails Grid to Excel

HOW TO EXPORT THE EMAILS GRID TO EXCEL

1. Go to **Communication > Email**.

   The **Email Search** and **Emails** screen appears.

2. Export the **Emails** grid to Excel.

   More details...

   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.

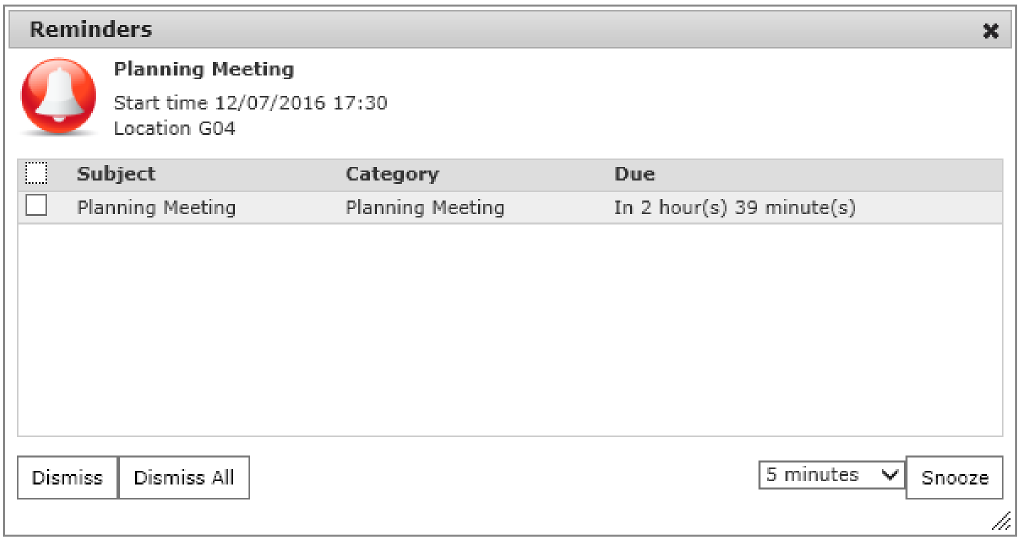
   » Click and **Save and open** to save and automatically open the file.

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

Using Notifications

Notifications can be used to remind individuals or groups of users about forthcoming events. For example, a notification could be used to call and remind attendees of an urgent staff meeting, or a teacher could use a notification to remind them when a pupil is on a final warning regarding homework.

Notifications appear on the relevant user's screen at the time set. Users can decide whether to dismiss or 'snooze' the message using the options on the popup.

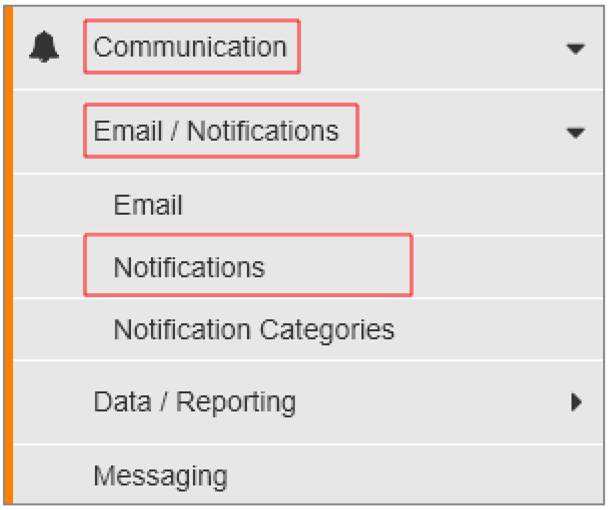


Note: Users MUST be logged in to receive notifications.

Accessing Notifications

HOW TO ACCESS NOTIFICATIONS

» Go to **Communication > Notifications**.



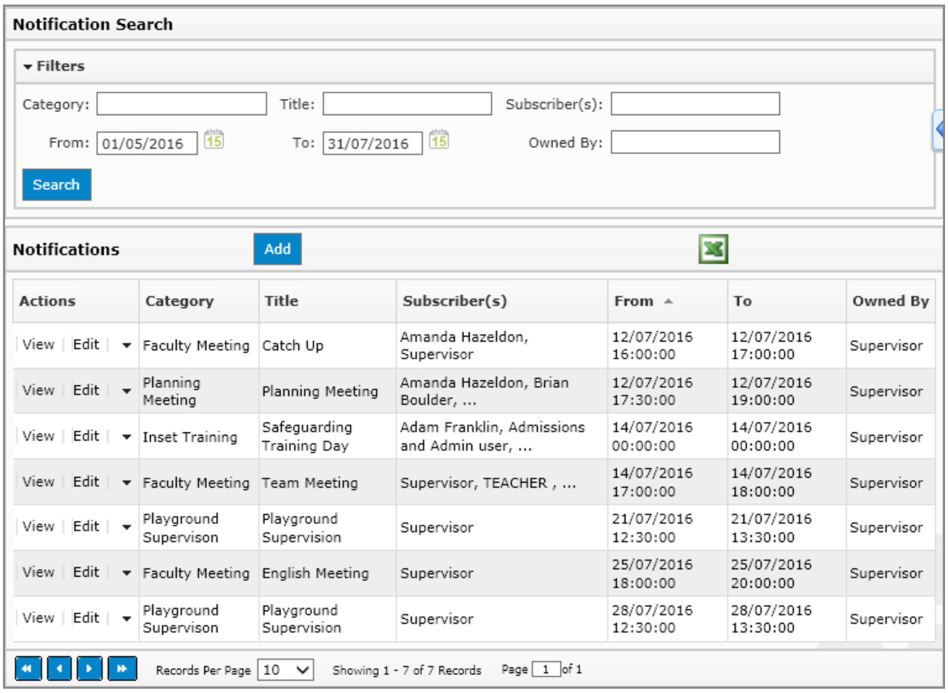
3sys® ACADEMIC

Adding Notifications

HOW TO ADD A NOTIFICATION

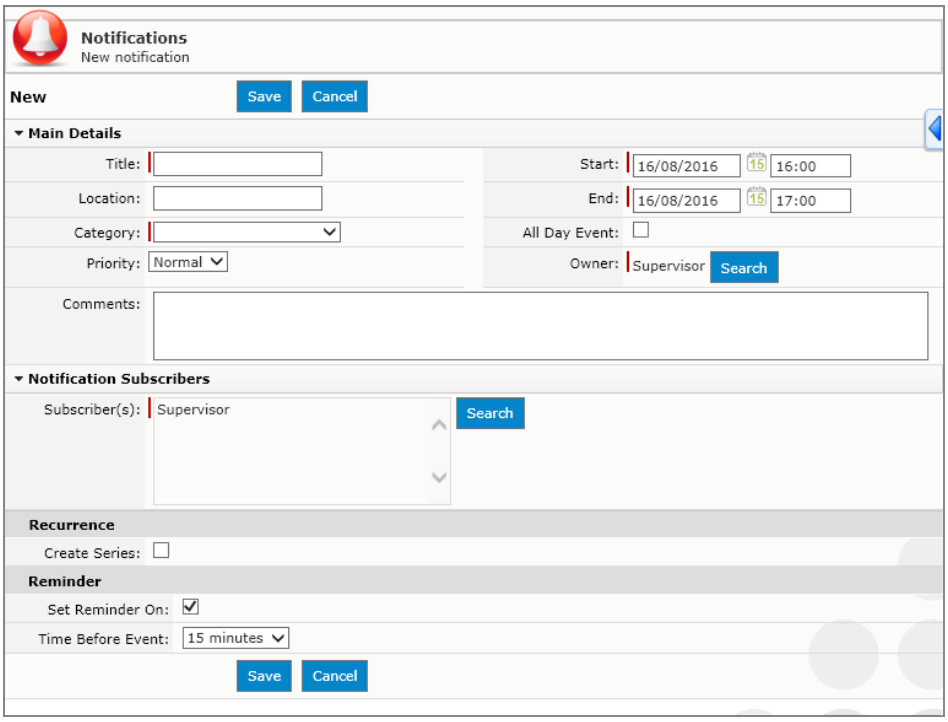
1. Go to **Communication > Notifications**.

   The **Notification Search** and **Notifications** screen appears.



2. Click **Add**.

   The **Notifications: New notification** screen appears.



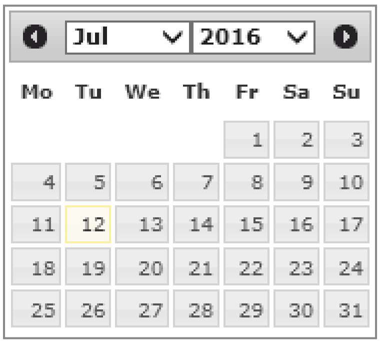
> **Note:** You MUST complete any sections marked with a red bar on the left-hand side.

3. Complete the **Title** field.
4. (Optional) Type a location in the **Location** field.
5. Select an option using the **Category** drop list.
6. Use the **Priority** drop list to select 'Low', 'Normal' or 'High'.
7. Add the dates to the **Start** and **End** fields.

   More details...

   Do ONE of the following:

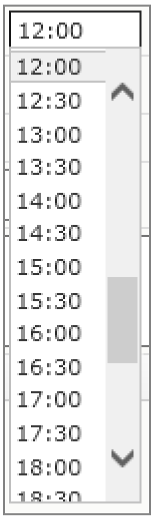
   - Click in the field and click to delete the existing date. Type the required date in the field using the format DD/MM/YYYY.
   - Click to display the **Calendar** popup and select your preferred date and time. (To go to other months use the arrows in the top left and right-hand corners of the calendar. To see other months or years, use the drop lists at the top.)



8. Do ONE of the following:
   - If the event described begins and finished at specific times, complete the **Start** and **End** fields.

     More details...

     Do ONE of the following:
     - Click in the field and delete the existing time. Type the required time using the format HH:MM.
     - Click in the time field to display the **Time** popup and select your preferred time. (To scroll to different hours, use the arrows at the top and bottom on the right-hand side.)

   - If this is an all day event, tick the **All Day Event** check box.

     Note: If this option is selected, the time fields disappear and the **Reminder** options change.

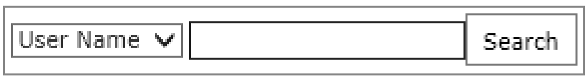
9. Amend the owner, if required. (The logged in user's user name appears here automatically.)

   More details...

   a. Click **Search**.

      The **Search** dialog appears.

   b. Do ONE of the following:
      - Type all or part of the user name you want into the second field and click **Search**. A list of possible matches appears in the **Name** field.

      - Leave the second field blank and click **Search**. A list of all available user names appears in the **Name** field.

   c. Click on the required name.

      You return to the previous screen. The selected user name appears in the relevant field.

10. (Optional) Type notes in the **Comments** field.

11. Add other **Notification Subscribers**, if required.

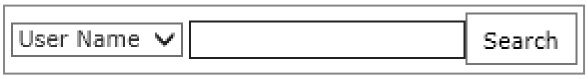
    More details...

    a. Click **Search**.

       A **Search** dialog appears.

    b. Do ONE of the following:

       - Type all or part of the user name you want into the second field and click **Search**. A list of possible matches appears in the **Name** field.

       - Leave the second field blank and click **Search**. A list of all available user names appears in the **Name** field.

    c. Tick the check box next to the name(s) you want.

    d. Click **Select**.

       The selected users appear in a list at the bottom of the screen.

    e. (Optional) To remove names from the selected list, tick the adjacent check box and click **Remove**.

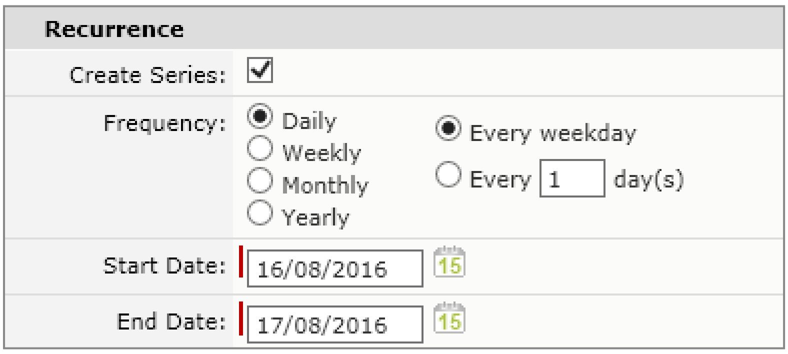
    f. Click **OK**.

12. (Optional) Make this a recurring notification.

    More details...

    a. Tick the **Create Series** check box.

       Additional fields appear.

    b. Select the notification's **Frequency** options.

       - **If you select 'Daily'**, pick 'Every weekday' OR 'Every 1 day(s)' and type how many days between notifications there should be in the relevant field.
       - **If you select 'Weekly'**, type how many weeks and tick the check box(es) for each day of the week the notification should recur.
       - **If you select 'Monthly'**, use the drop list to select the day of the month and type the number of months between recurrences OR use the drop lists to select an instance and the day of the week plus type the number of months into the relevant field.
       - **If you select 'Yearly'**, use the drop lists to select a month and date OR the date, day and month.

       > **Note:** Alternative options appear depending upon which frequency you select.

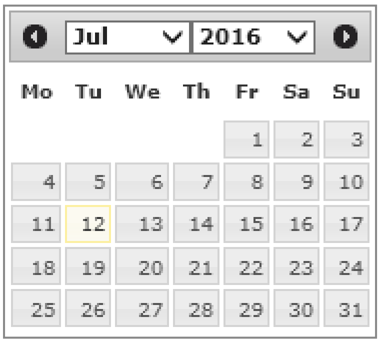
c. Complete the **Start Date** and **End Date** fields for your recurring notification.

More details...

Do ONE of the following:

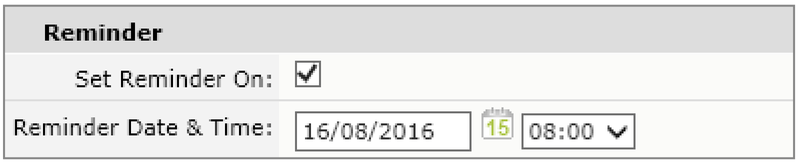
» Click in the field and click to delete the existing date. Type the required date in the field using the format DD/MM/YYYY.

» Click to display the **Calendar** popup and select your preferred date and time. (To go to other months use the arrows in the top left and right-hand corners of the calendar. To see other months or years, use the drop lists at the top.)

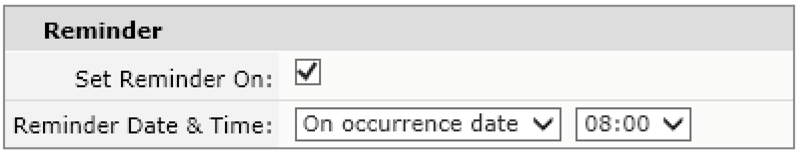


13. (Optional) To add a reminder, tick the **Set Reminder On** check box and set when the reminder should be issued.

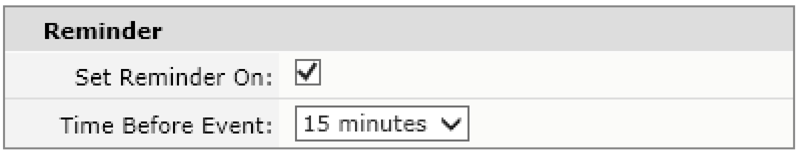
» **If this is an all day event**, complete the **Reminder** date field by typing in the relevant date OR using the calendar dialog and use the **Reminder Time** drop list to select the time the reminder appears.



» **If this is a recurring, all day event**, use the **Reminder Date & Time** drop lists to select how many days before the event and at what time the reminder should appear.



» **If this is not an all day event**, use the **Time Before Event** drop list to select how many minutes, hours, days or weeks in advance the reminder should appear.



14. Click **Save**.

Viewing Notifications

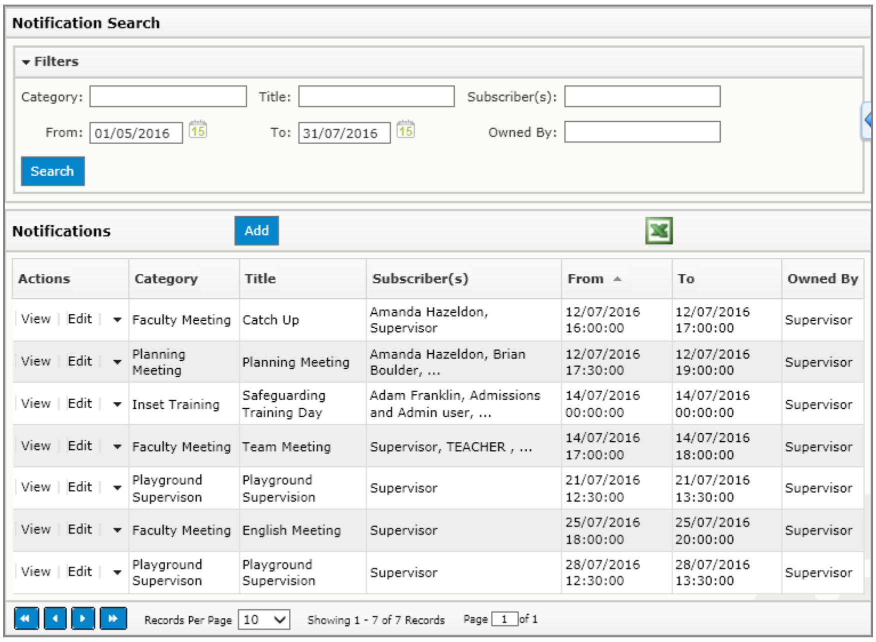
HOW TO VIEW A NOTIFICATION

1. Find the notification you would like to view.

   More details...

   a. Go to **Communication > Notifications**.

   The **Notification Search** and **Notifications** screen appears, showing a list of the notifications owned by the logged in user.



Actions	Category	Title	Subscriber(s)	From	To	Owned By
View | Edit	Faculty Meeting	Catch Up	Amanda Hazeldon, Supervisor	12/07/2016 16:00:00	12/07/2016 17:00:00	Supervisor
View | Edit	Planning Meeting	Planning Meeting	Amanda Hazeldon, Brian Boulder, ...	12/07/2016 17:30:00	12/07/2016 19:00:00	Supervisor
View | Edit	Inset Training	Safeguarding Training Day	Adam Franklin, Admissions and Admin user, ...	14/07/2016 00:00:00	14/07/2016 00:00:00	Supervisor
View | Edit	Faculty Meeting	Team Meeting	Supervisor, TEACHER , ...	14/07/2016 17:00:00	14/07/2016 18:00:00	Supervisor
View | Edit	Playground Supervison	Playground Supervision	Supervisor	21/07/2016 12:30:00	21/07/2016 13:30:00	Supervisor
View | Edit	Faculty Meeting	English Meeting	Supervisor	25/07/2016 18:00:00	25/07/2016 20:00:00	Supervisor
View | Edit	Playground Supervison	Playground Supervision	Supervisor	28/07/2016 12:30:00	28/07/2016 13:30:00	Supervisor

   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 from 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 results populate the grid. You can search by:

Field	Action
Category	Type all or part of a category in this field.
Title	Type all or part of a title in this field.
Subscriber(s)	Type all or part of a subscriber's name into this field.
From / **To**	Either type the relevant date(s) into these field(s) OR click the calendar icon to select a date using the calendar popup.
Owned By	Type all or part of the notification's owner's name into this field.

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

  Records Per Page 25

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

  Page 1 of 1

2. Click **View** next to the record you want to see in more detail.

   The relevant **Notifications** screen appears.

Editing Notifications

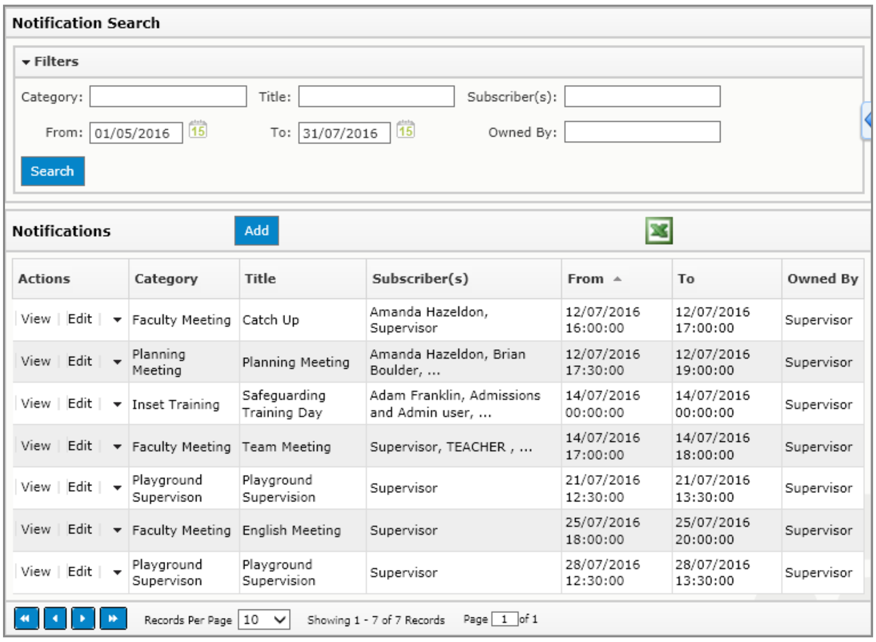
HOW TO EDIT A NOTIFICATION

1. Find the notification you would like to edit.

   More details...

   a. Go to **Communication > Notifications**.

   The **Notification Search** and **Notifications** screen appears, showing a list of the notifications owned by the logged in user.



Actions	Category	Title	Subscriber(s)	From	To	Owned By
View Edit	Faculty Meeting	Catch Up	Amanda Hazeldon, Supervisor	12/07/2016 16:00:00	12/07/2016 17:00:00	Supervisor
View Edit	Planning Meeting	Planning Meeting	Amanda Hazeldon, Brian Boulder, ...	12/07/2016 17:30:00	12/07/2016 19:00:00	Supervisor
View Edit	Inset Training	Safeguarding Training Day	Adam Franklin, Admissions and Admin user, ...	14/07/2016 00:00:00	14/07/2016 00:00:00	Supervisor
View Edit	Faculty Meeting	Team Meeting	Supervisor, TEACHER , ...	14/07/2016 17:00:00	14/07/2016 18:00:00	Supervisor
View Edit	Playground Supervison	Playground Supervision	Supervisor	21/07/2016 12:30:00	21/07/2016 13:30:00	Supervisor
View Edit	Faculty Meeting	English Meeting	Supervisor	25/07/2016 18:00:00	25/07/2016 20:00:00	Supervisor
View Edit	Playground Supervison	Playground Supervision	Supervisor	28/07/2016 12:30:00	28/07/2016 13:30:00	Supervisor

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 from highest to lowest.

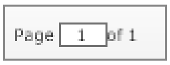
b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Field	Action
Category	Type all or part of a category in this field.
Title	Type all or part of a title in this field.
Subscriber(s)	Type all or part of a subscriber's name into this field.
From / **To**	Either type the relevant date(s) into these field(s) OR click to select a date using the calendar popup.
Owned By	Type all or part of the notification's owner's name into this field.

c. (Optional) Use the icons beneath the grid to navigate between pages of 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. Click **Edit** next to the record you would like to amend.
3. Make your changes.

> **Note:** To edit the series of notifications rather than the single event, select **Edit Series** in the **Recurrence** section.

4. Click **Save**.

Deleting Notifications

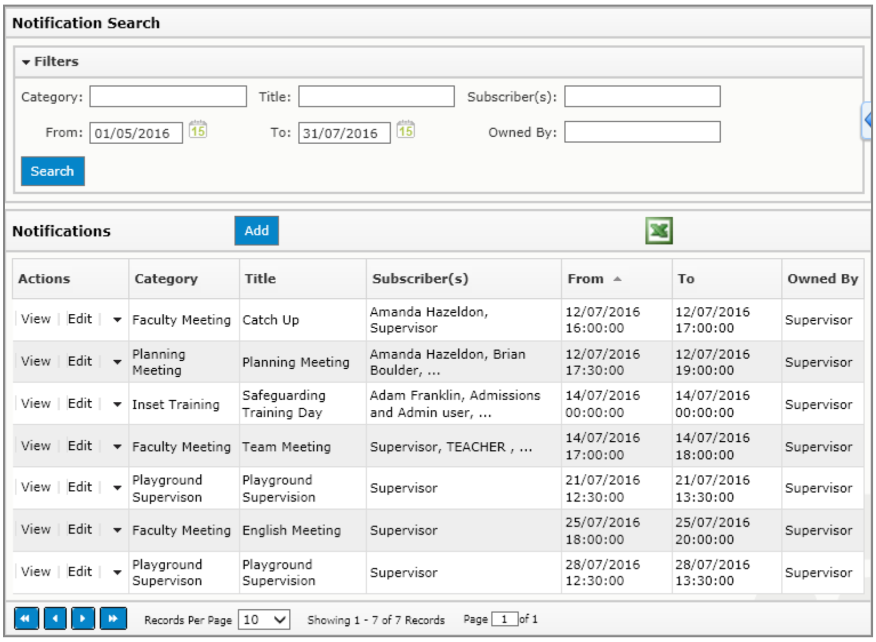
HOW TO DELETE A NOTIFICATION

1. Find the notification you would like to delete.

   More details...

   a. Go to **Communication > Notifications**.

   The **Notification Search** and **Notifications** screen appears, showing a list of the notifications owned by the logged in user.



> **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 from highest to lowest.

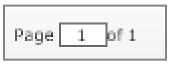
   b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Field	Action
Category	Type all or part of a category in this field.
Title	Type all or part of a title in this field.
Subscriber(s)	Type all or part of a subscriber's name into this field.
From / To	Either type the relevant date(s) into these field(s) OR click the calendar icon to select a date using the calendar popup.
Owned By	Type all or part of the notification's owner's name into this field.

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

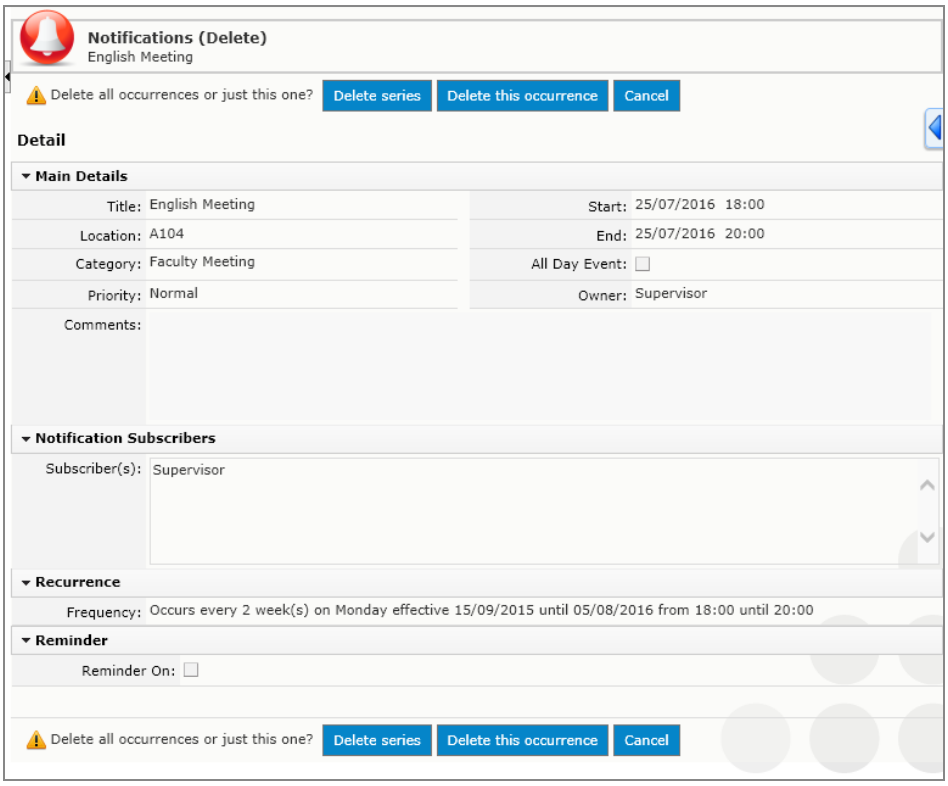
- Click or or on the numbers underneath the grid on the left-hand side to move between pages.
- Click to go to the first page or to go to the last page.
- Use the **Records Per Page** drop list to see more records on each page.

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



2. Click **Delete** next to the record you would like to remove.

   The relevant **Notifications (Delete)** screen appears.



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

3. Do ONE of the following:
   - To delete a one off events, click **Yes** if you are sure that you want to delete the record.
   - To delete one event in a series, click **Delete this occurrence**.
   - To delete a whole series of events, click **Delete series**.
   - To abort the action, click **Cancel**.

Exporting the Notifications Grid to Excel

HOW TO EXPORT THE NOTIFICATIONS GRID TO EXCEL

1. Go to **Communication > Notifications**.
2. Export the **Notifications** grid to Excel.

   More details...

   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.

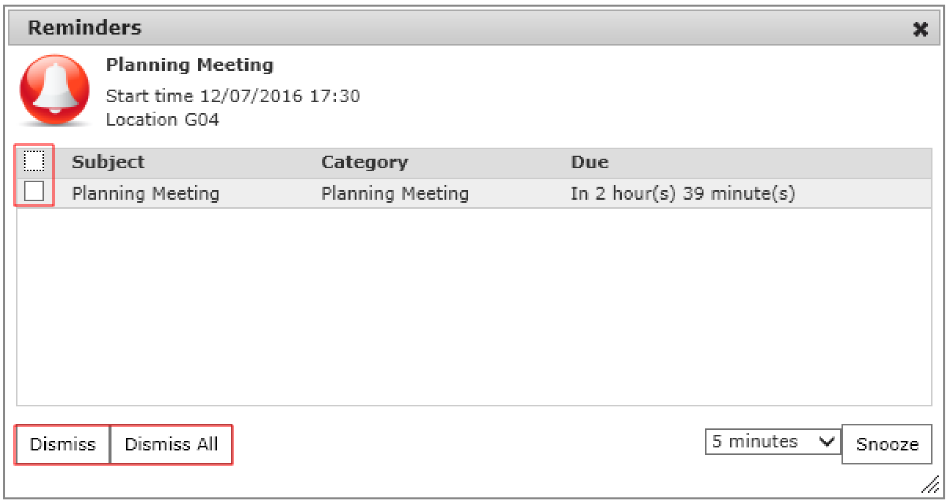
   » Click and **Save and open** to save and automatically open the file.

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

Dismissing Notification Reminders

HOW TO DISMISS NOTIFICATION REMINDERS

1. Tick the check box next to the relevant message(s) in the **Reminders** popup.



Note: To select ALL of the notification reminders listed, tick the check box in the header row.

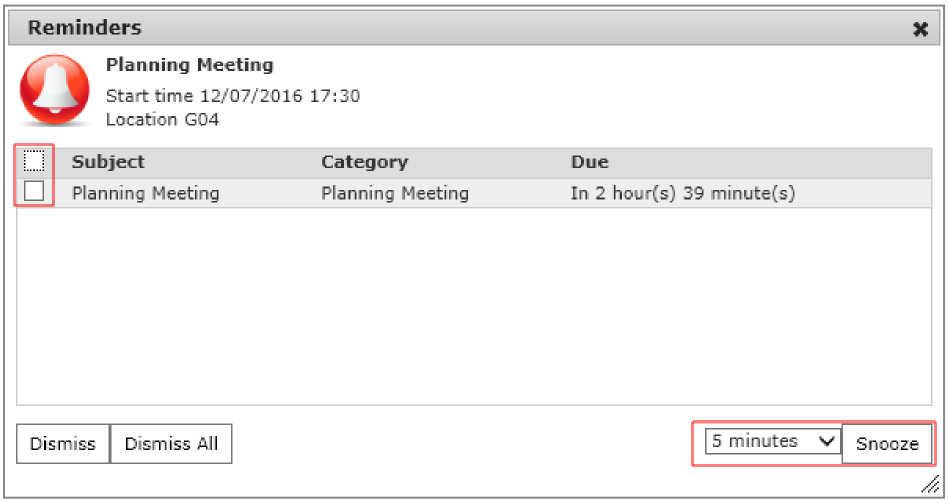
2. Click **Dismiss**.

Note: To remove ALL of the notification reminders listed, click **Dismiss All**.

Snoozing Notification Reminders

HOW TO SNOOZE NOTIFICATION REMINDERS

1. Tick the check box next to the relevant message(s) in the **Reminder** popup.



Note: To select ALL of the notification reminders listed, tick the check box in the header row.

2. Use the drop list in the bottom right-hand corner to select how long you would like to snooze the reminder.
3. Click **Snooze**.

   The reminder reappears after the specified time.

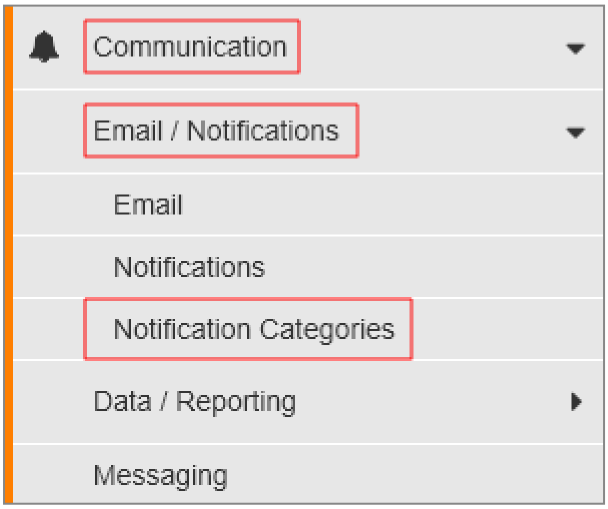
Configuring Notification Categories

Before notifications can be added to 3sysACADEMIC, notification categories must be created. Categories are brief descriptions used to identify and group specific notifications, e.g. 'Reminder', 'SMT Meeting' or 'Inset Training'. Once created, they can be added to a notification via a drop list. Users can add, edit and delete categories and export a list of them to Excel.

Accessing Notification Categories

HOW TO ACCESS A NOTIFICATION CATEGORY

» Go to **Communication > Notification Categories**.

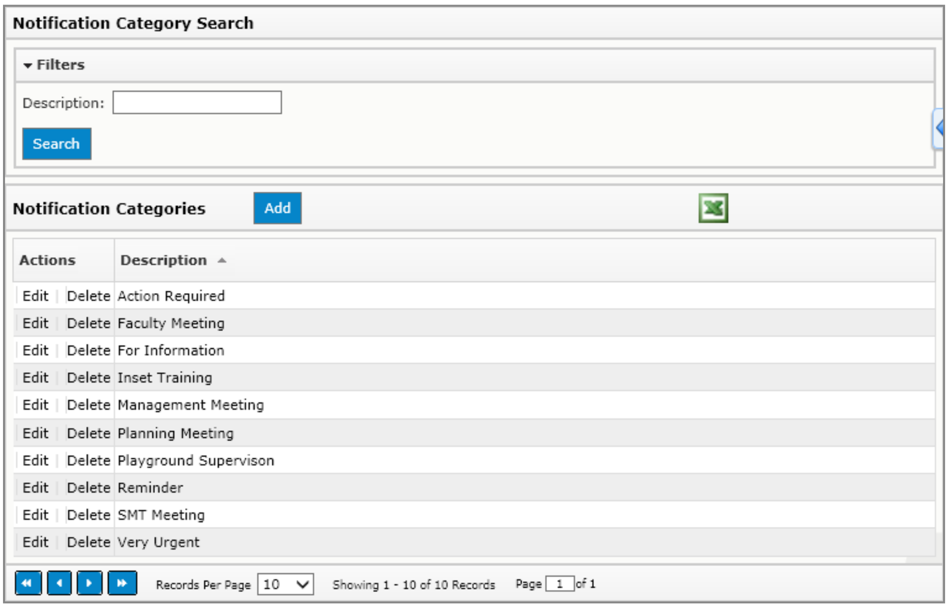


Adding Notification Categories

HOW TO ADD A NOTIFICATION CATEGORY

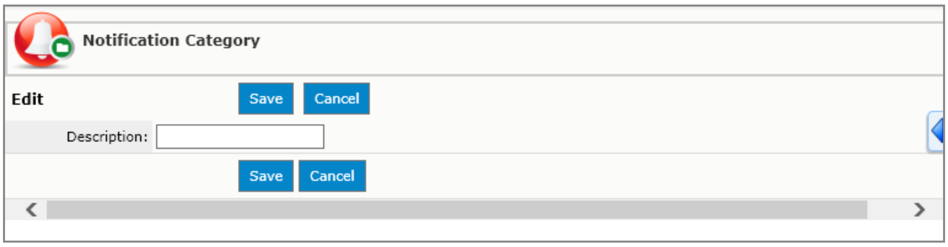
1. Go to **Communication > Notification Categories**.

   The **Notification Category Search** and **Notification Categories** screen appears.



2. Click **Add**.

   The **Notification Category** screen appears.



3. Type a description in the relevant field.
4. Click **Save**.

Editing Notification Categories

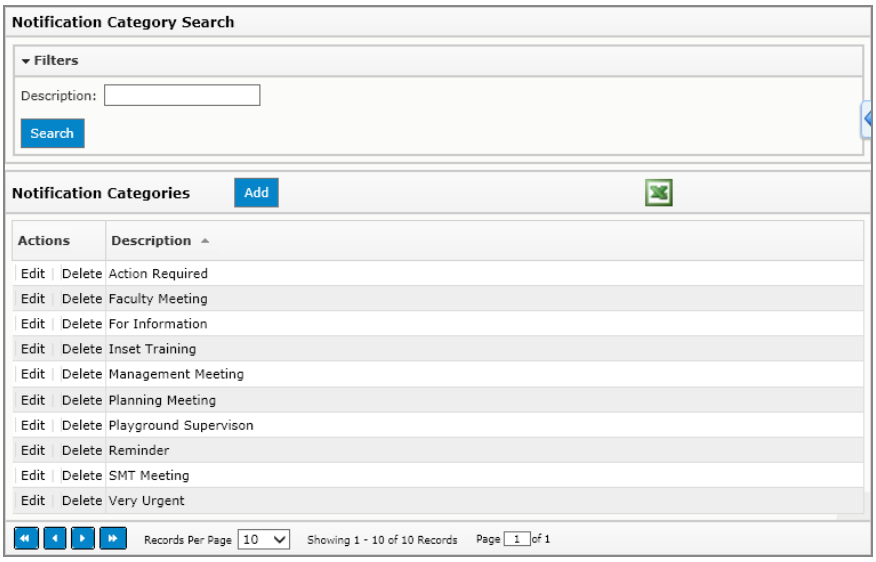
HOW TO EDIT A NOTIFICATION CATEGORY

1. Find the notification category you would like to edit.

   More details...

   a. Go to **Communication > Notification Categories**.

      The **Notification Category Search** and **Notification Categories** screen appears.



> **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 from highest to lowest.

   b. Type all or part of the category's description in the **Description** field above the grid.

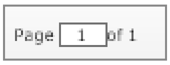
   c. Click **Search**.

      Matching records appear in the **Notification Categories** grid.

d. (Optional) Use the icons beneath the grid to navigate between pages of 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. Click **Edit** next to the category you would like to amend.
3. Make your amendments.
4. Click **Save**.

Deleting Notification Categories

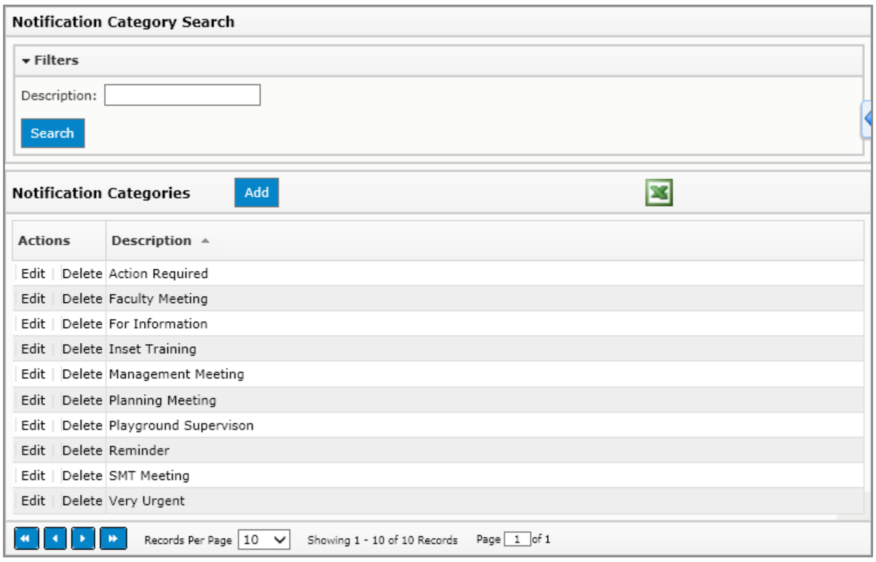
HOW TO DELETE A NOTIFICATION CATEGORY

1. Find the notification category you want to delete.

More details...

a. Go to **Communication > Notification Categories**.

The **Notification Category Search** and **Notification Categories** screen appears.



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 from highest to lowest.

b. Type all or part of the category's description in the **Description** field above the grid.

c. Click **Search**.

Matching records appear in the **Notification Categories** grid.

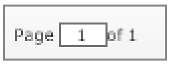
d. (Optional) Use the icons beneath the grid to navigate between pages of results.

» 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. Click **Delete** next to the relevant category.

The **Notification Category (Delete)** screen appears.

3. If you are user you would like to delete the category, click **Yes**.

Exporting the Notification Categories Grid to Excel

HOW TO EXPORT THE NOTIFICATION CATEGORIES GRID TO EXCEL

1. Go to **Communication > Notification Categories**.

The **Notification Category Search** and **Notification Categories** screen appears.

2. Export the grid to Excel.

More details...

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.

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CHAPTER 3

Data / Reporting

This chapter discusses the following:

About Data / Reporting Module

The **Data / Reporting** module consists of the following functions, as detailed below:

- **Documents** function.
- **Reports** function.
- **Names** function.

Documents

If you have the relevant permissions, the **Documents** function enables you to search for and view documents held within your system, and add documents to individuals' records. Typically, these documents are PDF files, but 3sysACADEMIC can display other types of documents, if the user has the relevant software installed on their client machine.

Your System Administrator is likely to restrict the availability of this function to specific users only. For example, documents could include a letter sent to a parent regarding overdue fees. It is unlikely that this type of document would be relevant for teachers, whereas your school's billing/accounts staff would need to have access to this type of document.

> **Note:** The accessibility of the **Documents** function is controlled by profile settings configured within 3sysACADEMIC AND the note category security model as configured within schoolADMIN (PASS).

Reports

The **Reports** function enables those users with the relevant permissions, such as a System Administrator, to view a list of Report Builder reports as available within schoolADMIN (PASS), and to view, edit and run them. If you have the permissions to run a Report Builder report within schoolADMIN (PASS), then you will have the permission to run the report within 3sysACADEMIC. You are also able to add reports to your **Favourite Reports** list, as available on your home page if the necessary widget has been configured.

> **Note:** If you are unable to view, edit or run reports, and you expect to be able to do so, please contact your System Administrator.

> **Note:** As the System Administrator with access to reports, if you want to make a specific report available to a particular user, you can impersonate that user (via **Setup**), and make a report a favourite for that user. The 'favourite' report is then available for that user in their **Favourite Reports** widget on their home page (if the home page has been set up appropriately for this user). This enables you to make specific Report Builder reports available to specific users without the need to alter permissions.

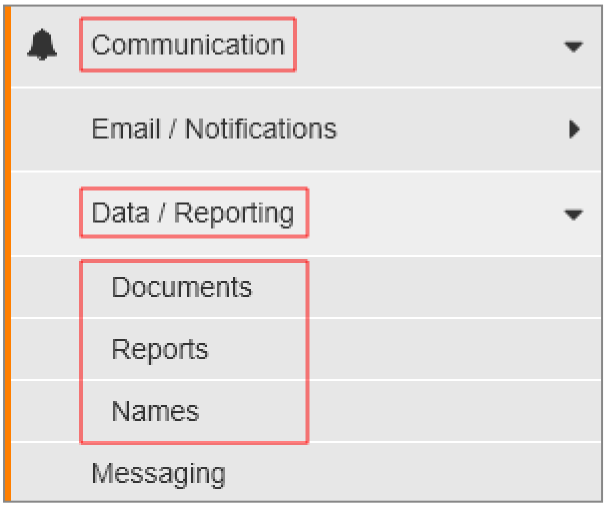
Names

The **Names** function enables you to search for individual records held within your database, including people and organisation records, such as suppliers. Using 3sysACADEMIC views you are able to search for and view records. You are also able to add notes to individual records, and add pupil documents to pupil records.

Accessing the Data / Reporting Module and Functions

HOW TO ACCESS THE DATA / REPORTING MODULE AND FUNCTIONS

» Go to **Communication > Data / Reporting** and click on the relevant function.



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CHAPTER 4

Messaging

This chapter discusses the following:

About the Messaging Module

The **Messaging** module is designed to enable you to send a message to an individual or group of Weixin / WeChat users who have registered to receive updates from the school. This means that you can take advantage of the groups you already have recorded in your database, e.g. form groups, year groups or pupil or staff custom groups for specific projects.

Using 3sysACADEMIC, Weixin / WeChat messages can be sent to individual or groups of pupils, contacts and staff.

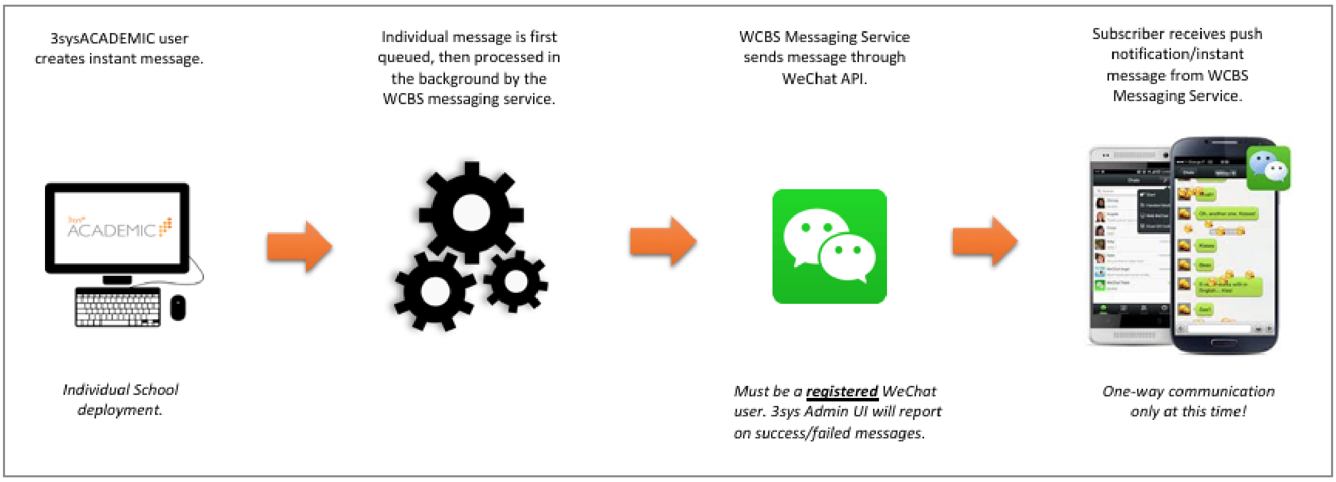
About Weixin / WeChat

Weixin / WeChat is an instant messaging and social networking app originating in China and now with over 930 million active users around the world. It allows smartphone users to send messages and share news, photos, videos and web links in a similar way to Facebook and WhatsApp. Using Weixin / WeChat, schools can 'broadcast' or 'push' messages to subscribers directly from 3sysACADEMIC.

Weixin / WeChat are essentially different versions of the same core application. Weixin is only available to users registered with a Chinese telephone number, while WeChat is available to any international user. Schools can send messages to users of either version via the 3sysACADEMIC **Messaging** module.

About the Messaging Process

When you send a message via the 3sysACADEMIC **Messaging** module, by clicking **Send**, your message is queued for dispatch. The progress of each message is shown on the **Messaging dashboard** tab. The following process occurs:



If you are sending a message to pupils, you can elect to copy the message to the people associated with them, for example parents / guardians. The associated contacts would also need to be registered to receive Weixin / WeChat from your school.

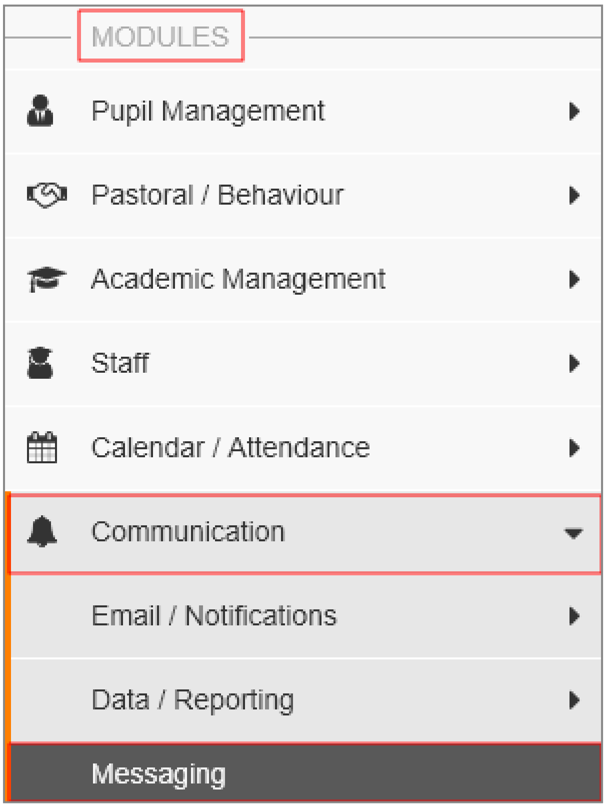
You can choose to send the message as both a Weixin / WeChat message and an email. You can also elect to send messages to staff as 3sysACADEMIC alerts too.

Note: In order to use the **Messaging** module, certain prerequisites must be in place. For example, both schools and message recipients must register and contact data must be up-to-date. For more details, see "About Messaging Module Prerequisites" on page 56.

Accessing and Using the Messaging Module

HOW TO ACCESS THE MESSAGING MODULE

» Go to **Communication > Messaging**.



More details:

» "About Messaging Module Prerequisites" on the next page.
» "About Receiving Messages (Subscriber Registration)" on page 57.
» "About Sending Messages" on page 61.
» "About Managing Messages" on page 71.

About Messaging Module Prerequisites

Note: This section is relevant for System Administrators configuring this function.

In order to use the **Messaging** module, the following prerequisites must be in place:

1. ***Your school must have registered a Weixin / WeChat Enterprise Account.***

   The WCBS Messaging Service can use any existing Weixin / WeChat Enterprise Account that the school may have already. The WCBS Messaging Service communicates with Weixin / WeChat using the official Application Programming Interface (API). This service must be able to communicate with the Weixin / WeChat API via a fixed Internet Protocol (IP) address using the recommended port 80.

2. ***Message recipients must have downloaded the app and registered.***

   The pupils, contacts and staff that you want to message must have a Weixin / WeChat account and have registered via 3sysACADEMIC or WCBS schoolPORTAL to receive your messages, as appropriate. For more information, see "About Receiving Messages (Subscriber Registration)" on the facing page.

3. ***Contact data should be checked.***

   As Weixin / WeChat is linked to a mobile phone, there is no additional information that needs to be captured in 3sysACADEMIC at time of publication. The recipients' mobile numbers must be recorded and up-to-date in 3sysACADEMIC. We encourage you to review this data before starting to use the **Messaging** module in earnest.

   Note: If you intend to send copy Weixin / WeChat messages via email, your contacts' email addresses should also be checked.

4. ***The Messaging module must be made available in 3sysACADEMIC.***

   The **Messaging** module must be enabled within 3sysACADEMIC and configured as appropriate for the applicable user profiles. This is usually undertaken by your System Administrator in each relevant profile's **Detail** screen, accessed via **Setup > Users and profiles > Profiles**. For more information, see the *3sysACADEMIC Setup User Guide*, available from the Customer Centre.

5. ***Staff users should be trained on the module.***

   Staff should be given guidance on how to use the **Messaging** module.

More details: For more information about the subscriber registration process, see "About Receiving Messages (Subscriber Registration)" on the facing page.

About Receiving Messages (Subscriber Registration)

In order for your staff, contacts and pupils to receive the Weixin / WeChat messages that you send using the **Messaging** module, their accounts must be registered with your school's Weixin / WeChat Enterprise Account. This process has been integrated into the software, meaning that your System Administrator can configure the system to allow users to register via 3sysACADEMIC or WCBS schoolPORTAL. Staff register using 3sysACADEMIC, while pupils and contacts register using WCBS schoolPORTAL.

The registration process includes the following steps:

1. Your System Administrator uses WCBS schoolPORTAL to add your school's Weixin / WeChat Enterprise Account details to the software, linking the two.

   More details: For more information, see the *WCBS schoolPORTAL Setup Administrator Guide*, available from our Customer Centre.

2. The System Administrator sends a registration URL to relevant staff, contacts and / or pupils, e.g. in an email. Contacts and / or pupils can also be directed to the **Weixin / WeChat registration** button on their **My Details** screen within WCBS schoolPORTAL.

   More details: For more information, see the *WCBS schoolPORTAL Setup Administrator Guide*, available from our Customer Centre.

3. Staff, contacts and / or pupils click on the URL they receive or the **Weixin / WeChat registration** button and complete the registration process via 3sysACADEMIC or WCBS schoolPORTAL. Users can then receive Weixin / WeChat messages sent by your school.

   More details: For information about how STAFF register to receive messages, see "Registering for your School's Weixin / WeChat Messaging Service" on the next page. For more about how CONTACTS and PUPILS register, log in to WCBS schoolPORTAL, impersonate a non-administrative user and click **Help** to open the *WCBS schoolPORTAL Online Help* or see the *WCBS schoolPORTAL Parents / Contacts User Guide* (PDF version), the *WCBS schoolPORTAL Pupils User Guide* (PDF version) or the *WCBS schoolPORTAL Weixin / WeChat Messaging Service Registration User Guide for Parents, Contacts & Pupils* (MS Word document).

Disabling Weixin / WeChat Registration for Staff / Contacts / Pupils

If your school decides to stop allowing users to register for Weixin / WeChat messages via WCBS schoolPORTAL or 3sysACADEMIC, your System Administrator can disable this feature at any time using WCBS schoolPORTAL.

More details: See the *WCBS schoolPORTAL Setup Administrator Guide* for details.

User Unregistration

As a member of staff, if you decide you no longer wish to receive Weixin / WeChat messages from your school, you can unregister. For more information, see "Unregistering from your School's Weixin / WeChat Messaging Service" on page 60.

More details: For more about how parents, pupils and contacts unregister, log in to WCBS schoolPORTAL, impersonate a non-administrative user and click **Help** to open the *WCBS schoolPORTAL Online Help* or see the *WCBS schoolPORTAL Parents / Contacts User Guide* (PDF version), the *WCBS schoolPORTAL Pupils User Guide* (PDF version) or the *WCBS schoolPORTAL Weixin / WeChat Messaging Service Registration User Guide for Parents, Contacts & Pupils* (MS Word document).

Registering for your School's Weixin / WeChat Messaging Service

HOW TO REGISTER FOR YOUR SCHOOL'S Weixin / WeChat MESSAGING SERVICE

Note: This information is for staff, who must register via 3sysACADEMIC to receive Weixin / WeChat messages from your school. Information for parents, contacts and pupils is included in the *WCBS schoolPORTAL Online Help*.

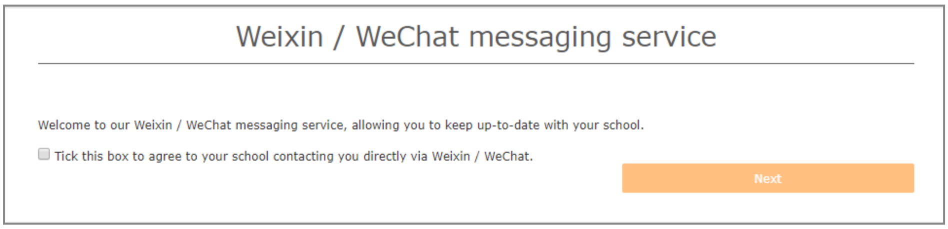
1. Click on the URL provided by your school.

   The **3sysACADEMIC login** screen appears.

   Note: Keep this link on file for future reference. You need it to access these options again, e.g. to unregister.

2. Log in to **3sysACADEMIC**.

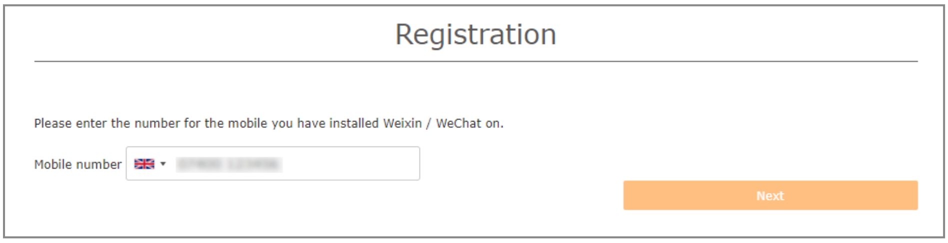
   The **Weixin / WeChat messaging service** screen appears.



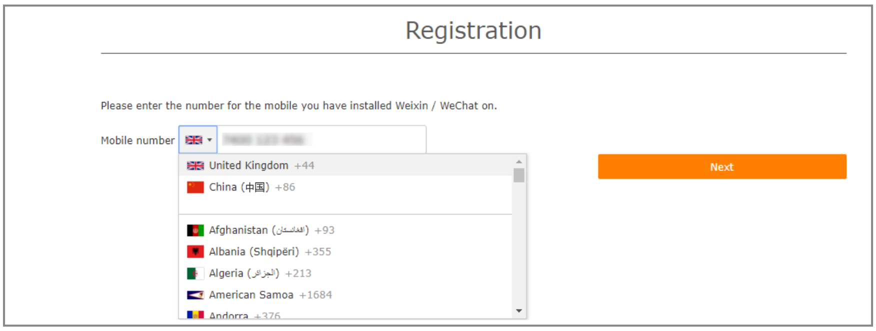
3. If you are happy for your school to contact you via Weixin / WeChat, tick the **Tick this box to agree to your school contacting you directly via Weixin / WeChat** check box.

4. Click **Next**.

   The **Registration** screen appears.



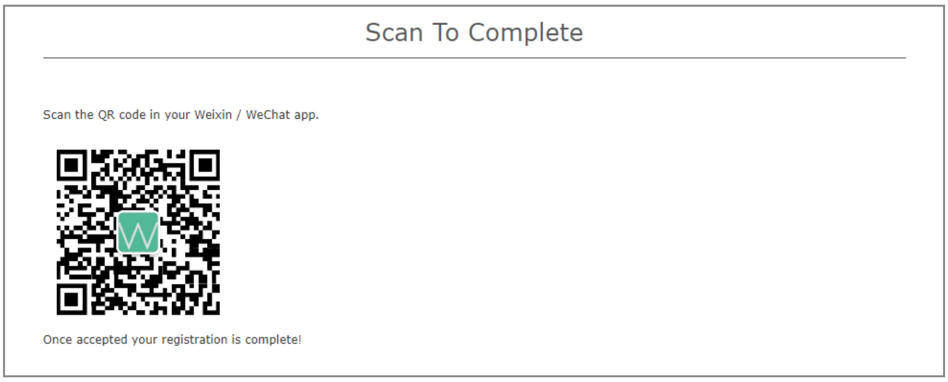
5. Add the mobile telephone number associated with your Weixin / WeChat account.
    a. If required, click on the flag and select the relevant international dialling code from the drop list.



    b. Type your mobile telephone number in the **Mobile number** field.

6. Click **Next**.

   The **Scan to Complete** screen appears.



7. Using the Weixin / WeChat app on your mobile telephone, go to **Discover > Scan QR Code** and scan the QR code to complete the registration process.

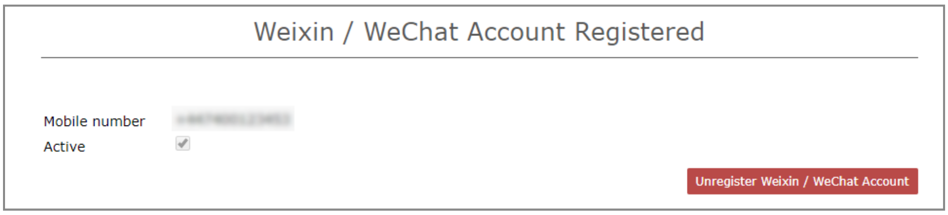
Unregistering from your School's Weixin / WeChat Messaging Service

HOW TO UNREGISTER FROM YOUR SCHOOL'S Weixin / WeChat MESSAGING SERVICE

Note: This information is for staff who wish to stop receiving Weixin / WeChat messages from your school. Staff unregister from this service using 3sysACADEMIC. Information about how pupils and contacts unregister is included in the *WCBS schoolPORTAL Online Help*.

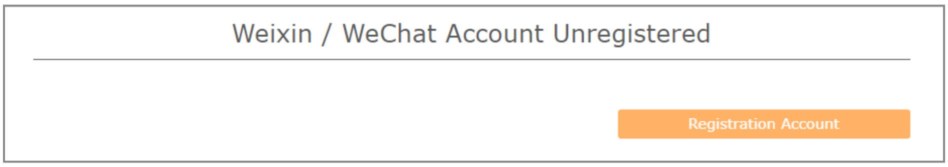
1. Click on the URL provided by your school and log in to 3sysACADEMIC.

   The **Weixin / WeChat Account Registered** screen appears.

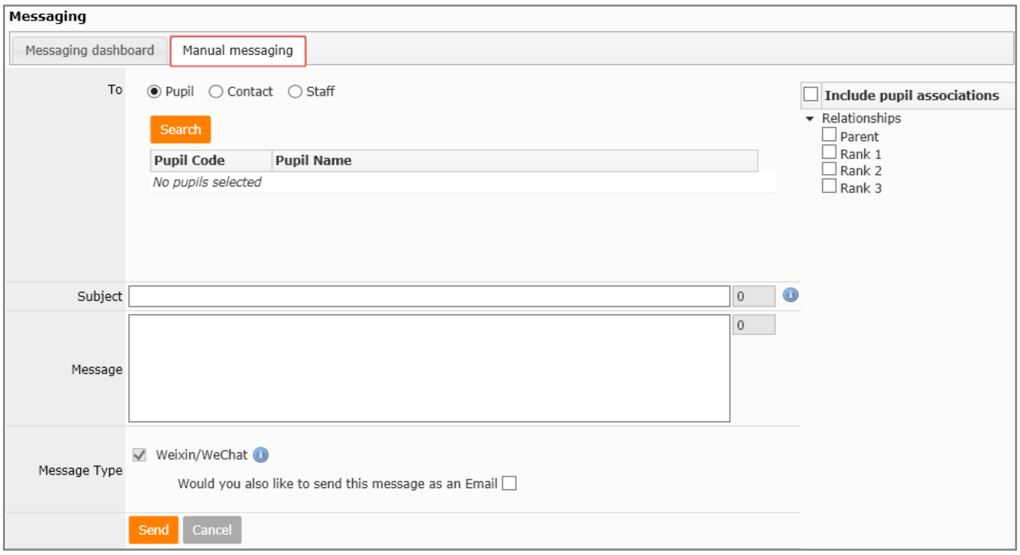
2. Click **Unregister Weixin / WeChat Account**.

   The **Weixin / WeChat Account Unregistered** screen appears.

About Sending Messages

You can create and send messages via the **Manual messaging** tab.

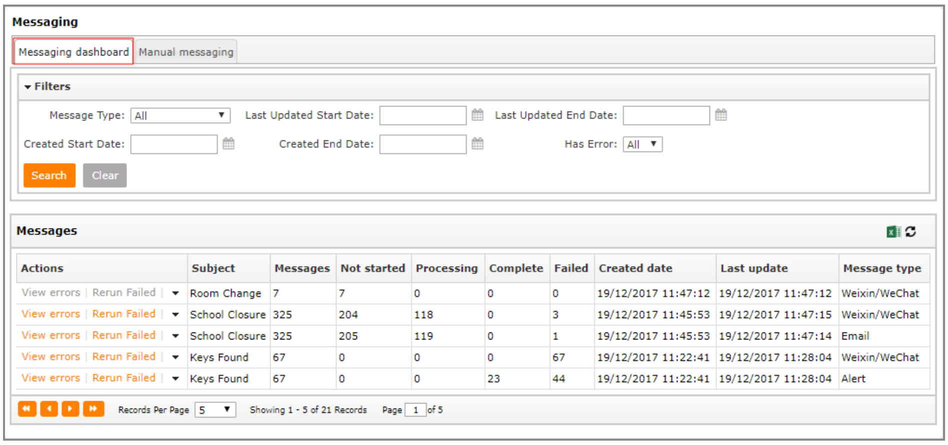


When you send a message via the 3sysACADEMIC **Messaging** module, by clicking **Send**, your message is queued for dispatch.

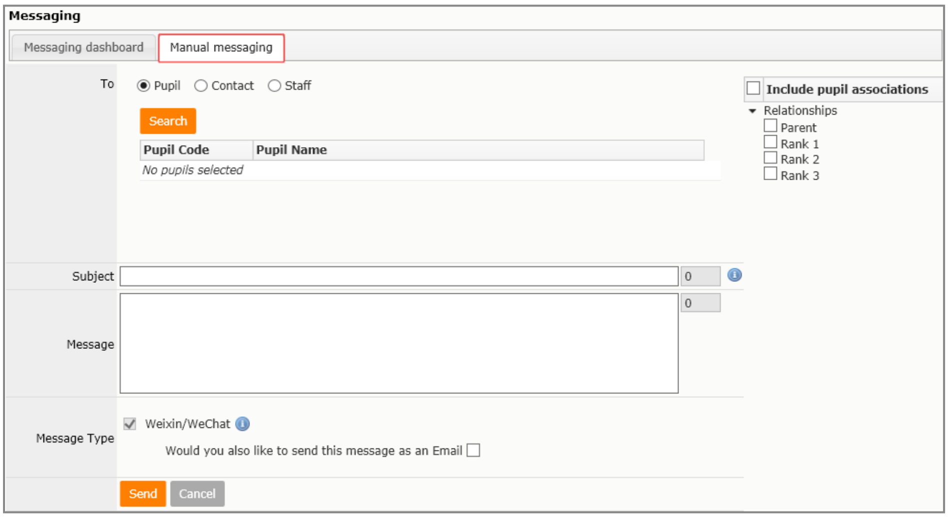
Sending Weixin / WeChat Messages

HOW TO SEND Weixin / WeChat MESSAGES

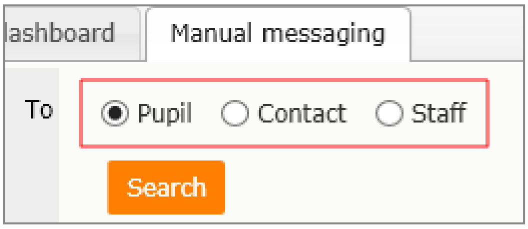
1. Go to **Communication > Messaging**.
   The **Messaging dashboard** tab appears.



2. Click on the **Manual messaging** tab.



3. Select the recipient type (i.e. 'Pupil', 'Contact' or 'Staff').



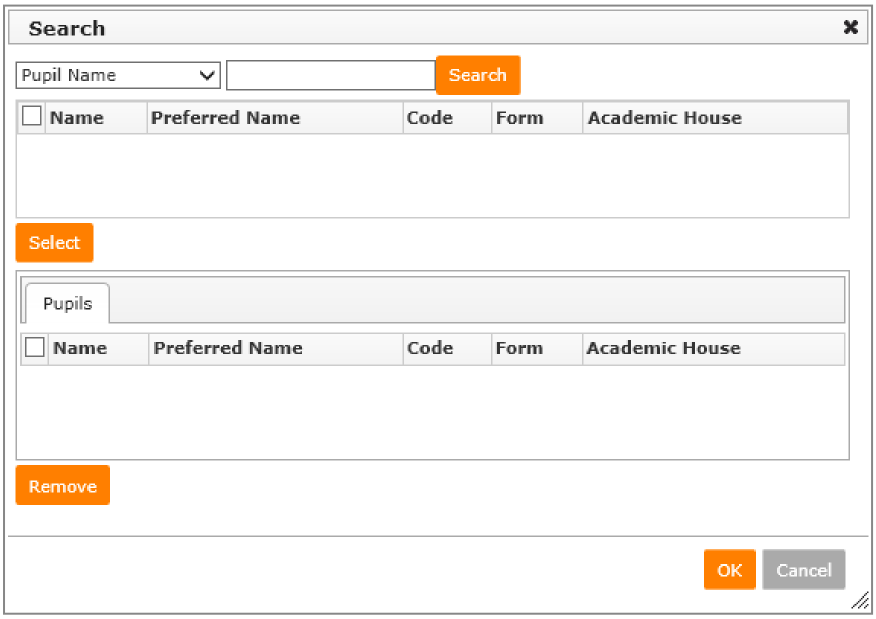
Note: If 'Staff' is selected, you also have the option to send your message as a 3sysACADEMIC alert. An additional **Message Type** check box appears.

4. Click **Search** to find your specific recipients.

More details...

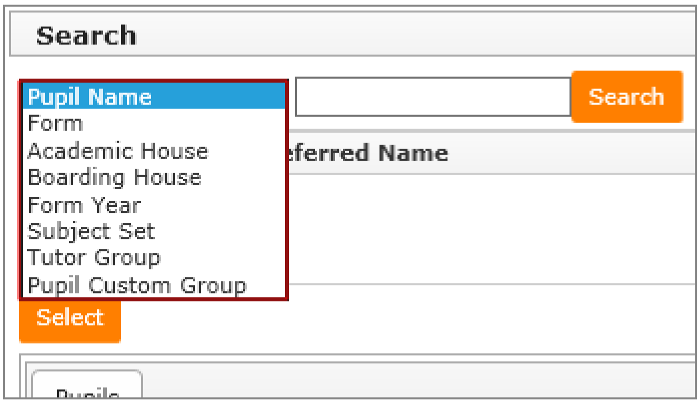
a. Click **Search**.

A **Search** dialog appears.

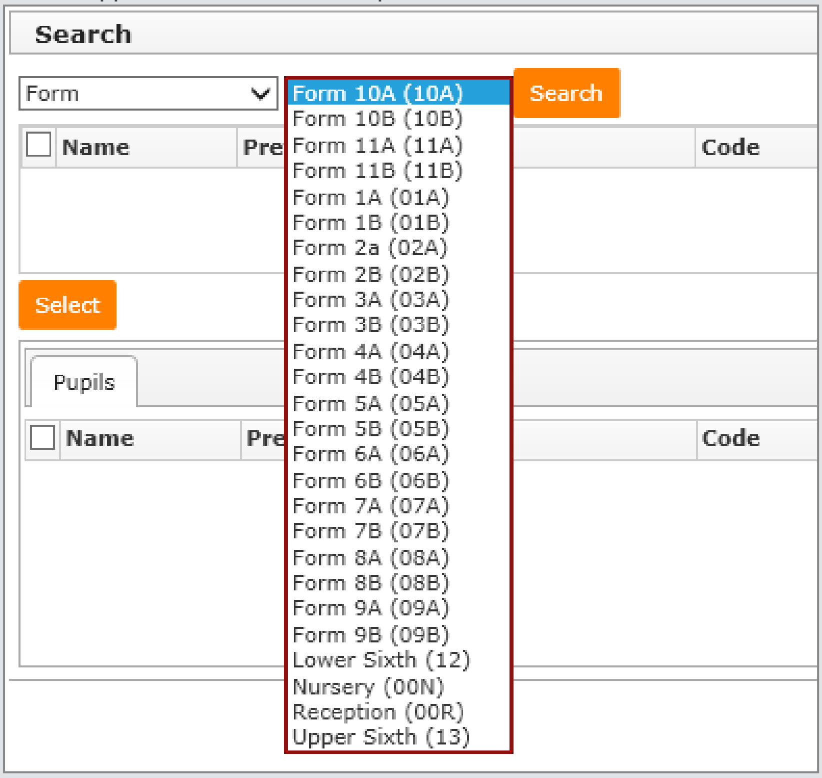


b. At the top of the dialog, enter your search criteria.

» ***To search for a pupil or staff group*** - 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 2018' etc. Your selection in the first drop list alters the options available in the second drop list.

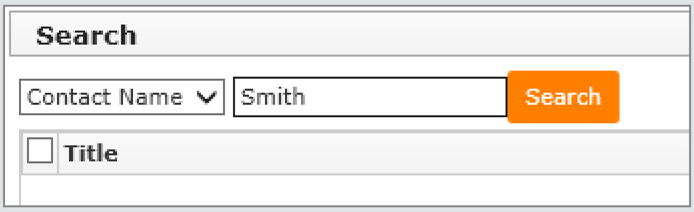


Example: If 'Form' is selected in the first drop list, a list of forms in the school appears in the second drop list.



» ***To search for an individual's name*** - Use the first drop list to select 'Pupil Name', 'Contact Name' or 'Staff Name' (as applicable), then type all or part of the individual's name into the second field.

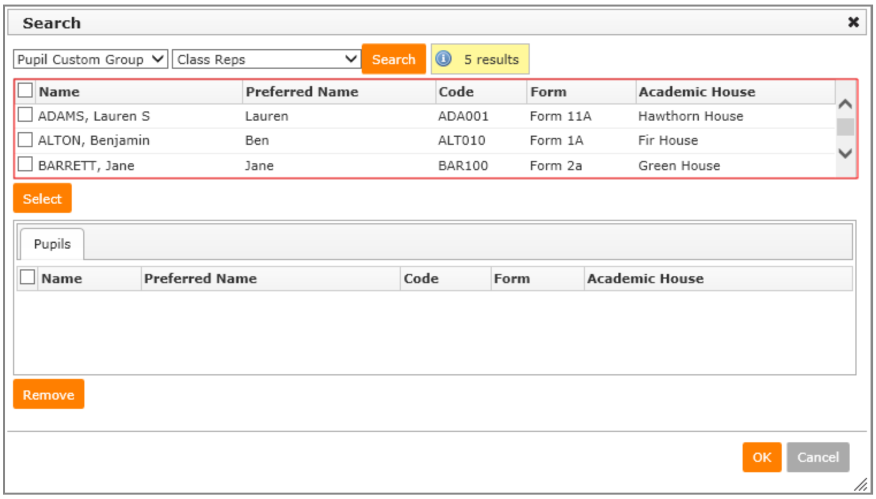
Example: This user is searching for contacts by name using the key word 'Smith'.



» ***To retrieve a full list of pupils / contacts / staff*** - Use the first drop list to select 'Pupil Name', 'Contact Name' or 'Staff Name' (as applicable) and leave the second field empty to retrieve a complete list of relevant individuals.

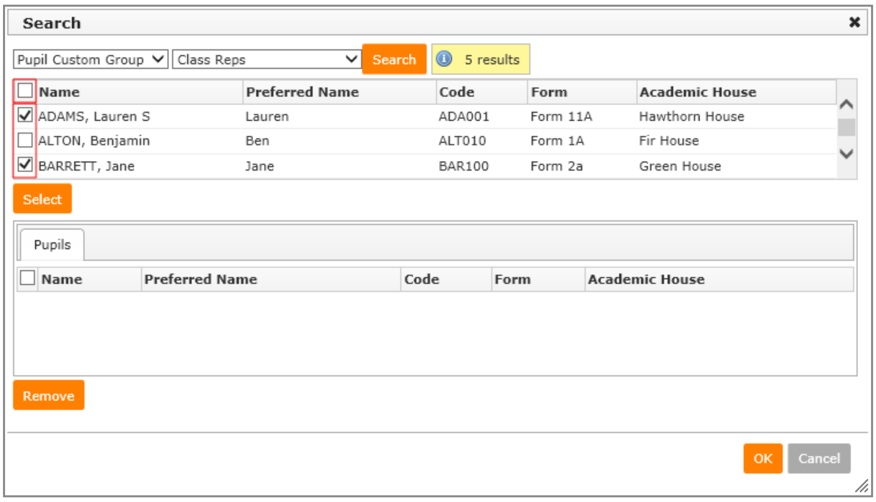
c. Click **Search**.

A list of individuals appears beneath the drop lists.



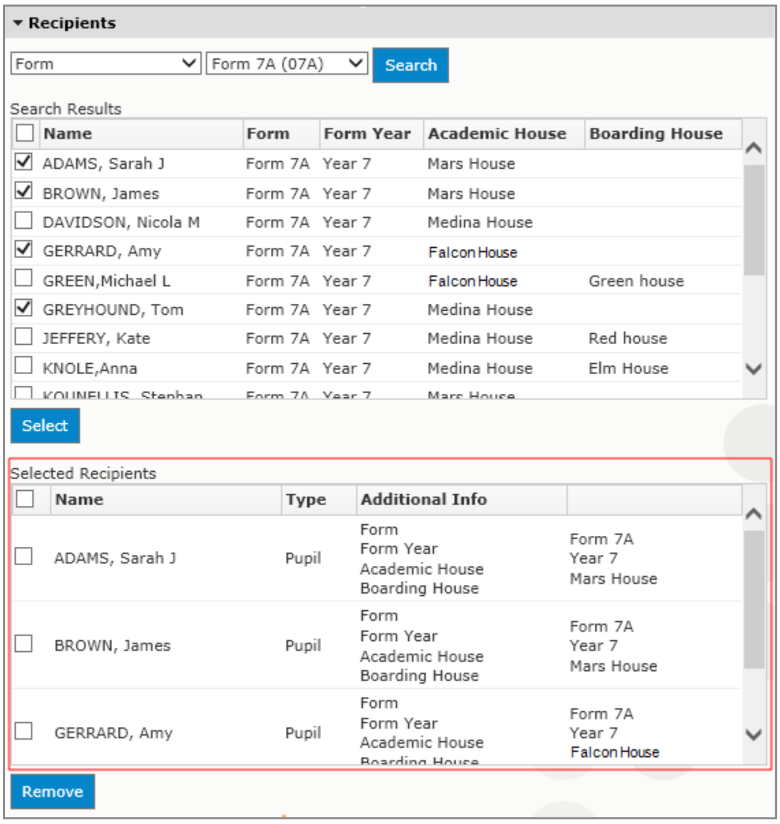
d. To select recipients, do ONE of the following:

- To select ALL the individuals in the list, tick the check box in the header row.
- To select individuals, tick the check box on the left-hand side of each name you require.

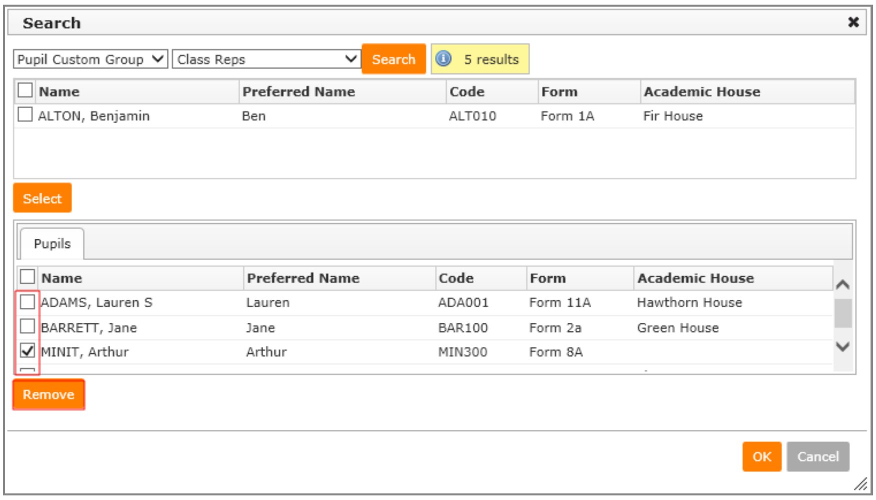


e. Click **Select**.

The selected names appear in the grid in the bottom half of the screen.



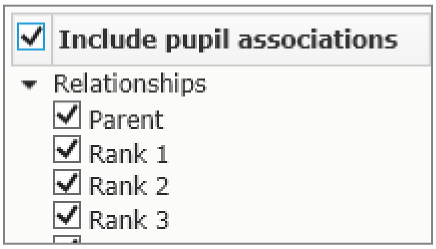
f. (Optional) To remove any individuals, tick the check box next to their name and click **Remove**.



g. Click **OK**.

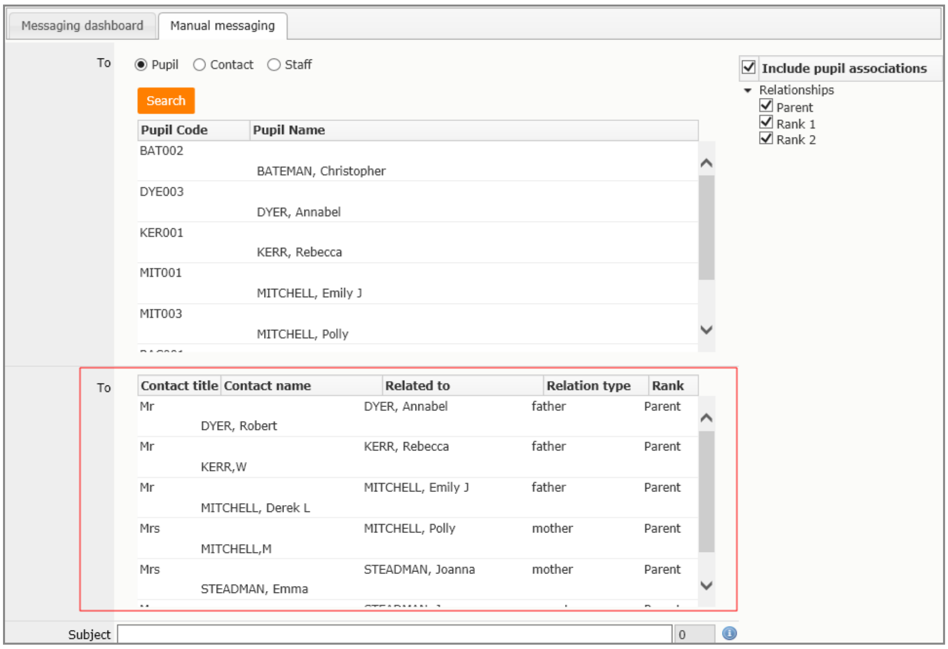
You are returned to the previous screen with the selected recipient(s) added.

5. If appears next to any names, there is no telephone number or email address recorded for the individual or their account is disabled. Hover your cursor over the icon to confirm what the error is and do ONE of the following:
    - Click **Search** and use the dialog to remove the contact from the selected grid. Proceed with sending the message to the other recipients.
    - Proceed and send your message to the remaining recipients, then review the errors via the **Module dashboard** tab. Take steps to add / correct the contact information, then rerun the message via the **Module dashboard** tab.
    - Leave the messaging process completely and add / amend the relevant contact information immediately. However, you will need to start the procedure anew once this has been done.
6. (Optional) If you are messaging a pupil(s) and would like to include their associated contacts as recipients, do ONE of the following:
    - To select ALL the pupil associates, tick the **Include pupil associations** check box.
    - To select specific pupil associates, tick the relevant **Relationships** check box for each relationship type that you want to include.



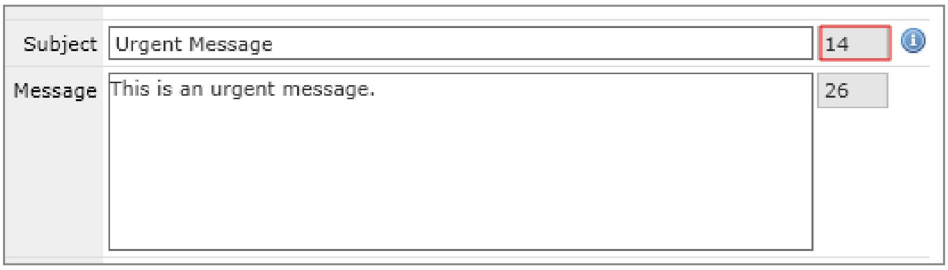
Note: Contacts associated with pupils are 'ranked' by the school. The school defines what each rank means and therefore which contact types fall into each rank. For example, parents and guardians may be 'Rank 1', secondary contacts such as grandparents or aunts and uncles could be 'Rank 2' and siblings could be 'Rank 3'. If you are unsure how your school is using the ranking system, speak with your Line Manager.

The selected associate names appear in a **Contacts** grid beneath the **Pupils** grid.



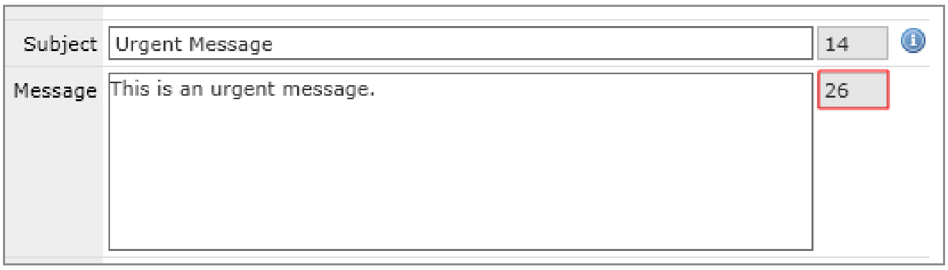
7. Complete the **Subject** field, as required.

   The subject header has a character limit of 100 characters, including spaces. You CANNOT enter more than this number of characters into this field. To help users adhere to this limit, the **Manual messaging** tab includes a character counter next to the **Subject** field.

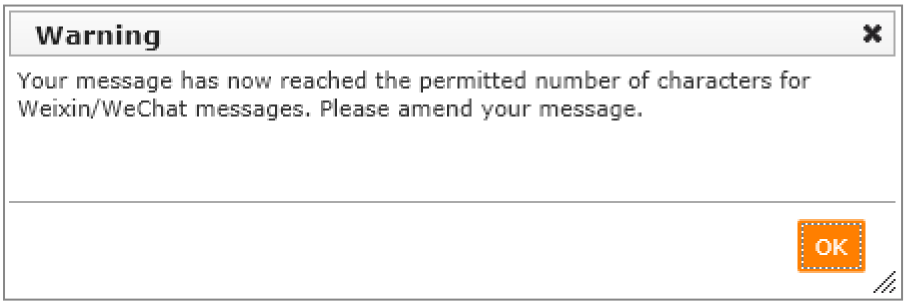


8. Complete the **Message** field, as required.

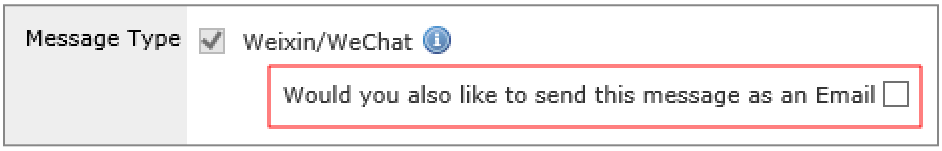
   Messages sent via Weixin / WeChat have character limits of up to 600 characters, including spaces. To help users adhere to these limits, the **Manual messaging** tab includes a character counter next to the **Message** field.



If you try to enter more than 600 characters in the **Message** field, either by typing them in or cutting and pasting text from elsewhere, a warning appears. Read the warning and click **OK** to return to the **Manual messaging** tab so that you can reduce your text.



9. (Optional) If you would like to send the message via Weixin / WeChat AND by email, tick the **Would you also like to send this message as an Email** check box.

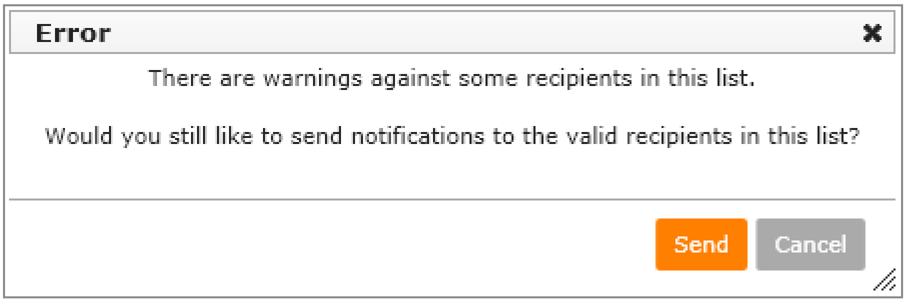


10. (Optional) If you are contacting staff and would also like to send your message as a 3sysACADEMIC alert, tick the **as an Alert** check box.

11. Click **Send**.

> **Note:** If there are errors (indicated by) against ALL of your recipients, the **Send** button does not work. Add a recipient with a valid telephone number OR add / update a telephone number for at least one existing recipient. This is done elsewhere in the software. Draft messages are not saved, so if you leave the **Manual messaging** tab to make changes, you must write your message again.

12. The **Messaging** module checks whether any recipients have against their name due to invalid contact information or their account being disabled. Click **Send** in the popup that appears.



> **Note:** 'Valid recipients' are those pupils, staff and contacts who have valid mobile telephone numbers in the database and are subscribed and registered for this service via Weixin / WeChat.

13. Once the message is queued, a popup appears detailing how many messages were dispatched successfully using each of the selected methods. Read the message and click **OK**.

You are returned to the **Manual messaging** tab.

> **Note:** When you send a message via the **Manual messaging** tab, it is queued for dispatch. It is not sent immediately, so you will need to check the **Messaging dashboard** tab after a few minutes. The time it takes for messages to be sent depends on a variety of factors, such as your network speed, the number of messages being sent at the time and the number of recipients.

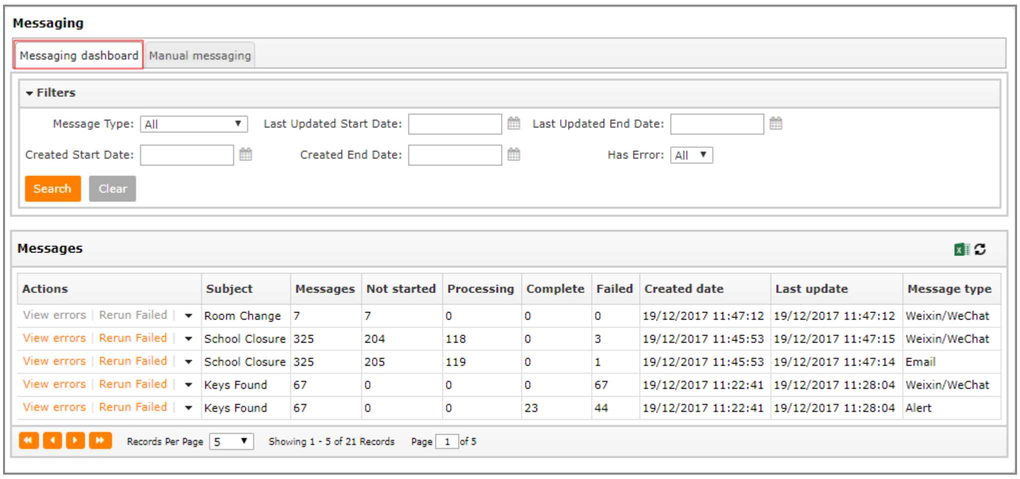
14. Go to the **Messaging dashboard** tab to review the status and progress of your message(s).

    More details: See "About Managing Messages" on the facing page.

About Managing Messages

The central point from which you manage and monitor message failures is the **Messaging dashboard** tab. When you create a message on the **Manual messaging** tab, your message is queued for dispatch. It is not sent immediately, so you will need to check the **Messaging dashboard** after a few minutes to see if the message has been sent successfully to all recipients or if it could not be delivered for some reason. The time it takes for messages to be sent depends on a variety of factors, such as your network speed, the number of messages being sent at the time and the number of recipients.

Note: It is recommended that the **Messaging dashboard** tab is monitored carefully so that message failures can be successfully managed and dealt with promptly.

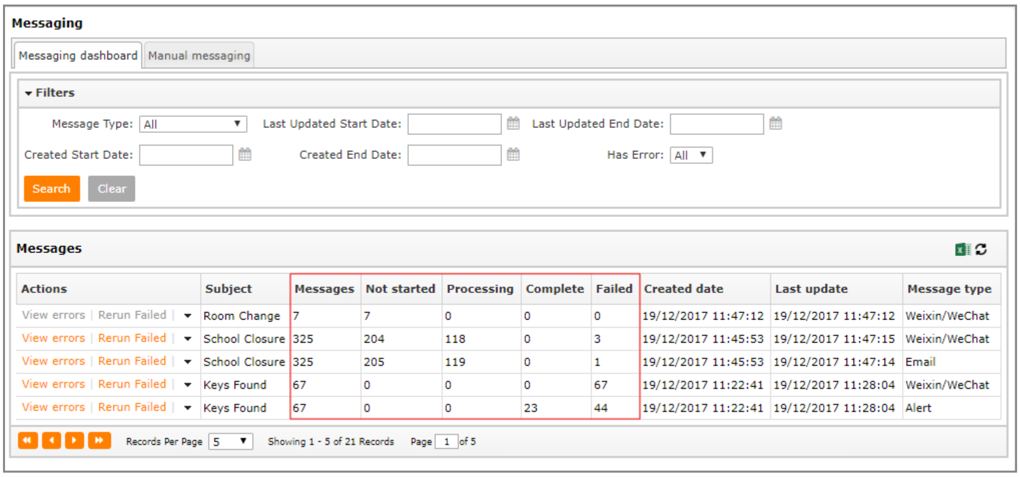


The **Messaging dashboard** tab shows a summary of messages dispatched. Depending upon your permission settings, you will either see your own messages or all users' messages.

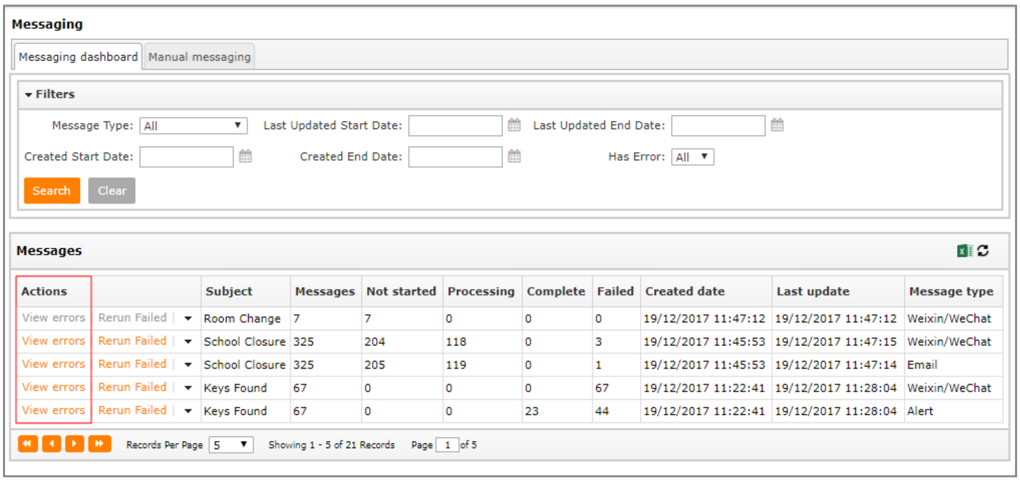
By default, the **Messaging dashboard** tab shows all message types sent (i.e. Weixin / WeChat messages, emails and alerts) and all messages with or without errors. The data is presented in chronological order with the most recently sent / rerun message at the top of the grid.

Each row shows the status / progress of one message type dispatched, detailed in the **Message type** column. For example, if you send one message by Weixin / WeChat and by email, two rows are added to the **Messaging dashboard** grid, one for Weixin / WeChat correspondence and one for the emails. The **Messages** column shows how many messages have been sent (i.e. how many recipients there are). The adjacent columns show the number of those messages with each status:

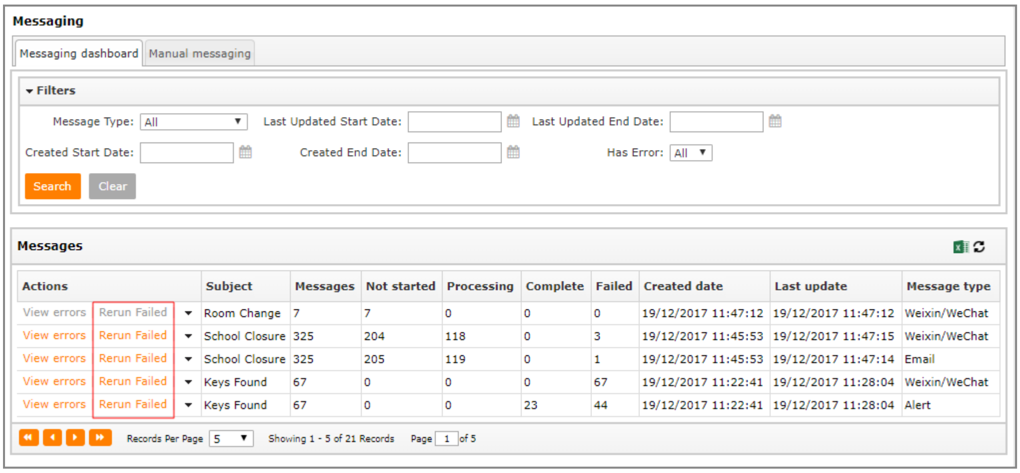
Column	Status
Not started	This is the number of messages that have been sent from the **Manual messaging** tab and are now queued for dispatch.
Processing	These messages are being sent.
Complete	These messages have been sent successfully.
Failed	These messages could not be received for some reason. More details about why the failure occurred can be accessed via the **Actions** column.



If there are 'Failed' messages, the **View errors** option in the **Actions** column becomes enabled for this row. Clicking on **View errors** shows details of why the failed messages could not be sent. Having reviewed this information, you can take action to enable them to be sent successfully, where possible. For example, if a mobile telephone number or email address is incorrect, you can check the details and update them in the user's record, if appropriate. If the issue relates to users not registering for the service, for example, they must be asked to do so.



Once each failure's cause has been addressed, you can rerun the failed messages via the **Messaging dashboard** tab by clicking **Rerun Failed** or **Rerun All** in the **Actions** column next to the relevant message.

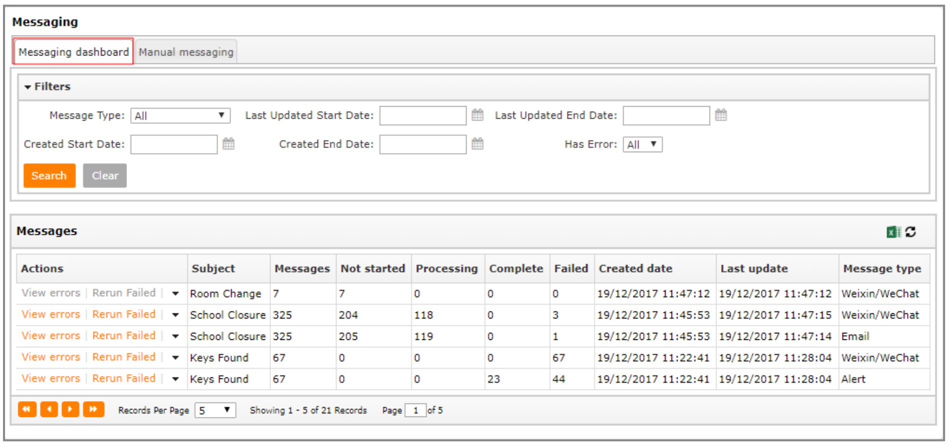


Finding Messages via the Dashboard Tab

HOW TO FIND MESSAGES VIA THE DASHBOARD TAB

1. Go to **Modules > Communication > Messaging**.

   The **Messaging dashboard** tab appears.



2. In the **Filters** section at the top of the screen, enter your search criteria in one or more of the fields. You can search by:

Field	Action
Message Type	Use this drop list to show all messages or filter them by type, i.e. 'Alert', 'Email' or 'Weixin / WeChat'.
Last Updated Start Date / **End Date**	To filter messages by a date range based on when they were last updated (e.g. rerun), type a date into these fields using a DD/MM/YYYY format OR click and select a date using the **Calendar** popup.
Created Start Date / **End Date**	To filter messages by a date range based on when they were created, type a date into these fields using a DD/MM/YYYY format OR click and select a date using the **Calendar** popup.
Has Error	Use this drop list to select 'All', 'Yes' or 'No'.

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

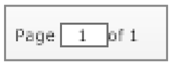
3. Click **Search**.

   The results appear in the **Messages** grid.

4. (Optional) Use the **Page** icons beneath the grid to navigate between pages of 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.

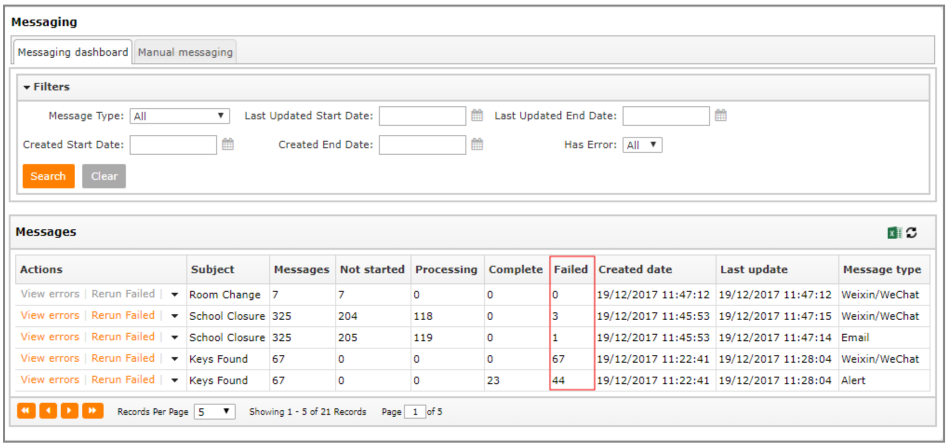
   - Click in the **Page** field and type the number of the page you want. 

Reviewing the Cause of Failed Messages

HOW TO REVIEW THE CAUSE OF FAILED MESSAGES

1. Go to **Modules > Communication > Messaging**.

   The **Messaging dashboard** tab appears. Any queued messages which have failed to send have a figure in the **Failed** column in the grid. This figure represents the number of recipients who have NOT received the message.



> **Note:** Each row represents a message sent via a particular medium, i.e. Weixin / WeChat, email or alert. This is the "message type" and detailed in the **Message type** column.

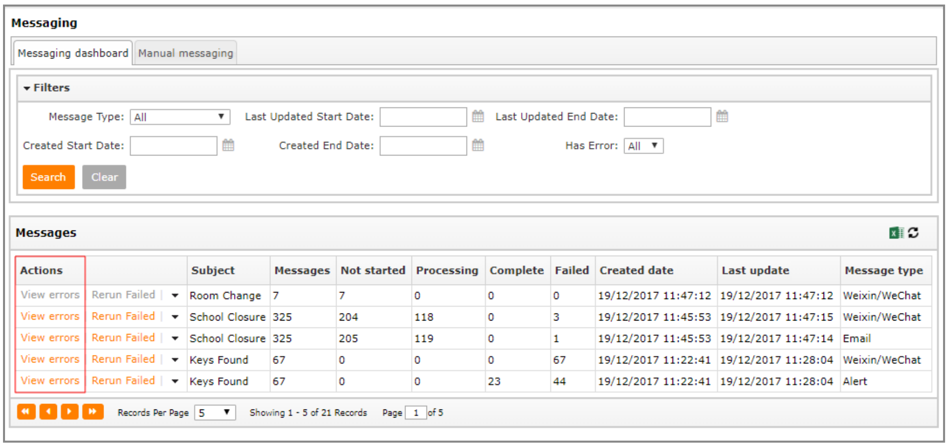
2. (Optional) To filter the list so that the grid only shows messages which have failed, in the **Filters** section, select 'Yes' using the **Has Error** drop list.

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

3. (Optional) Use the other options in the **Filters** section to find the specific message(s) that you want.

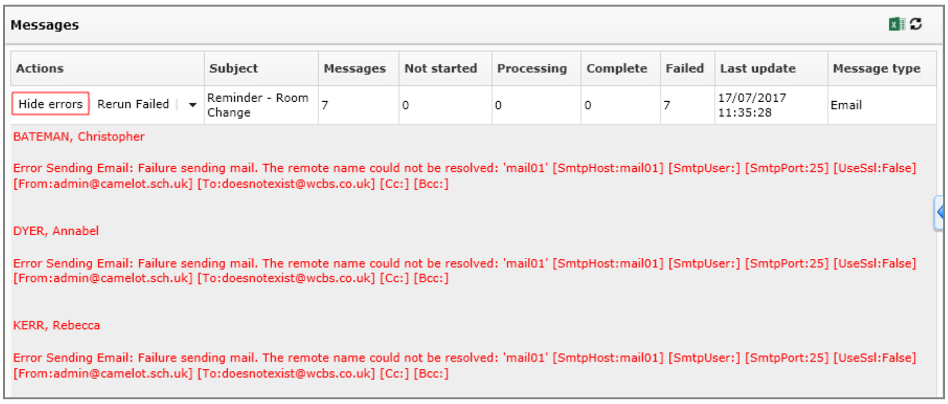
> **Note:** If you are unsure how to filter messages, see steps 2 to 4 of "Finding Messages via the Dashboard Tab" on page 73.

4. In the **Actions** column, click **View errors** next to the message that you want to know about.



Note: The **View errors** option is only enabled if individual messages failed for some reason. If none of the messages failed, there are no errors to view and the option is greyed out.

Text detailing why messages failed to reach each of the relevant recipients appears in red.



5. When you have finished reviewing the information, click **Hide errors** in the **Actions** column to return to the **Messaging dashboard** tab.
6. (Optional) Take action to resolve the error(s) and rerun the message(s).

Rerunning Messages

HOW TO RERUN MESSAGES

Note: Failed messages should only be rerun once the errors that prevented them from being sent successfully have been addressed, e.g. contact information added or corrected in your database.

1. Find the message(s) that you would like to rerun.

   Note: If you are unsure how to find a message, see "Finding Messages via the Dashboard Tab" on page 73.

2. To rerun messages, do ONE of the following:

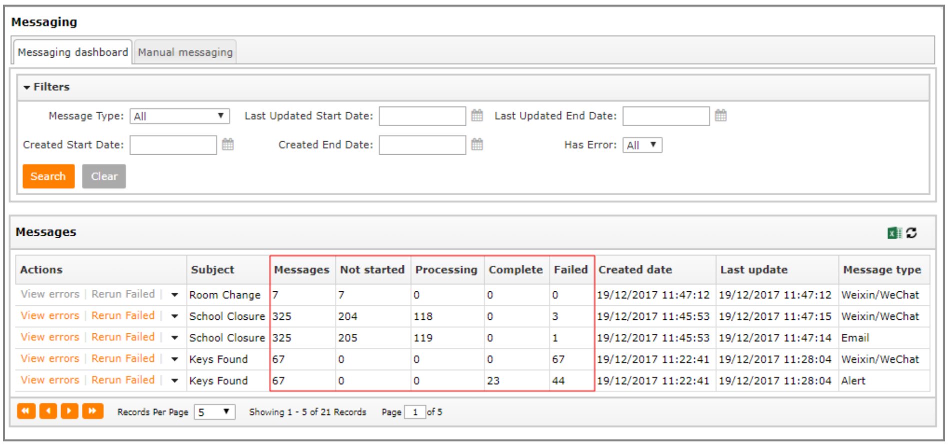
   » To resend the failed messages only, in the **Actions** column, click **Rerun Failed**.

   Note: The **Rerun Failed** option is only enabled if messages failed for some reason when last sent. If none of the messages failed, the **Rerun Failed** option is greyed out.

   » To resend ALL of the messages, i.e. including those sent successfully, in the **Actions** column, click **Rerun All**.

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

   The progress of recently sent messages is shown in the **Not started**, **Processing**, **Complete** and **Failed** columns.



Actions	Subject	Messages	Not started	Processing	Complete	Failed	Created date	Last update	Message type
View errors | Rerun Failed |	Room Change	7	7	0	0	0	19/12/2017 11:47:12	19/12/2017 11:47:12	Weixin/WeChat
View errors | Rerun Failed |	School Closure	325	204	118	0	3	19/12/2017 11:45:53	19/12/2017 11:47:15	Weixin/WeChat
View errors | Rerun Failed |	School Closure	325	205	119	0	1	19/12/2017 11:45:53	19/12/2017 11:47:14	Email
View errors | Rerun Failed |	Keys Found	67	0	0	0	67	19/12/2017 11:22:41	19/12/2017 11:28:04	Weixin/WeChat
View errors | Rerun Failed |	Keys Found	67	0	0	23	44	19/12/2017 11:22:41	19/12/2017 11:28:04	Alert

3. Click to refresh the screen to see the latest progress / status of messages until the number in the **Complete** column matches that in the **Messages** column, indicating that the rerun has successfully finished.

   Note: If any messages have not sent, a figure appears in the Failed column. Review the errors (see "Reviewing the Cause of Failed Messages" on page 75), remedy any issues and repeat steps 1 to 3.

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