

3sysACADEMIC

## Getting Started

User Guide

DRAFT



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# Getting Started

Welcome to the 3sysACADEMIC Getting Started User Guide. This Guide has been produced to provide you with an understanding of key functions in the software, plus details of how to navigate and use it to complete a range of tasks. We hope this Guide will give you both the essential tools you need to get started using 3sysACADEMIC and an overview of the range of support services available from WCBS, including training opportunities and our online Customer Centre.

This chapter discusses the following:

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# CHAPTER 1

## About 3sysACADEMIC

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

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



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

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

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

## Features

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

- » An uncluttered design that is easy to navigate and very intuitive.
- » A range of user-friendly features, such as search dialogs, drop lists and auto complete, that makes adding records and finding data quicker and simpler.
- » Accessibility via the web 24/7 from any device.
- » Compatibility with all leading browsers.
- » Ground-breaking tools and customisation features, such as WCBS schoolPORTAL.
- » Seamless integration with third party systems, meaning you only need to maintain one, secure database.
- » Suitability for a wide range of curriculum structures, both in the UK and around the world.
- » Adaptability for any language, so it can be used globally.

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

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

## Find out more

For more information about other products and services available from WCBS, including passFINANCE/schoolADMIN and training options, visit [www.wcbs.co.uk](http://www.wcbs.co.uk).

## Where Do I Begin?

Welcome to 3sysACADEMIC Help, a guide created to help you find your way around 3sysACADEMIC, supporting you to become more adept at using the software and getting the most out of it.

3sysACADEMIC is a specialist MIS software package and you can use it to complete a specific task or range of tasks.

For more in depth support with 3sysACADEMIC, you may like to consider one or more of the following options:

### TRAINING

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

For more information, contact our Training and Implementation team on 01458 833344, email [implementation@wcbs.co.uk](mailto:implementation@wcbs.co.uk) or visit [www.wcbs.co.uk/services](http://www.wcbs.co.uk/services).

### PDF GUIDES

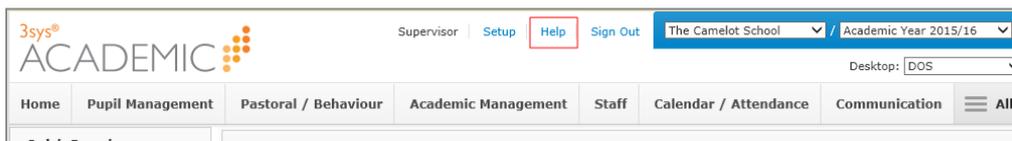
You can download and read the PDF User Guides providing information about a range of tasks and functions in 3sysACADEMIC. We recommend the 3sysACADEMIC *Getting Started Guide* is a good place to start, but there are many others. For a full list, see PDF Guides in the online 3sysACADEMIC Help or the WCBS Customer Centre.

### INTRODUCTORY HELP TOPICS

We encourage new users to see the following Help topics, available in this Guide or via the 3sysACADEMIC Online Help:

- » "About 3sysACADEMIC" on the previous page.
- » "Navigating 3sysACADEMIC" on page 14.
- » "About the Mega Menu" on page 20.
- » "About Dashboards" on page 27.
- » "Completing Fields" on page 33.

To access the 3sysACADEMIC Online Help, log in to 3sysACADEMIC and click **Help** at the top of any screen.



The 3sysACADEMIC Online Help opens in a new tab.



## WCBS CUSTOMER CENTRE

Our Customer Centre provides a whole host of useful information and resources encompassing the full range of software available from WCBS, including:

- » Software downloads.
- » Report Builder templates.
- » User documentation.
- » FAQs.
- » Hints and tips.

The Customer Centre also offers a flexible search function, so you are able to use keywords to filter the resources available and find the one most relevant to your query.

## Accessing the Customer Centre

### HOW TO ACCESS THE CUSTOMER CENTRE

1. Go to [www.wcbs.co.uk](http://www.wcbs.co.uk).
2. Click **SIGN IN** in the top, right-hand corner of the screen.



3. Enter your login details (usually your email address and a password).

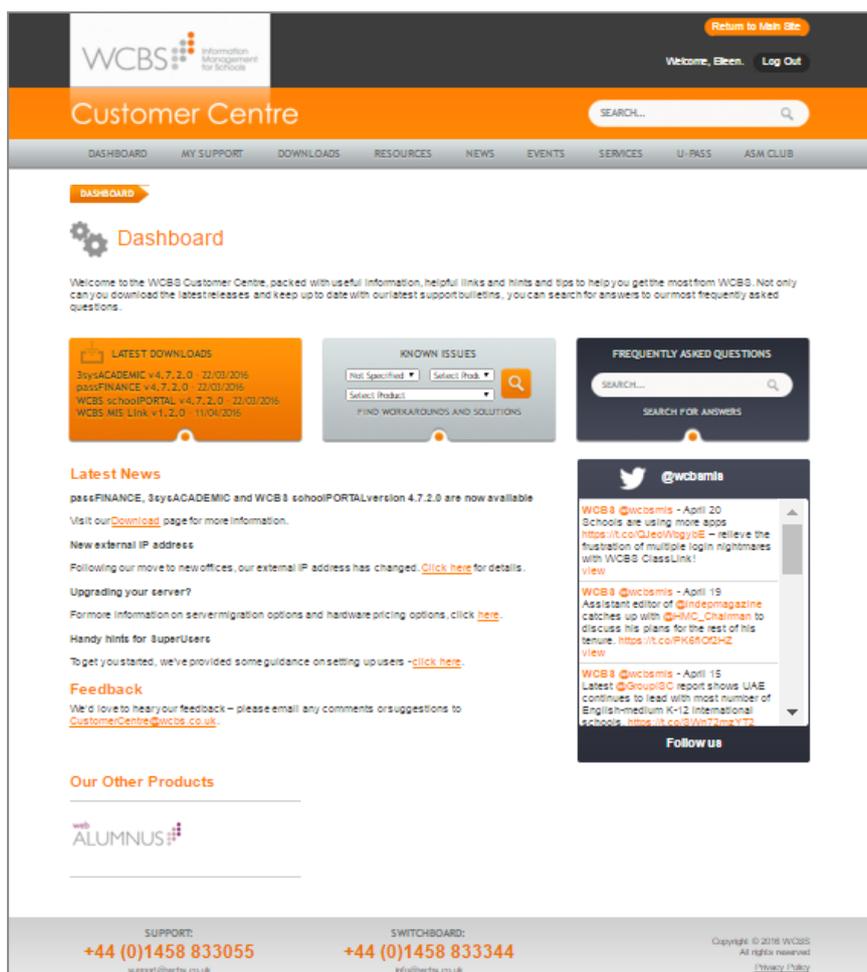
4. Click  OR press ENTER on your keyboard.

 **Note:** If you have forgotten your password, use the **Forgot password?** option and follow the steps to receive a reminder.

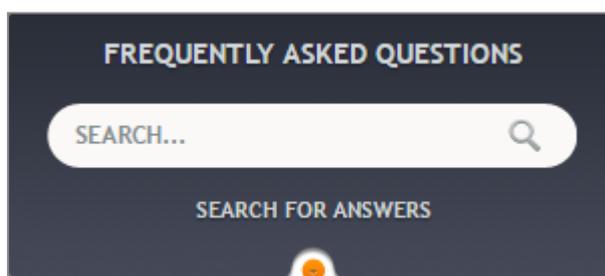
## Finding Answers to Frequently Asked Questions (FAQs)

### HOW TO FIND ANSWERS TO FREQUENTLY ASKED QUESTIONS

1. Go to [www.wcbs.co.uk](http://www.wcbs.co.uk) and click sign in to the Customer Centre. The **Customer Centre** dashboard appears.



2. In the **FREQUENTLY ASKED QUESTIONS** section on the right-hand side of the screen, enter your question in the **Search** field.



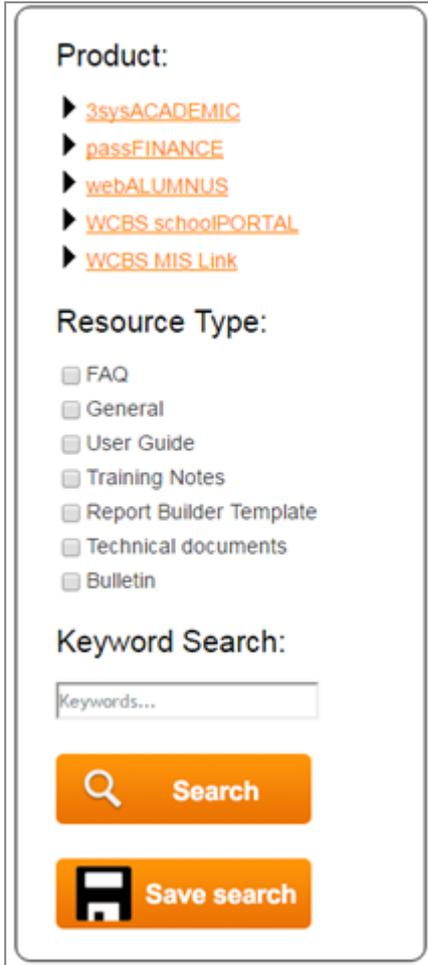
3. Click  OR press ENTER on your keyboard.  
The **Resources Library** screen appears, displaying a list of documents that may answer your question.

## Finding Resources on the Customer Centre

### HOW TO FIND RESOURCES ON THE CUSTOMER CENTRE

1. Go to [www.wcbs.co.uk](http://www.wcbs.co.uk) and sign in to the Customer Centre.
2. Click **Resources**.

The **Resources Library** screen appears.



**Product:**

- ▶ [3sysACADEMIC](#)
- ▶ [passFINANCE](#)
- ▶ [webALUMNUS](#)
- ▶ [WCBS schoolPORTAL](#)
- ▶ [WCBS MIS Link](#)

**Resource Type:**

- FAQ
- General
- User Guide
- Training Notes
- Report Builder Template
- Technical documents
- Bulletin

**Keyword Search:**

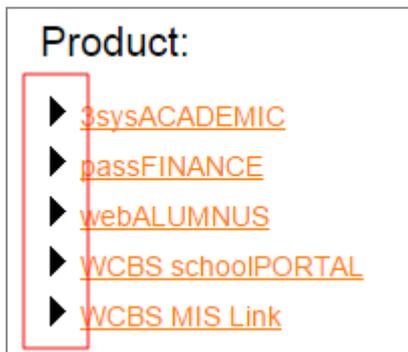
Keywords...

 **Search**

 **Save search**

3. Using the search panel on the left-hand side of the screen, search by product, resource type and/or key word:

» **To search by Product** - Click on ▶ next to the appropriate product to see a list of topics/modules. Select the relevant check box(es).



**Product:**

- ▶ [3sysACADEMIC](#)
- ▶ [passFINANCE](#)
- ▶ [webALUMNUS](#)
- ▶ [WCBS schoolPORTAL](#)
- ▶ [WCBS MIS Link](#)

» **To search by Resource Type** - Select the relevant **Resource Type** check box or boxes.

**Resource Type:**

- FAQ
- General
- User Guide
- Training Notes
- Report Builder Template
- Technical documents
- Bulletin

- » **To search by Keyword** - Enter your key word(s) into the **Keyword Search** field.

**Keyword Search:**

4. Click **Search**.

A list of search results appears. Newly added items are highlighted.



**Note:** You can sort search results by column heading. Click on a heading to re-order results alphabetically by that column's contents.

5. (Optional) Click **Save Search** to save your search and sign up for email alerts which notify you when new items are added that meet your search criteria.



**Note:** We recommend that you download and read documents in conjunction with the latest software releases, such as Release Notes and User Guides. These documents detail new enhancements and features.

# Navigating 3sysACADEMIC

This chapter discusses the following:

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# CHAPTER 2

## Navigating 3sysACADEMIC

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

### Key workspace areas

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

#### THE HOME PAGE

Users can navigate 3sysACADEMIC from their home page. It is the first screen you see when you log in and is usually tailored to schools and specific users by the System Administrator. More advanced users can alter their own home pages, however. For more information, see "About the Home Page" on page 17.

#### THE MEGA MENU

The mega menu is the main, ribbon menu which runs across the top of the 3sysACADEMIC workspace. For more information, see "About the Mega Menu" on page 20.

#### THE SCHOOL AND ACADEMIC DROP LISTS

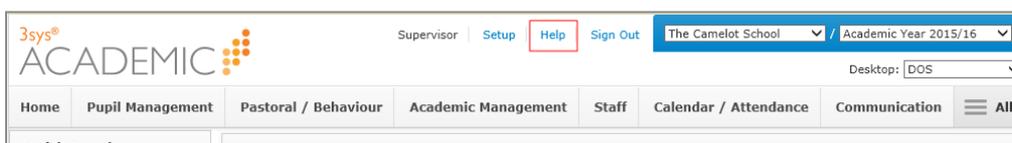
The **School** and **Academic Year** drop lists allow you to move easily between records for different schools within your organisation and years. For more information, see "About the School and Academic Year Drop Lists" on page 21.

#### SETUP AND MY SETTINGS

The **Setup** link appears at the top of the screen and takes you to the **Setup** screen. Here you can access your settings. For more information, see "My Settings" on page 22.

#### 3sysACADEMIC ONLINE HELP

Click **Help** at the top of the screen to access the 3sysACADEMIC Online Help, a guide to help you use 3sysACADEMIC, supporting you to become more adept at using the software and getting the most out of it. The site includes a library of useful PDF User Guides and links to other support services.



#### DESKTOPS

Desktops bring together home pages and the mega menu to help users access modules relevant to particular roles or functions. For more information, see "About Desktops" on page 26.

#### DASHBOARDS

Dashboards are being introduced for each module within 3sysACADEMIC. Dashboards provide access to record management and configuration options for modules and a summary of recent activity. For more information, see "About Dashboards" on page 27.

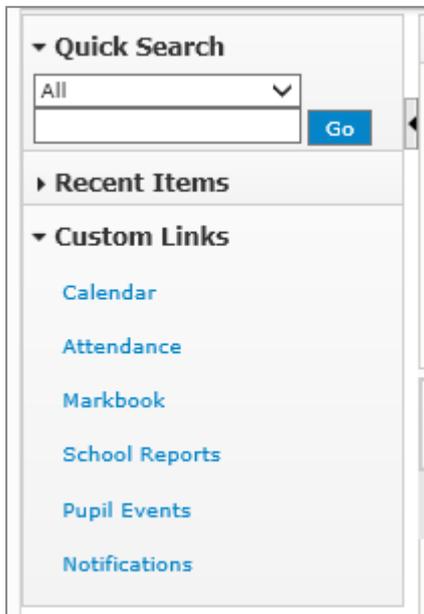


**Note:** This functionality is available in the following module: Pastoral Management. (In the future it will be available for all relevant modules.)

#### QUICK LINKS SIDE PANEL

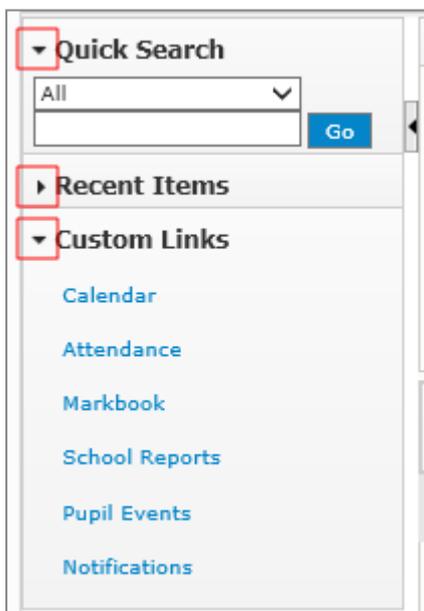
Appearing on the left-hand side of the screen, the quick links side panel includes:

- » **Quick Search** - This provides a simple way of finding people records in 3sysACADEMIC. Use the drop list to select 'All', 'Current pupil' or 'Staff' and type all or part of the name you want in the field below. Click **Go**.
- » **Recent Items** - A list of links to items you have recently viewed, making returning to them straightforward.
- » **Custom Links** - For more information, see "My Settings" on page 22.



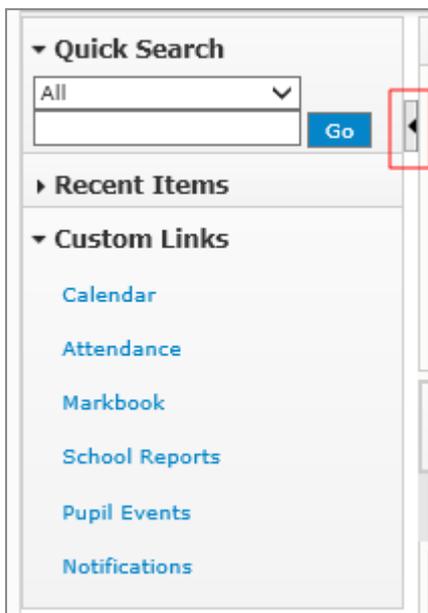
Each of these sections can be minimised and expanded, depending upon user preference.

- » Click  next to the relevant heading to expand a section.
- » Click  next to the relevant heading to minimise a section.



You can temporarily hide the whole quick links side panel, if required.

- » Click  to minimise the side panel.
- » Click  to expand the side panel.



#### REFINE SEARCH PANEL

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

The image shows the 'Pupil Search' panel. At the top, there is a 'View:' dropdown menu set to 'Allergies' and a row of links: 'Edit Add Copy Delete'. Below this is the 'Refine Search' section, which is highlighted with a red border. It contains the following fields: 'Name:' (text input), 'Form:' (text input), 'Allergy:' (dropdown menu set to '-- All --'), and 'Allergy information:' (text input). A blue 'Search' button is located at the bottom left of the 'Refine Search' section.



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

#### VIEWS

Where appropriate, some modules and functions include a **Views** drop list which allows you to filter records and save searches for repeated use. This appears at the top of the screen, above the **Refine Search** panel. For more information, see "About Views" on page 48.

This image is identical to the one above, showing the 'Pupil Search' panel. The 'View:' dropdown menu at the top is highlighted with a red box, showing it is set to 'Allergies'. The 'Refine Search' section below it is also highlighted with a red border.

## About the Home Page

Users can navigate 3sysACADEMIC from their home page. It is the first screen you see when you log in and is usually tailored to schools and specific users by the System Administrator. More advanced users may be given access to alter their own home pages, however.



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

## Editing a Home Page

### HOW TO EDIT A HOME PAGE

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

More details...

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

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



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

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

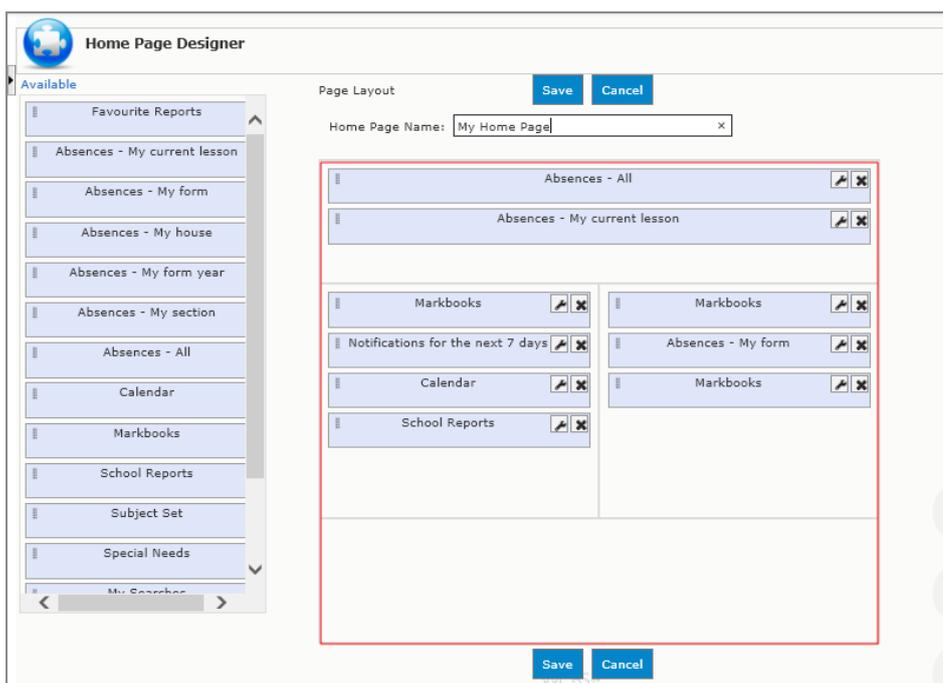
Records Per Page  ▼

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

Page  of 1

2. Click **Edit** next to the home page you would like to change.

The relevant **Home Page Designer** screen appears.



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



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

More details...

Widgets represent a function within 3sysACADEMIC.

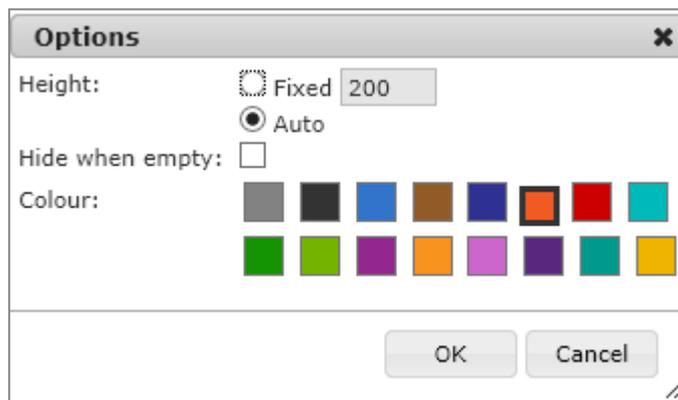
Widgets can include:

- » **Favourite Reports**, listing Report Builder templates which have been marked as favourites by the user.
- » **Absences - My current lesson**, drawing from the timetable, current time and today's registration data to list pupils who should be absent from your current lesson.
- » **Absences - My Form**, which lists pupils in the user's form (if they are a Form Tutor) who have been marked as absent at today's morning or afternoon registration.
- » **Absences - My House**, showing which pupils in a user's house (where they are a House Master/Mistress) who have been marked as absent at today's morning or afternoon registration.
- » **Absences - My Form Year**, designed so Heads of Year can see which pupils in the user's form year were marked absent at today's morning or afternoon registration.
- » **Absences - My Section**, listing pupils in the user's school section (where they are the Head of Section) who have been marked absent today at morning or afternoon registration.
- » **Absences - All**, which details ALL pupils who have been marked absent at this morning or this afternoon's registration.
- » **Calendar**, showing the user's timetable. Attendance, subject set inquiry and markbook functions can be launched from the calendar.

- » **School Reports**, which offers a graphical representation of outstanding school report entries and provides a shortcut to writing reports.
  - » **Subject Set**, listing all pupils in the user's current lesson, with a summary of today's attendance and a link to each pupil's full record.
  - » **Special Needs**, which provides a breakdown of the SEN requirements of pupils in the user's current lesson.
  - » **My Searches**, a configurable widget which allows users to access a variety of information.
  - » **Notifications for the next 7 days**, displaying notifications for the next seven days.
4. (Optional) Edit the widgets' size and colour.

More details...

- a. Click  in the widget you would like to edit.  
The **Options** dialog appears.



- b. State a fixed height for the widget on your home page OR check **Auto** for the size to adjust according to the content.
- c. Select the **Hide when empty** check box to remove the widget from the home page when there is no relevant data to show.
- d. Select a coloured square to colour code the widget.
- e. Click **OK**.
5. Click **Save**.

## About the Mega Menu

The mega menu is the main, ribbon menu which runs across the top of the 3sysACADEMIC workspace. You can access module and the functions they include through the mega menu. To

see a full list of modules available to you, click .



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



What are **modules**<sup>1</sup>?

What are **functions**<sup>2</sup>?

## Using the Mega Menu

### HOW TO USE THE MEGA MENU

1. Hover your cursor over a heading listed in the mega menu to see the items listed within it.
2. Click on the option you want to go to the relevant screen.



**Note:** Your school may have decided to customise the name of modules listed in the mega menu. The 3sysACADEMIC Help details mega menu options as originally supplied.

---

<sup>1</sup>Modules are sections of the 3sysACADEMIC software that contain functions. They are listed in the mega menu and its sub-menus.

<sup>2</sup>Functions are sub-sections within modules which relate to particular functionalities and tasks. They are contained grouped into modules.

## About the School and Academic Year Drop Lists

The **School** and **Academic Year** drop lists allow you to move easily between records for different schools within your organisation and years. They are located side-by-side in the top right-hand corner of your screen.



To select a different school or academic year, click the appropriate  and make a selection from the list of options that appears.



**Note:** The **Academic Year** drop list automatically shows the current year when you first log in.

## My Settings

There are options for users to change their password and create customised links within 3sysACADEMIC.

For more about changing passwords, see "Changing My Password" on the facing page.

For more about custom links, see "About Custom Links" on page 24.

### Accessing My Settings

#### HOW TO ACCESS MY SETTINGS

- » Go to [Setup](#) > [My Settings](#) and select an option from the sub-menu.

## Changing My Password

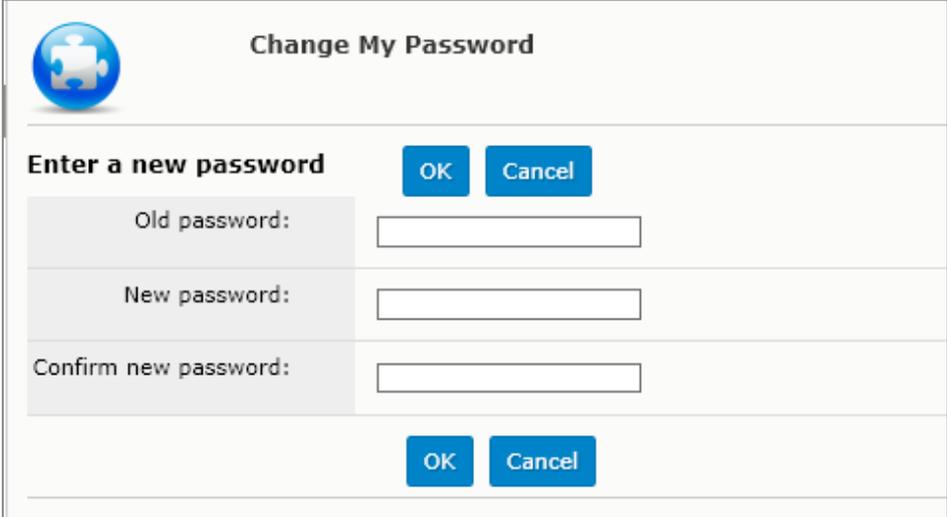
Changing your 3sysACADEMIC password has been designed to be straightforward.

### Changing Your Password

#### HOW TO CHANGE YOUR PASSWORD

1. Go to **Setup > My Settings > Change My Password**.

The **Change My Password** screen appears.



The screenshot shows a dialog box titled "Change My Password". At the top left is a blue puzzle piece icon. The title "Change My Password" is centered at the top. Below the title bar, there is a section titled "Enter a new password" with "OK" and "Cancel" buttons. Underneath, there are three input fields: "Old password:", "New password:", and "Confirm new password:". At the bottom of the dialog, there are "OK" and "Cancel" buttons.

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

## About Custom Links

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

### Accessing Custom Links

#### HOW TO ACCESS CUSTOM LINKS

- » Go to the bottom left-hand corner of a screen in 3sysACADEMIC and click on a link under **Custom Links**.



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

### Adding Custom Links

#### HOW TO ADD A CUSTOM LINK

1. Go to **Setup > My Settings > Custom Links**.  
The **Custom Links** screen appears.
2. Click **Add**.
3. Complete the **Title** field.
4. Put the link URL (e.g. www.wcbs.co.uk) in the **Link** field.
5. Use the **Visible To** drop list to select whether the link is available to just you, a user group or everyone ('Global').
6. Click **Save**.

### Editing Custom Links

#### HOW TO EDIT A CUSTOM LINK

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

More details...

- a. Go to **Setup > My Settings > Custom Links**.

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



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

- b. Enter all or part of the link's name in the **Title** field and click **Search**.
- c. 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 **Edit** next to the relevant custom link.
3. Make your amendments.
4. Click **Save**.

## Deleting Custom Links

### HOW TO DELETE A CUSTOM LINK

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

#### More details...

- a. Go to **Setup > My Settings > Custom Links**.

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

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

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

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

Page  of 1

2. Click **Delete** next to the custom link you would like to remove.  
A **Message from webpage** pop up appears.
3. If you are sure that you want to delete the link, click **OK**.

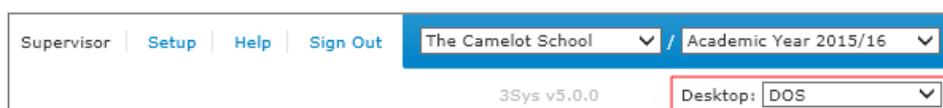
## About Desktops

Home pages are used to give you a single page view of the most pertinent data and functionality in 3sysACADEMIC and the Mega Menu allows you access the modules and functions relevant to your profile. Both are brought together to create Desktops. Each desktop is usually designed to help a member of staff undertake a particular role or function and a single profile may mean access to multiple desktops. Desktops are allocated to users by System Administrators via **Profiles**.

## Accessing Desktops

### HOW TO ACCESS A DESKTOP

- » Use the **Desktop** drop list in the top right-hand corner of any screen in 3sysACADEMIC to select the desktop you would like to use.



The view updates automatically.

## About Dashboards

Dashboards are being introduced for each module within 3sysACADEMIC. Dashboards provide access to record management and configuration options for modules and a summary of recent activity.

**Pastoral Management**  
Dashboard

**Management**

[Add Pastoral Record](#)

[Search](#)

**Configuration**

[Record Type](#)

[Category](#)

[GIRFEC](#)

**Reports**

[Child Protection Concern](#)

Requires Action By Me					
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016
	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016
	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016
	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016

1 - 4 of 4 items

Recent Pastoral Records				
Actions	Pupil Name(s)	Status	Heading	Date
	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00
	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00
	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00
	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00
	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

[Search More Pastoral Records](#)

**Note:** This functionality is available in the following module: Pastoral Management. (In the future it will be available for all relevant modules.)

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

For details on how to:

- » Use a dashboard, see below.
- » Review recent activity in a module, see "Reviewing Recent Activity" on the next page.
- » Access data via a dashboard, see "About Dashboards" above.
- » Access dashboards, see "Accessing Dashboards" on page 29.

## Using the Dashboard Menu

### HOW TO USE THE DASHBOARD MENU

On the left-hand side of the dashboard screen, a menu appears listing all the options available within that module.

**Pastoral Management Dashboard**

**Management**

- Add Pastoral Record
- Search

**Configuration**

- Record Type
- Category
- GIRFEC

**Reports**

- Child Protection Concern

**Requires Action By Me**

Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
Q ✎	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016
Q ✎	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016
Q ✎	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016
Q ✎	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016

Page 1 of 1 1 - 4 of 4 items

**Recent Pastoral Records**

Actions	Pupil Name(s)	Status	Heading	Date
Q ✎	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00
Q ✎	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00
Q ✎	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00
Q ✎	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00
Q ✎	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

[Search More Pastoral Records](#)

These often fall under the following sub-headings:

- » **Management** - You use the **Management** menu options to manage the data in the options in that module, e.g. adding single records, adding batches of records, completing searches, editing/deleting records or running reports. This is also where you will find tailored screens.

**Example:** From the **Pastoral Management** dashboard, you are able to add a pastoral record relating to one or more pupils and subsequently search for and edit those records (if you have the appropriate permissions).

- » **Configuration** - System Administrators use the **Configuration** menu functions to set up the relevant options other users will need when creating new records in the module. Some modules may require more than one set of items to be configured, e.g. categories.

**Example:** In the **Pastoral Management** function, you need to configure the record types and categories that can be used by staff when creating pastoral management records. System Administrators at Scottish Schools also set up GIRFEC options through the **Pastoral Management Configuration** section.

## Reviewing Recent Activity

### HOW TO REVIEW RECENT ACTIVITY

Dashboards often summarise recent activity, such as newly added records or personalised reminders, usually in grids. Charts and graphs illustrating longer term activity may also be included. For example, the **Pastoral Management** module dashboard shows a grid of items that require the logged in user to take action, plus a grid of recent pastoral records added to the system that the user has permission to access.



**Pastoral Management**  
Dashboard

**Management**

[Add Pastoral Record](#)

[Search](#)

**Configuration**

[Record Type](#)

[Category](#)

[GIRFEC](#)

**Reports**

[Child Protection Concern](#)

**Requires Action By Me**

Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
 	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016
 	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016
 	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016
 	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016

⏪ ⏩ 1 Page 1 of 1 ⏪ ⏩
1 - 4 of 4 items

**Recent Pastoral Records**

Actions	Pupil Name(s)	Status	Heading	Date
 	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00
 	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00
 	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00
 	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00
 	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

[Search More Pastoral Records](#)

## Accessing Dashboards

### HOW TO ACCESS A DASHBOARD

Do ONE of the following:

- » Click on or hover your cursor over a mega menu heading, then single-click on the relevant module/function name in the drop list.

For example, to open the **Pastoral Management** dashboard, go to **Pastoral / Behaviour > Pastoral Management**.

- » From within the module/function, click on the **Dashboard** button which appears in the top, right-hand corner of each screen.



CHAPTER 2 | Getting Started User Guide

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## Using 3sysACADEMIC

This chapter discusses the following:

Using 3sysACADEMIC .....	32
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Drop Lists and Auto Complete .....	33
Calendar Popups .....	34
Search Dialogs .....	34
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# CHAPTER 3

## Using 3sysACADEMIC

Once you have familiarised yourself with the workspace and how to find your way around it (see "Navigating 3sysACADEMIC" on page 14 for more information), you are ready to learn more about how to use the software.

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

### COMPLETING FIELDS

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

### GRIDS

Grids appear throughout 3sysACADEMIC. In simple terms, they are tables used to present, add or extract information from the system. For more information, see "About Grids" on page 36.

### SEARCHING FOR PUPILS

To attach pupils to records using 3sysACADEMIC, you need to search for them using special search dialogs. For details about how to do this, see "Searching for Pupils" on page 38.

### SEARCHING FOR STAFF

To attach staff to records using 3sysACADEMIC, you need to search for them using special search dialogs. For details, see "Searching for Staff" on page 42.



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

## Completing Fields

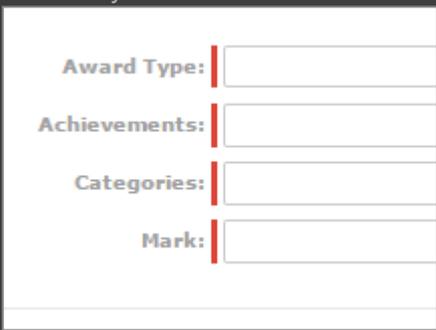
To add information for records in 3sysACADEMIC, you need to complete the fields on the relevant screens. To make the software user-friendly, functionalities are replicated across the program so that once you learn how to complete one section, you will find you also know how to complete many others.

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

For details on how to:

- » Use drop lists, see below.
- » Select a date and/or time, see "Calendar Popups" on the next page.
- » Find and add specific details, such as room numbers or record types, see "Search Dialogs" on the next page.
- » Attach electronic files to a record, see "Uploading Files" on page 35.

 **Note:** You MUST complete any mandatory fields marked with a red bar on the left-hand side. If you do not complete a mandatory field, a message appears describing the error and the relevant fields are highlighted. You cannot save records that have empty mandatory fields.



## Drop Lists and Auto Complete

### ABOUT DROP LISTS AND AUTO COMPLETE

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

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



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

 **Note:** This functionality is available in the following module: Pastoral Management. (In the future it will be available for all relevant modules.)

### HOW TO USE A DROP LIST OR AUTO COMPLETE

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

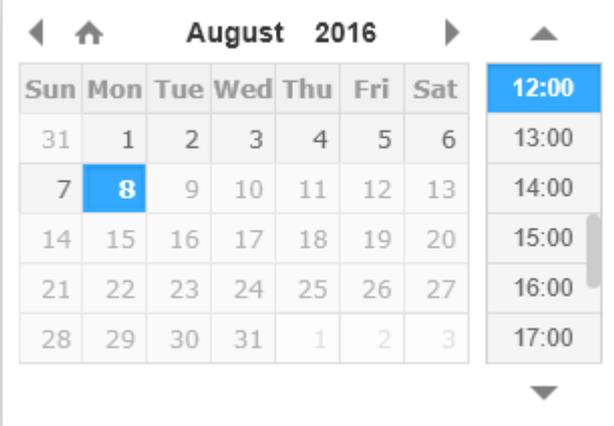
- » Click  and click on an option in the list that appears.
- » Click in the field and type all or part of the item you require. Select from the items that appear in the drop list. This is known as auto complete.

## Calendar Popups

### ABOUT CALENDAR POPUPS

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

 **Note:** Some calendar popups allow you to specify a time as well as a date. If so, an additional 24 hour clock column appears on the right-hand side of the popup.

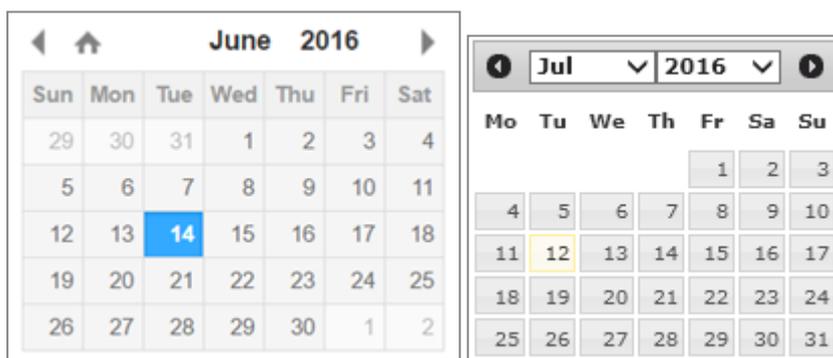


The screenshot shows a calendar for August 2016. The days of the week are listed at the top: Sun, Mon, Tue, Wed, Thu, Fri, Sat. The dates are arranged in a grid. On the right side of the calendar, there is a vertical column of time slots: 12:00, 13:00, 14:00, 15:00, 16:00, and 17:00. The date 8th and the time 12:00 are highlighted in blue.

### HOW TO USE A CALENDAR POPUP

Do ONE of the following:

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



The first screenshot shows a calendar for June 2016. The days of the week are listed at the top: Sun, Mon, Tue, Wed, Thu, Fri, Sat. The dates are arranged in a grid. The date 14th is highlighted in blue.

The second screenshot shows a calendar for July 2016. At the top, there are dropdown menus for the month (Jul) and the year (2016). Below the dropdowns, the days of the week are listed: Mo, Tu, We, Th, Fr, Sa, Su. The dates are arranged in a grid. The date 12th is highlighted in yellow.

## Search Dialogs

### ABOUT SEARCH DIALOGS

There are a variety of search dialogs included in 3sysACADEMIC to help you complete fields with

information such as staff names, pupil names, rooms, subjects and more. If a field has  or  at the end of it, then it has an associated search dialog. Although each dialog is tailored to the data you are searching, the basic principles remain the same throughout.

For specific information about staff and pupil name search dialogs, see "Searching for Staff" on page 42 and "Searching for Pupils" on page 38.

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

#### HOW TO USE A SEARCH DIALOG

1. Click  or  at the end of the relevant field.  
The search dialog appears.
2. Enter your search criteria in the fields at the top of the dialog to narrow down the list of results.
3. Click **Search**.
4. Click on the option you want from the list that appears.

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

## Uploading Files

#### ABOUT UPLOADING FILES

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

#### HOW TO UPLOAD A FILE

Do ONE of the following:

- » Click **Browse** and find the file(s) you would like to add. Double-click on each file to add them one at a time OR hold the CTRL button down on your keyboard and click on each file once to select it, then click **Open** to add one or more simultaneously.
- » In another window, open the folder containing the file(s). Left-click once on the file's icon OR hold the CTRL button down on your keyboard and left-click on each file's icon if you want to add multiple documents. Hold the mouse button down and, without letting go, drag the file(s) towards the **Documents** section. An **Upload Files** dialog appears. Let go of the mouse button and a copy of the document(s) attach to the record. Repeat for each file(s) you would like to add.



 **Note:** You can attach ANY file type to the record, including MP3s and film clips.

## About Grids

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

### About Grids for Presenting Data

The aim of these grids is to present data in an orderly fashion that makes its interpretation and navigation more straight forward for users. Examples of these grids include the **Recent Activity** grids on the module dashboards and data presented on **Search** screens.

**Pastoral Management**  
Dashboard

**Management**

[Add Pastoral Record](#)

[Search](#)

**Configuration**

[Record Type](#)

[Category](#)

[GIRFEC](#)

**Reports**

[Child Protection Concern](#)

Requires Action By Me					
Actions	Pupil Name(s)	Raised By	Status	Heading	Action Required By
<a href="#">Q</a> <a href="#">✎</a>	DAVIS Laura, DAVIS Steven	STRINGER, Robert	Open	Davis Divorce	04/07/2016
<a href="#">Q</a> <a href="#">✎</a>	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert	Open	Allegation of Bullying	01/07/2016
<a href="#">Q</a> <a href="#">✎</a>	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert	Open	Fighting at Lunchtime	01/07/2016
<a href="#">Q</a> <a href="#">✎</a>	ADAMS Sarah J	STRINGER, Robert	Open	Allegations of Stealing	09/07/2016

1 - 4 of 4 items

Recent Pastoral Records				
Actions	Pupil Name(s)	Status	Heading	Date
<a href="#">Q</a> <a href="#">✎</a>	DAVIS Laura, DAVIS Steven	Open	Davis Divorce	22/07/2016 11:10:00
<a href="#">Q</a> <a href="#">✎</a>	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel	Open	CPC	12/07/2016 10:31:00
<a href="#">Q</a> <a href="#">✎</a>	DUNCAN Katherine	Open	Unusual Behaviour	12/07/2016 09:31:00
<a href="#">Q</a> <a href="#">✎</a>	ADAMS Sarah J	Open	Allegations of Stealing	08/07/2016 09:20:00
<a href="#">Q</a> <a href="#">✎</a>	ADAMS Lauren S, ADAMS Sarah J	Open	Playground chat	07/07/2016 15:35:00

[Search More Pastoral Records](#)

**Pupils** 
[Add](#) [Add Event](#) [Create Pupil Custom Group](#) [Email](#) [Add Pupil Document](#)

More Actions ▾

Children With Allergies

Actions	<input type="checkbox"/>	Name ▲	Form	Allergy	Allergy information
View   Edit   ▾	<input type="checkbox"/>	ADAMS, Lauren S <span style="font-size: x-small; color: green;">👤</span> <span style="font-size: x-small; color: red;">+</span> <span style="font-size: x-small; color: red;">🚫</span>	Form 11A	<input checked="" type="checkbox"/>	Some forms of Smarties
View   Edit   ▾	<input type="checkbox"/>	ADAMS, Sarah J <span style="font-size: x-small; color: green;">👤</span> <span style="font-size: x-small; color: red;">+</span>	Form 7A	<input checked="" type="checkbox"/>	Emergency Treatment - Severe Nut Allergy - See Notes
View   Edit   ▾	<input type="checkbox"/>	ALLEN, David <span style="font-size: x-small; color: green;">👤</span> <span style="font-size: x-small; color: red;">+</span> <span style="font-size: x-small; color: red;">🚫</span>	Form 4B	<input checked="" type="checkbox"/>	Plasters
View   Edit   ▾	<input type="checkbox"/>	CAVENDISH, Mary <span style="font-size: x-small; color: green;">👤</span> <span style="font-size: x-small; color: red;">+</span> <span style="font-size: x-small; color: red;">🚫</span>	Form 11A	<input checked="" type="checkbox"/>	No Penicillin
View   Edit   ▾	<input type="checkbox"/>	COLES, Mark <span style="font-size: x-small; color: green;">👤</span> <span style="font-size: x-small; color: red;">+</span> <span style="font-size: x-small; color: red;">🚫</span>	Form 6A	<input checked="" type="checkbox"/>	Dairy Products
View   Edit   ▾	<input type="checkbox"/>	FRY, Jordan <span style="font-size: x-small; color: green;">👤</span> <span style="font-size: x-small; color: red;">+</span> <span style="font-size: x-small; color: red;">🚫</span>	Form 6A	<input checked="" type="checkbox"/>	ASD
View   Edit   ▾	<input type="checkbox"/>	JONES, Mary <span style="font-size: x-small; color: green;">👤</span> <span style="font-size: x-small; color: red;">+</span> <span style="font-size: x-small; color: red;">🚫</span>	Lower Sixth	<input checked="" type="checkbox"/>	Severe Hayfever in May/June
View   Edit   ▾	<input type="checkbox"/>	MITCHELL, Emily J <span style="font-size: x-small; color: green;">👤</span> <span style="font-size: x-small; color: red;">+</span>	Form 10A	<input checked="" type="checkbox"/>	Penicillin
View   Edit   ▾	<input type="checkbox"/>	MITCHELL, Rebecca <span style="font-size: x-small; color: green;">👤</span> <span style="font-size: x-small; color: red;">+</span>	Form 9A	<input checked="" type="checkbox"/>	Early mornings, bed making
View   Edit   ▾	<input type="checkbox"/>	O'MALLY-JONES, Paula S <span style="font-size: x-small; color: green;">👤</span> <span style="font-size: x-small; color: red;">+</span>	Form 8A	<input checked="" type="checkbox"/>	Milk. Slight Allergy to Face creams

⏪ ⏩ ⏴ ⏵
 Records Per Page 
 Showing 1 - 10 of 12 Records
 Page  of 2

For details on how to:

- » Use dashboards, see "About Dashboards" on page 27.
- » Use search screens, see the maintaining records sections within each module's Online Help pages.

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

## Grid Row Colour Coding

In newer modules, when editing data in a grid, coloured dots show you each row's status.

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

## About Grids for Extracting Data

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

### HOW TO EXTRACT GRID DATA AS AN MS EXCEL FILE

- a. Click .
- 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.

## Searching for Pupils

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

For details on how to:

- » Find pupil names, see below.
- » Find pupil names in the **Pastoral Management** module, see "Searching for Pupils in the Pastoral Management Module" on page 40. (Different pupil search dialogs are available in newer modules, such as the **Pastoral Management** module.)

For generic information about using search dialogs, see "Completing Fields" on page 33.

### Searching for Pupils

#### HOW TO SEARCH FOR PUPILS

- a. Click **Search**.

The **Search** dialog appears.

- b. At the top of the dialog, enter your search criteria. You can filter by:
  - » **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 2016' etc. Your selection in the first drop list alters the options available in the second drop list.
  - » **Name** - Use the first drop list to select 'Pupil Name', then type all or part of the pupil's name into the second field OR leave the second field empty to retrieve a complete list of all pupils.
- c. Click **Search**.  
A list of pupils appears in the top half of the dialog.
- d. Do ONE of the following:

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

Search

Form Form 10A (10A) Search 7 results

<input checked="" type="checkbox"/>	Name	Preferred Name	Code	Form	Academic House
<input type="checkbox"/>	BATEMAN, Christopher	Christopher	BAT002	Form 10A	M1
<input type="checkbox"/>	KERR, Rebecca	Rebecca	KER001	Form 10A	G
<input checked="" type="checkbox"/>	MITCHELL, Emily J	Emily	MIT001	Form 10A	PUFFIN
<input type="checkbox"/>	MITCHELL, Polly	Polly	MIT003	Form 10A	M1
<input type="checkbox"/>	RACE, Adam	Adam	RAC001	Form 10A	PUFFIN

Select

Pupils

<input type="checkbox"/>	Name	Preferred Name	Code	Form	Academic House
--------------------------	------	----------------	------	------	----------------

Remove

OK Cancel

- e. Click **Select**.  
The selected pupils appear on the **Pupils** tab in the bottom half of the screen.
- f. (Optional) To remove any erroneous pupils, tick the check box next to their name and click **Remove**.

Search

Form Form 10A (10A) Search 7 results

<input type="checkbox"/>	Name	Preferred Name	Code	Form	Academic House
<input type="checkbox"/>	BATEMAN, Christopher	Christopher	BAT002	Form 10A	M1
<input type="checkbox"/>	KERR, Rebecca	Rebecca	KER001	Form 10A	G
<input type="checkbox"/>	MITCHELL, Emily J	Emily	MIT001	Form 10A	PUFFIN
<input type="checkbox"/>	MITCHELL, Polly	Polly	MIT003	Form 10A	M1
<input type="checkbox"/>	RACE, Adam	Adam	RAC001	Form 10A	PUFFIN

Select

Pupils

<input checked="" type="checkbox"/>	Name	Preferred Name	Code	Form	Academic House
<input checked="" type="checkbox"/>	DYER, Annabel	Annabel	DYE003	Form 10A	M1
<input type="checkbox"/>	MITCHELL, Emily J	Emily	MIT001	Form 10A	PUFFIN

Remove

OK Cancel

- g. Click **OK**.

✕
Search

Form

Form 10A (10A)

Search

7 results

<input type="checkbox"/> Name	Preferred Name	Code	Form	Academic House
<input type="checkbox"/> BATEMAN, Christopher	Christopher	BAT002	Form 10A	M1
<input type="checkbox"/> DYER, Annabel	Annabel	DYE003	Form 10A	M1
<input type="checkbox"/> KERR, Rebecca	Rebecca	KER001	Form 10A	G
<input type="checkbox"/> MITCHELL, Emily J	Emily	MIT001	Form 10A	PUFFIN
<input type="checkbox"/> MITCHELL, Polly	Polly	MIT003	Form 10A	M1

Select

Pupils

<input type="checkbox"/> Name	Preferred Name	Code	Form	Academic House
<input type="checkbox"/> MITCHELL, Emily J	Emily	MIT001	Form 10A	PUFFIN

Remove

OK
Cancel

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

## Searching for Pupils in the Pastoral Management Module

### HOW TO SEARCH FOR MULTIPLE PUPILS IN THE PASTORAL MANAGEMENT MODULE

Do ONE of the following:

- » Click in the field and type the first letters of the item you require. Select your choice from the items that appear in the drop list. This is known as auto complete. Repeat this sequence until you have selected all the names you require.
- » Click  at the end of the **Pupil Name(s)** field. The **Pupil Search** dialog appears.

✕
Pupil Search

Please Select

Please Select

Pupil Name

Search

Pupil Name	Pupil Code	Form	Pupil Name	Pupil Code	Form

OK
Cancel

- a. Do one or both of the following:
  - » Use the two **Group** drop lists to refine your search. Your selection in the first drop list alters the options available in the second drop list.
  - » In the **Pupil Name** field, enter all or part of the name you want.
- b. Click **Search**.
- c. Click on each pupil you want in the left-hand column of the resultant search results list.

Pupils move to the right-hand column once selected.

**Pupil Search**

Group

Pupil Name

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

13 result(s)

 **Note:** To deselect a pupil, click on the  next to the relevant name.

- d. Repeat the search process until you have found and moved all the names you need into the right-hand column. When you are finished, click **OK**.  
You return to the previous screen with the pupil(s) added to the relevant field.

## Searching for Staff

To attach staff to records using 3sysACADEMIC, you need to search for them using special search dialogs. You may need to find individual staff, e.g. the name of a person who has given a pupil an award, or assemble a group of personnel, for example to assign them tasks on a pastoral management record. The procedures below detail these key search types.

For details on how to:

- » Find staff names, see below.
- » Find members of staff in the Pastoral Management module, see "Searching for Staff in the Pastoral Management Module" on page 44.

For generic information about using search dialogs, see "Completing Fields" on page 33.

### Searching for Staff

#### HOW TO SEARCH FOR STAFF

- a. Click **Search**.

The **Search** dialog appears.

- b. At the top of the dialog, enter your search criteria. You can filter by:
  - » **Group** - From the first drop list, select the group type you want, e.g. 'Form', 'Subject Set' or 'Boarding House' and from the second drop list, select the person's specific group, e.g. 'Form 10A', 'Camelot House' etc. Your selection in the first list alters the options available in the second drop list.
  - » **Name** - Use the first drop list to select 'Staff Name', then type all or part of the pupil's name into the second field OR leave the second field empty to retrieve a complete list of all pupils.
- c. (Optional) To exclude non-academic staff from the search, tick the **Academic staff only?** check box.

**Search**

Staff Name   Academic staff only?

<input type="checkbox"/> Name	Preferred Name	Code
-------------------------------	----------------	------

Staff

<input type="checkbox"/> Name	Preferred Name	Code
-------------------------------	----------------	------

d. Click **Search**.

A list of staff appears in the top half of the dialog.

e. Do ONE of the following:

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

**Search**

Staff Name   Academic staff only?  68 results

<input type="checkbox"/> Name	Preferred Name	Code
<input checked="" type="checkbox"/> ALLEN, Barbara	Barbara	ALL001
<input checked="" type="checkbox"/> ANDREWS, Ellie J	Eleanor	EJA
<input type="checkbox"/> BAKER, Molly B	Molly	MBB
<input type="checkbox"/> BAYTON, Elizabeth	Liz	EB
<input checked="" type="checkbox"/> BELL, Alexander	Alexander	BEL001

Staff

<input type="checkbox"/> Name	Preferred Name	Code
-------------------------------	----------------	------

f. Click **Select**.

The selected staff appear on the **Staff** tab in the bottom half of the screen.

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

**Search** [X]

Staff Name [v] [Search] Academic staff only?  68 results

<input type="checkbox"/> Name	Preferred Name	Code
<input type="checkbox"/> BAKER, Molly B	Molly	MBB
<input type="checkbox"/> BAYTON, Elizabeth	Liz	EB
<input type="checkbox"/> BINNS, Elise	Elise	BIN001
<input type="checkbox"/> BOULDER, Brian James	Brian	BJB
<input type="checkbox"/> BRADLEY, Howard	Howard	BRA001

Select

Staff

<input type="checkbox"/> Name	Preferred Name	Code
<input type="checkbox"/> ALLEN, Barbara	Barbara	ALL001
<input checked="" type="checkbox"/> ANDREWS, Ellie J	Eleanor	EJA
<input type="checkbox"/> BELL, Alexander	Alexander	BEL001

Remove

OK Cancel

h. Click **OK**.

**Search** [X]

Staff Name [v] [Search] Academic staff only?  68 results

<input type="checkbox"/> Name	Preferred Name	Code
<input type="checkbox"/> BAKER, Molly B	Molly	MBB
<input type="checkbox"/> BAYTON, Elizabeth	Liz	EB
<input type="checkbox"/> BINNS, Elise	Elise	BIN001
<input type="checkbox"/> BOULDER, Brian James	Brian	BJB
<input type="checkbox"/> BRADLEY, Howard	Howard	BRA001

Select

Staff

<input type="checkbox"/> Name	Preferred Name	Code
<input type="checkbox"/> ALLEN, Barbara	Barbara	ALL001
<input type="checkbox"/> BELL, Alexander	Alexander	BEL001

Remove

OK Cancel

You are returned to the previous page with the selected staff added to the relevant field.

## Searching for Staff in the Pastoral Management Module

### HOW TO SEARCH FOR INDIVIDUAL STAFF IN THE PASTORAL MANAGEMENT MODULE

Do ONE of the following:

- » Click in the relevant field and type all or part of the name you require. Select your choice from the items that appear in the drop list. This is known as auto complete. For example:

Staff Name:

- DAVIS, Patrick M
- PARKER, Lucy Ann
- PARKER, Simon P
- PARSONS, Albert Trevor

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

**Staff Search** ■

Group

Staff Type

Staff Name

Staff Name	Staff Code

- a. In the top part of the dialog, enter your search criteria and click **Search**.

You can filter by:

- » **Group** - From the first **Group** drop list, select the group type you want, e.g. 'Boarding House', 'Form' or 'Subject Set', and from the second **Group** drop list, select the person's specific group, e.g. 'Form 10A', 'English' etc.
- » **Staff Type** - From the **Staff Type** drop list, select the required type of staff, such as 'Academic', 'Non-Academic' or 'Both'.
- » **Name** - Type all or part of the staff member's name in the **Staff Name** field.

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

- b. Click on the record you want. You are returned to the previous screen with the required staff record entered in the relevant field.

#### HOW TO SEARCH FOR MULTIPLE STAFF IN PASTORAL MANAGEMENT

Do ONE of the following:

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

Staff Name: | pa|

- DAVIS, Patrick M
- PARKER, Lucy Ann
- PARKER, Simon P
- PARSONS, Albert Trevor

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

**Staff Search** ✕

Dynamic  Individual

Group

Staff Type

Staff Name

Staff Name	Staff Code

- In the top part of the dialog, enter your search criteria and click **Search**. You can filter by:
  - » **Group** – From the first **Group** drop list, select the group type you want, e.g. boarding house, form or subject set, and from the second **Group** drop list, select the person's specific group, e.g. 10A, English etc. (If you do not wish to search by group, select 'None' in the first field.)
  - » **Staff Type** – From the **Staff Type** drop list, select the required type of staff, such as 'Academic', 'Non-Academic' or 'Both'.
  - » **Name** – Type in all or part of a staff member's name in the **Staff Name** field.
- Click on each record you want in the list that appears in the bottom left-hand corner. Staff move from the left to the right-hand side of the screen once selected.

**Staff Search** ✕

Dynamic    Individual

Group: Form Year ▾ Please Select ▾

Staff Type: Academic ▾

Staff Name:

**Search**

Staff Name	Staff Code		Staff Name	Staff Code	
FARMER, Christopher	FAR00001	<input checked="" type="checkbox"/>	PARKER, Selina	PAR00001	<input type="checkbox"/>
JAMES, Henry	JAM00001	<input checked="" type="checkbox"/>	HARRISON, Jane-Claire	HAR00001	<input type="checkbox"/>
O'MALLEY-JONES, Sean	OMA00001	<input checked="" type="checkbox"/>			
SMYTHE, Janice	SMY00001	<input checked="" type="checkbox"/>			

6 result(s) **OK** **Cancel**

**Note:** To deselect staff, click on the  next to the relevant name.

- c. When done, click **OK**.  
You are returned to the previous screen with the required staff entered in the relevant field.

## About Views

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

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

Views are available wherever you see this drop list at the top of a screen. Select a view using this drop list and the page's grid refreshes with the relevant data.

View: <input type="text" value="Standard"/> 	<a href="#">Add Copy</a>
---	--------------------------

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

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

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

by form year for a complete list of known allergy sufferers.

**Edit View : Current Pupil** Save Cancel

---

**Enter View Name And Description**

View Name:

Description:

---

**Specify Filters**

New Filter :  Add

Field	Operator	Value
Allergy	Equals	Yes

✕ Add OR Condition

---

**Select Columns To Display**

Available	Selected
Academic house	Name
Academic house code	Form
Academic year	Allergy
Address country	Allergy information
Address telephone	
Admission number	
Adult?	
Allow billing?	
Award 1	
Award 1 code	
Award 2	
Award 2 code	
Award 3	
Award 3 code	
Birth place	

---

**Choose Column To Order By**

Order by Column:

---

**Choose Column To Group By**

Group by Column:

Operator Value

Having   record(s)

---

**Visibility of View**

Visible To:

Save Cancel

 **Note:** Once a user has created a new search view, it is possible to embed it into a user's home page using the My Searches Widget.

## Accessing Search Views

### HOW TO ACCESS A SEARCH VIEW

1. Via the **Mega Menu**, go to the relevant module or function.
2. Use the **View** drop list at the top of the screen to select the search view you want.  
The grid beneath refreshes to show the selected search view's results.
3. Enter further criteria to refine your search results.

#### More details

- a. If not already expanded, click  **Refine Search** to display the fields by which you

can further restrict your search.

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

## Adding Search Views

### HOW TO ADD A SEARCH VIEW

1. Via the **Mega Menu**, go to the relevant module or function, e.g. **Pupils**.
2. Click **Add** next to the **View** drop list at the top of the screen.  
The relevant **Create View** screen appears.
3. Complete the **View Name** and **Description** fields.
4. Specify how the search view should filter the records.

More details...

- » **Select a Field(s)** - Use the **New Filter** drop list to select the field you would like to filter by and click **Add**. Repeat as required.
- » **Select an Operator** - Select an option from the **Operator** drop list to describe the contents of the selected field in the records you would like to view. For example, 'equals' means that the field contains the value specified, 'contains' means that the field includes the value you set plus other content and 'Greater Than' means the field contains a number higher than the value you search for.
- » **Select a Value** - Complete the **Value** field with what the software should look for in the selected field. You may be able to select this from a drop list or simply type the relevant value.



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

- » **Select an 'Or' Condition** - (Optional) If you would like to search for records with different values in the same field, click **Add OR Condition** after adding the first filter line. This allows you specify a second operator and value for the same field, meaning that the software looks for both and presents records containing either of them in the search view. For example, if you select the 'Allergy Information' field and add a line stating 'Allergy Information' 'Contains' 'Peanuts', click **Add OR Condition** and specify 'Allergy Information' 'Contains' 'Milk', then your search view will contain records of pupils with allergies to peanuts, allergies to milk or allergies to both.

5. Select the columns to display.

More details...

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



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

- b. Click  to move the highlighted column name(s) to the **Selected** list.
- c. (Optional) Use the icons to navigate the lists.

- » Click  or  to scroll up or down the list.
  - » Click  or  to go to the top or bottom of the list.
6. Use the **Order by Column** drop lists to select which field to sort the data by and whether it should be 'Ascending' or 'Descending'.
  7. (Optional) Use the **Group by Column** drop list to select which field the results should be grouped by, e.g. form, and whether the list should be ascending or descending.
  8. Set who can see this search view using the **Visible To** drop list.
  9. Click **Save**.

## Editing Search Views

### HOW TO EDIT A SEARCH VIEW

1. Via the **Mega Menu**, go to the relevant module or function, e.g. **Pupils**.
2. Select the search view you would like to edit using the **View** drop list.



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

3. Edit the search view settings, as required.
4. Click **Save**.

## Copying Search Views

### HOW TO COPY A SEARCH VIEW

1. Via the **Mega Menu**, go to the relevant module or function, e.g. **Pupils**.
2. Select the search view you want to copy from the **View** drop list and click **Copy**.  
The relevant **Copy View** screen appears.
3. Enter a new name and view description.
4. Amend the search view settings, as required.
5. Click **Save**.

## Deleting Search Views

### HOW TO DELETE A SEARCH VIEW

1. Via the **Mega Menu**, go to the relevant module or function, e.g. **Pupils**.
2. Select the search view you want to delete from the **View** drop list.
3. Click **Delete**.  
The **Confirm Delete** pop up appears.
4. If you are sure that you want to delete the search view, click **Delete**.

## Adding the My Searches Widget to your Home Page

### HOW TO ADD THE MY SEARCHES WIDGET TO YOUR HOME PAGE

1. Go to **Setup > Desktop Management > Home Pages**.
2. Find the home page you would like to update.

More details...

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

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



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

- b. Enter all or part of the home page name into the **Name** field at the top of the screen, and click **Search**. Your search results populate the grid.
- c. (Optional) Use the 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  ▼

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

Page  of 1

3. Click **Edit** next to the relevant home page.

The **Home Page Designer** screen appears.

4. Click on the **My Searches** widget in the **Available** list and drag it to your preferred location on the **Page Layout** template on the right-hand side of the screen.

The **Options** pop up appears.

5. Edit the widget's settings.

**More details...**

- a. State a fixed height for the widget on your home page OR check **Auto** for the size to adjust according to the content.
  - b. Select the **Hide when empty** check box to remove the widget from the home page when there is no relevant data to show.
  - c. Select a coloured square to colour code the widget.
  - d. Use the **Function** and **View** drop lists to select which search view the widget should link to.
  - e. Click **OK**.
6. Click **Save**.



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

**This page has been left blank intentionally.**

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