WCBS

3sysACADEMIC

Getting Started

User Guide

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CHAPTER 1

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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- Features 6
- Find out more 6

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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.

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, which you can use 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.

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

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.

For details, see "Customer Centre" on page 9.

PDF GUIDES

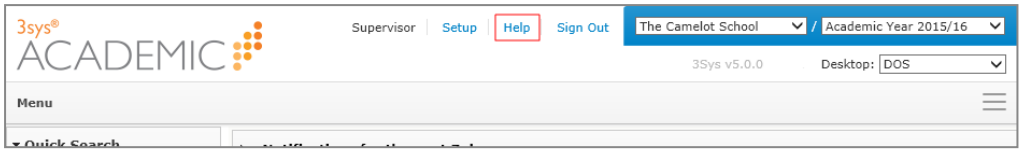
You can download and read the PDF User Guides. These provide information about a range of tasks and functions in 3sysACADEMIC. We recommend the 3sysACADEMIC *Getting Started Guide* is a good place to start, but there are many others. For a full list, see **Getting Started > PDF Guides** in the online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

INTRODUCTORY HELP TOPICS

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

- "About 3sysACADEMIC" on the previous page.
- "About Navigating 3sysACADEMIC" on page 21.
- "About the Mega Menu" on page 40.
- "About Dashboards" on page 50.
- "Completing Fields" on page 55.

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.

Note: To return to the software, click on the relevant tab.

For details, see "3sysACADEMIC Online Help Tips and Tricks" on page 15.

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.

For further details, see:

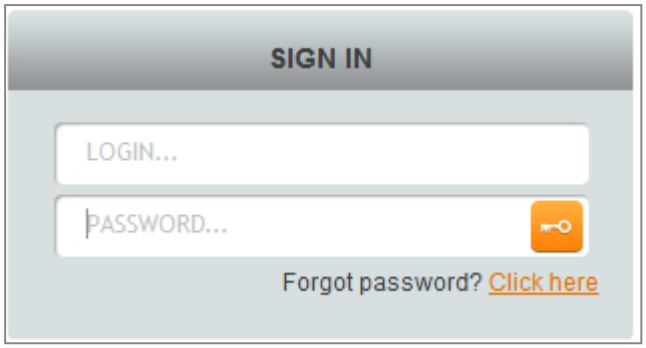
- "Accessing the Customer Centre" below.
- "Finding Answers to Frequently Asked Questions (FAQs)" on the next page.
- "Finding Resources on the Customer Centre" on page 11.

Accessing the Customer Centre

HOW TO ACCESS THE CUSTOMER CENTRE

1. Go to 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).



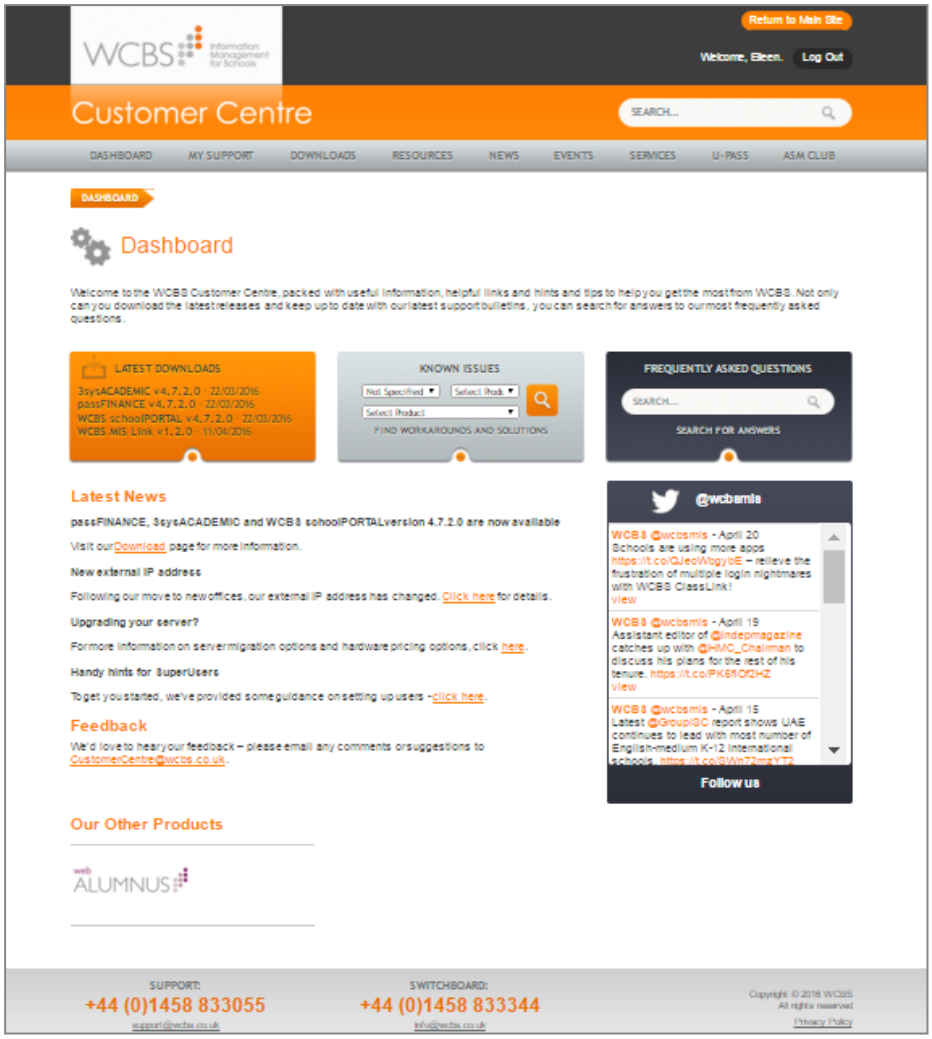
4. Click OR press ENTER on your keyboard.

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

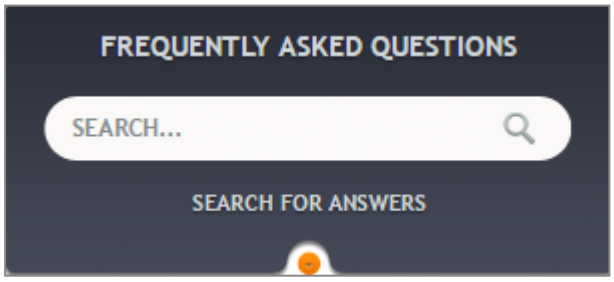
Finding Answers to Frequently Asked Questions (FAQs)

HOW TO FIND ANSWERS TO FREQUENTLY ASKED QUESTIONS

1. Go to www.wcbs.co.uk 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.

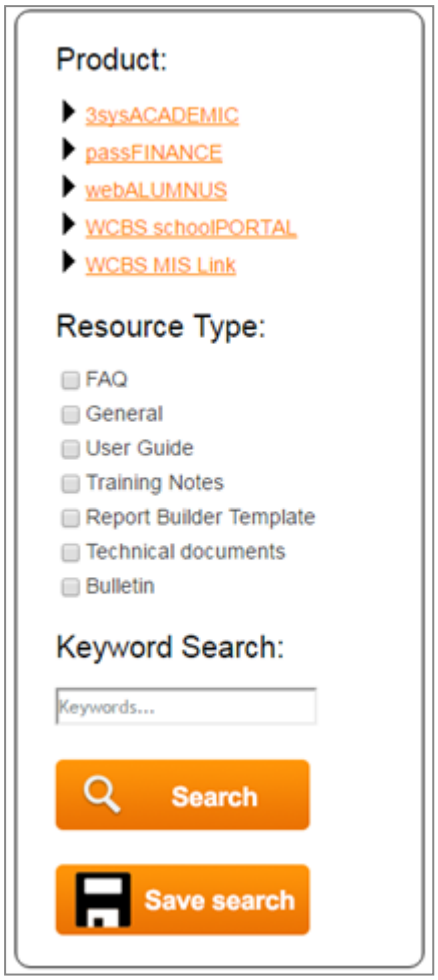
Finding Resources on the Customer Centre

HOW TO FIND RESOURCES ON THE CUSTOMER CENTRE

1. Go to www.wcbs.co.uk and sign in to the Customer Centre.

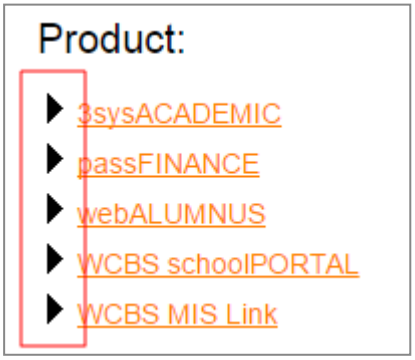
2. Click **Resources**.

   The **Resources Library** screen appears.



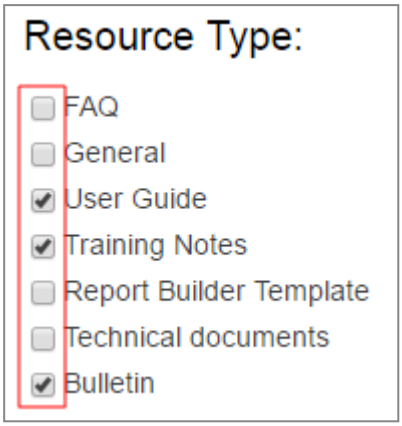
3. Using the search panel on the left-hand side of the screen, search by product, resource type and/or key word:

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

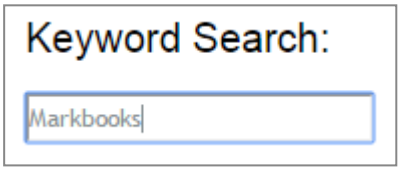


   » **To search by Resource Type** - Select the relevant **Resource Type** check box or

boxes.



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



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.

3sys® ACADEMIC

Contact Us

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

Please feel free to contact us in the following ways:

CALL OR EMAIL SALES OR YOUR ACCOUNT MANAGER ON

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

Email: sales@wcbs.co.uk

LOOKING FOR TECHNICAL SUPPORT?

Call: +44 (0) 1458 833 055

Email: support@wcbs.co.uk

Visit our Customer Centre: SIGN IN.

WANT TO FIND OUT ABOUT TRAINING OPPORTUNITIES?

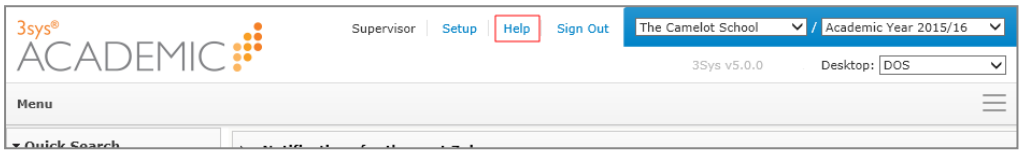
Call: +44 (0) 1458 833 344

Email: trainingevents@wcbs.co.uk

3sysACADEMIC Online Help Tips and Tricks

3sysACADEMIC Online Help has been created to help users at all levels, including System Administrators, find their way around 3sysACADEMIC, supporting them to become more adept at using the software and getting the most out of it.

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



For key Online Help tips and tricks, see:

- "Searching 3sysACADEMIC Help Online" below.
- "Using Menus in the Online Help" below.
- "More Details" on the next page.
- "Expanding Images" on page 17.

Searching 3sysACADEMIC Help Online

Searching 3sysACADEMIC Help Online

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

You will find **Search** bars at the top of each screen and on the 3sysACADEMIC Help home page.

Enter your search criteria and click to see a list of pages that may help answer your query. Click on a result to go to that page.

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

Using Menus in the Online Help

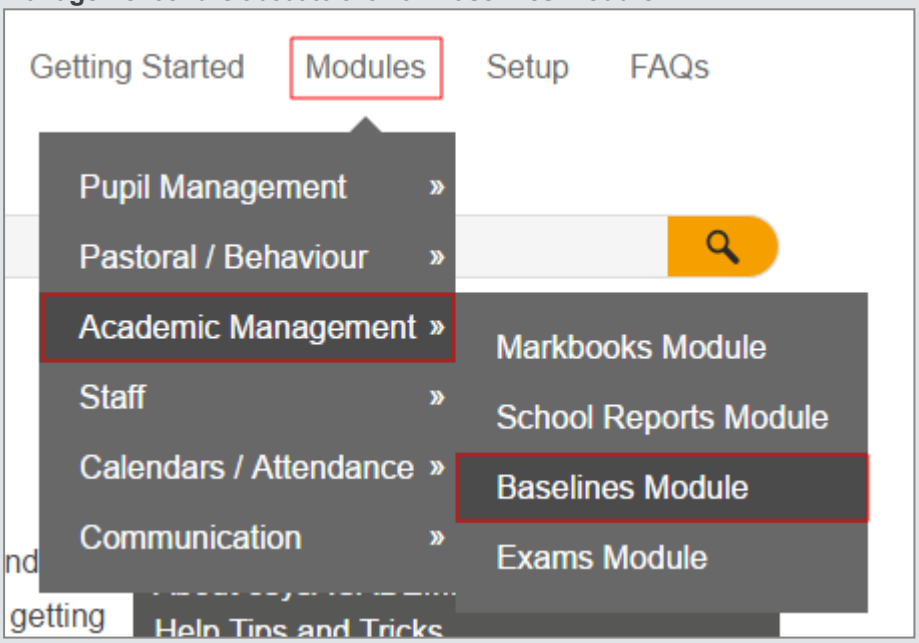
Using Menus in the Online Help

You can also find information via the Online Help's drop menus. At the top of each screen is a list of menu options reflecting the structure of the software and providing easy access to specialist sections for new users and System Administrators.

Getting Started provides essential information for new users or those who have not used the software recently and need to refresh their knowledge. **Modules** includes details about each 3sysACADEMIC module and how to use and configure each module / function. **Setup** covers information about how to set up 3sysACADEMIC ready for use, while the **FAQs** section contains answers to users' questions.

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

Example: In this example, the user has hovered over **Modules**, then **Academic Management** and is about to click on **Baselines Module**.



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

More Details

More Details

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

More details...

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

Expanding Images

Expanding Images

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

This page has been left blank intentionally.

CHAPTER 2

Navigating 3sysACADEMIC

This chapter discusses the following:

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About Navigating 3sysACADEMIC

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

Key workspace areas

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

THE 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 25.

DESKTOPS

Desktops are additional home page-type screens which help users access modules relevant to particular roles or functions. For more information, see "About Desktops" on page 34.

THE MEGA MENU

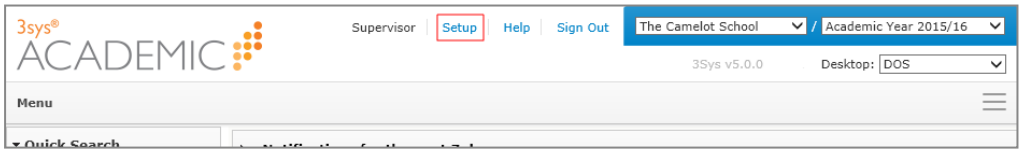
The mega menu is the main, ribbon menu which runs across the top of the 3sysACADEMIC workspace. For more information, see "About the Mega Menu" on page 40.

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 44.

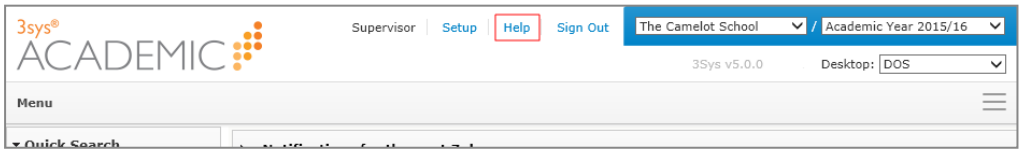
SETUP AND MY SETTINGS

The **Setup** link appears at the top of the screen and takes you to the **Setup** screen. You can access your settings via this screen. For more information, see "About My Settings" on page 45.



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.



DASHBOARDS

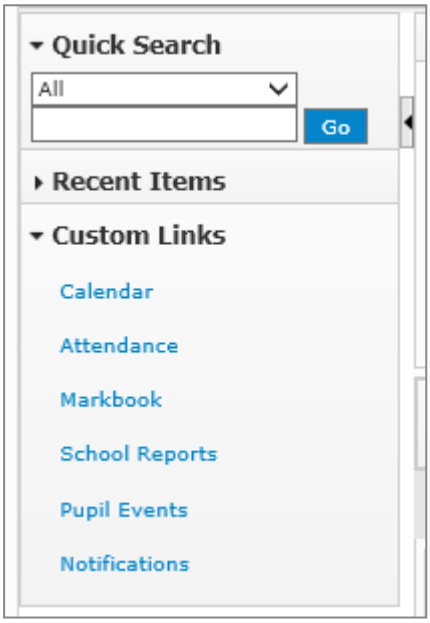
Dashboards are being introduced for each module within 3sysACADEMIC. Dashboards provide access to record management and configuration options for modules and a summary of recent activity. For more information, see "About Dashboards" on page 50.

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:

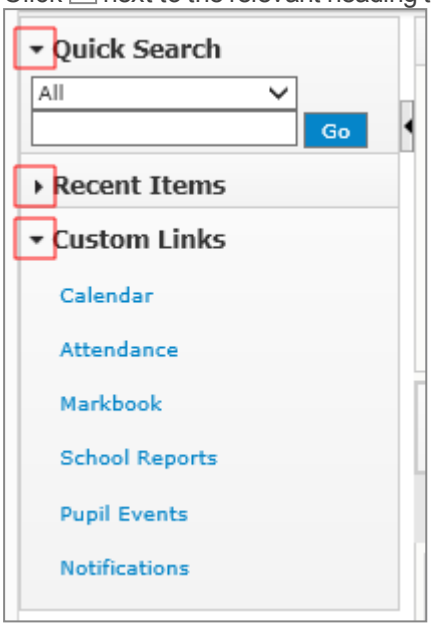
- **Quick Search** - This provides a simple way of finding people records in 3sysACADEMIC. Use the drop list to select 'All', 'Current pupil' or 'Staff' and type all or part of the name you want in the field below. Click **Go**.
- **Recent Items** - A list of links to items you have recently viewed, making returning to them straightforward.
- **Custom Links** - For more information, see "About Custom Links" on page 47.



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

» Click ▸ next to the relevant heading to expand a section.

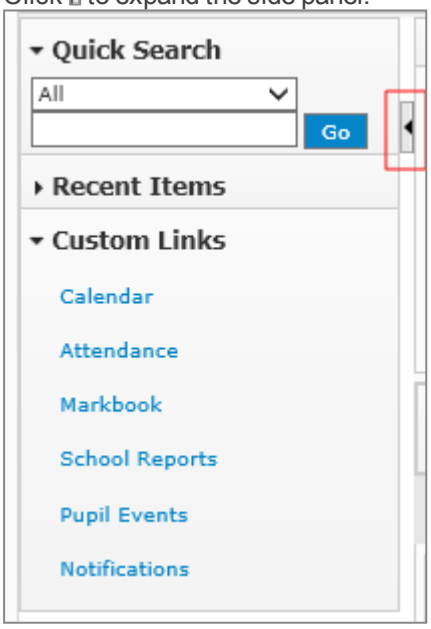
» Click ▾ next to the relevant heading to minimise a section.



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

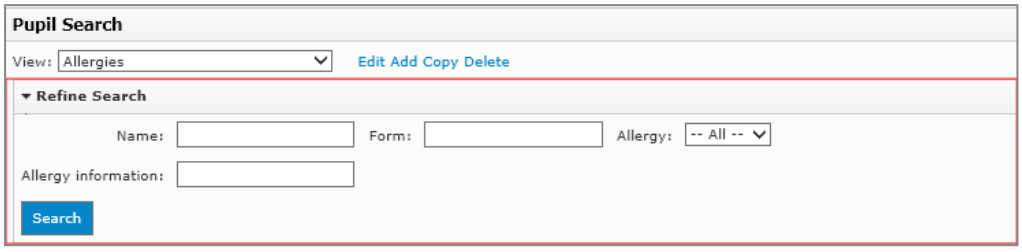
» Click ◂ to minimise the side panel.

» Click ▸ to expand the side panel.



REFINE SEARCH PANEL

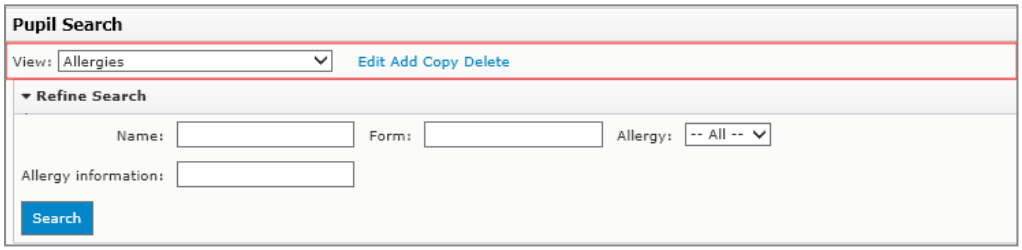
At the top of many screens there is a **Refine Search** panel which allows you to filter the records in that section based on relevant criteria. Complete one or more fields and click **Search**. How to use each panel is covered in more detail in the Help section for each module.



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 77.



About the Home Page

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

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

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

For further information, see:

- "Accessing your Home Page" below.
- "Creating a Home Page" below.
- "Editing a Home Page" on page 29.
- "Deleting a Home Page" on page 32.

If you are a System Administrator, also see the Setup User Guide.

Accessing your Home Page

HOW TO ACCESS YOUR HOME PAGE

Do ONE of the following:

- Log in to 3sysACADEMIC. Your home page is the first screen that appears.
- Click **Home** on the left-hand side of the mega menu.

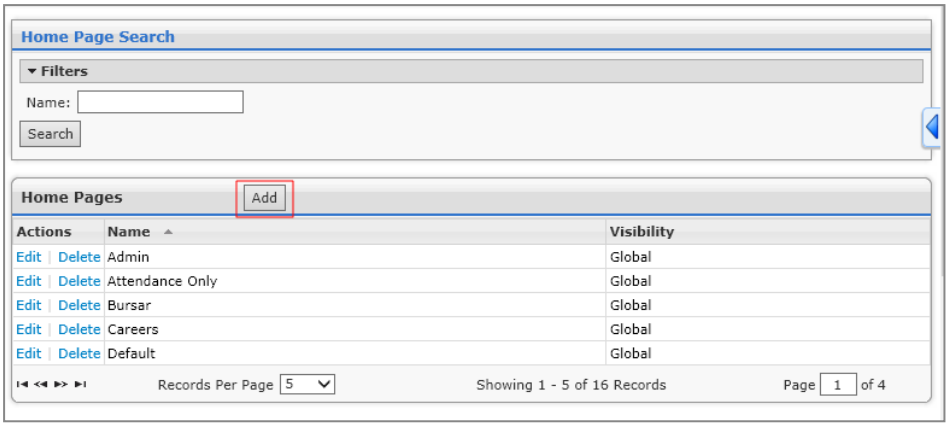
Creating a Home Page

HOW TO CREATE A HOME PAGE

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

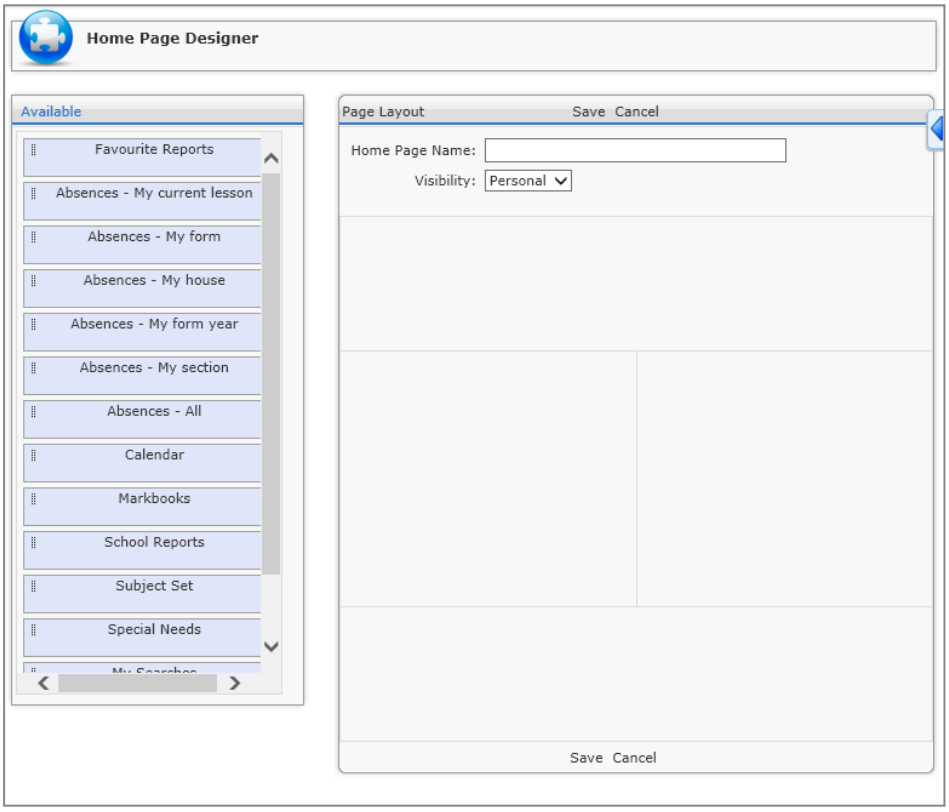
1. Go to **Setup > Desktop Management > Home Pages**.

   The **Home Pages** screen appears.



2. Click **Add**.

   The **Home Page Designer** screen appears.

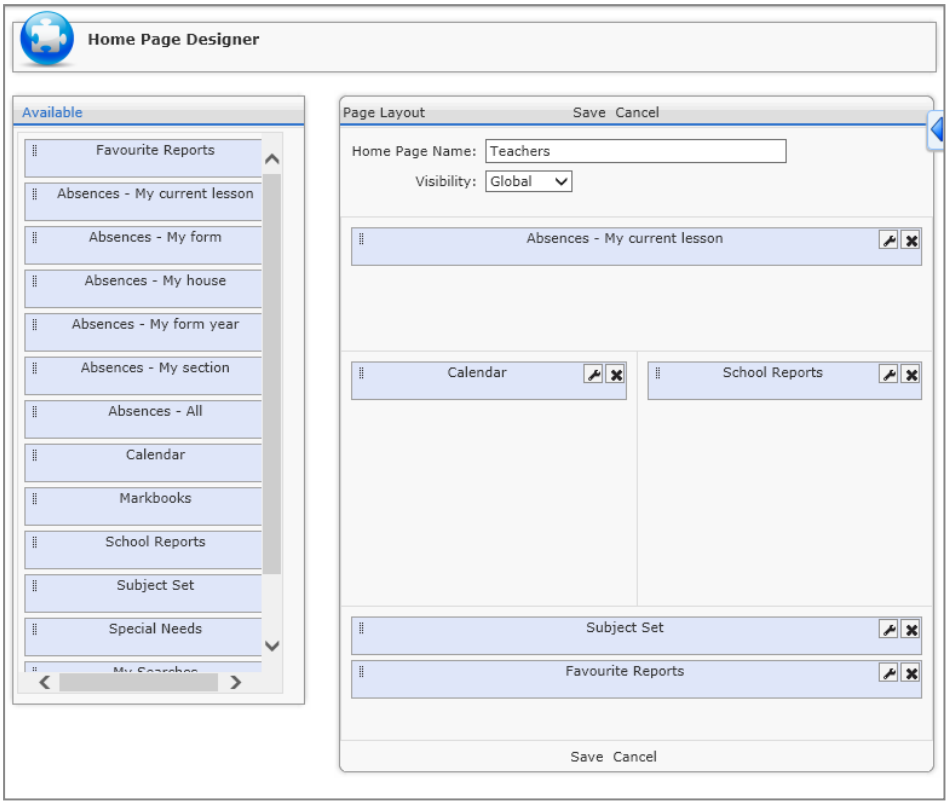


3. Complete the **Home Page Name** field.
4. Using the **Visibility** drop list, select 'Personal' if only you should be able to see this home page, OR 'Global' if multiple users can access it.
5. Design your home page layout by dragging functions or 'widgets' from the **Available** list on the left-hand side of the screen and dropping them into the blank **Page Layout** on the right-hand side.

   More details...

   Widgets represent a function within 3sysACADEMIC. Widgets can include:

Widget	Action
Favourite Reports	Lists Report Builder templates which have been marked as favourites by the user.
Absences - My Current Lesson	Draws from the timetable, current time and today's registration data to list pupils who should be absent from your current lesson.
Absences - My Form	Lists pupils in the user's form (if they are a Form Tutor) who have been marked as absent at today's morning or afternoon registration.
Absences - My House	Shows which pupils in a user's house (where they are a House Master/Mistress) who have been marked as absent at today's morning or afternoon registration.
Absences - My Form Year	Designed to show Heads of Year which pupils in the user's form year were marked absent at today's morning or afternoon registration.
Absences - My Section	Lists pupils in the user's school section (where they are the Head of Section) who have been marked absent today at morning or afternoon registration.
Absences - All	Details ALL pupils who have been marked absent at this morning or this afternoon's registration.
Calendar	Shows the user's timetable. Attendance, subject set inquiry and markbook functions can be launched from the calendar.
School Reports	Offers a graphical representation of outstanding school report entries and provides a shortcut to writing reports.
Subject Set	Lists all pupils in the user's current lesson, with a summary of today's attendance and a link to each pupil's full record.
Special Needs	Provides a breakdown of the SEN requirements of pupils in the user's current lesson.
My Searches	A configurable widget which allows users to access a variety of information.
Notifications for the next 7 days	Displays notifications for the next seven days.

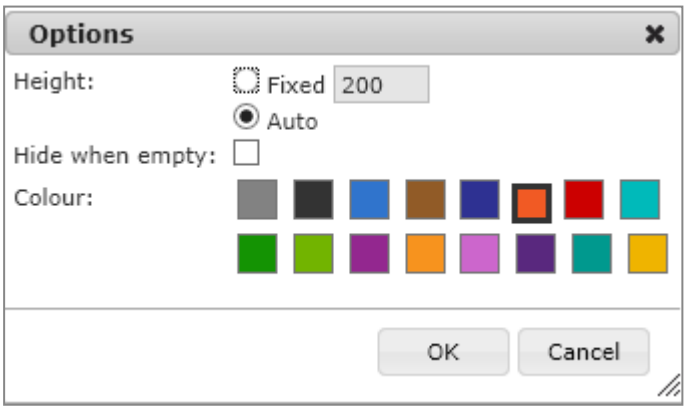


Note: If you add a widget in error, click ✖ to remove it.

6. (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**.

7. Click **Save**.

Editing a Home Page

HOW TO EDIT A HOME PAGE

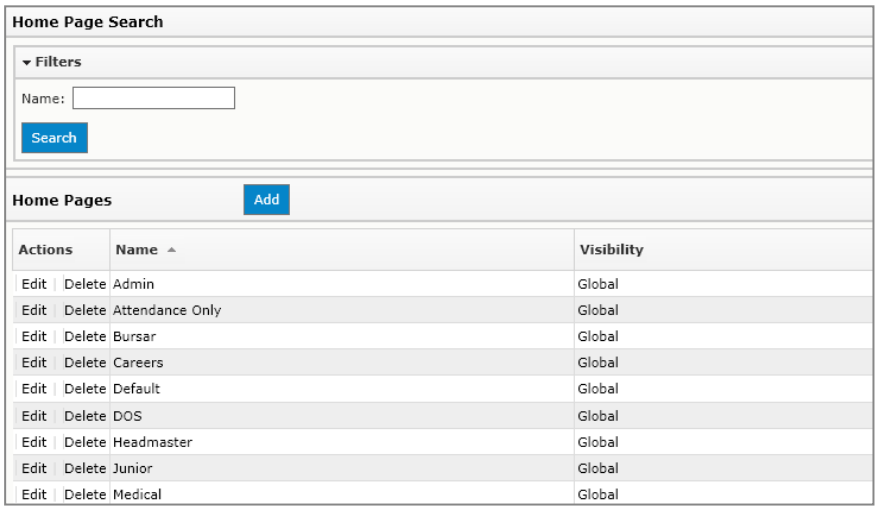
Note: The options you see depend upon the permissions set by your System Administrator.

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

   More details...

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

   The **Home Page Search** and **Home Pages** 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.

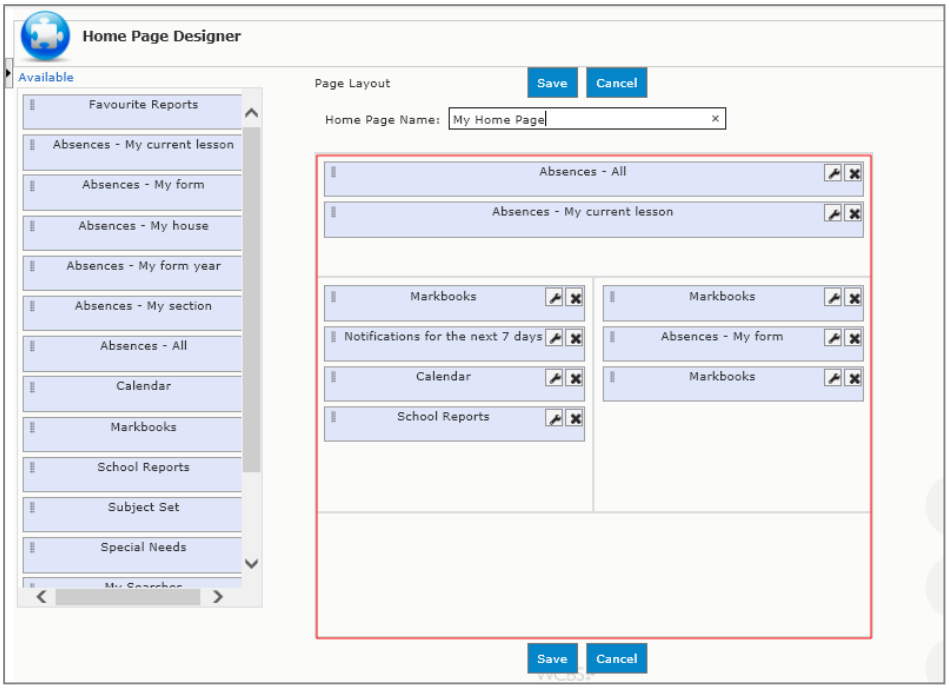
   c. (Optional) Use the icons beneath the grid to navigate between pages of records.

   - 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.

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

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

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



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

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

More details...

Widgets represent a function within 3sysACADEMIC. Widgets can include:

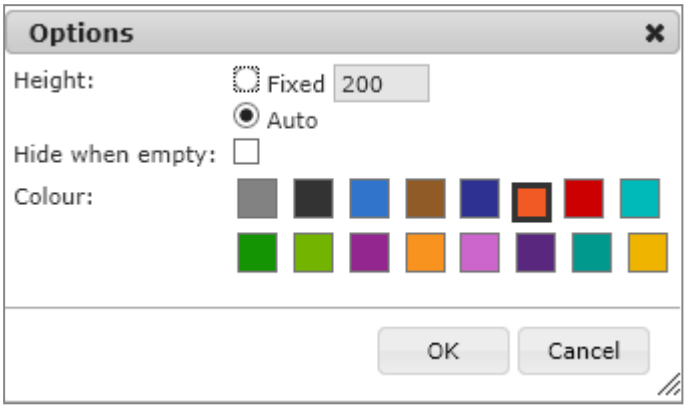
Widget	Action
Favourite Reports	Lists Report Builder templates which have been marked as favourites by the user.
Absences - My Current Lesson	Draws from the timetable, current time and today's registration data to list pupils who should be absent from your current lesson.
Absences - My Form	Lists pupils in the user's form (if they are a Form Tutor) who have been marked as absent at today's morning or afternoon registration.
Absences - My House	Shows which pupils in a user's house (where they are a House Master/Mistress) who have been marked as absent at today's morning or afternoon registration.
Absences - My Form Year	Designed to show Heads of Year which pupils in the user's form year were marked absent at today's morning or afternoon registration.
Absences - My Section	Lists pupils in the user's school section (where they are the Head of Section) who have been marked absent today at morning or afternoon registration.
Absences - All	Details ALL pupils who have been marked absent at this morning or this afternoon's registration.
Calendar	Shows the user's timetable. Attendance, subject set inquiry and markbook functions can be launched from the calendar.
School Reports	Offers a graphical representation of outstanding school report entries and provides a shortcut to writing reports.
Subject Set	Lists all pupils in the user's current lesson, with a summary of today's attendance and a link to each pupil's full record.
Special Needs	Provides a breakdown of the SEN requirements of pupils in the user's current lesson.
My Searches	A configurable widget which allows users to access a variety of information.
Notifications for the next 7 days	Displays notifications for the next seven days.

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**.

Deleting a Home Page

HOW TO DELETE A HOME PAGE

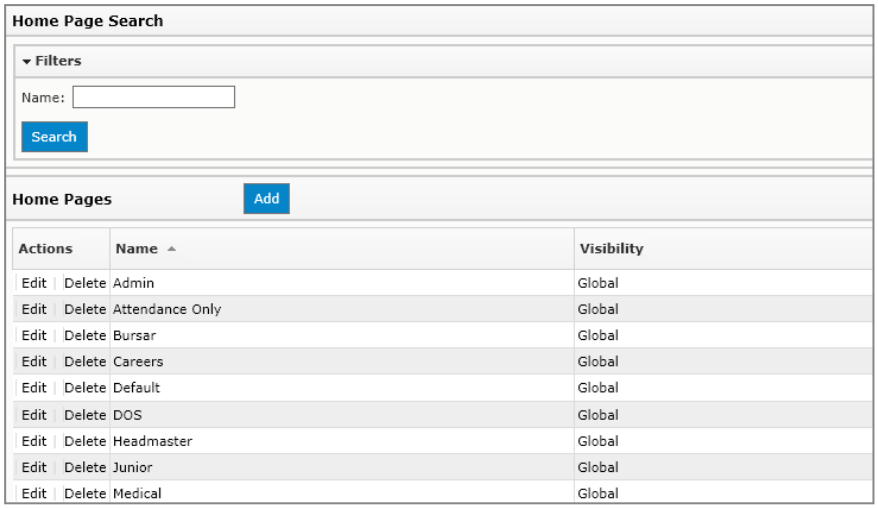
Note: The options you see depend upon the permissions set by your System Administrator.

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

   More details...

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

      The **Home Page Search** and **Home Pages** 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 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 relevant home page.

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

   Note: You cannot delete a home page that is liked to desktops.

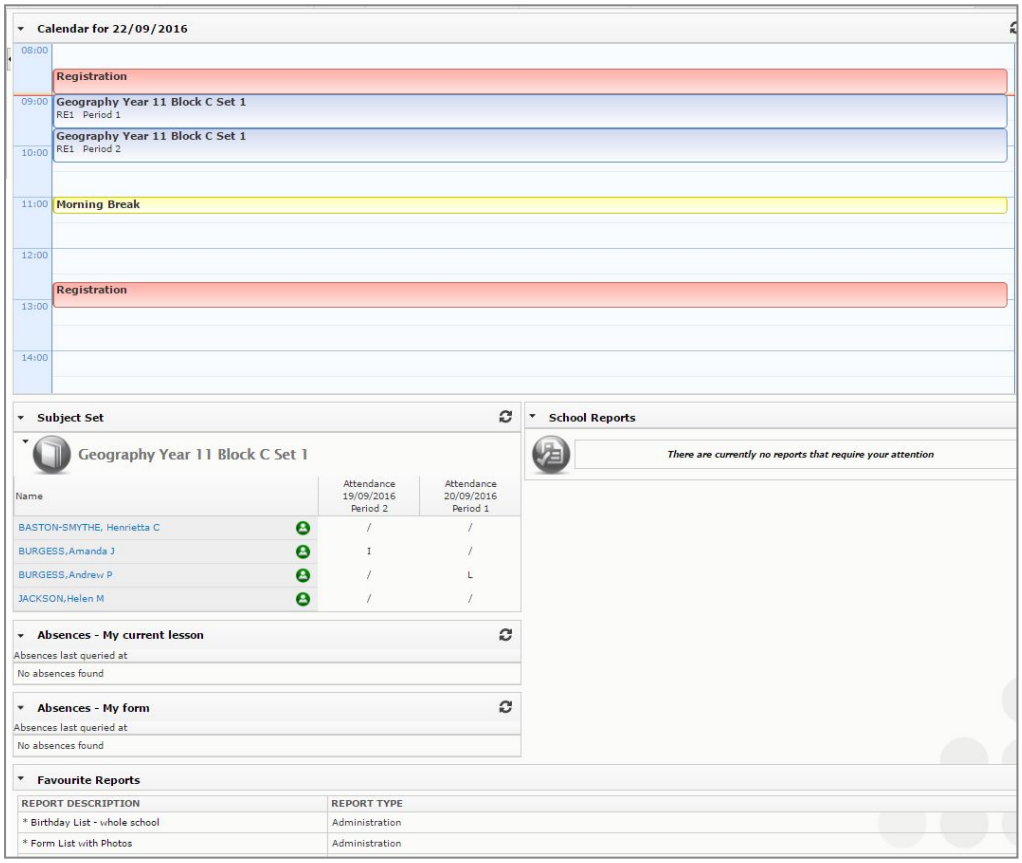
3. Click **Delete**.
   The relevant home page is deleted and removed from the **Home Pages** grid.

About Desktops

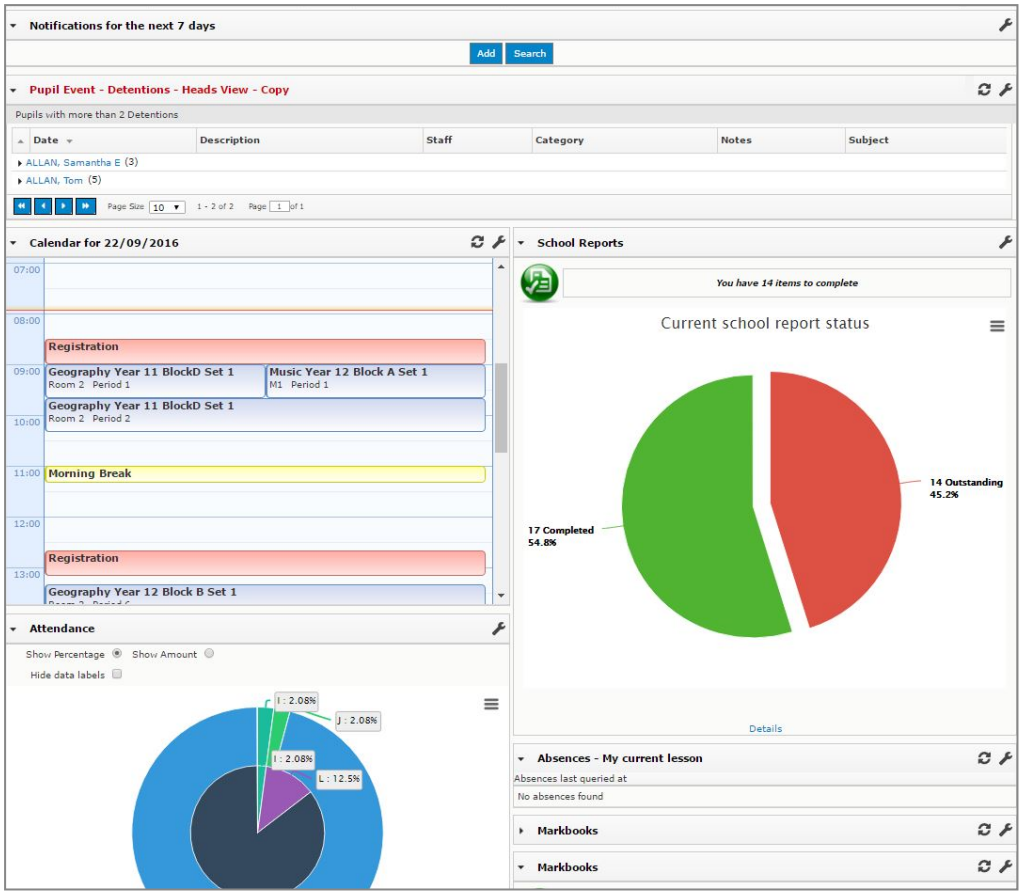
Desktops are supplementary home page-type screens which help you access widgets relevant to specific roles or functions. For example, if you have a range of responsibilities, e.g. teaching, administrative or managerial, it may be more practical to create supplementary desktops for each role to keep the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

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

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



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



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

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

What are widgets[1]?

For further information, see:

- "Accessing Desktops" below.
- "Creating Desktops" on the next page.
- "Editing Desktops" on page 37.
- "Deleting Desktops" on page 38.

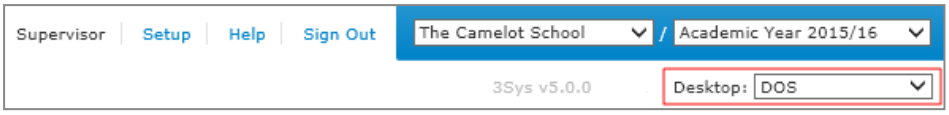
Accessing Desktops

HOW TO ACCESS A DESKTOP

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

  The screen updates automatically.

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

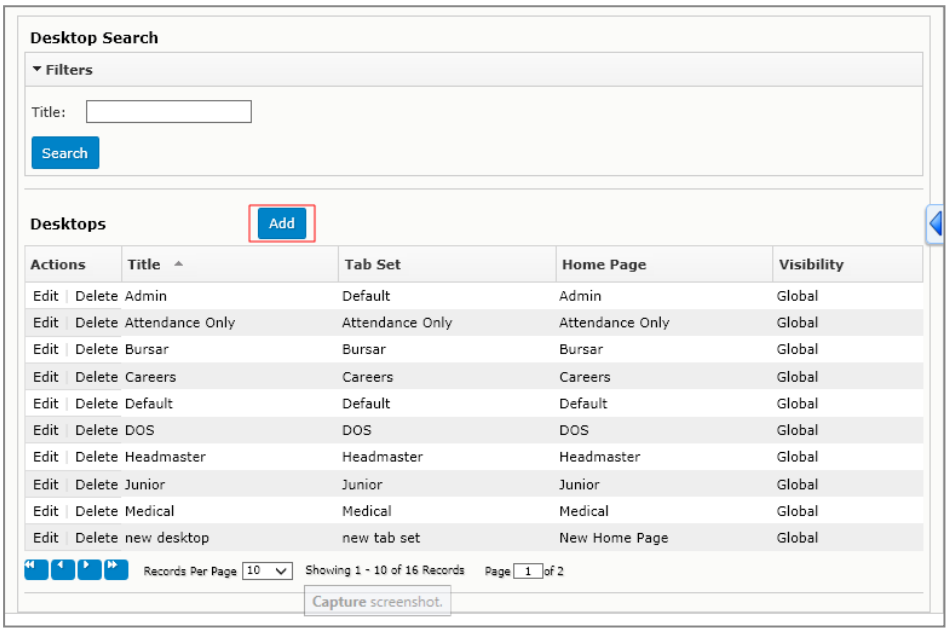


Creating Desktops

HOW TO CREATE A DESKTOP

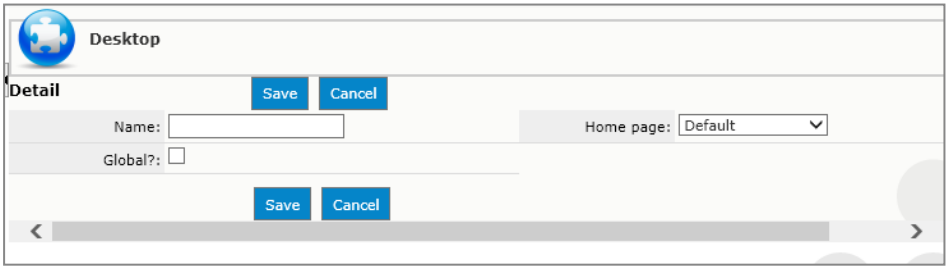
1. Go to **Setup > Desktop Management > Desktops**.

   The **Desktop Search** and **Desktops** screen appears.



2. Click **Add**.

   The **Desktop Detail** screen appears.



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

   Note: For more information about how to create a home page, see "Creating a Home Page" on page 25.

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

Editing Desktops

HOW TO EDIT A DESKTOP

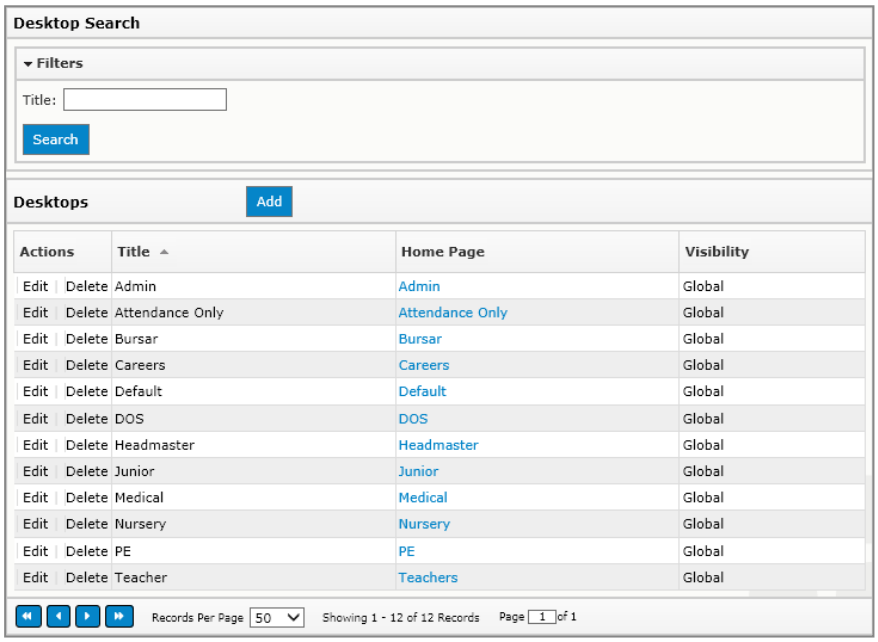
Note: For information about how to change the home page that appears when a desktop is selected, see "Editing a Home Page" on page 29.

1. Find the desktop you would like to edit.

   More details...

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

   The **Desktop Search** and **Desktops** screen appears.



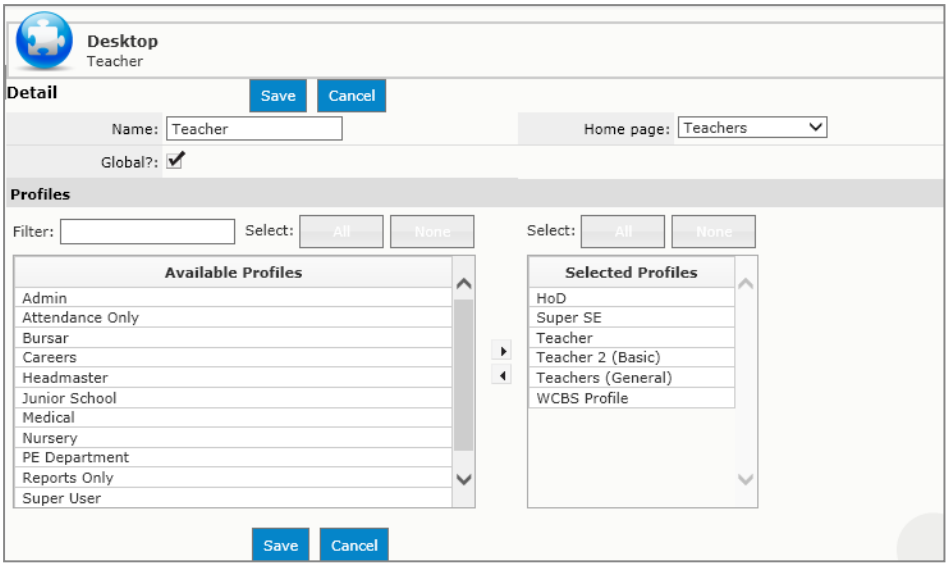
   b. In the **Title** field, type all or part of the title of the desktop you want.

   c. Click **Search**.

   The **Desktops** grid is updated appropriately.

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

   The relevant **Desktop** screen appears.



3. Make the required changes.
4. Click **Save**.

Deleting Desktops

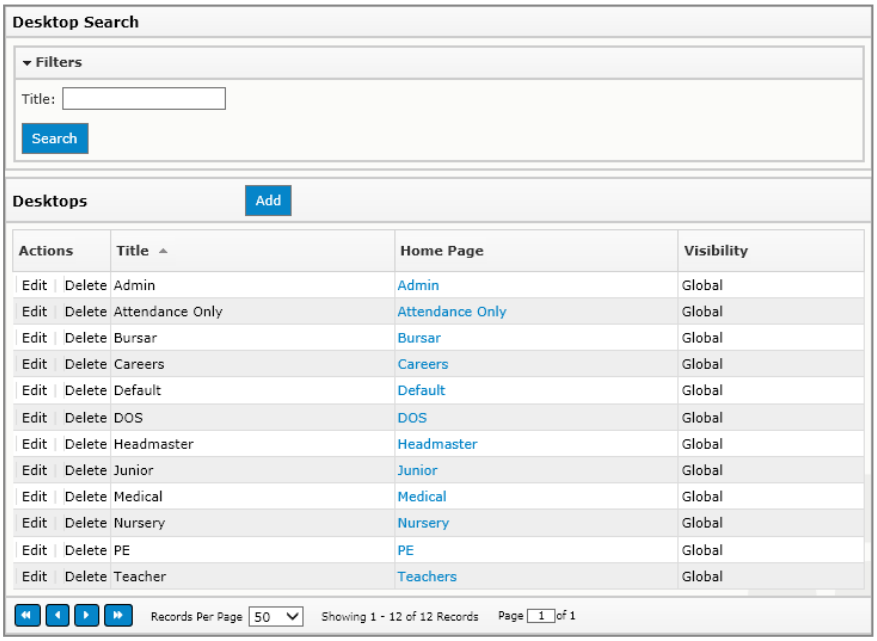
HOW TO DELETE A DESKTOP

1. Find the desktop you would like to delete.

   More details...

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

      The **Desktop Search** and **Desktops** screen appears.



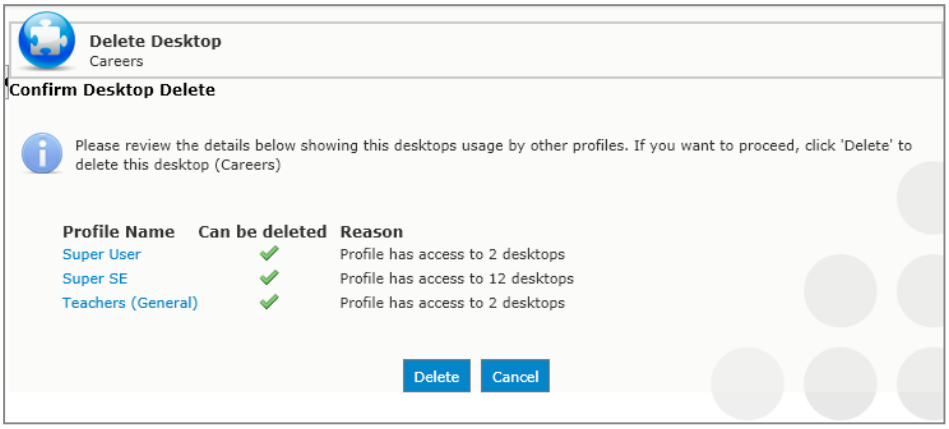
   b. In the **Title** field, type all or part of the title of the desktop you want.

   c. Click **Search**.

The **Desktops** grid is updated appropriately.

2. In the **Actions** column, click **Delete**.

   The **Confirm Desktop Delete** screen appears listing the profiles linked to the desktop.



Note: User profiles MUST be linked to at least one desktop. If a profile is ONLY linked to one desktop, that desktop cannot be deleted. To link a user profile to a different desktop, contact your System Administrator.

3. Do ONE of the following:
   - » If you can delete this desktop, click **Delete**.
   - » If you cannot delete this desktop, click **Cancel** and contact your System Administrator.

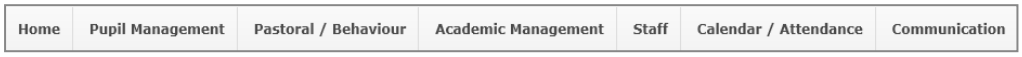
   Once the desktop is deleted, the **Desktop Search** and **Desktops** screen reappears.

About the Mega Menu

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

What are Modules[1]?

What are Functions[2]?



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

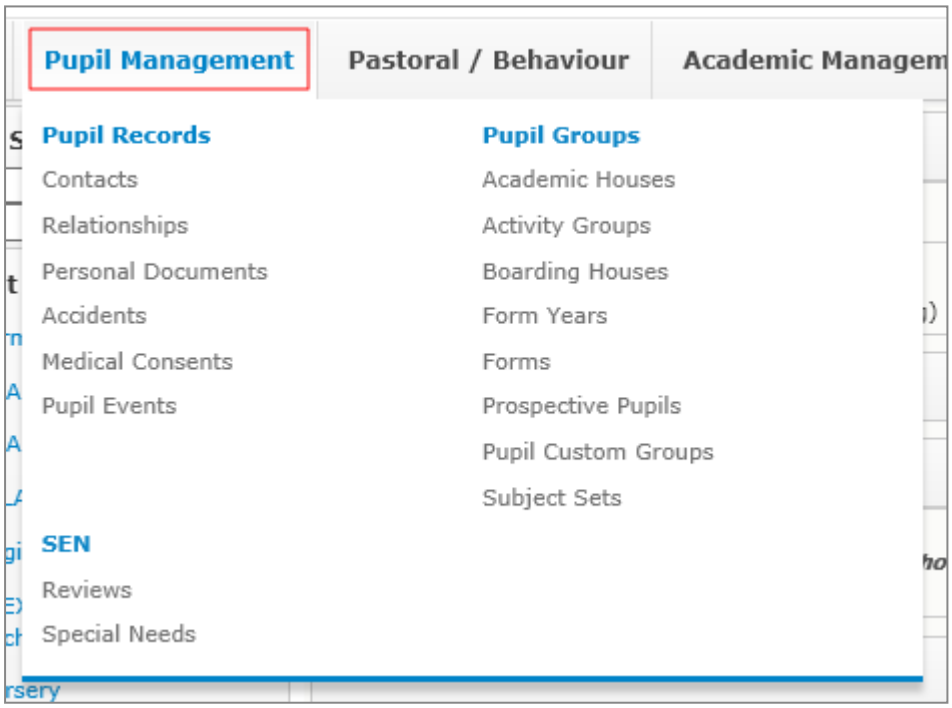
A list of modules and functions appears when you hover over a mega menu item. For details, see below.

For further information, see:

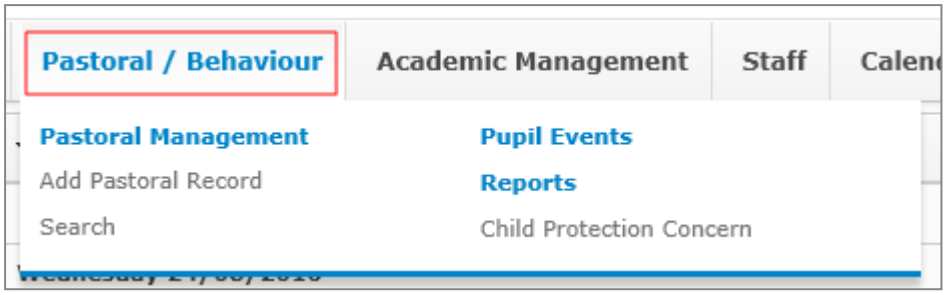
- "About Module and Function Menus" below.
- "Using the Mega Menu" on page 42.
- "Expanding Minimised Mega Menu Options" on page 42.

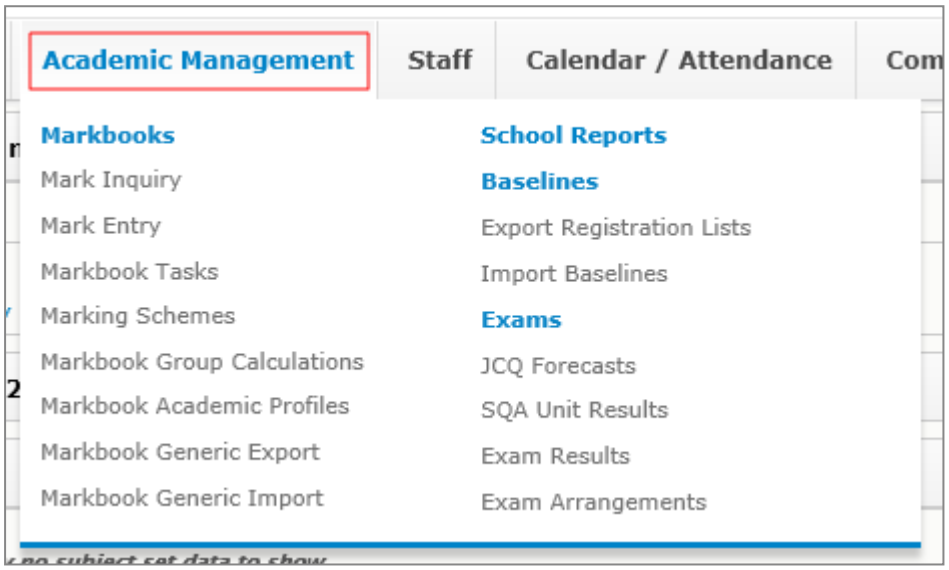
About Module and Function Menus

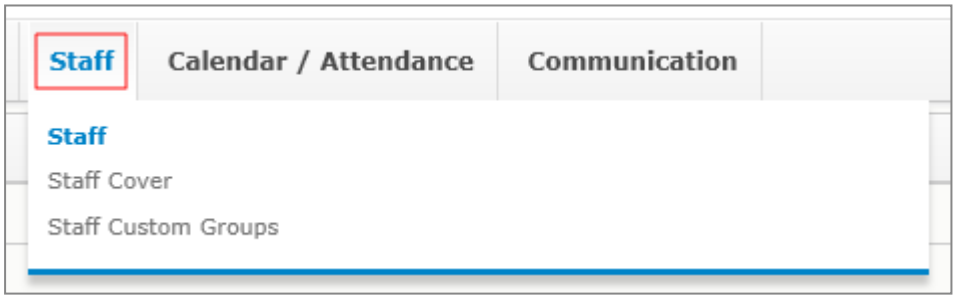
The following screenshots show options available in version 5.0.0 of 3sysACADEMIC.

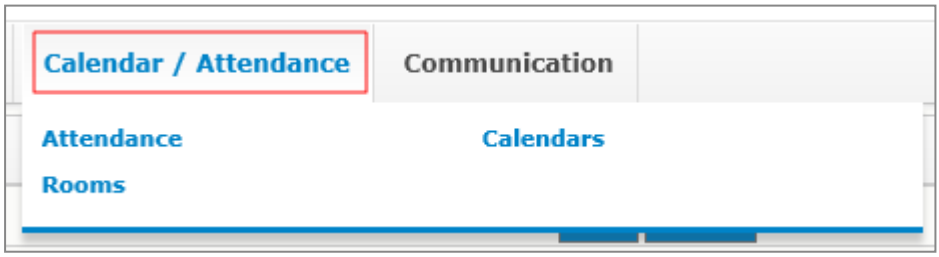


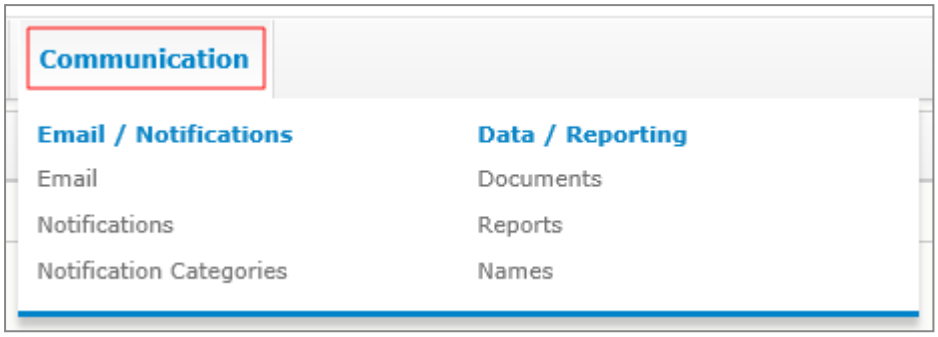
[1]Modules are sections of the 3sysACADEMIC software that contain functions. They are listed in the mega menu and its sub-menus.
[2]Functions are sub-sections within modules which relate to particular functionalities and tasks. They are grouped into modules.


Pastoral / Behaviour
Academic Management
Staff
Calen
Pastoral Management
Add Pastoral Record
Search
Pupil Events
Reports
Child Protection Concern

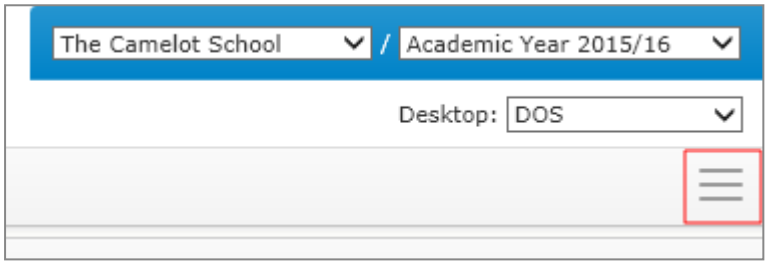

Academic Management
Staff
Calendar / Attendance
Com
Markbooks
Mark Inquiry
Mark Entry
Markbook Tasks
Marking Schemes
Markbook Group Calculations
Markbook Academic Profiles
Markbook Generic Export
Markbook Generic Import
School Reports
Baselines
Export Registration Lists
Import Baselines
Exams
JCQ Forecasts
SQA Unit Results
Exam Results
Exam Arrangements


Staff
Calendar / Attendance
Communication
Staff
Staff Cover
Staff Custom Groups


Calendar / Attendance
Communication
Attendance
Rooms
Calendars



On narrower screens, the mega menu is minimised. To see a full list of the mega menu items available to you, click on the right-hand side of the screen, beneath the **Desktop** drop list.



Using the Mega Menu

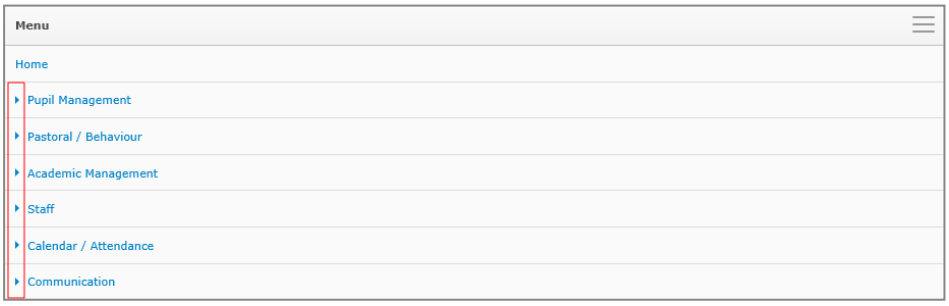
HOW TO USE THE MEGA MENU

1. Hover your cursor over a heading listed in the mega menu to see the items within it.
2. Click on the appropriate item in order to open the relevant screen.

Expanding Minimised Mega Menu Options

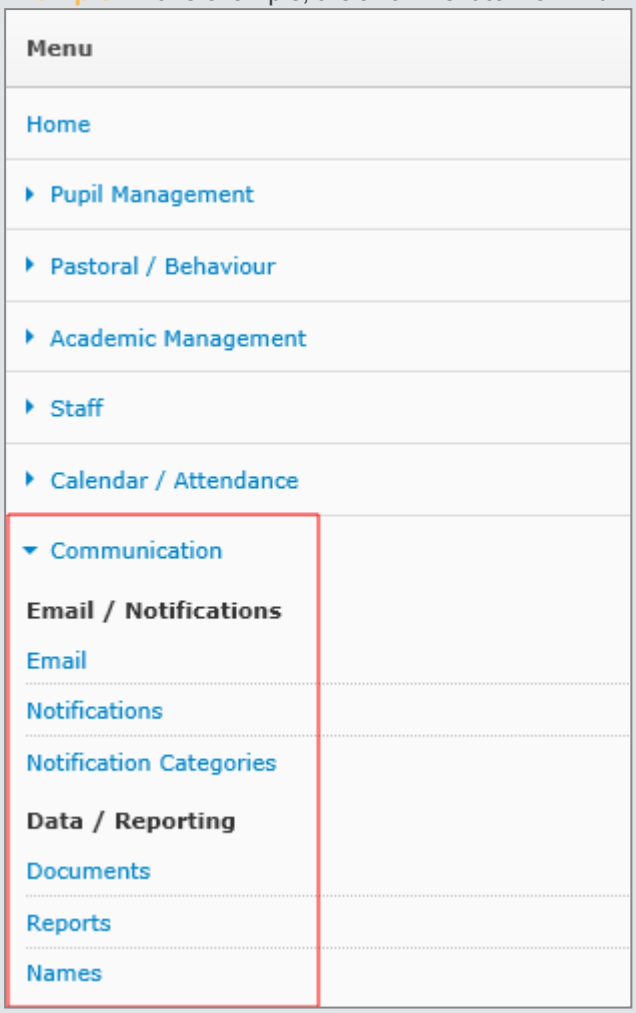
HOW TO EXPAND MINIMISED MEGA MENU OPTIONS

1. Click on the right-hand side of the screen.
   The menu items appear below.



2. Click on the arrow next to the section you want in order to see a list of available modules and functions.

Example: In this example, the arrow next to **Communication** has been clicked:



3. Click on the required module or function in the list that appears.

About the School and Academic Year Drop Lists

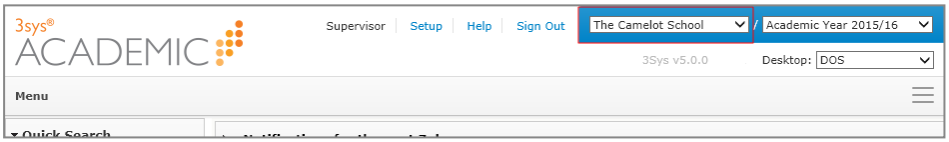
The **School** and **Academic Year** drop lists allow you to move easily between records for different schools within your organisation and years. They are located side-by-side in the top right-hand corner of your screen.

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

Changing the School and Academic Year

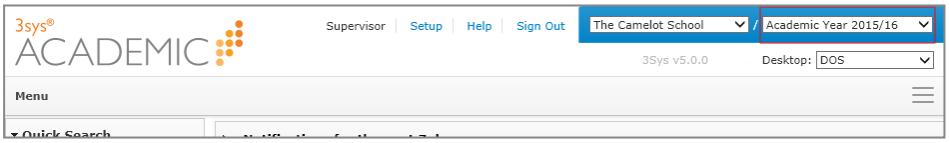
HOW TO CHANGE THE SCHOOL AND ACADEMIC YEAR

1. Click ⌄ next to the school name at the top of the screen and select an option from the drop list that appears.



The screen refreshes to show data for the school you have selected.

2. Click ⌄ next to the academic year at the top of the screen and select an option from the drop list that appears.



The screen refreshes to show data for the academic year you have selected.

About My Settings

You are able to change your password and create customised links via the **My Settings** screen in 3sysACADEMIC.

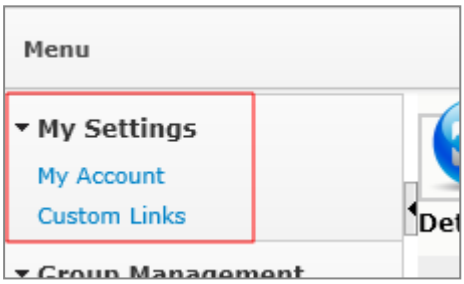
- For more about changing passwords, see "Changing Your Password" on the next page.
- For more about custom links, see "About Custom Links" on page 47.

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

Accessing My Settings

HOW TO ACCESS MY SETTINGS

- Go to **Setup > My Settings** and select an option from the sub-menu.



Changing Your Password

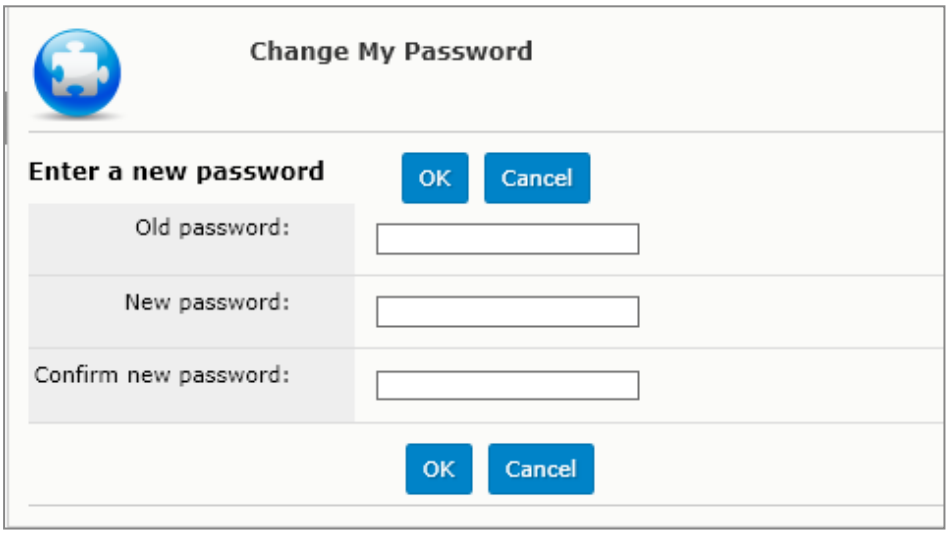
Changing your 3sysACADEMIC password has been designed to be straightforward. How you change your password is slightly different depending upon whether you are a System Administrator or not.

Changing Your Password

HOW TO CHANGE YOUR PASSWORD

1. Do ONE of the following:
   - » If you are a System Administrator, go to **Setup > My Settings > Change My Password**.
   - » If you are NOT a System Administrator, go to **Setup > My Settings > My Account** and click **Change Password**.

   The **Change My Password** screen appears.



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.

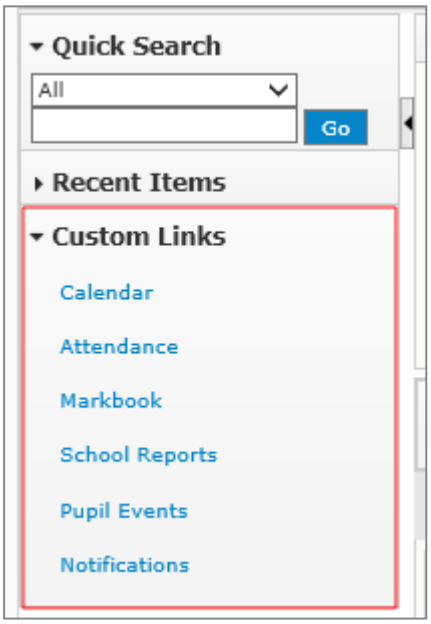
For further details, see:

- "Accessing Custom Links" below.
- "Adding Custom Links" below.
- "Editing Custom Links" on the next page.
- "Deleting Custom Links" on the next page.

Accessing Custom Links

HOW TO ACCESS CUSTOM LINKS

- Go to the bottom of the quick links column on the left-hand side 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.

Note: This functionality is NOT available in the following module: Pastoral Management.

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.

        Page 1 of 1

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 25

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

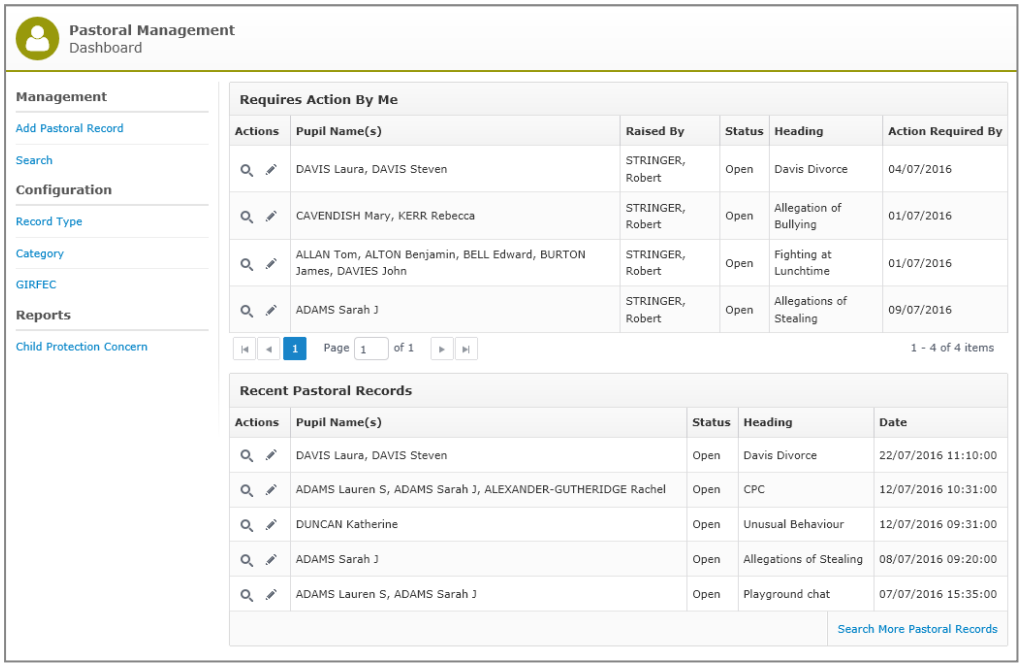
  Page 1 of 1

2. Click **Delete** next to the 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 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.



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.

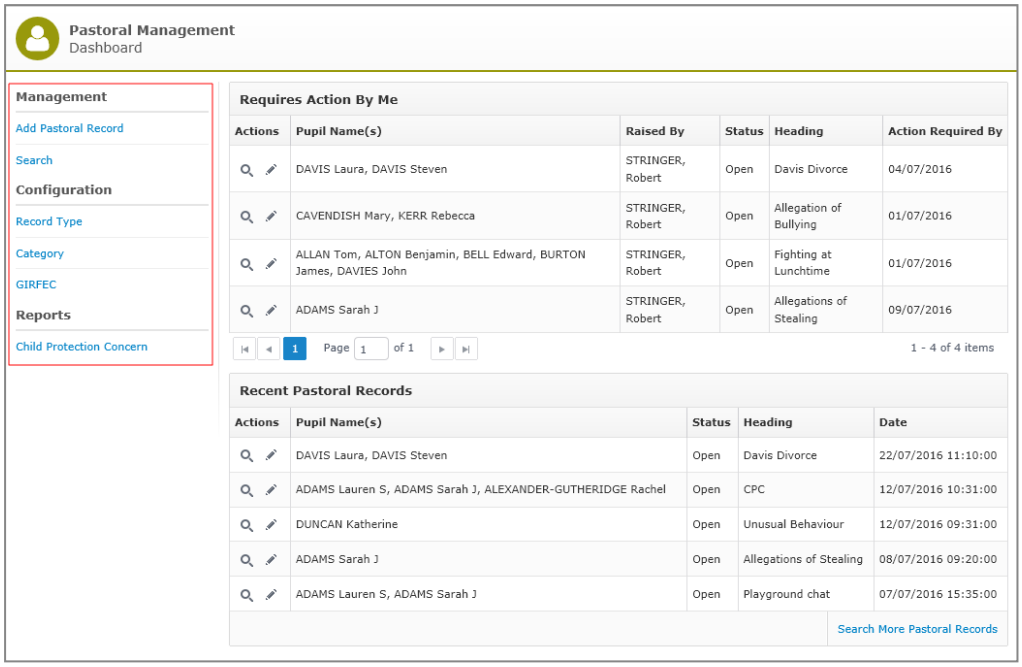
For details on how to:

- Use a dashboard, see below.
- Review recent activity in a module, see "Reviewing Recent Activity" on the facing page.
- Access data via a dashboard, see "About Dashboards" above.
- Access dashboards, see "Accessing Dashboards" on page 52.

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.



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).

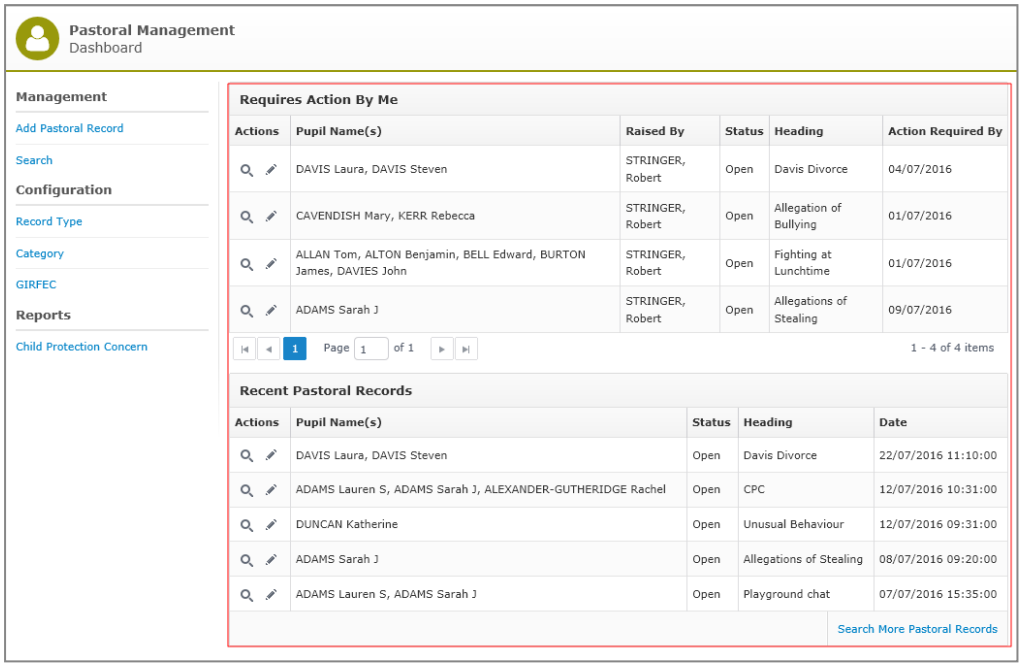
- **Configuration** - System Administrators use the **Configuration** menu functions to set up the relevant options other users will need when creating new records in the module. Some modules may require more than one set of items to be configured, e.g. categories.

  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.



Accessing Dashboards

HOW TO ACCESS A DASHBOARD

Do ONE of the following:

» Click on or hover your cursor over a mega menu heading, then 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 3

Using 3sysACADEMIC

This chapter discusses the following:

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Drop Lists and Auto Complete 55
Calendar Popups 56
Search Dialogs 56
Uploading Files 57
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Using 3sysACADEMIC

Once you have familiarised yourself with the workspace and how to find your way around it (see "About Navigating 3sysACADEMIC" on page 21 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 popups, auto complete and search dialogs. For an overview of how to use these, see "Completing Fields" on the facing page.

GRIDS

Grids appear throughout 3sysACADEMIC. In simple terms, they are tables used to present, add or extract information from the system. For more information, see "About Grids" on page 58.

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 61.

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 69.

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

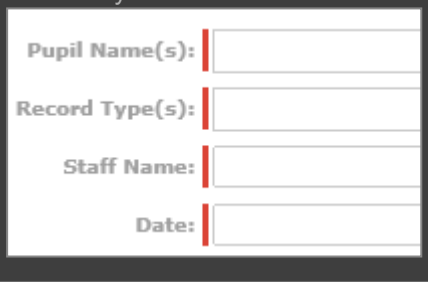
To add information for records in 3sysACADEMIC, you need to complete the fields on the relevant screens. To make the software user-friendly, functionalities are replicated across the program so that once you learn how to complete one section, you will find you also know how to complete many others.

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 57.

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.

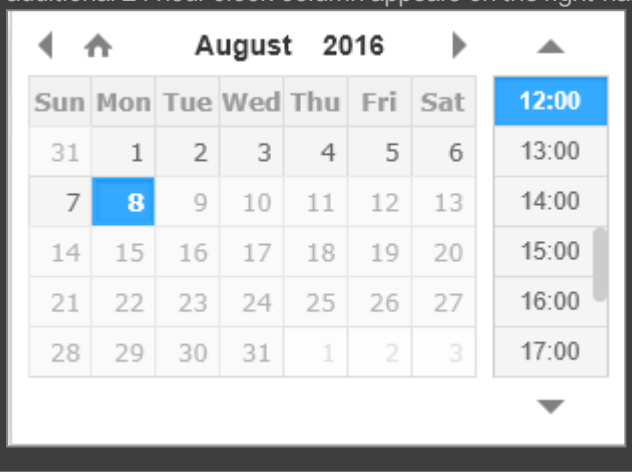
» Click in the field and type all or part of the item you require. Select from the items that appear in the drop list. This is known as auto complete.

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.

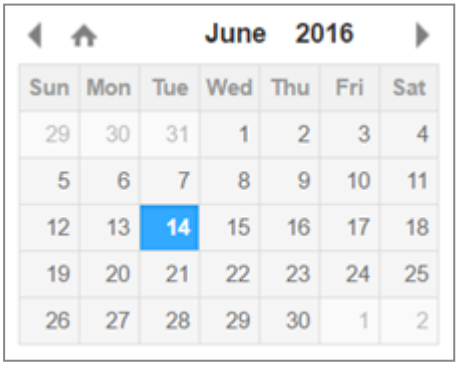


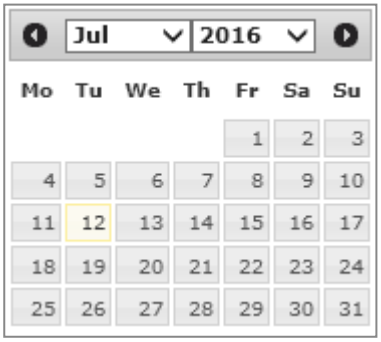
HOW TO USE A CALENDAR POPUP

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 .)





Search Dialogs

ABOUT SEARCH DIALOGS

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

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

For specific information about staff and pupil name search dialogs, see "Searching for Pupils" on page 61 and "Searching for Staff" on page 69.

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 Search at the end of the relevant field.

   The relevant 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

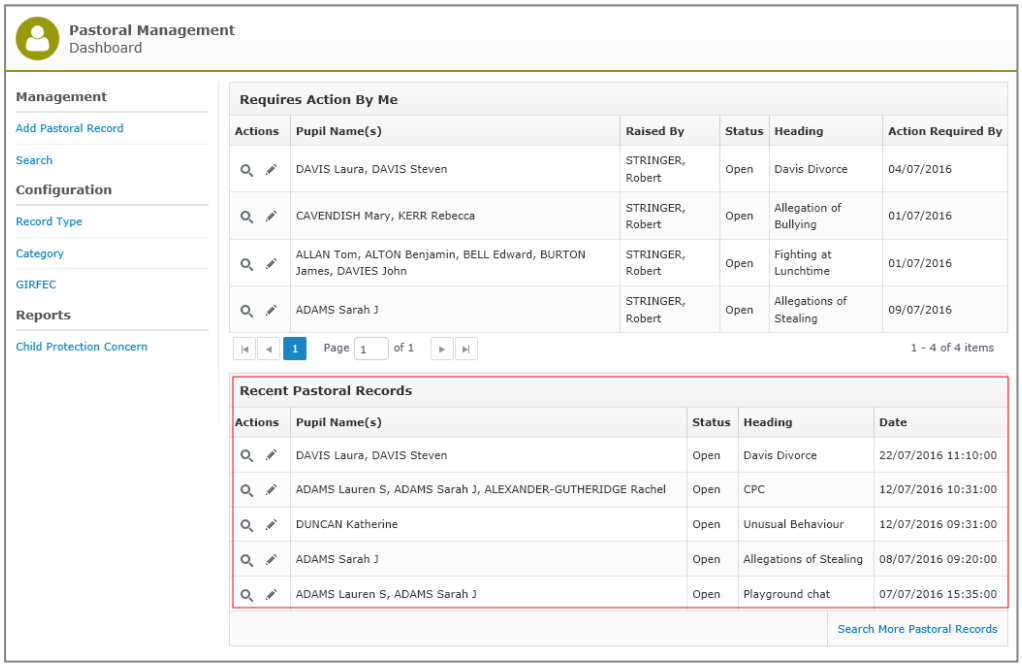
Grids appear throughout 3sysACADEMIC. In simple terms, they are tables used to present, add or extract information through the system.

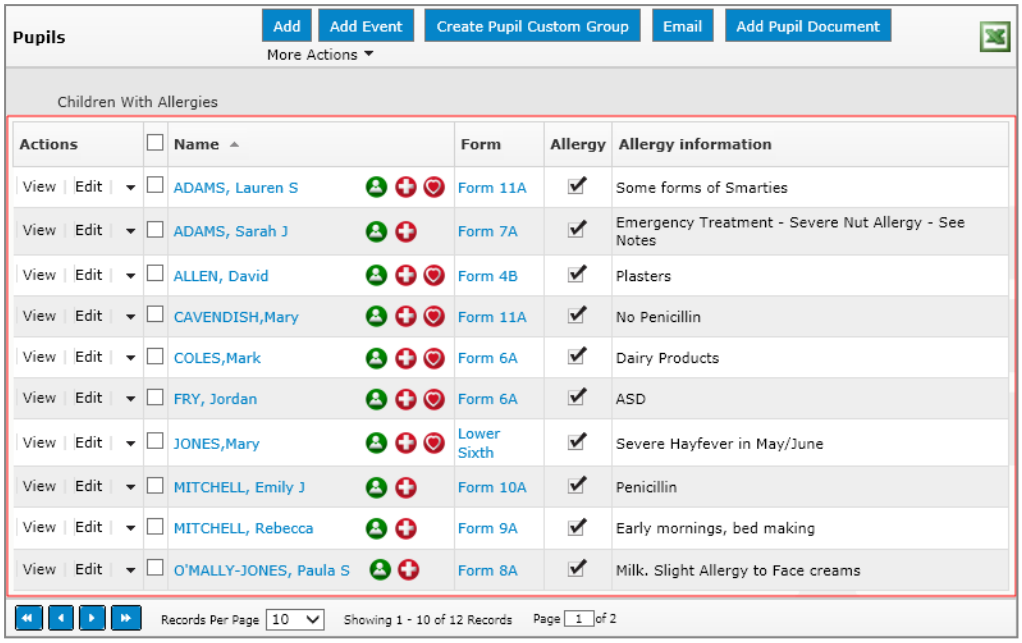
For details, see:

» "About Grids for Presenting Data" below.
» "About Grid Row Colour Coding" on the facing page.
» "About Grids for Extracting Data" on the facing page.

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.





For details on how to:

- Use dashboards, see "About Dashboards" on page 50.
- 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.

About 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.

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

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 65. (Different pupil search dialogs are available in newer modules, such as the **Pastoral Management** module.)

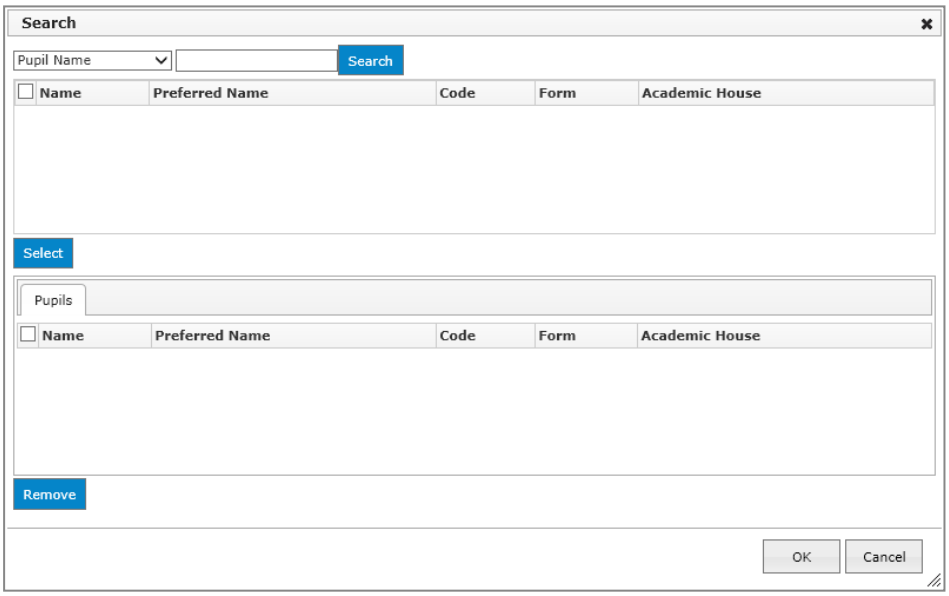
Note: For generic information about using search dialogs, see "Completing Fields" on page 55.

Searching for Pupils

HOW TO SEARCH FOR PUPILS

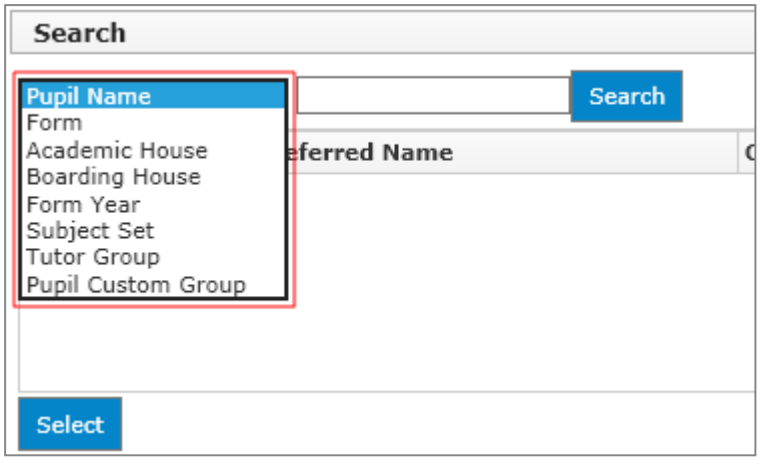
a. Click **Search**.

The **Search** dialog appears.

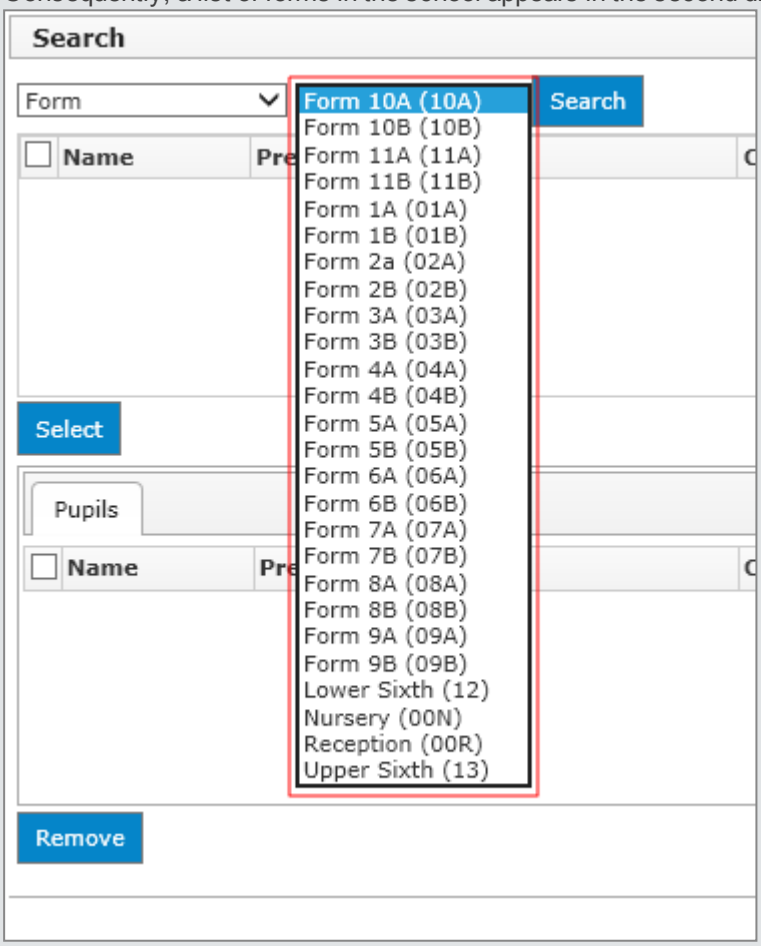


b. At the top of the dialog, enter your search criteria.

- ***To Search for a Group of Pupils*** - From the first drop list, select the group type you want, e.g. 'Form', 'Subject Set' or 'Pupil Custom Group', and from the second drop list, select the person's specific group, e.g. 'Form 10A', 'Lower Sixth', 'Ski Trip 2016' etc. Your selection in the first drop list alters the options available in the second drop list.

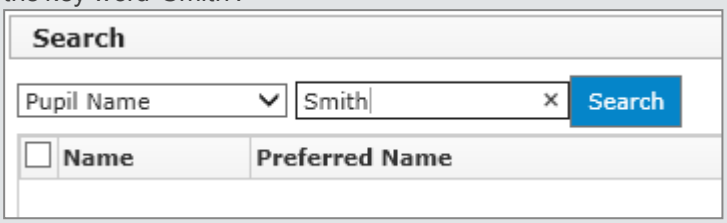


Example: In the example below, 'Form' has been selected in the first drop list. Consequently, a list of forms in the school appears in the second drop list.



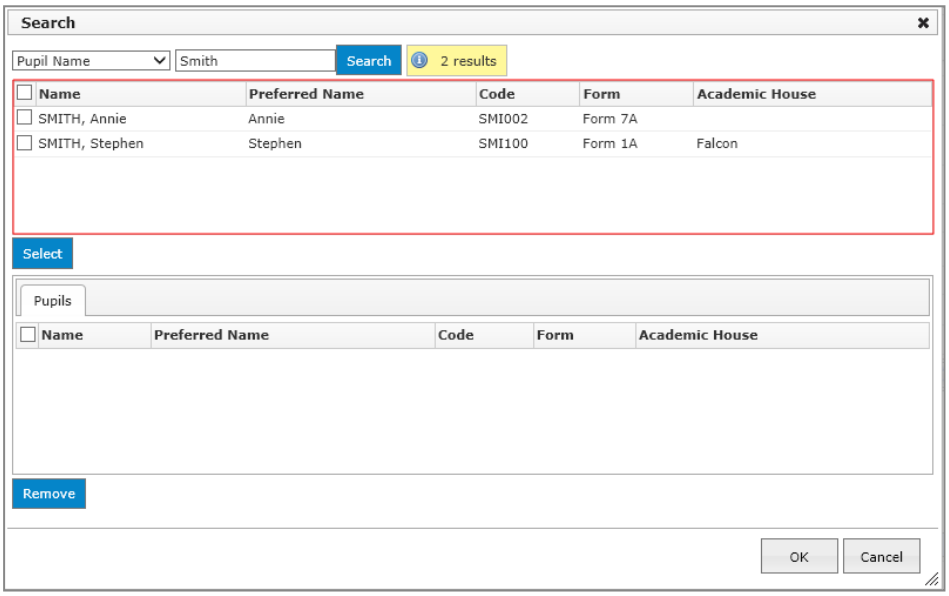
» ***To Search by Pupil Name*** - Use the first drop list to select 'Pupil Name', then type all or part of the pupil's name into the second field OR leave the second field empty to retrieve a complete list of all pupils.

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



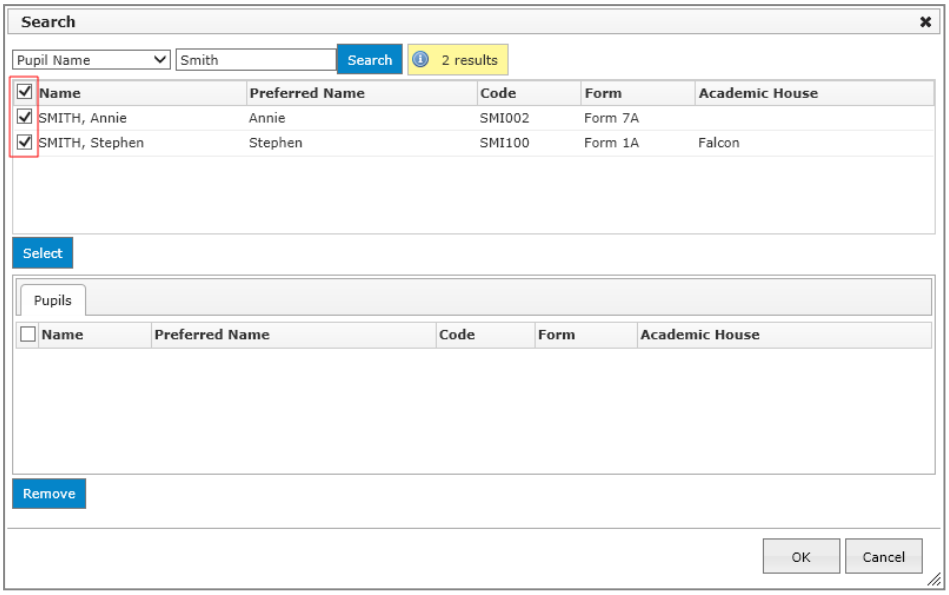
c. Click **Search**.

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



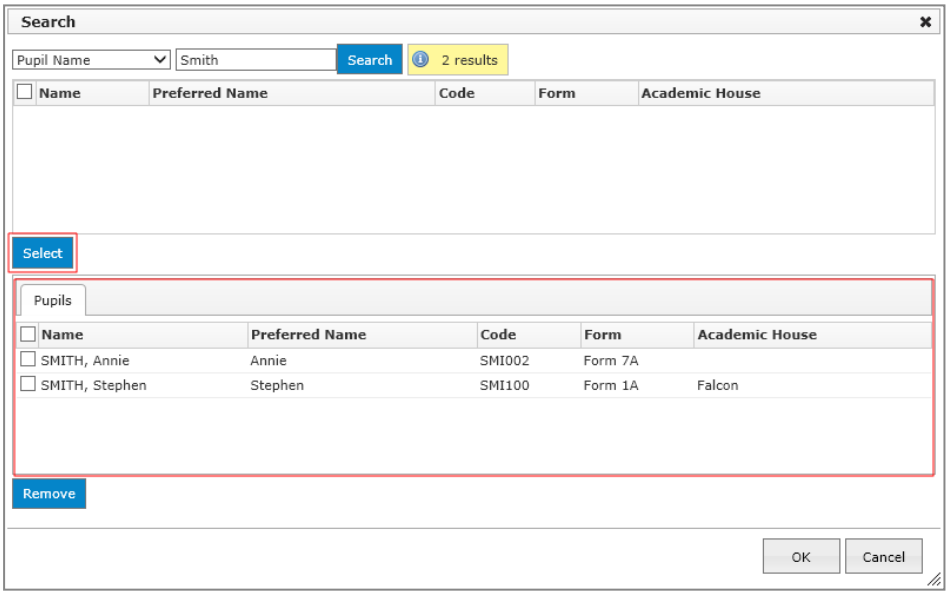
d. Do ONE of the following:

- 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.

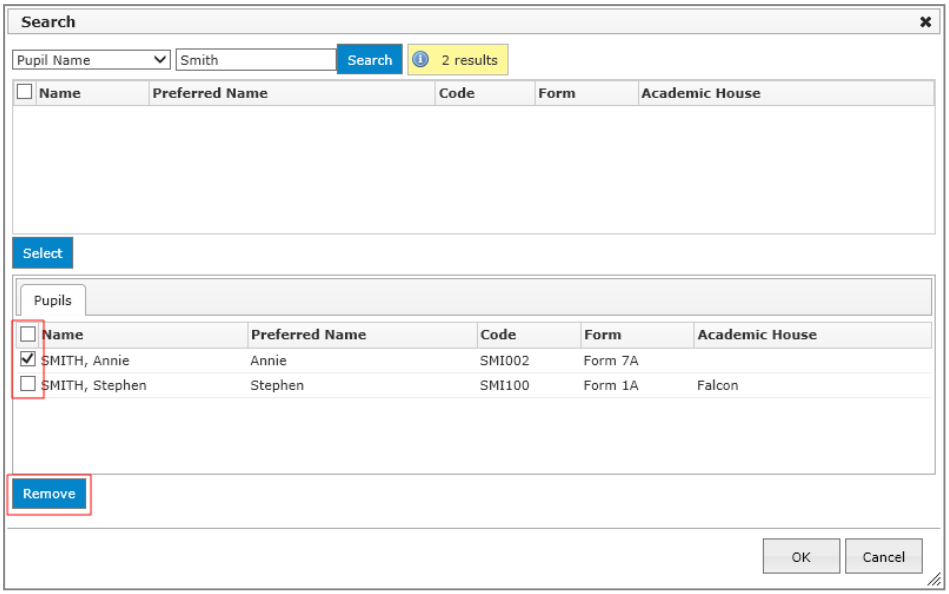


e. Click **Select**.

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



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



g. Click **OK**.

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

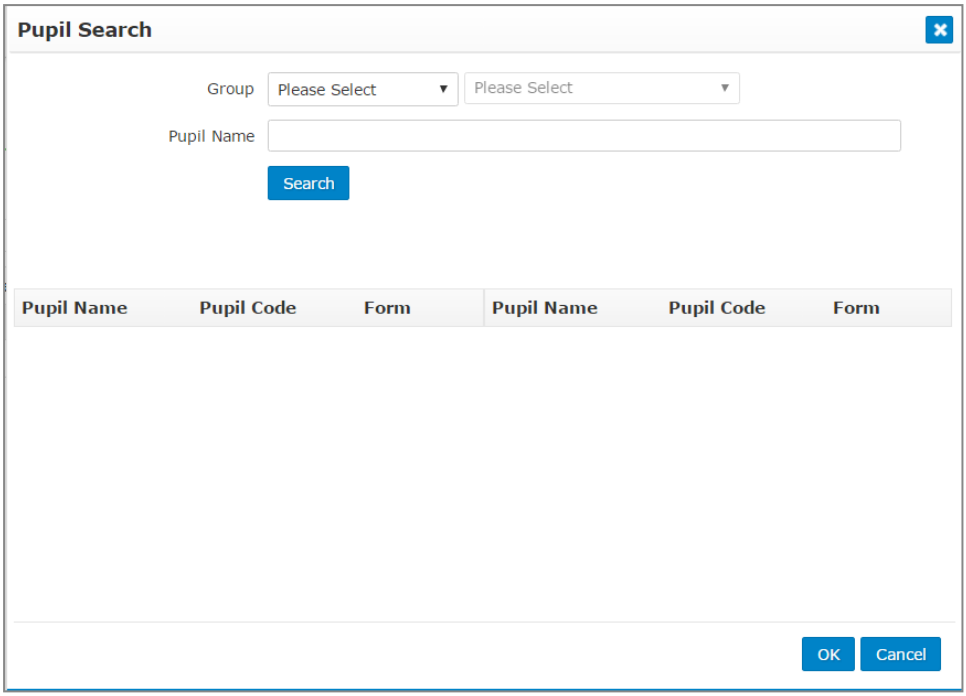
Searching for Pupils in the Pastoral Management Module

HOW TO SEARCH FOR MULTIPLE PUPILS IN THE PASTORAL MANAGEMENT MODULE

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

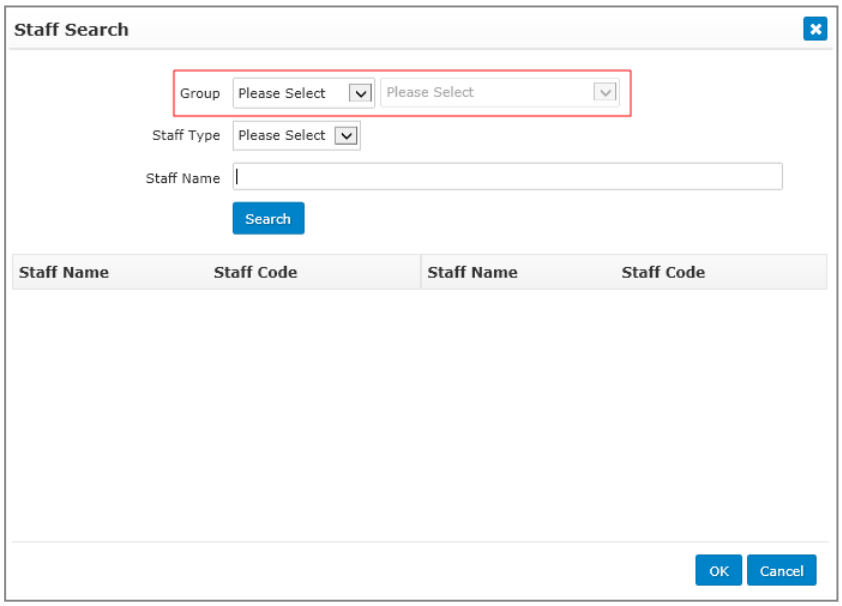
» Click in the relevant **Pupil Name(s)** field and type the first letters of the item you require. Select your choice from the items that appear in the drop list. This is known as auto complete. Repeat this sequence until you have selected all the names you require.

» Click at the end of the **Pupil Name(s)** field.
The **Pupil Search** dialog appears.

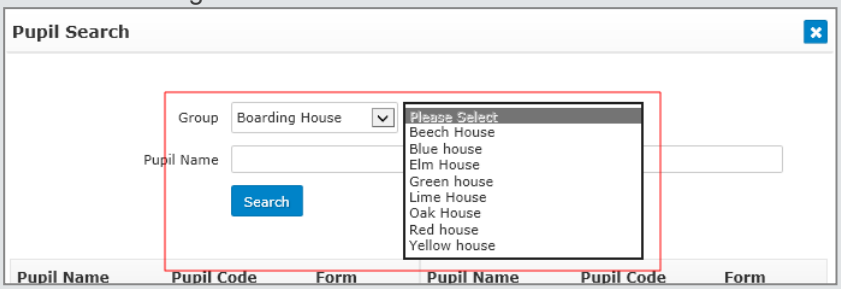


a. Do one OR both of the following:

» 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.

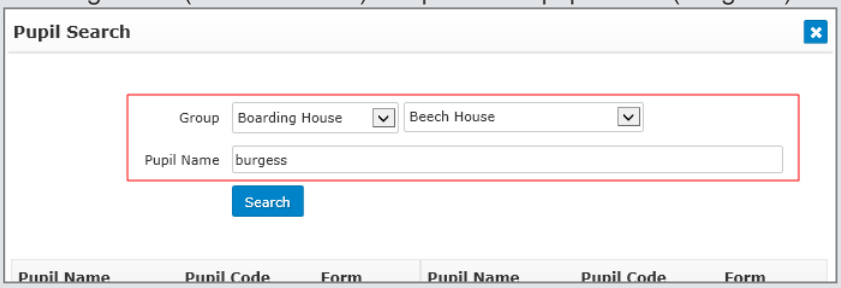


Example: In the example below, the user has selected 'Boarding House' using the first drop list, so the second drop list provides details of the school's boarding houses.



» In the **Pupil Name** field, enter all or part of the name you want.

Example: In the example below, the user has selected to search by both boarding house ('Beech House') and part of the pupil name ('burgess').

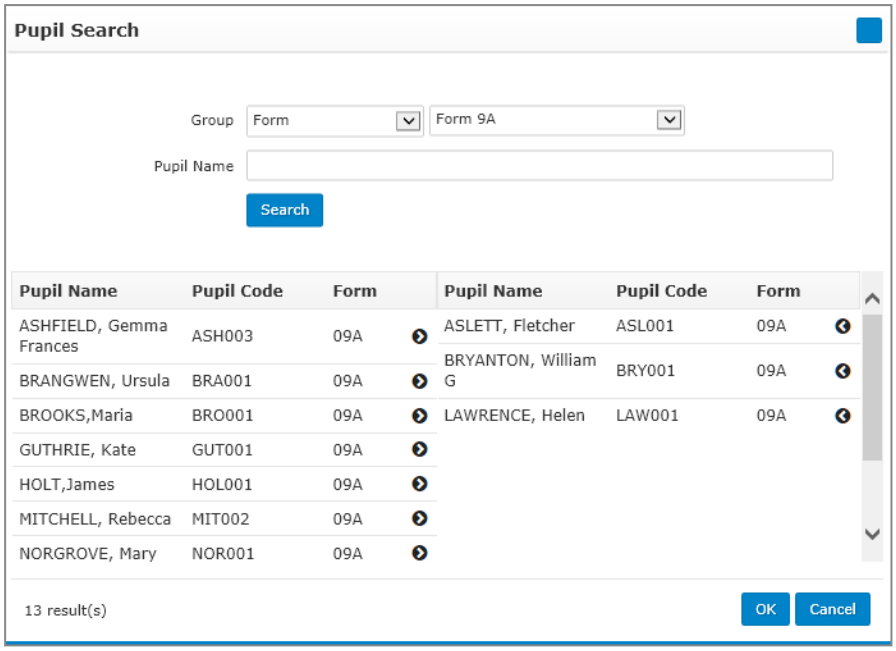


b. Click **Search**.

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

c. Click on each available pupil you want in the left-hand column.

Pupils move to the right-hand column once selected.



Note: To deselect a pupil, click on the next to the relevant name or click on the name again to return it to the left-hand column.

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

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

Searching for Staff

To attach staff to records using 3sysACADEMIC, you 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 73.

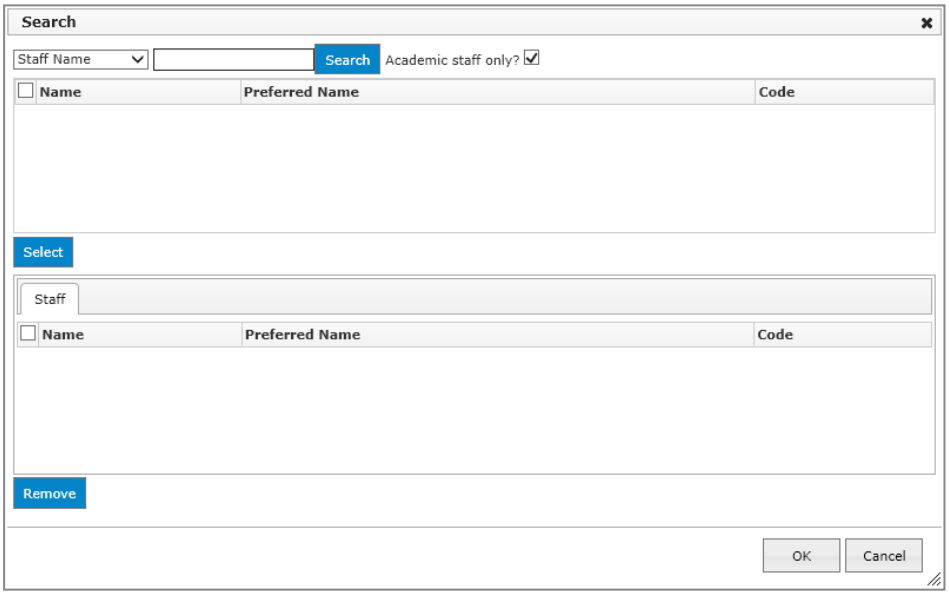
Note: For generic information about using search dialogs, see "Completing Fields" on page 55.

Searching for Staff

HOW TO SEARCH FOR STAFF

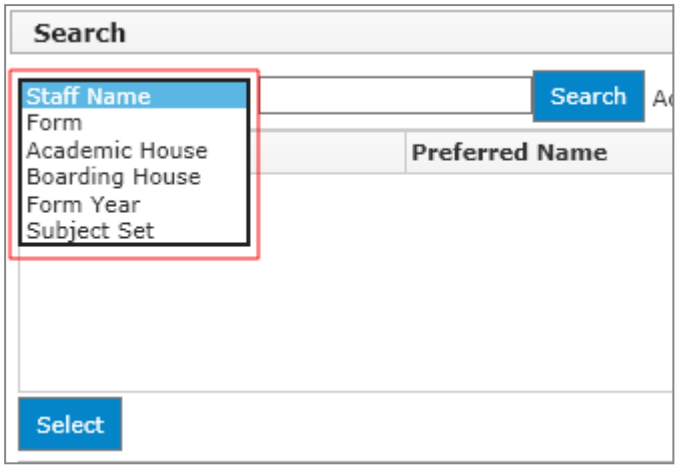
a. Click **Search**.

The **Search** dialog appears.

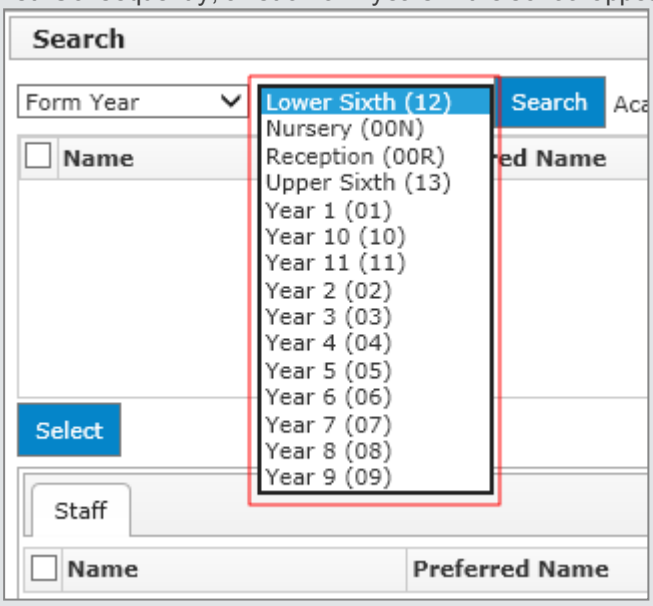


b. At the top of the dialog, enter your search criteria. You can filter by:

- ***To Search for a Group of Staff Members*** - 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.

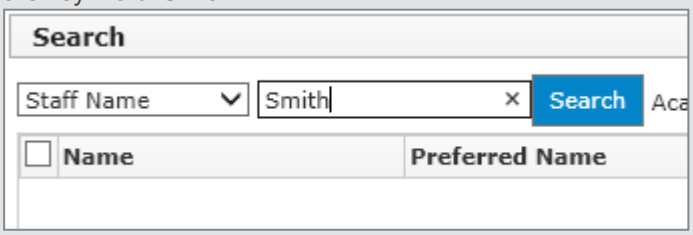


Example: In the example below, 'Form Year' has been selected in the first drop list. Consequently, a list of form years in the school appears in the second list.

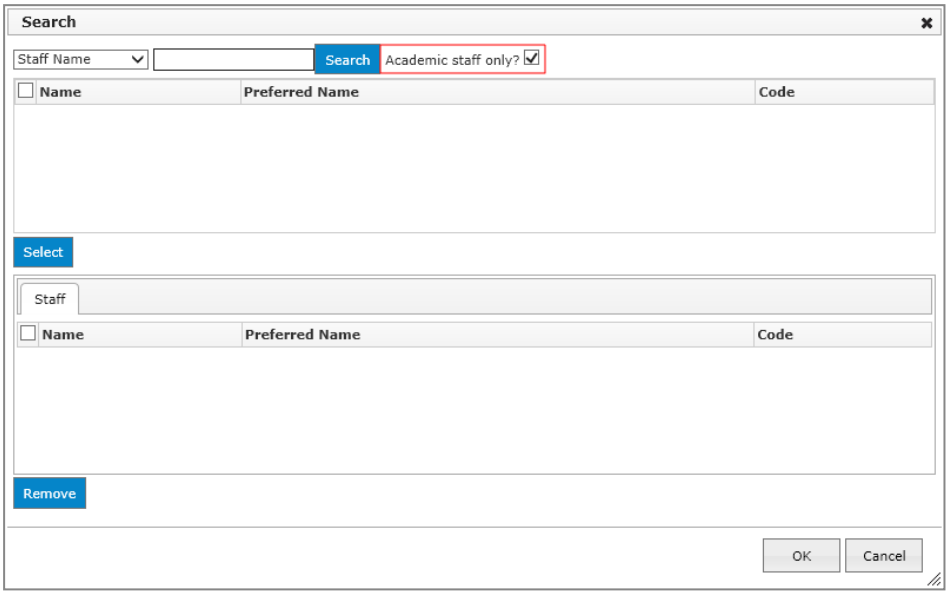


» ***To Search by Staff Member's Name*** - Use the first drop list to select 'Staff Name', then type all or part of the staff member's name into the second field OR leave the second field empty to retrieve a complete list of all staff.

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

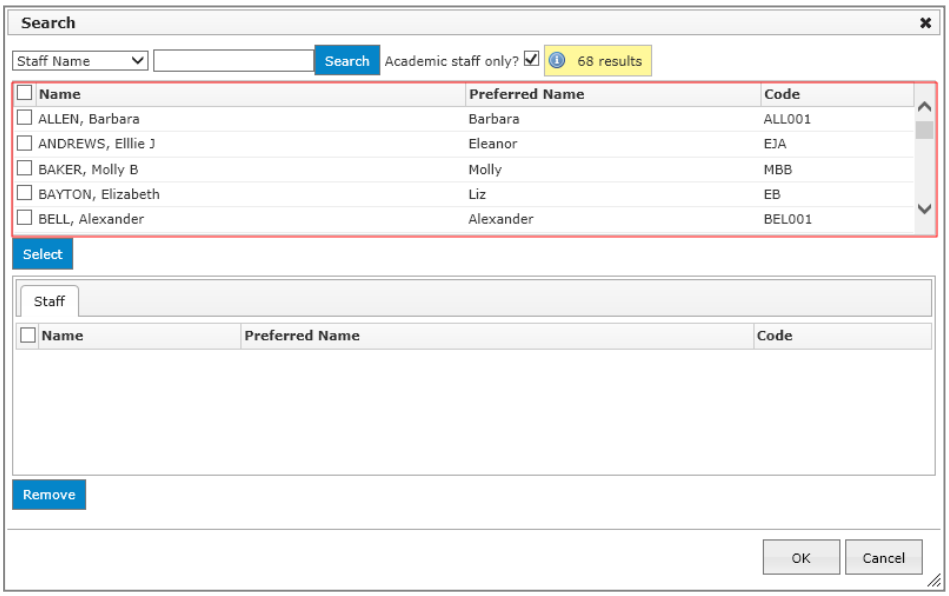


c. (Optional) To exclude non-academic staff from the search, tick the **Academic staff only?** check box.



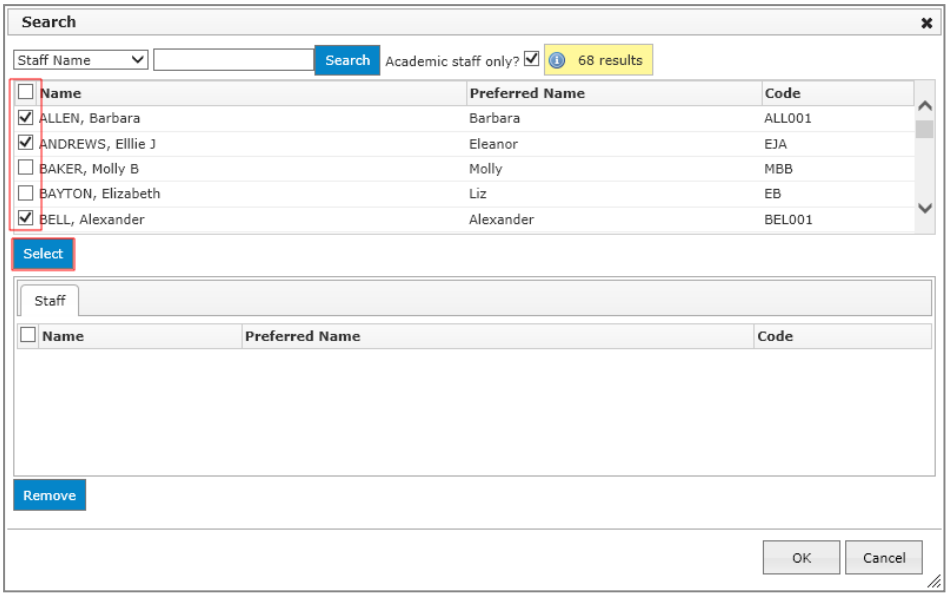
d. Click **Search**.

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



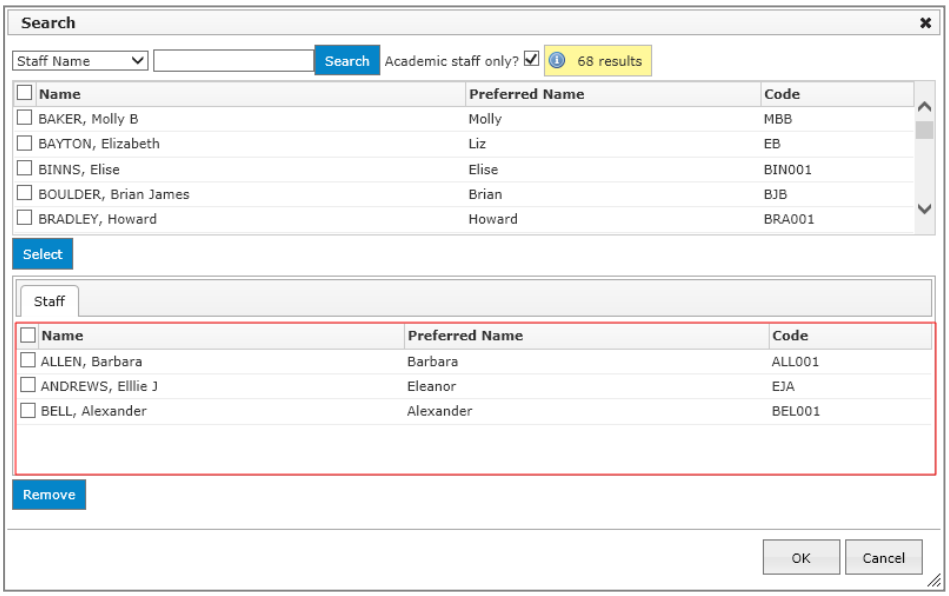
e. Do ONE of the following:

- 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.

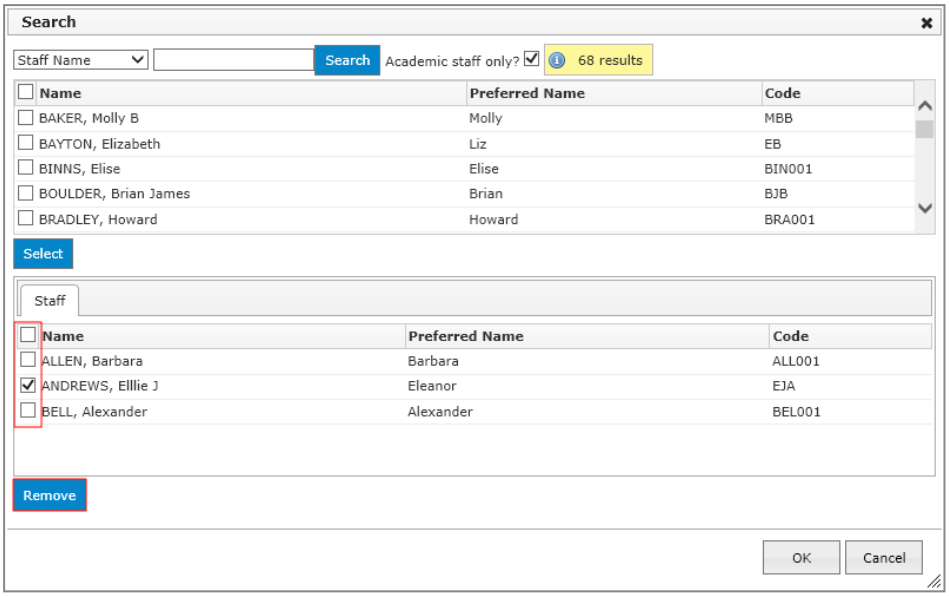


f. Click **Select**.

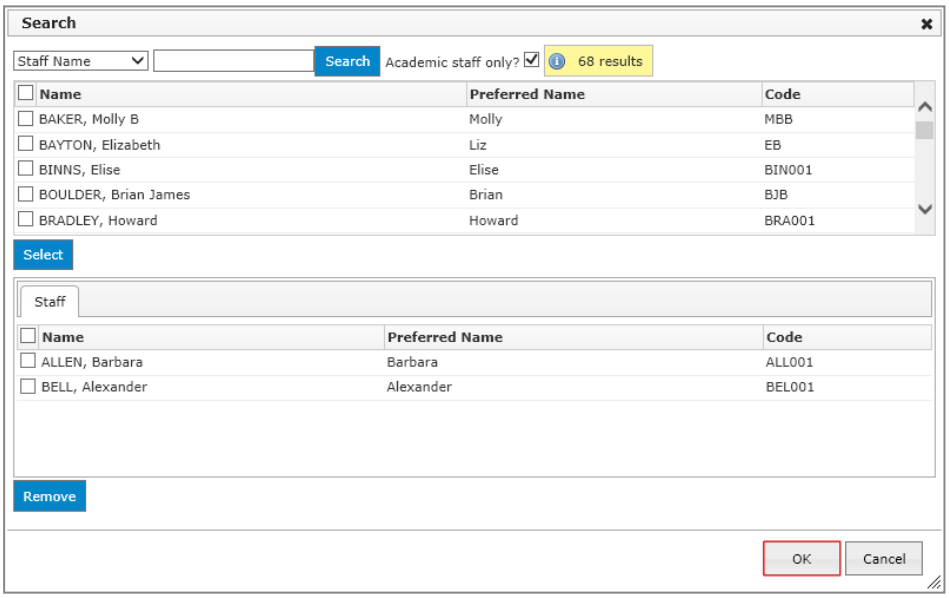
The selected staff appear on the **Staff** tab in the bottom half of the screen.



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



h. Click **OK**.



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

Searching for Staff in the Pastoral Management Module

Depending on the **Pastoral Management** field you are completing, you may need to enter the name of a single individual OR a list of several staff names.

For details, see:

» "Searching for Individual Staff in the Pastoral Management Module" on the next page.
» "Searching for Multiple Staff in the Pastoral Management Module" on page 75.

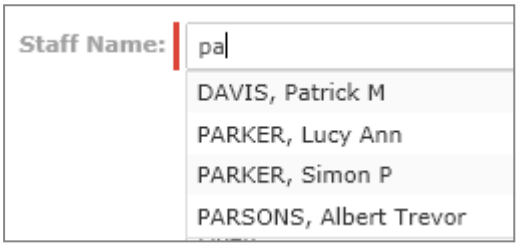
Searching for Individual Staff in the Pastoral Management Module

HOW TO SEARCH FOR INDIVIDUAL STAFF IN THE PASTORAL MANAGEMENT MODULE

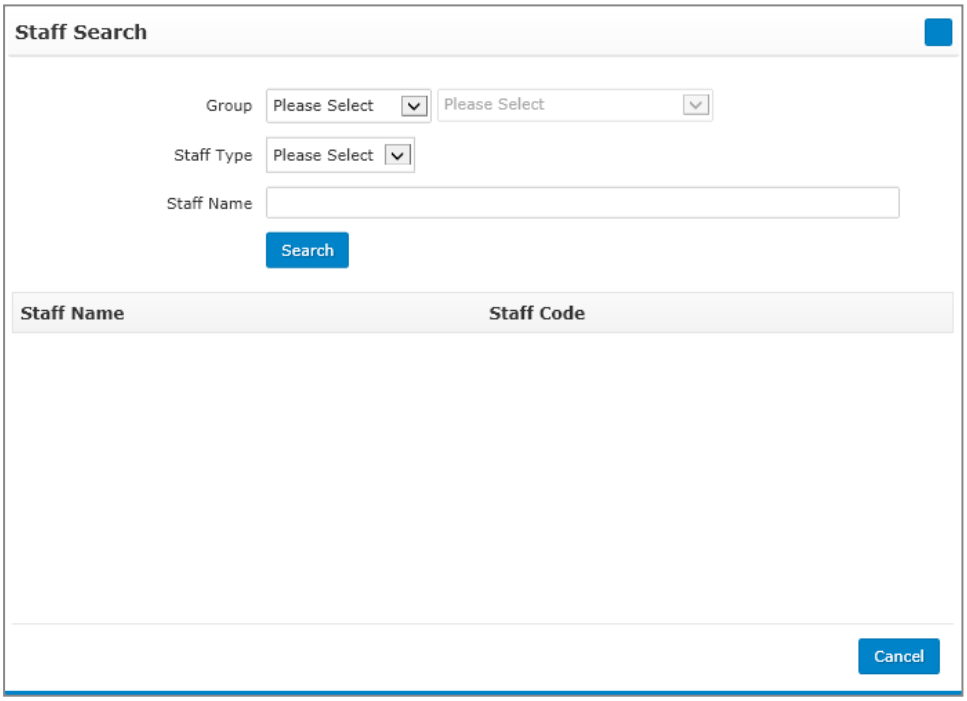
In the **Pastoral Management** module, you can search for staff names and add them to records using auto complete OR via a search dialog.

Do ONE of the following:

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



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



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

You can filter by:

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

» ***Staff Type*** - From the **Staff Type** drop list, select the required type of staff, such

as 'Academic', 'Non-Academic' or 'Both'.

» ***Name*** - Type all or part of 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.

Searching for Multiple Staff in the Pastoral Management Module

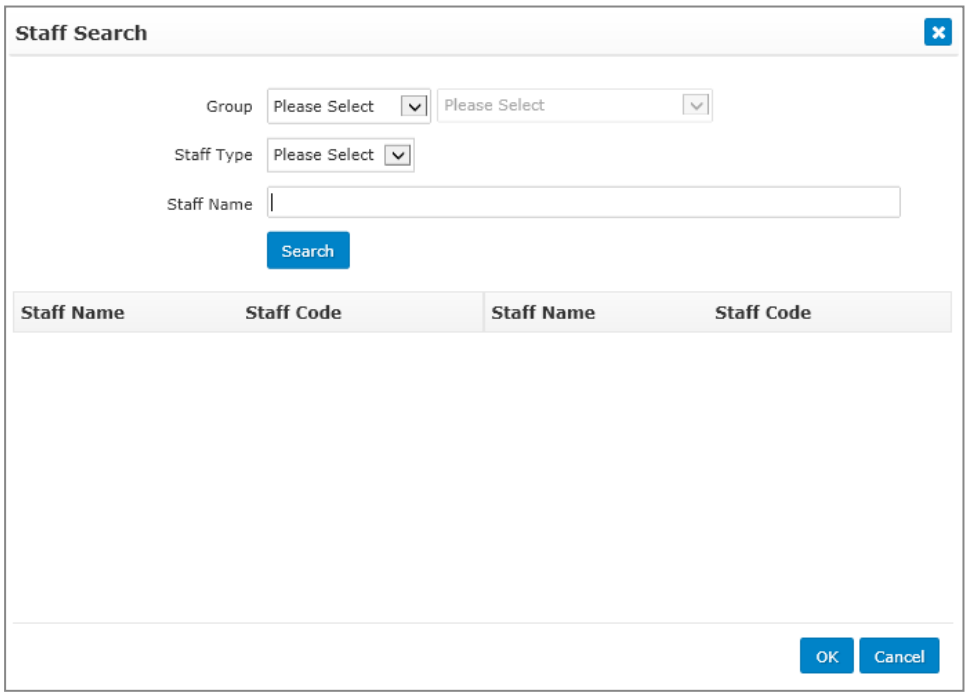
HOW TO SEARCH FOR MULTIPLE STAFF IN THE PASTORAL MANAGEMENT MODULE

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

Do ONE of the following:

» Click in the relevant field and type 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 added all the names that you require.

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

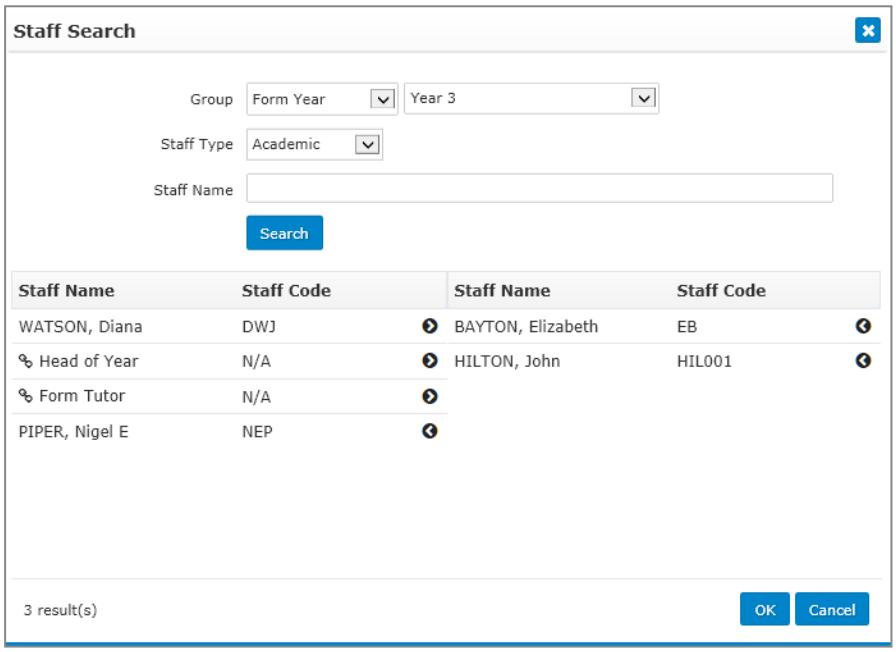


a. In the top part of the dialog, enter your search criteria and click **Search**. You can filter by:
   - ***Group*** – From the first **Group** drop list, select the group type you want, e.g. boarding house, form or subject set, and from the second **Group** drop list, select the person's specific group, e.g. 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.

   The results of your search appear in a list on the left-hand side of the dialog.

b. Click on each record you want in the list of available options that appears in the bottom left-hand corner.

   Staff names move from the left to the right-hand side of the screen once selected.



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

c. (Optional) Repeat steps a to b to search for and add other staff members to the list of selected individuals on the right-hand side of the screen.

d. When done, click **OK**.

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

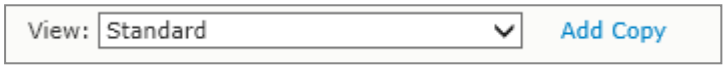
About Views

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.

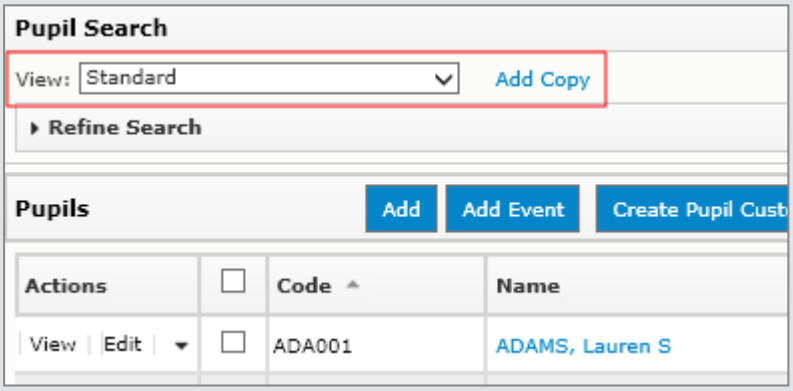
For selected grids of information presented in 3sysACADEMIC, users can use existing views or create alternative search views to filter, sort and group the data. These search views can be saved for later use, either by the person that created them or by other users.

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

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



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



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

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

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

For further information, see:

- "Example: 'Allergies' Search View" below.
- "Accessing Search Views" on page 79.
- "Adding Search Views" on page 80.
- "Editing Search Views" on page 82.
- "Copying Search Views" on page 83.
- "Deleting Search Views" on page 84.
- "Adding the My Searches Widget to your Home Page" on page 84.

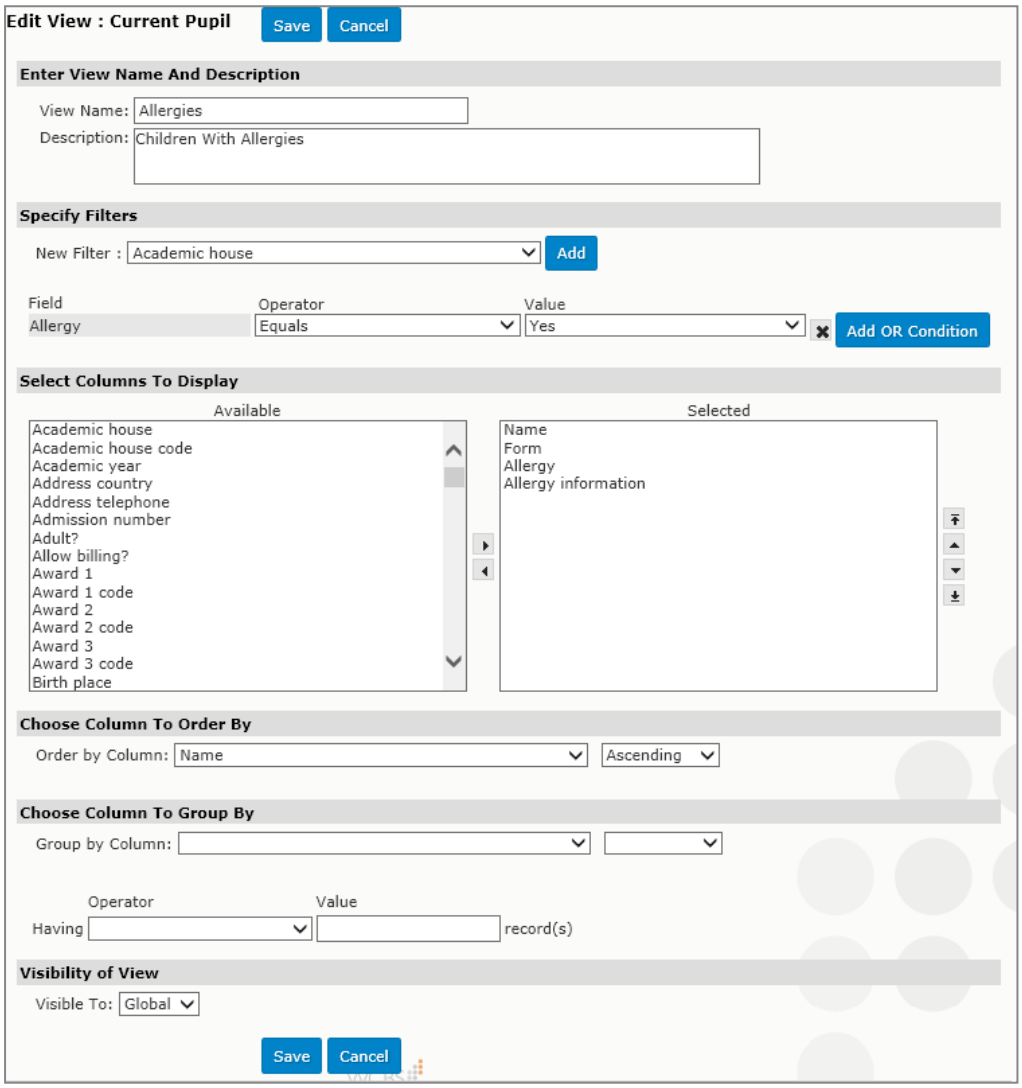
Example: 'Allergies' Search View

For example, in the **Pupil** function, you could define an 'Allergies' search view, in which you specify all those pupils with a known allergy. If you have the required permissions, you could then

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

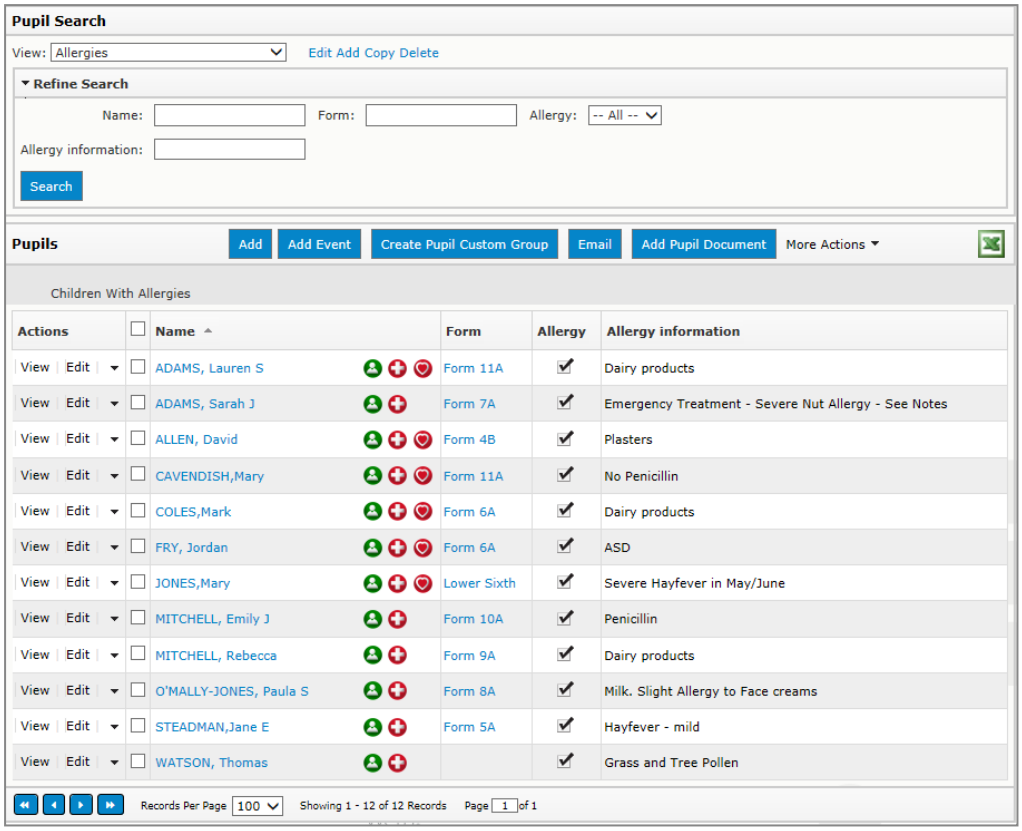
The following examples show the settings for an 'Allergies' view and what users see when they select the 'Allergies' search view from the **Views** drop list.

Example: Configuring an 'Allergies' Search View



Example: Resultant 'Allergies' Search View with Data

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



Note: Once a user has created a new search view, it is possible to embed it into a user's home page using the **My Searches Widget**. For details, see "Adding the My Searches Widget to your Home Page" on page 84.

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.

   View: Standard Add Copy

   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.

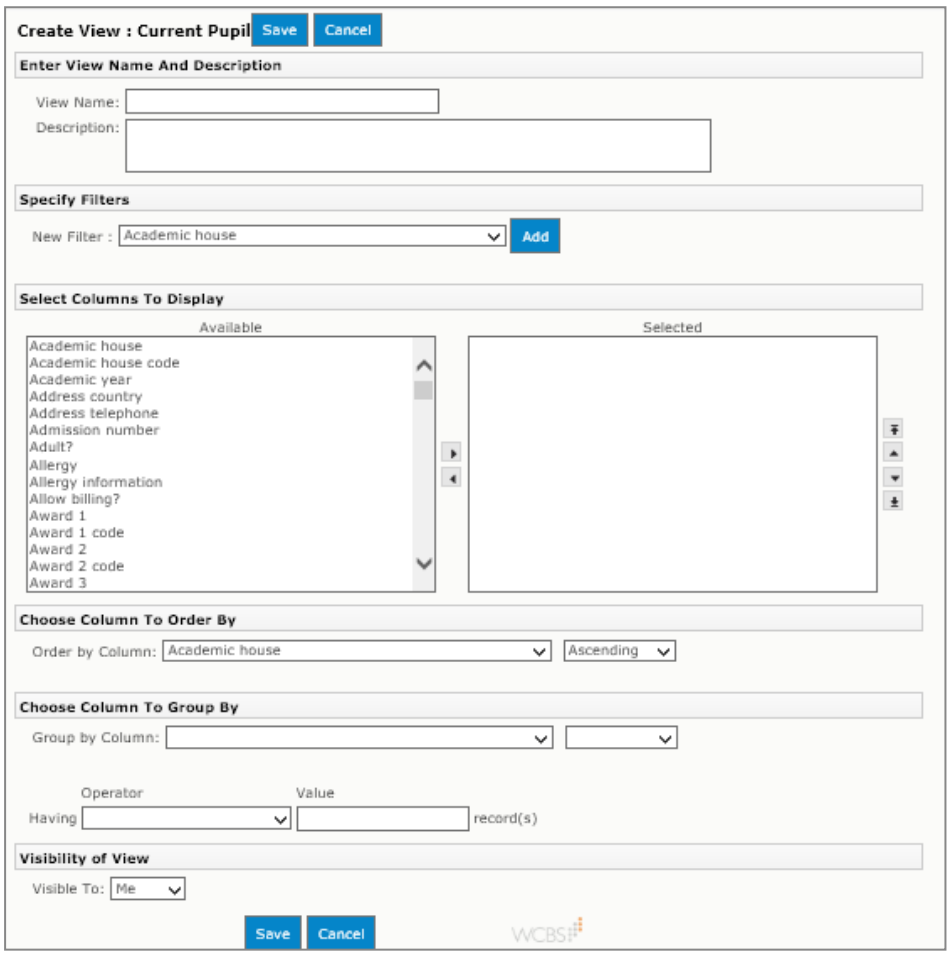
   b. Enter filtering criteria in the relevant fields, and click **Search**. The grid is refreshed to display those records that match the selected view and the data entered in the **Refine Search** fields.

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.

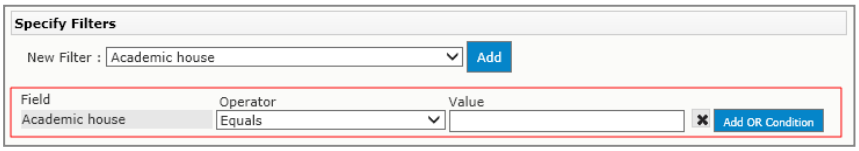
The relevant **Create View** screen appears.



3. Complete the **View Name** and **Description** fields.
4. Specify how the search view should filter the records.

More details...

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

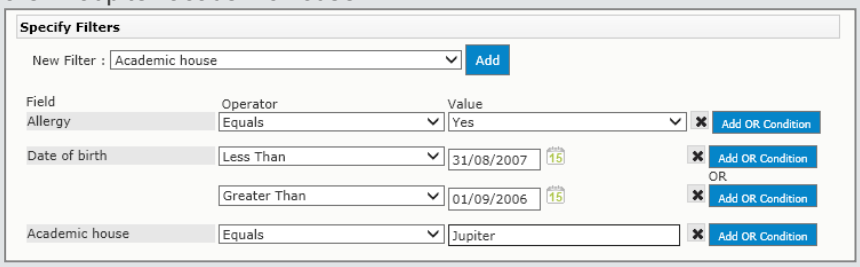


b. (Optional) Repeat step a to select more fields to filter by, as required.

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

- 'equals', i.e. that the field contains the value specified.
- 'contains', i.e. that the field includes the value you set plus other content.
- 'Greater Than', i.e. the field contains a figure or date higher than the value you search for.

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

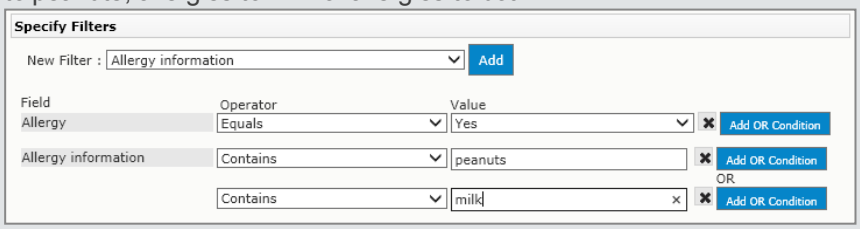


d. Complete the relevant **Value** field(s) with the required search criteria. You may be able to select this from a drop list or simply type in the relevant value.

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

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

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



5. Select the columns to display in the view's **Refine Search** section and the search results grid.

More details...

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

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

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

c. (Optional) 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.

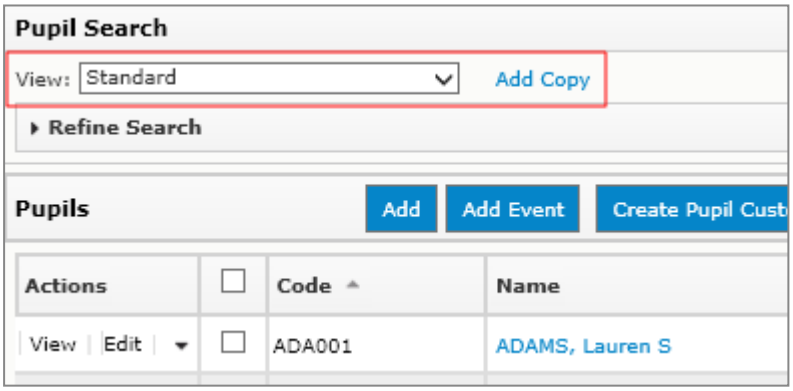
> **Note:** If you do NOT have permission to create 'Global' views, this drop list is unavailable. Please proceed to step 9.

9. Click **Save**.

Editing Search Views

HOW TO EDIT A SEARCH VIEW

1. Via the **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. Click **Edit** next to the **View** drop list.

   The relevant **Edit View** screen appears.

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

4. Amend the search view settings, as required. See "Adding Search Views" on page 80 for details.
5. Click **Save**.

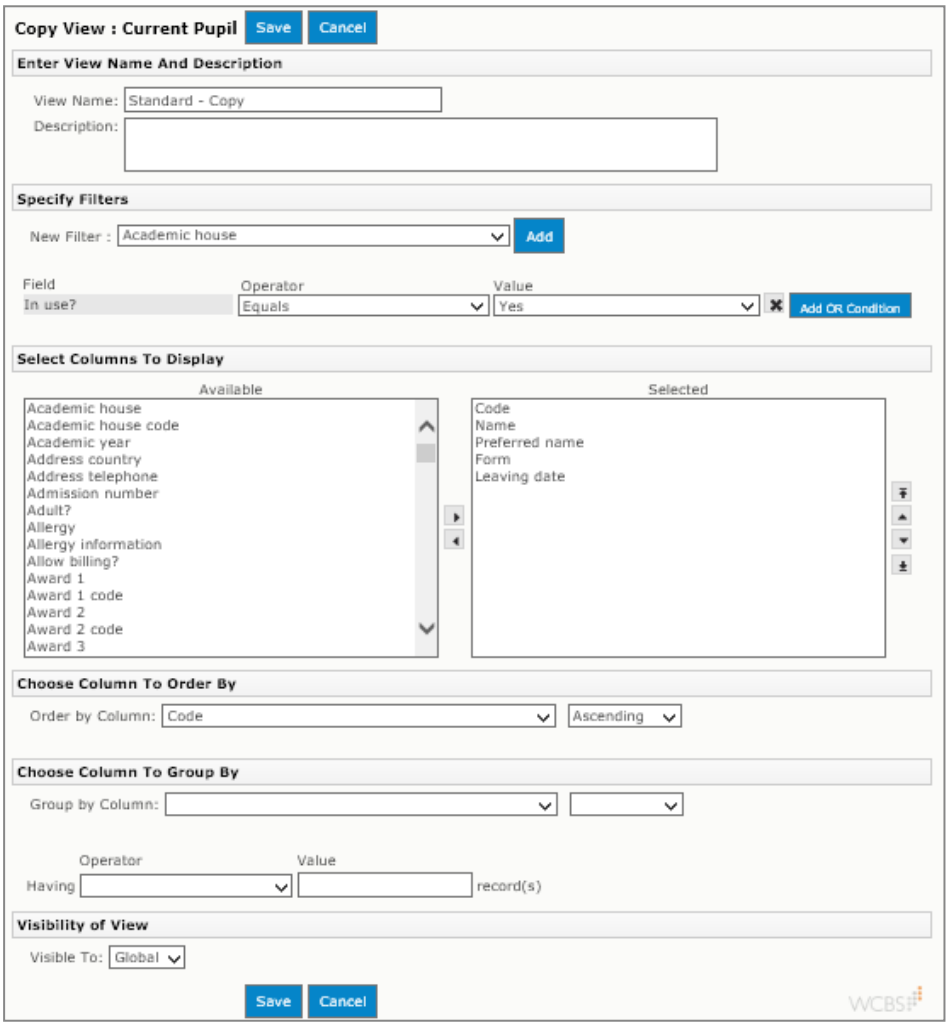
Copying Search Views

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**.

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

The relevant **Copy View** screen appears.

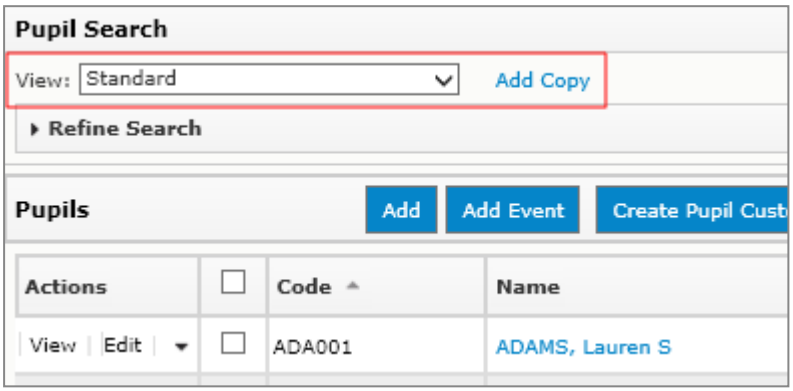


3. Enter a new name and view description. See "Adding Search Views" on page 80 for details.
4. Amend the search view settings, as required. See "Adding Search Views" on page 80 for details.
5. Click **Save**.

Deleting Search Views

HOW TO DELETE A SEARCH VIEW

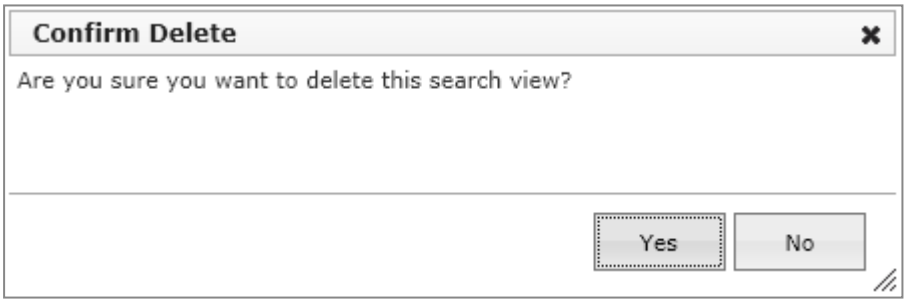
1. Via the **Mega Menu**, go to the relevant module or function, e.g. **Pupils**.
2. Select the search view you want to delete from the **View** drop list.



3. Click **Delete** next to the **View** drop list.

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

The **Confirm Delete** pop up appears.



4. If you are sure that you want to delete the search view, click **Delete**.

Adding the My Searches Widget to your Home Page

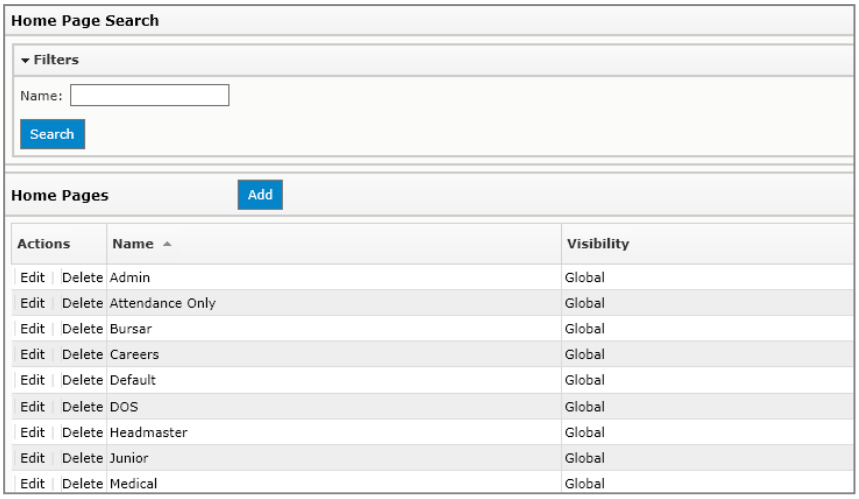
HOW TO ADD THE MY SEARCHES WIDGET TO YOUR HOME PAGE

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** and **Home Pages** 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.

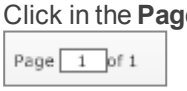
c. (Optional) Use the icons beneath the grid to navigate between pages of records.

» 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.

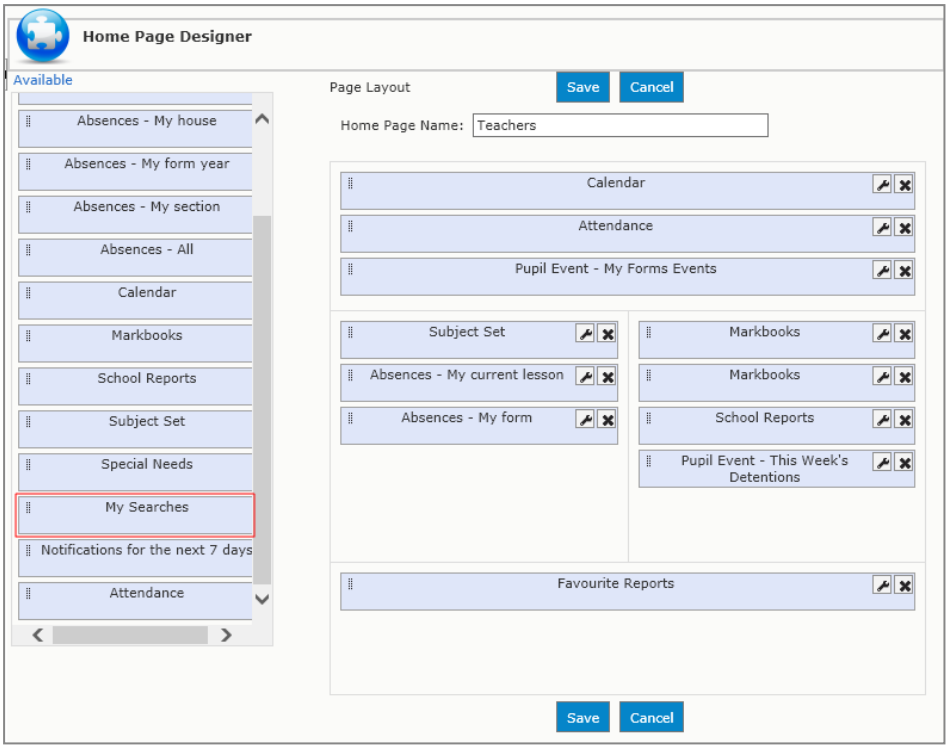
» Use the **Records Per Page** drop list to see more records on each page.

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



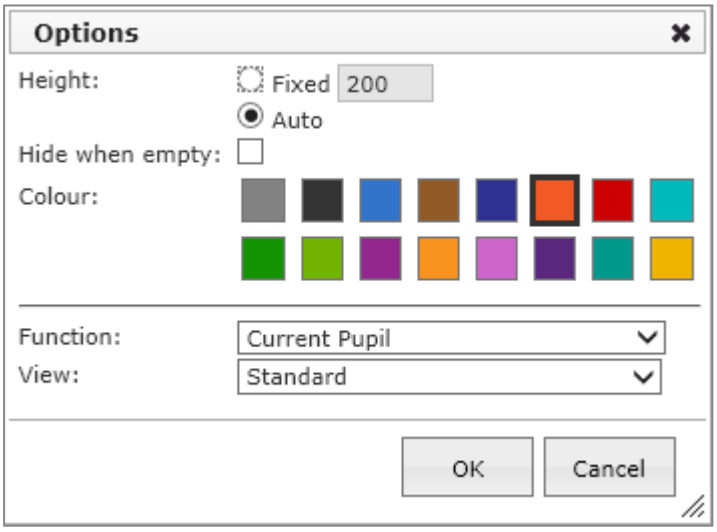
3. Click **Edit** next to the relevant home page.

   The **Home Page Designer** screen appears.



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

   The **Options** pop up appears.



5. Edit the widget's settings.

   More details...

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

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

e. Click **OK**.

6. Click **Save**.

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

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CHAPTER 4

FAQs

This chapter discusses the following:

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FAQs

This section details Frequently Asked Questions (FAQs) asked by users about 3sysACADEMIC version 5.0.0 and above and its associated Online Help. Answers to FAQs will continue to be shared on the 3sysACADEMIC Online Help, as they arise.

Note: For FAQs about earlier versions of 3sysACADEMIC, please go to www.wcbs.co.uk and click the **SIGN IN** button to access our Customer Centre.

WHAT IS THE 'MEGA MENU'?

Introduced in version 5.0.0, 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 40.

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

Mandatory fields are denoted with a red line to the left-hand side of the field. If you omit to enter a mandatory field, then a message appears informing you which fields you still need to complete.

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

Click on **Help** at the top of any 3sysACADEMIC screen from version 5.0.0 onwards and you can access the 3sysACADEMIC Online Help. You can find information in the Online Help by searching the site or clicking on links named after specific topics. For more details, see "3sysACADEMIC Online Help Tips and Tricks" on page 15.

CAN I STILL ACCESS PDF USER GUIDES?

Of course! To see the latest PDF User Guides, do ONE of the following:

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

Note: If you cannot see the PDFs roundel, click or to scroll to other roundel options.

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

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

Other PDF documents, including Release Notes, some training guides and year end guides, can be found on our Customer Centre. For more about how to access the Customer Centre, see "Customer Centre" on page 9.

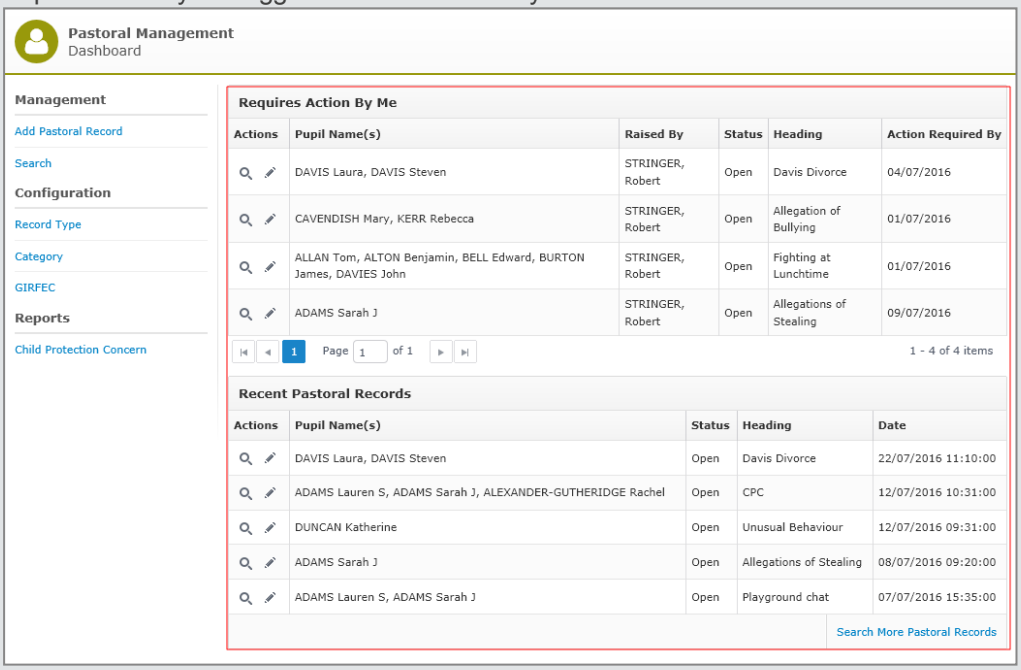
HOW DO I EXPAND / MINIMISE AN IMAGE IN 3sysACADEMIC ONLINE HELP?

If you click on a thumbnail image in the Online Help, then a full size image appears, enabling you to see the screen or dialog in detail. To reduce the image back to a thumbnail, click on the image again. For more tips and tricks for using the 3sysACADEMIC Online Help, see "3sysACADEMIC Online Help Tips and Tricks" on page 15.

WHAT IS A 'DASHBOARD' AND HOW DO I USE IT?

First introduced in the **Pastoral Management** module in version 5.0.0, a dashboard is a module / function-specific screen which provides easy access to record management, configuration and other options as well as clear summaries of key information, such as new records added to this section.

Example: The **Pastoral Management** dashboard displays grids showing records which require action by the logged in user and recently added records which the user can view.



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

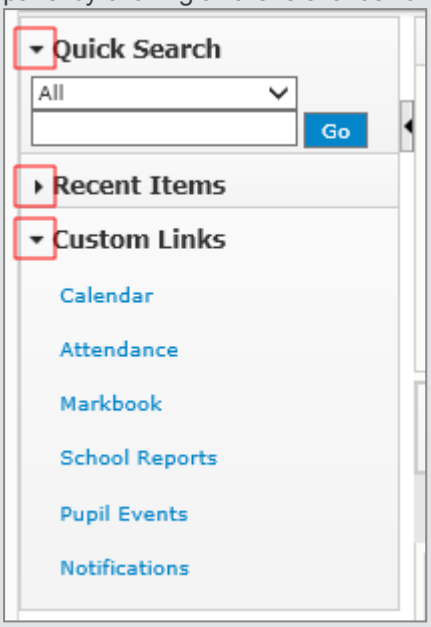
For more information about dashboards, see "About Dashboards" on page 50. For details of how to use each dashboard, see the Online Help section or User Guide related to that module / function.

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

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

Users click on arrows to minimise and expand different sections.

Example: For example, the **Quick Links** side panel appears on screens throughout 3sysACADEMIC. Users can minimise or expand the whole panel or sections within the panel by clicking on the relevant arrows.



If you cannot see a particular section, look for an arrow where you would normally expect to see it or next to the section's heading, and click on it.

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

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

WHY DO MY FIELD AND SCREEN NAMES NOT MATCH THAT DISPLAYED IN THE ONLINE HELP?

Your school may have chosen to rename fields, dialogs and menu items. If this is the case, the Online Help system is unable to reflect exactly what you see, as the Online Help describes the software as it is issued.

HOW DO I ACCESS THE CUSTOMER CENTRE?

Go to www.wcbs.co.uk and click **SIGN IN**. The Customer Centre log in screen appears for you to enter your username and password. For more information, see "Customer Centre" on page 9.

HOW DO I CONTACT THE WCBS SUPPORT TEAM?

Our helpful and knowledgeable Support team can answer a range of queries about WCBS software. For more information about how to get in touch, see "Contact Us" on page 14.

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

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

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

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

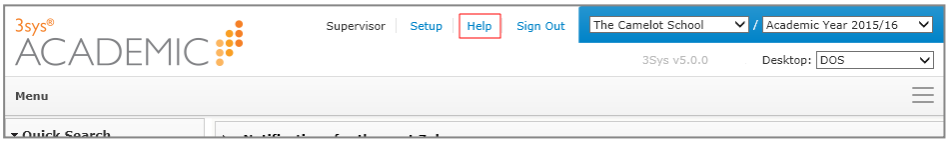
» Download the relevant Release Notes from the "Customer Centre" on page 9.

Each release includes all the enhancements made in previous releases, so if you are upgrading from an older version, e.g. 4.6.0, to the latest version, e.g. 5.0.0, you may like to check the Release Notes for each version released in between so you are fully informed about new functionalities.

I'M A NEW USER - WHERE DO I START?

Welcome! We understand that starting to use a new type of software can be very challenging, so a special section of the 3sysACADEMIC Help has been created to help you. It aims to support you as you learn the essentials of how to navigate your way around and then use the software to add and extract data. You can access the Getting Started User Guide via the 3sysACADEMIC Online Help in one of the following ways:

1. Click **Help** at the top of any 3sysACADEMIC screen.



The 3sysACADEMIC Online Help appears in a separate tab.

2. Do ONE of the following:
   - » To access the Getting Started User Guide PDF:
     a. Click the **PDFs** roundel on the Online Help home page OR go to **Getting Started > PDFs**.

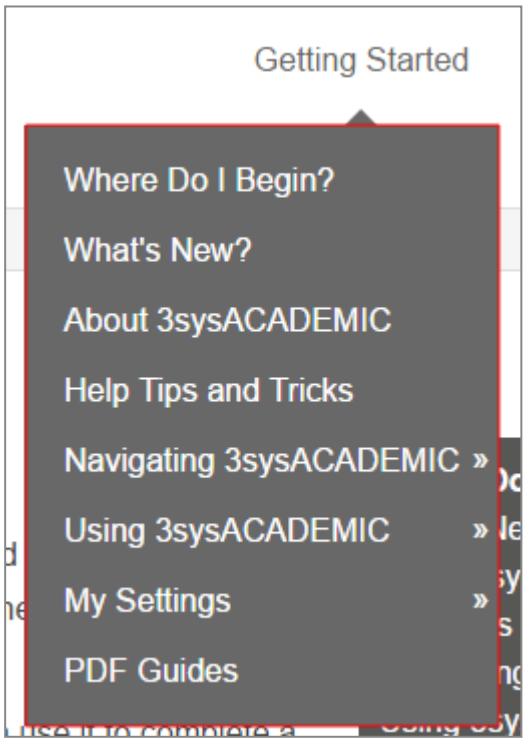
b. Click on the PDF you want to view in the list.

» To access the online Getting Started topics:

a. Hover your mouse over **Getting Started** at the top of the screen.

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

b. Click on a topic in the menu that appears to read more about it.



Note: To return to the software, click on the relevant tab.

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