



3sysACADEMIC

Getting Started

User Guide



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Getting Started

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

This chapter discusses the following:

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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 <u>www.wcbs.co.uk</u>.



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.



3sys®	Supervisor Setup Help	Sign Out	The Camelot School	✓ / Academic Year 2015/16	~
			3Sys v5.0.0	Desktop: DOS	~
Menu					\equiv
• Ouick Search	· ·· · · · ·				

The 3sysACADEMIC Online Help opens in a new tab.

3575® Getting Started Modules Setup FACs	
Welcome to your 3sysACADEMIC Online Help The place to find information about 3sysACADEMIC	
Search 3	
Georg Stands Custome Centra FDFs	
FAGS About Help Copyright Help Copyright 92016 Weed Country Business Systems (Holdings) Limited	

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 <u>www.wcbs.co.uk</u>.
- 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).



_	SIGN IN
LOGIN	
PASSWO	RD
	Forgot password? Click here

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

 Go to <u>www.wcbs.co.uk</u> 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 <u>www.wcbs.co.uk</u> 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).

Product:			
	SysACADEMIC		
▶₁	assFINANCE		
► v	vebALUMNUS		
► <u>\</u>	VCBS schoolPORTAL		
•	VCBS MIS Link		

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



boxes.

Resource Type:			
FAQ			
🔲 General			
🕑 User Guide			
Training Notes			
🔲 Report Builder Template			
Technical documents			
🕑 Bulletin			
To search by Keyword - Enter v			

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

Keyword Search:
Markbooks

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 reorder 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.



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.

3sys®	Supervisor Setup Help	Sign Out	The Camelot School	✓ / Academic Year 2015/16	~
			3Sys v5.0.0	Desktop: DOS	\checkmark
Menu					\equiv
- Ouick Separch					

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.

^{3sys®} ACADEMIC	Getting Started	Modules	Setup	FAQs
Search				٩
You are here: Getting Started > Where Do I Begin?				0 I

Enter your search criteria and click <u>see</u> 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.



^{3sys®} ACADEMIC	Getting Started	Modules	Setup	FAQs
Search				٩
You are here: Getting Started > Where Do I Begin?				8 =

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.



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. \blacktriangleright or \odot . 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.)

O 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.



Navigating 3sysACADEMIC

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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.

3sys®	Supervisor	Setup	Help Sign Out	The Camelot School	✓ / Academic Year 2015/16	~
				3Sys v5.0.0	Desktop: DOS	~
Menu						\equiv
• Ouick Search						

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.

3sys®	Supervisor Setup He	lp Sign Out	The Camelot School	✓ / Academic Year 2015/16	~
			3Sys v5.0.0	Desktop: DOS	~
Menu					\equiv
• Ouick Search	7 .1				

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.

← Quick Search All ✓ Go	•
Recent Items	
Calendar	
Attendance	
Markbook	
School Reports	
Pupil Events	
Notifications	

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 I to minimise the side panel.
- >> Click I to expand the side panel.

Go	• Quick Search			
 ✓ Custom Links Calendar Attendance 		Ť	Go	•
Calendar Attendance	• Recent Items			
Attendance	▼ Custom Links			
	Calendar			
	Attendance			
Markbook	Markbook			
School Reports	School Reports			
Pupil Events	Pupil Events			
Notifications	Notifications			

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.



Pupil Search	
View: Allergies 🗸	Edit Add Copy Delete
▼ Refine Search	
Name:	Form: Allergy: All V
Allergy information:	
Search	_
Jearch	
Note: If you cannot se	e this section in the software, it may be minimised. Click 🕨
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.

Pupil Search		
View: Allergies	~	Edit Add Copy Delete
▼ Refine Search		
Name:		Form: Allergy: All V
Allergy information:]
Search		



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



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

The Home Pages screen appears.



▼ Filters		
Name:		
Search		
Home Pag	es Add	
	Name A	Visibility
Actions	Name A	Visibility Global
Actions Edit Delete	Name A	
Actions Edit Delete Edit Delete	Admin Attendance Only	Global
Actions Edit Delete	Admin Attendance Only Bursar	Global

2. Click Add.

The Home Page Designer screen appears.

ilable	Page Layout	Save Cancel	
Favourite Reports	Home Page Name: Visibility:	Personal V	
Absences - My form			
Absences - My house			
Absences - My form year			
Absences - My section			
Absences - All			
Calendar			
Markbooks			
School Reports			
Subject Set			
Special Needs			
My Coperhos			

- 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.



ailable	Page Layout	Save Cancel	
Favourite Reports	Home Page Name: Teache	ers	
Absences - My current lesson	Visibility: Global	~	
Absences - My form	A A	bsences - My current lesson	×
Absences - My house			
Absences - My form year			
Absences - My section	I Calendar	School Reports	s 🎤
Absences - All			
Calendar			
Markbooks			
School Reports			
Subject Set			
Special Needs	I	Subject Set	×
(My Cosrebee >		Favourite Reports	×
		Save Cancel	

6. (Optional) Edit the widgets' size and colour.

More details...

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

Options	×
Height:	C Fixed 200
	Auto
Hide when empty:	
Colour:	
	OK Cancel

- 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



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.

Home	e Page	Search		
▼ Fil	ters			
Nam	e:			
	irch			
Sea	irch			
lome	e Pages	Add		
Actio	ns	Name 🔺	Visibility	
Edit	Delete	Admin	Global	
Edit	Delete	Attendance Only	Global	
Edit	Delete	Bursar	Global	
Edit	Delete	Careers	Global	
Edit	Delete	Default	Global	
Edit	Delete	DOS	Global	
Edit	Delete	Headmaster	Global	
	Delete	Junior	Global	

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 do to the first page or be 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 home page you would like to change.



The relevant Home Page Designer screen appears.

Home Page Designer		
Available	Page Layout Save Cancel	
II Favourite Reports	Home Page Name: My Home Page X	
Absences - My current lesson		
Absences - My form	II Absences - All	
Absences - My house	Absences - My current lesson	
Absences - My form year		
Absences - My section	II Markbooks 🖋 II Markbooks 🖋 🗶	
Absences - All	Notifications for the next 7 days 🖉 🗶 Absences - My form 🖉 🕱	
I Calendar	II Calendar 🌶 🕱 II Markbooks 🌶 🕱	
I Markbooks	School Reports	
I School Reports		
I Subject Set		
I Special Needs		
Mu Conreher		
	Save Cancel	

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.

Options	×
Height:	C Fixed 200
	Auto
Hide when empty:	
Colour:	
	OK Cancel

- 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



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.



lome	Page	Search		
▼ Filt	ers			
Name	:			
Sea	rch			
500				
lome	Pages	Add		
ioniic	ruges			
Actio	ns	Name 🔺	Visibility	
Edit	Delete	Admin	Global	
Edit	Delete	Attendance Only	Global	
Edit	Delete	Bursar	Global	
Edit	Delete	Careers	Global	
Edit	Delete	Default	Global	
Edit	Delete	DOS	Global	
	Delete	Headmaster	Global	
Edit				
	Delete	Junior	Global	

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.

	lendar for 22/09/2016			
08:00				
	Registration			
09:00	Geography Year 11 Block C Set 1 RE1 Period 1			
	Geography Year 11 Block C Set 1			
10:00	RE1 Period 2			
11:00	Morning Break			
12:00				
	Registration			
13:00				
14:00				
- Su	bject Set		0	 School Reports
1	Geography Year 11 Block C Set 1			
Name	Geography rear 11 Block C Set 1	Attendance 19/09/2016 Deriod 2	Attendance 20/09/2016 Derind 1	There are currently no reports that require your attention
		19/09/2016 Period 2		There are currently no reports that require your attention
BASTO	N-SMYTHE, Henrietta C	19/09/2016 Period 2 /	20/09/2016	There are currently no reports that require your attention
BASTO	N-SMYTHE, Henrietta C S SS.Amanda J	19/09/2016 Period 2 / I	20/09/2016 Period 1 /	There are currently no reports that require your attention
BASTO BURGE BURGE	NI-SMYTHE, Henrietta C S SS,Amanda J S SS,Andrew P S	19/09/2016 Period 2 / I /	20/09/2016 Period 1 / / L	There are currently no reports that require your attention
BASTO BURGE BURGE	N-SMYTHE, Henrietta C S SS.Amanda J	19/09/2016 Period 2 / I	20/09/2016 Period 1 /	There are currently no reports that require your attention
BASTO BURGE BURGE JACKSO	NI-SMYTHE, Henrietta C S SS,Amanda J S SS,Andrew P S	19/09/2016 Period 2 / I /	20/09/2016 Period 1 / / L	There are currently no reports that require your attention
BASTO BURGE BURGE JACKS	N-SMYTHE, Henrietta C SS,Amanda J SS,Andrew P O) N.Helen M S	19/09/2016 Period 2 / I /	20/09/2016 Period 1 / / L /	There are currently no reports that require your attention
BASTO BURGE BURGE JACKSO - Ab	N-SMYTHE, Henrietta C SS.Amanda J SS.Andrew P S ON.Helen M SS.exect Statement Lesson	19/09/2016 Period 2 / I /	20/09/2016 Period 1 / / L /	There are currently no reports that require your attention
BASTO BURGE JACKSO Absence No abs	N-SMYTHE, Henrietta C SS,Amande J SS,Andrev P N. Helen M sences - My current lesson s last queried at	19/09/2016 Period 2 / I /	20/09/2016 Period 1 / / L /	There are currently no reports that require your attention
BASTO BURGE JACKSI Absence No absi	N-SMYTHE, Henrietta C SS.Amanda J SS.Amanda J SS.Andrew P S SS.Andrew P S DN. Helen M S sences - My current lesson s last queried at ances found	19/09/2016 Period 2 / I /	20/09/2016 Period 1 / L /	There are currently no reports that require your attention
BASTO BURGE JACKSI JACKSI Absence No absi Absence	N-SMYTHE, Henrietta C SS,Amanda J SS,Andrew P SS,Andrew P SOX,Helen M Sences - My current lesson is last queried at ances found sences - My form	19/09/2016 Period 2 / I /	20/09/2016 Period 1 / L /	There are currently no reports that require your attention
BASTO BURGE JACKS JACKS Absence No abse Absence No abse	N-SMYTHE, Henrietta C SS.Anarada J SS.Andrew P Status P Sences - My current lesson is last queried at sences - My form is last queried at	19/09/2016 Period 2 / I /	20/09/2016 Period 1 / L /	There are currently no reports that require your attention
BASTO BURGE JACKS Absence No abse Absence No abse Fa	N-SMYTHE, Henrietta C SS,Amanda J SS,Andrew P SS,Andrew P SS,Andrew P SS,Andrew P SS, Hy current lesson s last queried at ences found sences - My form s last queried at ences found	19/09/2016 Period 2 / I /	20/09/2016 Period 1 / L /	There are currently no reports that require your attention
BASTO BURGE JACKS Absence No abse Absence No abse Fa	N-SMYTHE, Henrietta C SS.Amanda J SS.Andrew P SS.Andrew P SS.Andrew P Sences - My current lesson s last queried at conces found sences - My form s last queried at conces found wounte Reports	19/09/2016 Period 2 / I / /	20/09/2016 Period 1 / L /	There are currently no reports that require your attention

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.

¹A 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.



Supervisor Setup Help Sign Ou	t The Camelot School	✓ / Academic Year 2015/16	~
	3Sys v5.0.0	Desktop: DOS	~

Creating Desktops

HOW TO CREATE A DESKTOP

1. Go to Setup > Desktop Management > Desktops.

The Desktop Search and Desktops screen appears.

	ters				
Title:					
Sea	rch				
Desk	tops	A	Id		
Actio		Title 🔺	Tab Set	Home Page	Visibility
Edit	Delete	Admin	Default	Admin	Global
Edit	Delete	Attendance Only	Attendance Only	Attendance Only	Global
Edit	Delete	Bursar	Bursar	Bursar	Global
Edit	Delete	Careers	Careers	Careers	Global
Edit	Delete	Default	Default	Default	Global
Edit	Delete	DOS	DOS	DOS	Global
Edit	Delete	Headmaster	Headmaster	Headmaster	Global
Edit	Delete	Junior	Junior	Junior	Global
Edit	Delete	Medical	Medical	Medical	Global
		new desktop	new tab set	New Home Page	Global

2. Click Add.

The Desktop Detail screen appears.

	Desktop					
Detail		Save Cancel				
	Name:		Home page:	Default	~	
	Global?:					
		Save Cancel				
<						>

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



- 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.

* Filters						
Title:						
Searc	h					
Deskto	ps	Add				
Actions	Title 🔺	Home Page	Visibility			
Edit D	elete Admin	Admin	Global			
Edit D	Delete Attendance Only	Attendance Only	Global			
Edit D	elete Bursar	Bursar	Global			
Edit D	elete Careers	Careers	Global			
Edit D	Delete Default	Default	Global			
Edit D	elete DOS	DOS	Global			
Edit D	elete Headmaster	Headmaster	Global			
Edit D	elete Junior	Junior	Global			
Edit D	elete Medical	Medical	Global			
Edit D	elete Nursery	Nursery	Global			
Edit D	elete PE	PE	Global			
Edit L D	elete Teacher	Teachers	Global			

- 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.



Desktop Teacher	
Detail	Save Cancel
Name:	Teacher Home page: Teachers
Global?:	✓
Profiles	
Filter:	Select: All None Select: All None
	Available Profiles Selected Profiles
Admin Attendance Only Bursar Careers Headmaster Junior School Medical Nursery PE Department Reports Only Super User	HoD Super SE Teacher Teacher 2 (Basic) Teachers (General) WCBS Profile
	Save Cancel

- 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.

▼ Filters						
Title:						
Sea	irch					
Desk	tops	Add				
Actio	ns	Title 🔺	Home Page	Visibility		
Edit	Delete	Admin	Admin	Global		
Edit	Delete	Attendance Only	Attendance Only	Global		
Edit	Delete	Bursar	Bursar	Global		
Edit	Delete	Careers	Careers	Global		
Edit	Delete	Default	Default	Global		
Edit	Delete	DOS	DOS	Global		
Edit	Delete	Headmaster	Headmaster	Global		
Edit	Delete	Junior	Junior	Global		
Edit	Delete	Medical	Medical	Global		
Edit	Delete	Nursery	Nursery	Global		
Edit	Delete	PE	PE	Global		
Edit	Delete	Teacher	Teachers	Global		

- 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.

Please review the details below si delete this desktop (Careers)	nowing this desktops usage by other profiles. If you want to proceed, click 'Delete' to
Profile Name Can be delete	ed Reason
Super User 🛛 🖌	Profile has access to 2 desktops
Super SE 🛛 🗸	Profile has access to 12 desktops
Teachers (General) 🛛 💙	Profile has access to 2 desktops
	Delete Cancel

- 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 Modules1?

What are Functions2?



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.

	Pupil Management	Pastoral / Behaviour	Academic Managem
s	Pupil Records	Pupil Groups	
	Contacts	Academic Hous	es
	Relationships	Activity Groups	
t	Personal Documents	Boarding House	es
-	Accidents	Form Years	1)
ľ	Medical Consents	Forms	_
A	Pupil Events	Prospective Pup	pils
A		Pupil Custom G	roups
4		Subject Sets	
gi	SEN		ha
=)	Reviews		10
cł	Special Needs		
rs	ery		

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



Pastoral / Behaviour	Academi	c Management	Staff	Calen
Pastoral Management	P	upil Events		
Add Pastoral Record	R	eports		
Search	C	hild Protection Con	cern	
Academic Management	Staff	Calendar / At	tendance	Con
Markbooks	s	chool Reports		
Mark Inquiry	E	aselines		
Mark Entry	E	xport Registration l	ists	
Markbook Tasks	I	mport Baselines		
Marking Schemes	E	xams		
Markbook Group Calculations	J	CQ Forecasts		
Markbook Academic Profiles	S	QA Unit Results		
Markbook Generic Export	E	xam Results		
Markbook Generic Import	E	xam Arrangements		
Staff Calendar / Atte	ndance	Communicatio	on	
Staff				
Staff Cover				
Staff Custom Groups				
Calendar / Attendance	Comm	unication		
Attendance	c	alendars		

Rooms



Communication			_
Email / Notificati	ons	Data / Reporting	
Email		Documents	
Notifications		Reports	
Notification Catego	ries	Names	

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

The Camelot School	V / Academic Year 2015/16	~
	Desktop: DOS	~
		\equiv

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

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

Menu –			
Home			
Pupil Management			
Pastoral / Behaviour			
Academic Management			
▶ Staff			
 Academic Management Staff Calendar / Attendance 			
Communication			

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



xample: In this example,	the arrow next to Commun	ication has been clicked:
Menu		
Home		
Pupil Management		
Pastoral / Behaviour		
Academic Management		
▶ Staff		
Calendar / Attendance		
 Communication 		
Email / Notifications		
Email		
Notifications		
Notification Categories		
Data / Reporting		
Documents		
Reports		
Names		

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.

The Camelot School	✓ / Academic Year 2015/16	
Note: The Acade log in.	mic Year drop list automatically	y shows the current year when you first

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.

3sys®	Supervisor Setup Help Sign Out	The Camelot School 🗸 / Academic Year 2015/16	~
		3Sys v5.0.0 Desktop: DOS	<
Menu		3	=
• Ouick Search	/ . .		

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.

3sys®	Supervisor Setup	Help Sign Out	The Camelot School	✓ / Academic Year 2015/16	~
			3Sys v5.0.0	Desktop: DOS	~
Menu					\equiv
• Ouick Search					

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.

Menu	
▼ My Settings	
My Account	
Custom Links	Det
• Croup Managen	ont



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.

Change My Password								
Enter a new password	OK Cancel							
Old password:								
New password:								
Confirm new password:								
	OK Cancel							

- 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.

Recent Items		
Custom Links		
Calendar		
Attendance		
Markbook		
School Reports		
Pupil Events		
Notifications		

Adding Custom Links

HOW TO ADD A CUSTOM LINK

- 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 Imes to go to the first page or Imes to go to the last page.
 - Use the Records Per Page drop list to see more records on each page.

 Records Per Page
 25
 V

 Vector
 Vector
 Vector
 Vector
 - » 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.



- 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

 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.

Management	Requir	es Action By Me					
Add Pastoral Record	Actions	Pupil Name(s)	Raised By	St	atus Heading		Action Required B
Gearch Configuration	0, 1	rce	04/07/2016				
Record Type	0, 1	CAVENDISH Mary, KERR Rebecca	STRINGER Robert	Op	en Allegation Bullying	of	01/07/2016
Category	0, 1	Q ✓ ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON STRINGER, Robert Open Fighting at Lunchtime					01/07/2016
GIRFEC Reports	Q 🖋 ADAMS Sarah J STRINGER, Robert Allegatio						09/07/2016
Child Protection Concern	4 4	1 Page 1 of 1 🕨 🕨					1 - 4 of 4 items
	Recent	Pastoral Records					
	Actions	Pupil Name(s)		Status	Heading		Date
	Q. 🖉	DAVIS Laura, DAVIS Steven Open Davis Divorce					22/07/2016 11:10:00
	0, 1	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERI	Open	Open CPC		12/07/2016 10:31:00	
	٩. /	DUNCAN Katherine	Open	Unusual Behavio	our	12/07/2016 09:31:00	
	٩. /	ADAMS Sarah J	Open	Allegations of St	ealing	08/07/2016 09:20:00	
	0. /	ADAMS Lauren S, ADAMS Sarah J		Open	Playground chat		07/07/2016 15:35:00

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.



Management	Requir	es Action By Me						
Add Pastoral Record	Actions	Pupil Name(s)	tatus	Heading	Action Required E			
Gearch Configuration	۹. /	DAVIS Laura, DAVIS Steven	Davis Divorce	04/07/2016				
Record Type	Q. #	Q ✓ CAVENDISH Mary, KERR Rebecca STRINGER, Robert Allegation of Bullying					01/07/2016	
Category	0, /	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON STRINGER, Robert Pipting at Lunchtime					01/07/2016	
SIRFEC Reports	0, 1	ADAMS Sarah J	′ Open		Allegations of Stealing	09/07/2016		
Child Protection Concern	H 4	1 Page 1 of 1 F					1 - 4 of 4 items	
	Recent	Pastoral Records						
	Actions	Pupil Name(s)	Status Head		ding	Date		
	Q. 🖉	Q 💉 ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel Open				s Divorce	22/07/2016 11:10:00	
	0,1						12/07/2016 10:31:0	
	۹. /					ual Behaviour	12/07/2016 09:31:0	
	0, 1	O ADAMS Sarah J Ope				ations of Stealing	08/07/2016 09:20:00	
	0. /	ADAMS Lauren S, ADAMS Sarah J						

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.



Management	Requir	es Action By Me					
Add Pastoral Record	Actions	Pupil Name(s)	Raised By	S	tatus	Heading	Action Required E
Search Configuration	٩.1	DAVIS Laura, DAVIS Steven	04/07/2016				
Record Type	0, 1	CAVENDISH Mary, KERR Rebecca	01/07/2016				
Category	٩ /	ALLAN TOM, ALTON Benjamin, BELL Edward, BURTON STRINGER, Robert Open Fighting at Lunchtime					01/07/2016
Reports	91	Q 🖋 ADAMS Sarah J STRINGER, Robert Open Allegations : Stealing					09/07/2016
Child Protection Concern	4 4	1 Page 1 of 1 🕨 🕨					1 - 4 of 4 items
	Recent	Pastoral Records					
	Actions	Pupil Name(s)		Status	Head	ding	Date
	۹. /	DAVIS Laura, DAVIS Steven		Open	Davis	s Divorce	22/07/2016 11:10:0
	Q. /	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERI		12/07/2016 10:31:0			
	٩. /	DUNCAN Katherine	Open	Unus	ual Behaviour	12/07/2016 09:31:0	
	0, 1	ADAMS Sarah J		Open	Alleg	ations of Steali	ng 08/07/2016 09:20:0
	0.1	ADAMS Lauren S, ADAMS Sarah J		Open	Diau	round chat	07/07/2016 15:35:0

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.

Pastoral Management Dashboard



Using 3sysACADEMIC

This chapter discusses the following:

	0,
	Completing
	Drop Lists
(Y)	Calendar
	Search Di
	Uploading
	About Grids
	About Gri
	About Gri
	About Gri
	Searching for
	Searching
	Searching
	Searching for
	Searching
	Searching
	Searching
	Searching
	About Views
	Example:
	Example:
	Example:
	Accessing
	Adding Se
	Editing Se
	Copying S
	Deleting S
	Adding the

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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.

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.

•	∧	Α	ugus	t 20)16	►		
Sun	Mon	Tue	Wed	Thu	Fri	Sat	12:00	
31	1	2	3	4	5	6	13:00	
7	8	9	10	11	12	13	14:00	
14	15	16	17	18	19	20	15:00	
21	22	23	24	25	26	27	16:00	
28	29	30	31	1			17:00	

HOW TO USE A CALENDAR POPUP

Do ONE of the following:

- >> Click in the field and click is to delete the existing date. Type the required date in the field using the format DD/MM/YYYY.
- >> Click is or is 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 .)

(1	↑		June	20	16	►	0	Jul		1 20)16	~	0
Sun	Mon	Tue	Wed	Thu	Fri	Sat	-			-			-
29	30	31	1	2	3	4	Mo	Tu	We	Th	Fr	Sa	Su
5	6	7	8	9	10	11					1	2	3
12	13	14	15	16	17	18	4	5	6	7	8	9	10
19	20	21	22	23	24	25	11	12	13	14	15	16	17
							18	19	20	21	22	23	24
26	27	28	29	30	1	2	25	26	27	28	29	30	31

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 a 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

- 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.

Documents:	Browse
	Click 'Browse' to select files for upload or Upload, Files
	Def (Files dropped here will be uploaded and attached to your document
	🗙 🕂 Сору
	L

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.

Management	Requir	es Action By Me						
Add Pastoral Record	Actions	Pupil Name(s)	Raised By	St	atus	Heading	Action Required B	
Search Configuration	0, 1	DAVIS Laura, DAVIS Steven	STRINGER, Open I Robert			Davis Divorce	04/07/2016	
Record Type	0, 1	CAVENDISH Mary, KERR Rebecca	STRINGER, Open Robert			Allegation of Bullying	01/07/2016	
Category	Q 🖉					Fighting at Lunchtime	01/07/2016	
GIRFEC Reports	0, 1	ADAMS Sarah J	STRINGER, Open			Allegations of Stealing	09/07/2016	
Child Protection Concern	44	1 Page 1 of 1 🕨 🕨					1 - 4 of 4 items	
	Recent	Pastoral Records						
	Actions	Pupil Name(s)		Status	Head	ing	Date	
	۹ /	DAVIS Laura, DAVIS Steven		Open	Davis	Divorce	22/07/2016 11:10:00	
	۹. /	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERI	DGE Rachel	Open	CPC		12/07/2016 10:31:00	
	٩. /	DUNCAN Katherine		Open	Unusu	al Behaviour	12/07/2016 09:31:00	
	0, 1	ADAMS Sarah J Ope			Allega	tions of Stealing	08/07/2016 09:20:00	
	Q 💉 ADAMS Lauren S, ADAMS Sarah J Open Playground cl							



Pupils		Add Add More Actions		Create Pupil Cu	istom Gro	oup Email Add Pupil Document	2
Children	With A	llergies					
Actions		Name 🔺		Form	Allergy	Allergy information	
View Edit	-	ADAMS, Lauren S	800	Form 11A	1	Some forms of Smarties	
View Edit	•	ADAMS, Sarah J	80	Form 7A	✓	Emergency Treatment - Severe Nut Allergy - Se Notes	e
View Edit	•	ALLEN, David	800	Form 4B	✓	Plasters	
View Edit	-	CAVENDISH, Mary	800	Form 11A	✓	No Penicillin	
View Edit	-	COLES,Mark	800	Form 6A	1	Dairy Products	
View Edit	-	FRY, Jordan	800	Form 6A	✓	ASD	
View Edit	•	JONES,Mary	800	Lower Sixth	✓	Severe Hayfever in May/June	
View Edit	-	MITCHELL, Emily J	80	Form 10A	✓	Penicillin	
View Edit	-	MITCHELL, Rebecca	80	Form 9A	1	Early mornings, bed making	
View Edit	-	O'MALLY-JONES, Paula S	80	Form 8A	1	Milk. Slight Allergy to Face creams	

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 si 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
\bigcirc	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 I 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 rand Save and open to save and automatically open the file.
 - \gg Click **Cancel** or $\boxed{\times}$ 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.

Search					×
Pupil Name	✓ Se	arch			
Name	Preferred Name	Code	Form	Academic House	
Select					
Pupils					
Name	Preferred Name	Code	Form	Academic House	
Remove					
				ок	Cancel

- 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.



Search	
Pupil Name Form Academic House Boarding House Form Year Subject Set Tutor Group Pupil Custom Group	eferred Name C
Select	

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.

Form	~	Form 10A (10A)	Search
		Form 10B (10B)	
Select Pupils Name	Pre	Form 11A (11A) Form 11B (11B) Form 1A (01A) Form 1B (01B) Form 2a (02A) Form 2B (02B) Form 3A (03A) Form 3B (03B) Form 3B (03B) Form 4A (04A) Form 5B (04B) Form 5A (05A) Form 5B (05B) Form 6A (06A) Form 6B (06B) Form 7B (07B) Form 7B (07B) Form 8A (08A) Form 8B (08B) Form 9B (09B) Lower Sixth (12) Nursery (00N) Reception (00R) Upper Sixth (13)	
		oppor orxer (10)	
Remove			

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'.

Search
Pupil Name
Preferred Name
Preferred Name

c. Click Search.

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

Search											×
Pupil Name	✓ Smith		Search	2 res	ults						
Name		Preferred N	lame		Code		Form		Academic	House	
SMITH, Annie		Annie			SMI002		Form 7A	1			
SMITH, Stephen		Stephen			SMI100		Form 14	1	Falcon		
Select Pupils											
Name	Preferred N	lame		Code		Form		Acaden	nic House		
Remove											
										ок	Cancel

- 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.



pil Name	✓ Smith		Search	🕕 2 res	ults						
Name		Preferred N	lame		Code		Form		Academi	c House	
SMITH, Annie		Annie			SMI002		Form 7A	A.			
SMITH, Stephen	1	Stephen			SMI100		Form 14	4	Falcon		
Select											
Pupils											
Pupils Name	Preferred Na	ame		Code		Form		Acaden	nic House		
	Preferred Na	ame		Code		Form		Acaden	nic House		

e. Click Select.

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

Search											×
Pupil Name	~	Smith		Search	2 results						
Name	Pre	ferred Na	me		Code	Form	1	Acader	nic House		
Select											
Select											
Pupils											
Name			Preferred N	ame	Code		Form		Academic Ho	use	
SMITH, Annie			Annie		SMIOC	2	Form 7A	ι			
SMITH, Stephen	I		Stephen		SMI10	0	Form 1A	4	Falcon		
Remove											
									(ок	Cancel

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



upil Name 🗸 🗸	Smith	Search 🕕 2	2 results		
Name Pr	eferred Name	c	Code	Form	Academic House
elect					
Pupils					
] Name	Preferred I	Name	Code	Form	Academic House
Name	Preferred I Annie	Name	Code SMI002	Form	
Name		Name			4
] Name] SMITH, Annie	Annie	Name	SMI002	Form 74	4
] Name] SMITH, Annie	Annie	Name	SMI002	Form 74	4
] Name] SMITH, Annie	Annie	Name	SMI002	Form 74	4
] Name] SMITH, Annie	Annie	Name	SMI002	Form 74	4

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.



Pupil Search					×
Gro	up Please S	elect 🔻	Please Select	Ŧ	
Pupil Nar	me				
	Search				
Pupil Name Pup	il Code	Form	Pupil Name	Pupil Code	Form
	il code	1 on m	i upii itunie	i upii couc	1 on m
					OK Cancel

- a. Do one OR both of the following:
 - >> Use the two Group drop lists to refine your search. Your selection in the first drop list alters the options available in the second drop list.

Staff Search				×
	Group Please Select	▼ Please Select		
	Staff Type Please Select 🗸]		
	Staff Name			
	Search			
Staff Name	Staff Code	Staff Name	Staff Code	
			ОКСа	incel



Example: In the ex using the first drop school's boarding f	list, so the s			
Pupil Search				×
Group Pupil Name		V Please Select Beech House Blue house Elm House Green house Lime House Oak House Red house Yellow house		
Pupil Name Pupil	Code Form	Pupil Name	Pupil Code	Form

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

Pupil Searc	h				
	Group	Boarding House	Beech House	~	
	Pupil Name	burgess			
		Search			

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.



	Group Form		\mathbf{v}	Form 9A	~			
Pu	pil Name							
	Sear	ch						
Pupil Name	Pupil Code	Form		Pupil Name	Pupil Code	Form		/
ASHFIELD, Gemma	ASH003	09A	Ð	ASLETT, Fletcher	ASL001	09A	G	
Frances			-	BRYANTON, William	BRY001	09A	0	
BRANGWEN, Ursula	BRA001	09A	Ð	G	DICIOUI	004	•	
BROOKS,Maria	BR0001	09A	Ø	LAWRENCE, Helen	LAW001	09A	Ø	
GUTHRIE, Kate	GUT001	09A	Ø					
HOLT,James	HOL001	09A	Ð					
MITCHELL, Rebecca	MIT002	09A	Ø					
		09A	Ð					

Note: To deselect a pupil, click on the <u>o</u> 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.

Search		×
Staff Name 🗸	Search Academic staff only? 🗹	
Name	Preferred Name	Code
Select		
Staff		
Name	Preferred Name	Code
		couc
Remove		
		OK Cancel

- 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.



E

Search	
Staff Name Form	Search Ad
Academic House	Preferred Name
Boarding House Form Year Cubicat Cat	
Subject Set	
Select	

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.

Search				
Form Year 🗸	Lower Sixth		Search	Aca
Name Select Staff	Nursery (001 Reception (0 Upper Sixth Year 1 (01) Year 10 (10) Year 11 (11) Year 2 (02) Year 3 (03) Year 4 (04) Year 5 (05) Year 6 (06) Year 7 (07) Year 8 (08) Year 9 (09)	0R) (13)	ed Name	2
Name		Prefer	red Name	e

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 the key word 'Sr		, the user is searching for staff by name usin
Search		
Staff Name	✓ Smith	× Search Aca
Name		Preferred Name



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

Search		×
Staff Name 🗸	Search Academic staff only? 🗹	
Name	Preferred Name	Code
Select		
Staff		
Name	Preferred Name	Code
Remove		
Kentove		
		OK Cancel
		//

d. Click Search.

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

ademic staff only? 2 0 68 results Preferred Name Code Barbara ALL001 Eleanor EJA Molly MBB Liz EB Alexander BEL001
Barbara ALL001 Eleanor EJA Molly MBB Liz EB
Barbara ALL001 Eleanor EJA Molly MBB Liz EB
Molly MBB Liz EB
Liz EB
Alexander BEL001
Lode
Code

- 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.

Search		
taff Name 🗸	Search Academic staff only? 🗹 🕕 68 results	
Name	Preferred Name	Code
BAKER, Molly B	Molly	МВВ
BAYTON, Elizabeth	Liz	EB
BINNS, Elise	Elise	BIN001
BOULDER, Brian James	Brian	BJB
BRADLEY, Howard	Howard	BRA001
Staff		
	L	1
Name	Preferred Name	Code
Name	Barbara	ALL001
Name ALLEN, Barbara ANDREWS, Ellie J	Barbara Eleanor	ALLO01 EJA
	Barbara	ALL001
Name ALLEN, Barbara ANDREWS, Elllie J	Barbara Eleanor	ALLO01 EJA
Name ALLEN, Barbara ANDREWS, Ellie J	Barbara Eleanor	ALLO01 EJA
Name ALLEN, Barbara ANDREWS, Elllie J	Barbara Eleanor	ALLOO1 EJA

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


Search		3
Staff Name 🗸	Search Academic staff only? 🗹 🕕 68 results	
Name	Preferred Name	Code
BAKER, Molly B	Molly	МВВ
BAYTON, Elizabeth	Liz	EB
BINNS, Elise	Elise	BIN001
BOULDER, Brian James	Brian	BJB
BRADLEY, Howard	Howard	BRA001
Name	Preferred Name	Code
ALLEN, Barbara	Barbara	ALL001
ANDREWS, Ellie J	Eleanor	EJA
BELL, Alexander	Alexander	BEL001
Remove		
		OK Cancel

h. Click OK.

Search		×
Staff Name 🗸	Search Academic staff only? 🗹 🕕 68 results	
🗌 Name	Preferred Name	Code
BAKER, Molly B	Molly	мвв
BAYTON, Elizabeth	Liz	EB
BINNS, Elise	Elise	BIN001
BOULDER, Brian James	Brian	ВЈВ
BRADLEY, Howard	Howard	BRA001
Staff Name	Preferred Name	Code
	Preferred Name	Code
ALLEN, Barbara	Barbara	ALL001
BELL, Alexander	Alexander	BEL001
Remove		
		OK Cancel

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

Searching for Staff in the Pastoral Management Module

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:

Staff Name:	pa
-	DAVIS, Patrick M
	PARKER, Lucy Ann
	PARKER, Simon P
	PARSONS, Albert Trevor

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

Staff Search		
Group Staff Type Staff Name	Please Select Image: Select Please Select Image: Select Search	
Staff Name	Staff Code	
	Cancel	

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

You can filter by:

- Group From the first Group drop list, select the group type you want, e.g. 'Boarding House', 'Form' or 'Subject Set', and from the second Group drop list, select the person's specific group, e.g. 'Form 10A', 'English' etc.
- >> Staff Type From the Staff Type drop list, select the required type of staff, such



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

>> Name - Type all or part of the staff member's name in the Staff Name field.



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.

Staff Name:	pa
-	DAVIS, Patrick M
	PARKER, Lucy Ann
	PARKER, Simon P
	PARSONS, Albert Trevor

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

Staff Search							×
	Group Staff Type Staff Name	Please Select Please Select Search	Pleas	e Select	V		
Staff Name	St	aff Code		Staff Name		Staff Code	
						ок	Cancel



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

Staff Search							×
	Group Staff Type taff Name	Form Year Academic Search	Year	3	V		
Staff Name		Staff Code		Staff Name	S	Staff Code	
WATSON, Diana		LMJ	Ð	BAYTON, Elizabeth	E	B	0
% Head of Year		N/A	ø	HILTON, John	Н	ILO01	0
& Form Tutor		N/A	Ð				
PIPER, Nigel E		NEP	G				
3 result(s)						ОК	Cancel

- **Note:** To deselect staff, click on the **o** 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.

View:	Standard	~	Add Copy
-------	----------	---	----------

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

Pupil Search			
View: Standard	~	Add Copy	
 Refine Search 			
Pupils	Add Ad	ld Event	Create Pupil Cust
Actions	Code 🔺	Name	
View Edit 👻	ADA001	ADAMS, La	uren S

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

Edit View : Current Pupil	Save Cancel		
Enter View Name And Des	cription		
View Name: Allergies Description: Children With	Allergies]
Specify Filters			
New Filter : Academic hous	se	Add	
Field	Operator	Value	
Allergy	Equals	✓ Yes	Add OR Condition
Select Columns To Display			
	ailable	Selected	1
Academic house Academic vear Address country Address telephone Admission number Adult? Allow billing? Award 1 Award 1 Award 2 Award 2 Award 3 Award 3 Award 3 code Birth place		Name Form Allergy Allergy information	* * *
Choose Column To Order B Order by Column: Name	¦γ	✓ Ascending ✓	
Choose Column To Group E	Зу		
Group by Column:		✓ ✓	
Operator Having	Value	record(s)	
Visibility of View			
Visible To: Global 🗸	Save Cancel		

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 \blacktriangleright next to **Refine Search** to display the filtering fields and options.



Pupil Search								
View:	: Allergies V Edit Add Copy Delete							
▼ Ref	ine Se	arcł	1					
		Nar	ne:		Form:		Allergy:	All 🗸
Allerg	y inforr	nati	on:					
Sear	ch							
Pupils				Add A	Add Event Create	Pupil Custom Gr	oup Em	nail Add Pupil Document More Actions ▼
Pupils				Add A	Add Event Create	Pupil Custom Gr	oup En	Add Pupil Document More Actions *
c	hildren	Wit	h Al	lergies				
Action	ıs			Name 🔺		Form	Allergy	Allergy information
View	Edit	•		ADAMS, Lauren S	😂 🛟 🧕	Form 11A	1	Dairy products
View	Edit	•		ADAMS, Sarah J	80	Form 7A		Emergency Treatment - Severe Nut Allergy - See Notes
View	Edit	•		ALLEN, David	8 🗘 🧐	Form 4B		Plasters
View	Edit	•		CAVENDISH,Mary	😂 🗘 🧕	Form 11A		No Penicillin
View	Edit	•		COLES,Mark	😂 🛟 🧕	Form 6A		Dairy products
View	Edit	•		FRY, Jordan	80 🕄 🖲	Form 6A		ASD
View	Edit	•		JONES, Mary	😂 🗘 🧕	Lower Sixth		Severe Hayfever in May/June
View	Edit	•		MITCHELL, Emily J	😆 🗘	Form 10A		Penicillin
View	Edit	•		MITCHELL, Rebecca	😂 🗘	Form 9A		Dairy products
View	Edit	•		O'MALLY-JONES, Paula	s 🔂 🗘	Form 8A	✓	Milk. Slight Allergy to Face creams
View	Edit	•		STEADMAN, Jane E	80	Form 5A		Hayfever - mild
View	Edit	•		WATSON, Thomas	80			Grass and Tree Pollen
•		*	R	ecords Per Page 100 🗸	Showing 1 - 12 of 12 Rec	ords Page 1 o	f 1	

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.

nter View Name And Description		
View Name: Description:		
pecify Filters		
New Filter : Academic house	Add	
elect Columns To Display		
Available Academic house	Selected	
Academic house code Academic year Address country Address telephone Address telephone Addult? Allergy Allergy Allergy Illergy Illow billing? Award 1 Award 1 Award 1 Award 2 Award 2 Award 2 Award 2 Award 3		x • y
hoose Column To Order By Order by Column: Academic house	V Ascending V	
hoose Column To Group By		
Group by Column:	v v	
Operator Value Having	record(s)	
isibility of View		

- 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.

Specify Filters			
New Filter : Academic	house	✓ Add	
Field	Operator	Value	
Academic house	Equals	~	X Add OR Condition

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.

New Filter : Academic	house	✓ Add	
Field	Operator	Value	
Allergy	Equals	✓ Yes	Add OR Condition
Date of birth	Less Than	✓ 31/08/2007 15	Add OR Condition
	Greater Than	♥ 01/09/2006	OR Add OR Condition
Academic house	Equals	✓ Jupiter	X Add OR Condition

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.

pecify Filters			
New Filter : Allergy info	ormation	✓ Add	
ield	Operator	Value	
Allergy	Equals	✓ Yes	Add OR Condition
Allergy information	Contains	♥ peanuts	Add OR Condition
	Contains	✓ milk	× X Add OR Condition

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.

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



9. Click Save.

Editing Search Views

HOW TO EDIT A SEARCH VIEW

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

Pupil Search						
View: Standard V Add Copy						
Refine Search						
Pupils			Add	Add Eve	nt	Create Pupil Cust
Actions		Code 🔺		Nam	e	
View Edit 👻		ADA001		ADAN	IS, La	uren S

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.



- 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.

View:	Standard	~	Add Copy

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

The relevant Copy	View screen	appears.
-------------------	-------------	----------

inter View Name	And Description		
View Name: Star Description:	ndard - Copy		
specify Filters			
New Filter : Acad	emic house	Add	
Field	Operator	Value	
In use?	Equals	✓ Yes	✓ X Add OR Condition
elect Columns To	Display		
	Available	Selected	
Academic house Academic house ci Academic year Address country Address telephone Admission number Adlergy information Allergy information Allergy information Allergy information Allergy information Allergy and the Award 1 Award 1 Award 2 Award 2 Award 2 Award 2 Award 3		Code Name Preferred name Form Leaving date	T A Z
hoose Column Te			
Order by Column:	Code	✓ Ascending ✓	
hoose Column To			
Group by Column: Operator Having Visibility of View Visible To: Globa	Value V	record(s)	

- 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.

Pupil Search				
View: Standard		~	Add Copy	
▶ Refine Search				
a .1				
Pupils		Add A	dd Event	Create Pupil Cust
Actions		Code 🔺	Name	
View Edit 👻		ADA001	ADAMS, La	auren S

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.

Confirm Delete		×
Are you sure you want to delete this search view?		
	Yes	No

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.



Но	me	Page	Search	
-	Filte	ers		
	ame: Searc			
но	me	Pages	Add	
Actions		5	Name 🔺	Visibility
E	dit	Delete	Admin	Global
E	dit	Delete	Attendance Only	Global
E	dit	Delete	Bursar	Global
E	dit	Delete	Careers	Global
E	dit	Delete	Default	Global
E	dit	Delete	DOS	Global
E	dit	Delete	Headmaster	Global
E	dit	Delete	Junior	Global
E	dit	Delete	Medical	Global

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 do to the first page or b 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

3. Click Edit next to the relevant home page.

The Home Page Designer screen appears.



ilable	Page Layout Save	Cancel
Absences - My house	Home Page Name: Teachers	
Absences - My form year	II Cale	ndar 🛛
Absences - My section		
Absences - All		<i>•</i>
Calendar	II Pupil Event - M	/ Forms Events
Markbooks	II Subject Set	II Markbooks
School Reports	📱 Absences - My current lesson 🌶 🗶	ii Markbooks 🌶
Subject Set	ii Absences - My form 🎤 🗶	II School Reports
Special Needs		Pupil Event - This Week's Detentions
My Searches		
Notifications for the next 7 days		
Attendance 🗸	II Favourite	Reports
>		

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.

Options	×
Height:	C Fixed 200
	Auto
Hide when empty:	
Colour:	
Function:	Current Pupil
View:	Standard 🗸
	OK Cancel

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.





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FAQs

This chapter discusses the following:

FAQs	
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M Ш I ()



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 <u>www.wcbs.co.uk</u> 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.

Pastoral Manage Dashboard	ement									
Management	Requir	Requires Action By Me								
Add Pastoral Record	Actions	Actions Pupil Name(s) Raised By		y S	atus	Heading	Action Required By			
Search Configuration	٩. /	DAVIS Laura, DAVIS Steven	STRINGER, Op Robert		ben	Davis Divorce	rce 04/07/2016			
Record Type	٩. /	CAVENDISH Mary, KERR Rebecca	STRINGER, Robert		ben	Allegation of Bullying	01/07/2016			
Category	٩./	ALLAN Tom, ALTON Benjamin, BELL Edward, BURTON James, DAVIES John	STRINGER, Robert O		ben	Fighting at Lunchtime	01/07/2016			
GIRFEC Reports	0, 1	ADAMS Sarah J	STRINGER	, o	ben	Allegations of Stealing	09/07/2016			
Child Protection Concern	H	I Page 1 of 1 I								
	Recent Pastoral Records									
	Actions	Pupil Name(s)		Status	6 Heading		Date			
	۹. /	DAVIS Laura, DAVIS Steven		Open	Davis Divorce		22/07/2016 11:10:00			
	0, 1	ADAMS Lauren S, ADAMS Sarah J, ALEXANDER-GUTHERIDGE Rachel		Open	CPC		12/07/2016 10:31:00			
	۹. /	DUNCAN Katherine		Open	Unus	sual Behaviour	12/07/2016 09:31:00			
	0, 1	ADAMS Sarah J		Open	Alleg	ations of Steal	ling 08/07/2016 09:20:00			
	Q /	ADAMS Lauren S, ADAMS Sarah J Op		Open	Play	ground chat	07/07/2016 15:35:00			

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 <u>www.wcbs.co.uk</u> 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.

^{3sys®} ACADEMIC	Getting Started Modules Setu	ıp FAQs
Search		٩
You are here: Getting Started > Where Do I Begin?		ØE
Note: If you cannot see the 3	AsvsACADEMIC Online	Heln meni

- 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.





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

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