WCBS

3sysACADEMIC

Pastoral Management

User Guide

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CHAPTER 1

Introduction

Welcome to the 3sysACADEMIC Pastoral Management User Guide.

The **Pastoral Management** module allows users to record and track a range of emotional and behavioural issues affecting pupils. As well as logging pastoral issues, you can add notes and actions to each instance, which then link to the relevant pupil(s) personal record and alerts for staff.

Scottish schools can also complete Getting It Right For Every Child (GIRFEC) information using the **Pastoral Management** module.

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CHAPTER 2

Pastoral Management

This chapter discusses the following:

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About GIRFEC 10
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- Adding Pastoral Record Notes 23

Maintaining Pastoral Records 30
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About Pastoral Management

The **Pastoral Management** module allows users to record and track a range of emotional and behavioural issues affecting pupils. As well as logging pastoral issues, you can add notes and actions to each instance, which then link to the relevant pupil(s) personal record and alerts for staff.

Using the **Pastoral Management** module, you can:

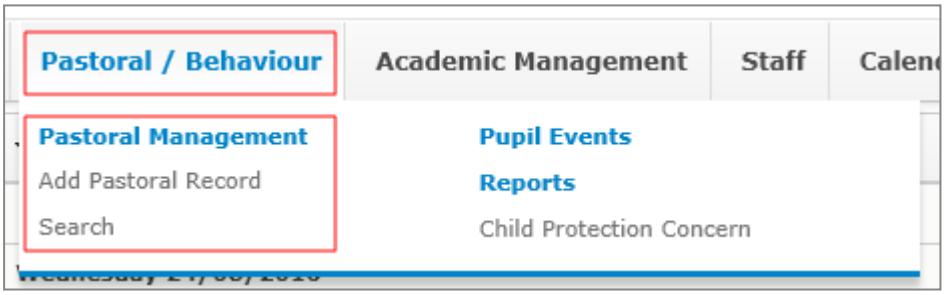
- Record pastoral management issues for individuals or groups of pupils.
- Add notes and actions to records.
- Search records.
- View, edit and delete pastoral records.
- Create and update pastoral record types and categories.
- Complete Getting It Right For Every Child (GIRFEC) forms. (Scottish Schools Only. For more information, see "About GIRFEC" on page 10).

What is Pastoral Management[1]?

HOW TO ACCESS AND MANAGE PASTORAL RECORDS

Do ONE of the following:

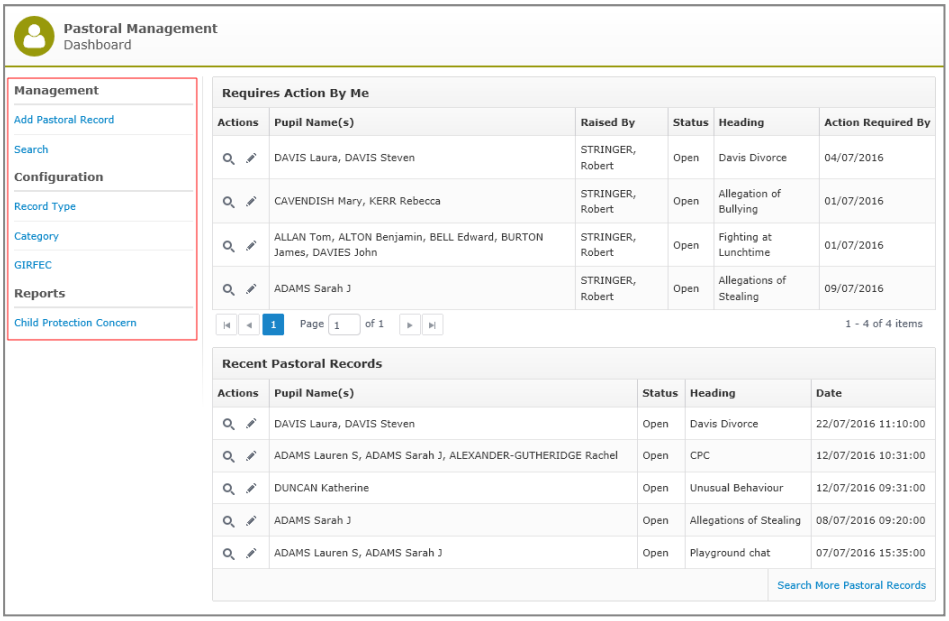
- Go to **Pastoral / Behaviour** and, from the **Pastoral Management** menu, click the relevant action.



- Go to **Pastoral / Behaviour > Pastoral Management** and, from the **Pastoral**

[1]Pastoral Management relates to supporting students with a range of personal, welfare or behavioural issues to ensure that they can continue their academic education.

Management dashboard, click on the appropriate action in the **Management** menu.

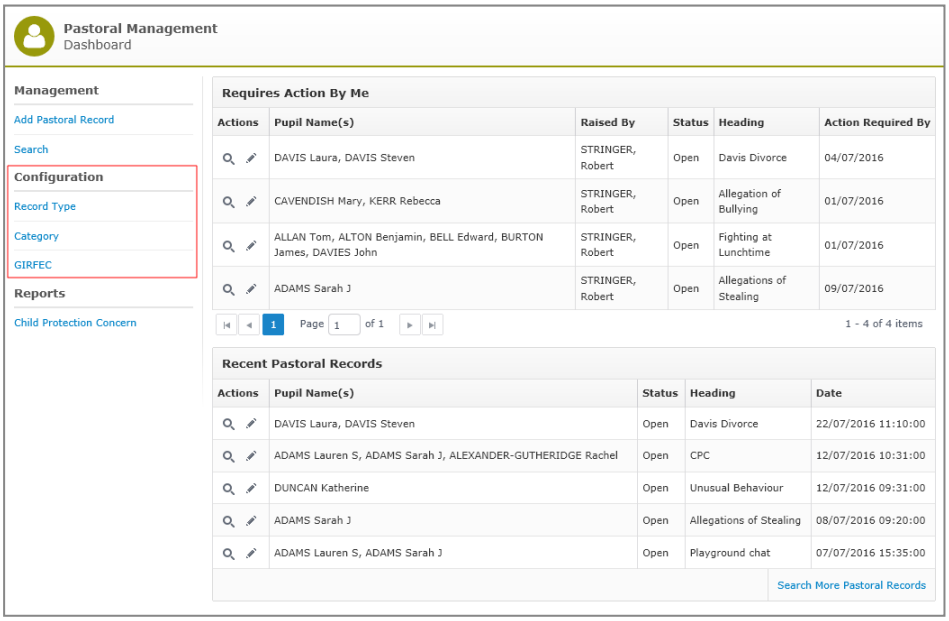


For more details, see:

» "Adding Pastoral Records" on page 12.
» "Maintaining Pastoral Records" on page 30.

HOW TO CONFIGURE PASTORAL RECORDS

» Go to **Pastoral / Behaviour > Pastoral Management** and click on the appropriate action in the **Pastoral Management** dashboard's **Configuration** menu.



For more details, see:

» "Configuring Pastoral Management" on page 58.
» "Configuring GIRFEC" on page 72.

About GIRFEC

GIRFEC is the national approach in Scotland to improving outcomes and supporting the well being of children and young people by offering the right help at the right time for the right people. 3sysACADEMIC helps Scottish schools fulfil their GIRFEC responsibilities by incorporating the required forms into the **Pastoral Management** module and ensuring records can be kept accurately while making a suitable document trail is available.

3sysACADEMIC allows users in Scottish schools to:

- Configure access to GIRFEC forms and information.
- Associate appropriate Pastoral Management categories with specific GIRFEC forms.
- Complete GIRFEC forms when adding new pastoral management records and notes.
- Complete GIRFEC forms after the initial record has been created, if required.
- Update forms at a later date based upon a copy of the latest version, meaning every change creates a new record and previously captured information remains intact.
- Download a report summarising child protection concerns.

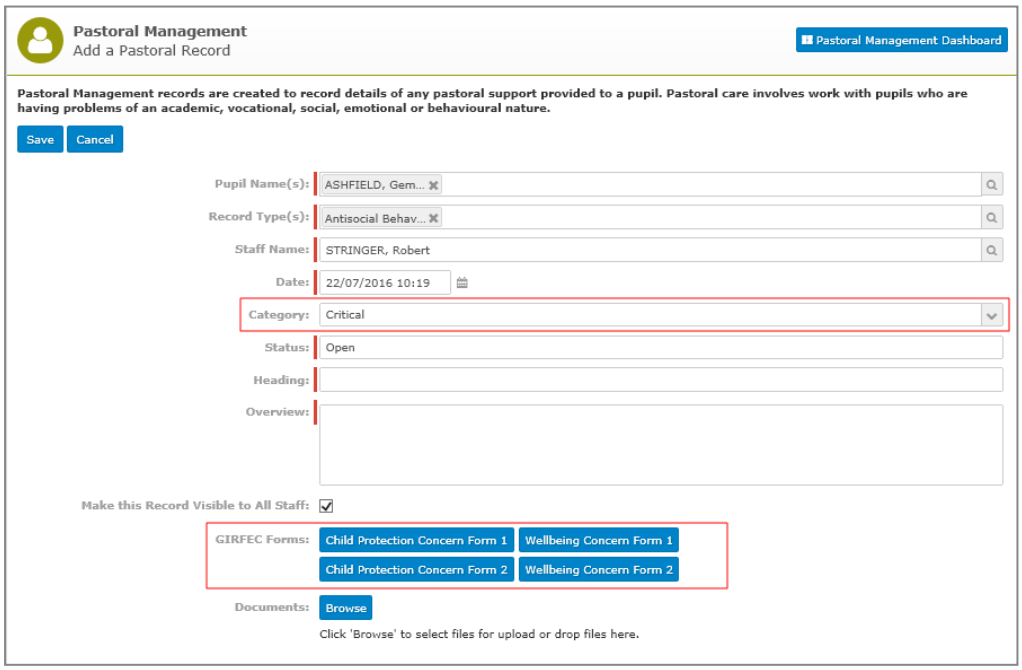
GIRFEC forms MUST be completed PER PUPIL rather than per record and in accordance with Scottish Council of Independent Schools (SCIS) guidance. Some fields are completed automatically based on data already added to the system.

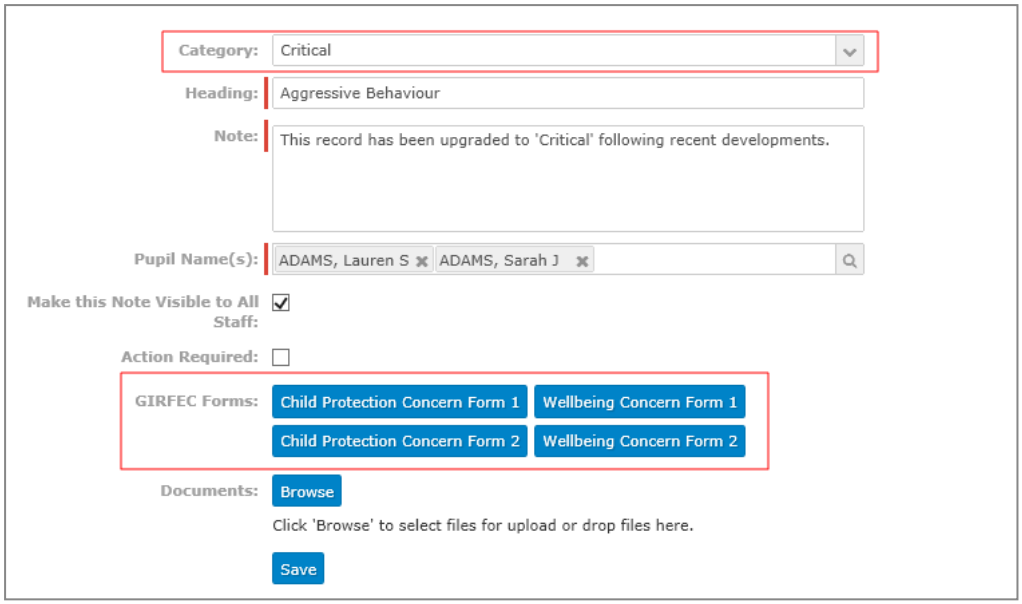
You complete the GIRFEC information as part of adding and maintaining pastoral records. However, GIRFEC functionality needs to be activated on the system and access to the **Pastoral Management** module and Child Protection Concern report allocated to relevant users by your System Administrator. For details, see "Configuring GIRFEC" on page 72.

GIRFEC options are associated with categories. When a category is created by your System Administrator, he/she can indicate which GIRFEC forms, if any, can be completed for this type of pastoral management record. For more information about creating categories, see "Configuring Pastoral Management" on page 58.

This means that GIRFEC options appear whenever a user selects a relevant category, e.g. when adding a record via the **Add a Pastoral Record** screen or adding a note via the **Edit a Pastoral Record** screen.

In the following examples, GIRFEC forms are associated with the 'Critical' category, so have appeared when 'Critical' is selected from the **Category** drop list.





For more information, see:

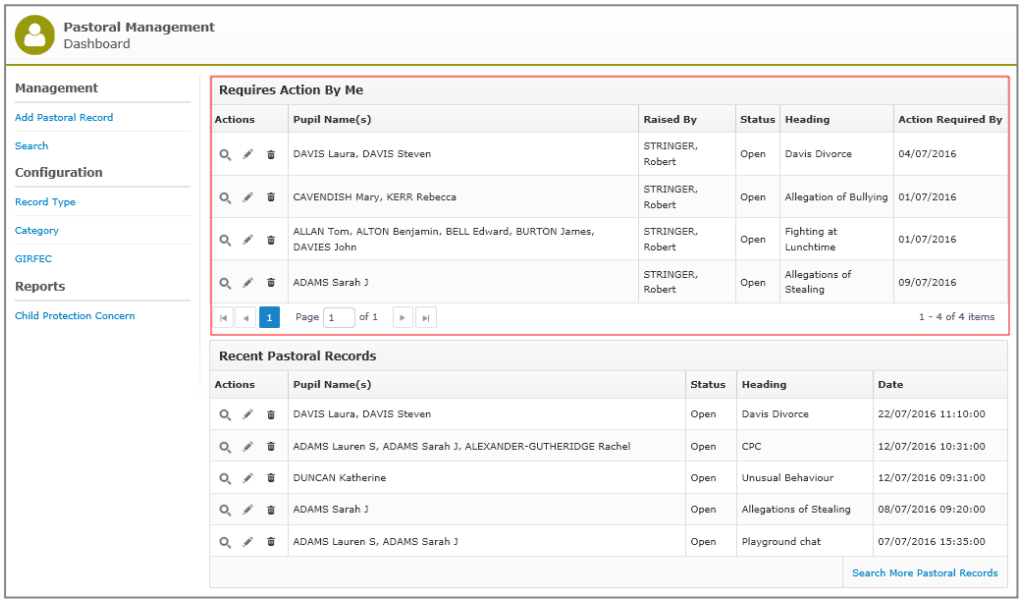
» "Adding Pastoral Records" on the next page.
» "Maintaining Pastoral Records" on page 30.

Adding Pastoral Records

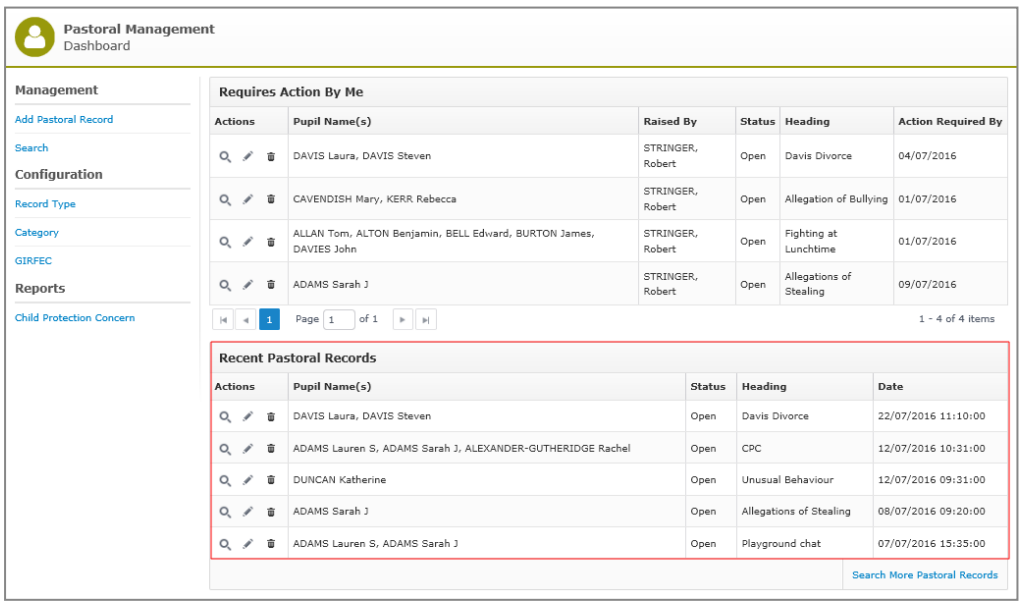
You can add pastoral records relating to individual or groups of pupils about the same incident or concern using 3sysACADEMIC's **Pastoral Management** module.

After an initial Pastoral Management record has been logged, subsequent developments, decisions and actions can be added to it as **Notes**. This can be done as soon as the initial record is created or at a later time or date, as required.

Pastoral care often requires a range of staff to undertake roles to help and support pupils and the **Pastoral Management** module helps you manage specific tasks through **Actions**. Added as part of a note, actions include a summary of the task that must be completed and are assigned to staff with a specific deadline. A list of actions for each user to complete appears on their **Pastoral Management** dashboard, providing a convenient, single place where staff can see what they need to do.



A list of recently added pastoral records that a user can access, whether they have a specific action to complete or not, also appears on their dashboard.



For more information, see:

- "Adding Pastoral Records" below.
- "Adding Pastoral Record Notes" on page 23.
- "Maintaining Pastoral Records" on page 30.

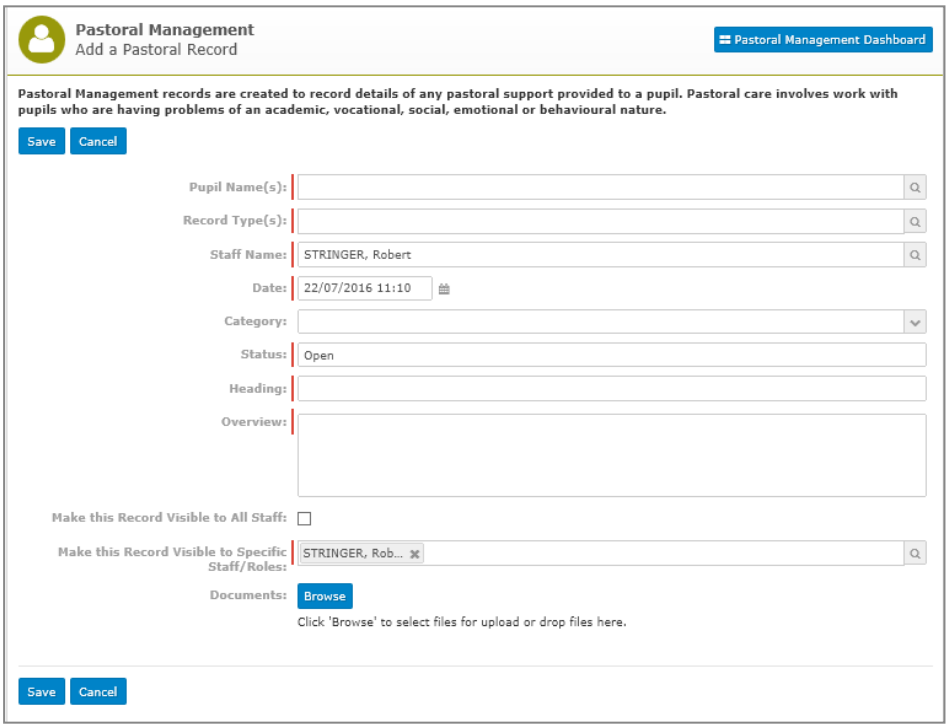
These procedures incorporate the completion of GIRFEC information. (Applicable for Scottish schools only.) For details, see "About GIRFEC" on page 10.

Adding Pastoral Records

HOW TO ADD A PASTORAL RECORD

1. Do ONE of the following:
   - Go to **Pastoral / Behaviour > Pastoral Management > Add Pastoral Record**.
   - Go to **Pastoral / Behaviour > Pastoral Management** and click on **Add Pastoral Record** in the **Management** menu.

   The **Add a Pastoral Record** screen appears.



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

Note: When created, each pastoral record's status is automatically set to 'Open'.

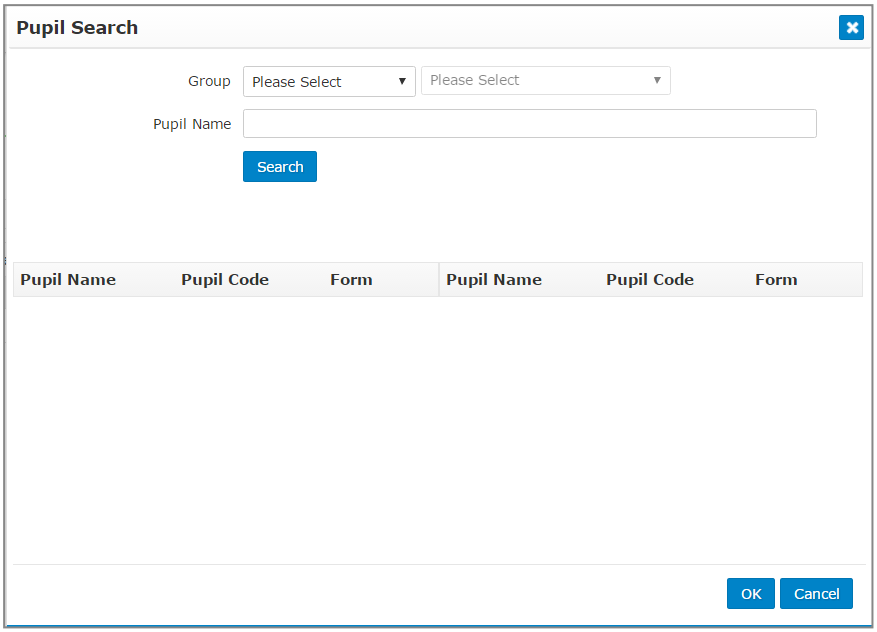
2. Complete the **Pupil Name(s)** field with details of the relevant pupil(s).

   More details...

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

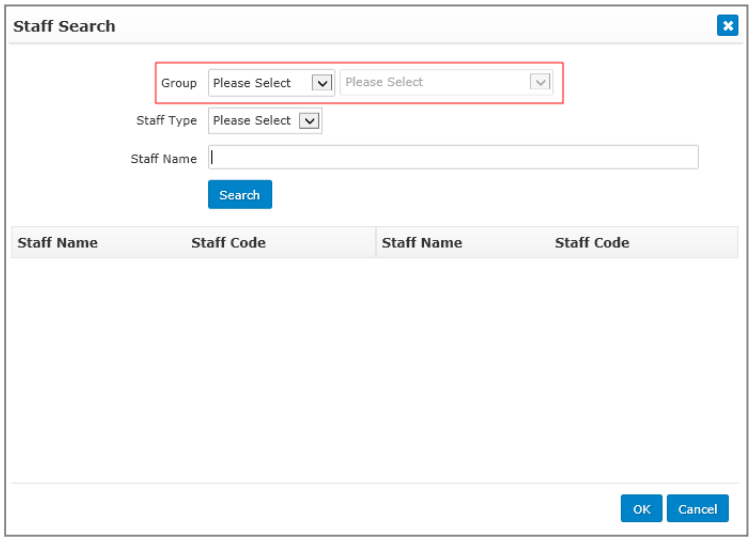
require.

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

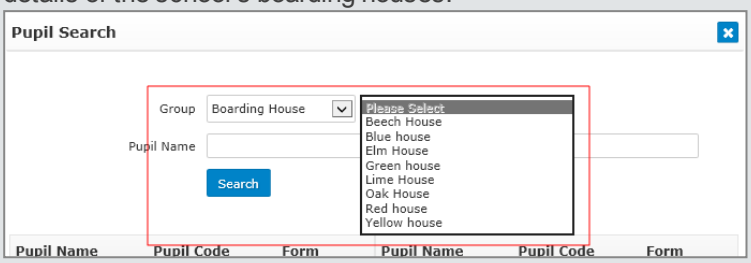


a. Do one OR both of the following:

» Use the two **Group** drop lists to refine your search. Your selection in the first drop list alters the options available in the second drop list.

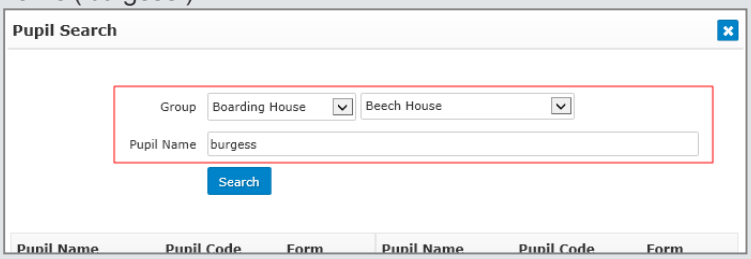


Example: In the example below, the user has selected 'Boarding House' using the first drop list, so the second drop list provides details of the school's boarding houses.



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

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

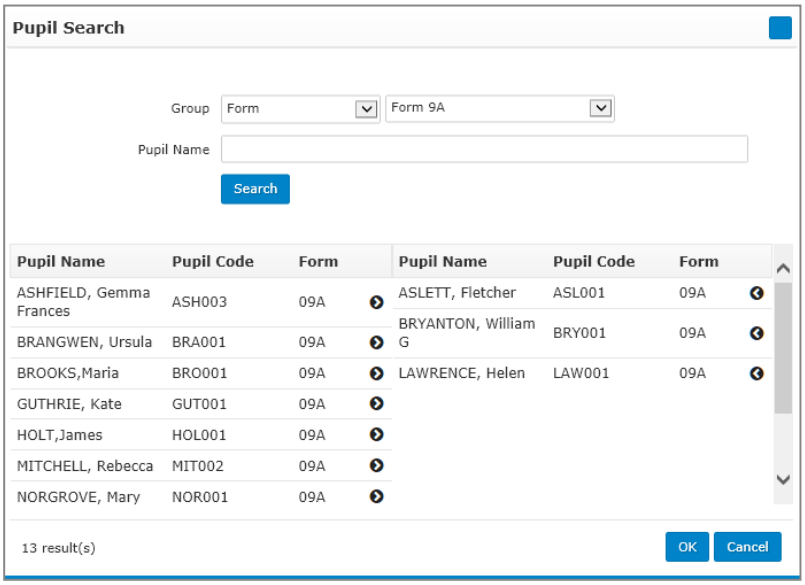


b. Click **Search**.

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

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

Pupils move to the right-hand column once selected.



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

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

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

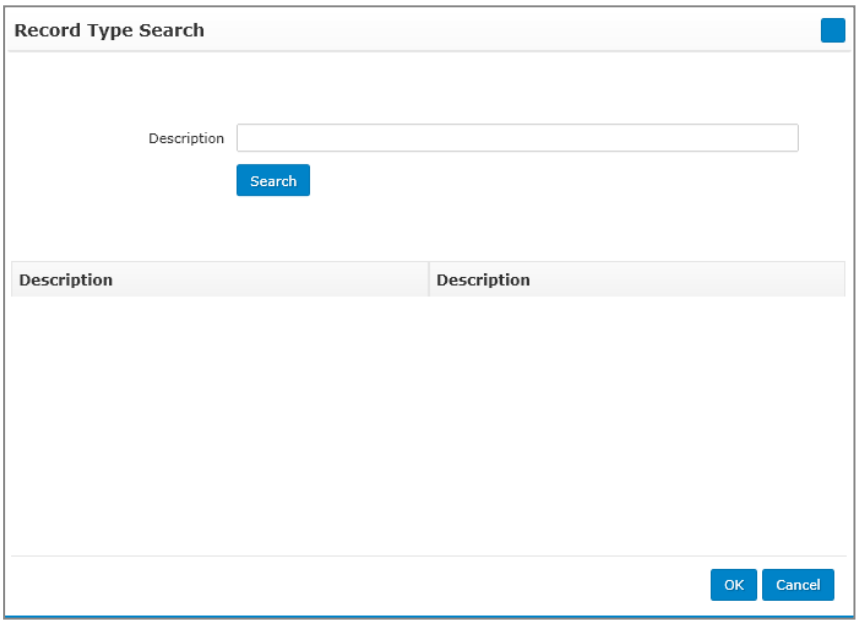
3. Add one or more options to the **Record Type(s)** field.

More details...

To select one or more record type, do ONE of the following:

» Click in the **Record Type(s)** field and type the first letters of the record type you require. Select it from the options that appear in the drop list. This is known as auto complete.

» Click and the **Record Type Search** dialog appears.

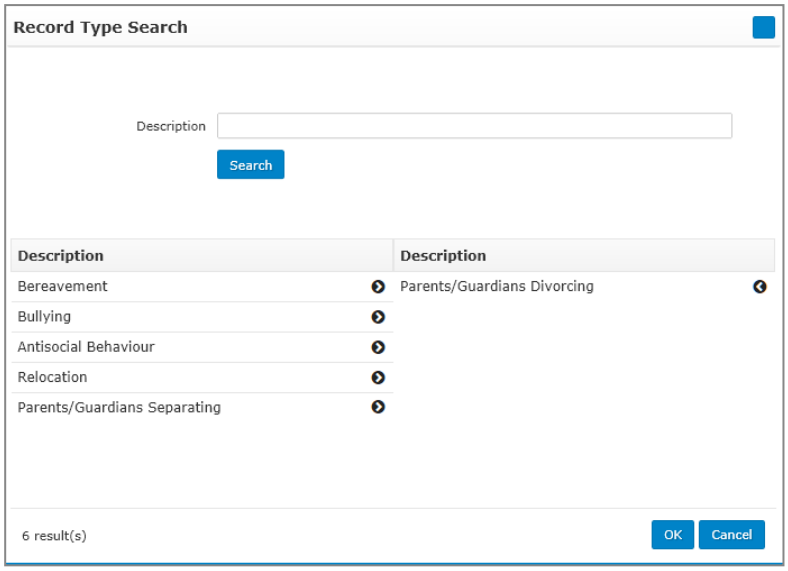


a. Type all or part of the relevant record type you want into the **Description** field OR leave it blank to return a complete list of available options.

b. Click **Search**.

c. Click on the record type(s) you want in the list that appears in the bottom left-hand column.

   Selections move to the bottom right-hand column.



d. Click **OK**.

You are returned to the previous screen with the record type details added to the relevant field.

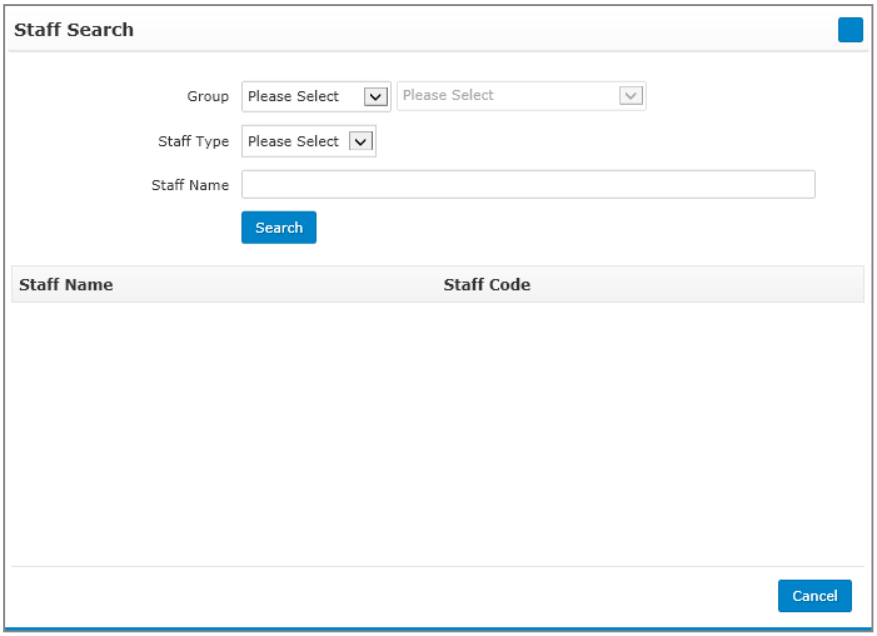
4. Change the reporting member of staff, if required. (The logged in user appears automatically.)

More details...

Do ONE of the following:

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

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



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

   You can filter by:

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

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

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

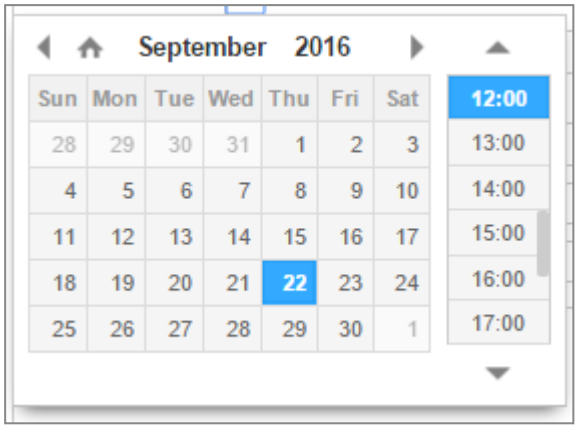
5. Amend the date and time, if required. (Today's date appears automatically.)

   More details...

   Do ONE of the following:

   - Type the required date and time in the field using the format DD/MM/YYYY and HH:MM.
   - Click to display the **Calendar and Time** popup and select your preferred date and time. (To go to other months use the arrows in the top left and right-hand corners of the calendar. To see other times, use the arrows at the top and bottom on the right-

hand side.)



6. (Optional) Select an option from the **Category** drop list or use auto complete.

   More details...

   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.

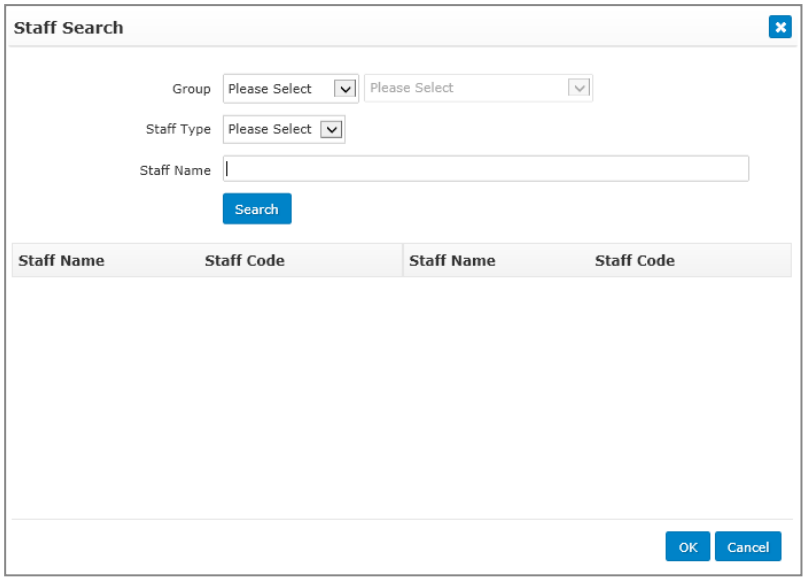
   Note: (Scottish Schools Only) If you select a category with GIRFEC requirements, links to the relevant forms appear.

7. Type relevant information into the **Heading** and **Overview** fields.
8. Do ONE of the following:
   - Tick the check box to make the record visible to all staff.
   - Add specific staff who can see the record to the **Make this Record Visible to Specific Staff/Roles** field.

     More details...

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

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

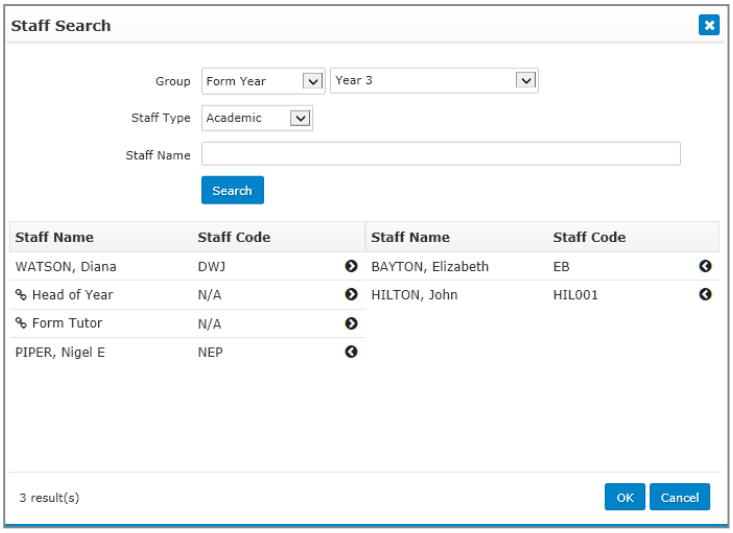


a. In the top part of the dialog, enter your search criteria and click **Search**. You can filter by:
   - ***Group*** – From the first **Group** drop list, select the group type you want, e.g. boarding house, form or subject set, and from the second **Group** drop list, select the person's specific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

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

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

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



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

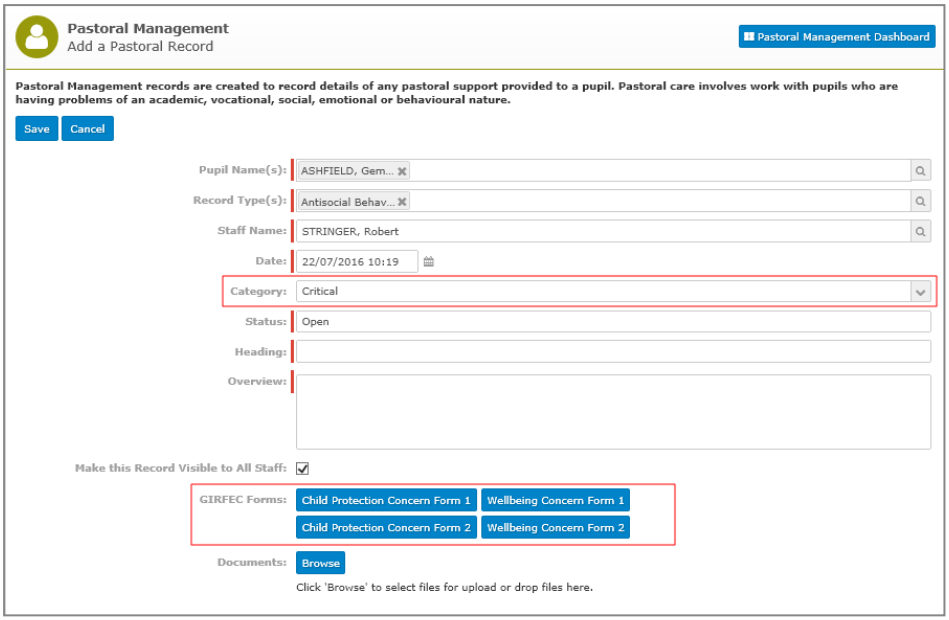
c. (Optional) Repeat steps a to b to search for and add other staff members to the list of selected individuals on the right-hand side of the screen.

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

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

9. (Scottish Schools Only) If applicable, click on the relevant GIRFEC form and complete it according to Scottish Council of Independent Schools (SCIS) guidance. Some fields are completed automatically. When done, click **Save**.

Note: You MUST complete all compulsory fields before accessing the GIRFEC forms. GIRFEC options only appear if they are linked to the category selected.



10. (Optional) Attach related documents or evidence, such as statements and photographs.

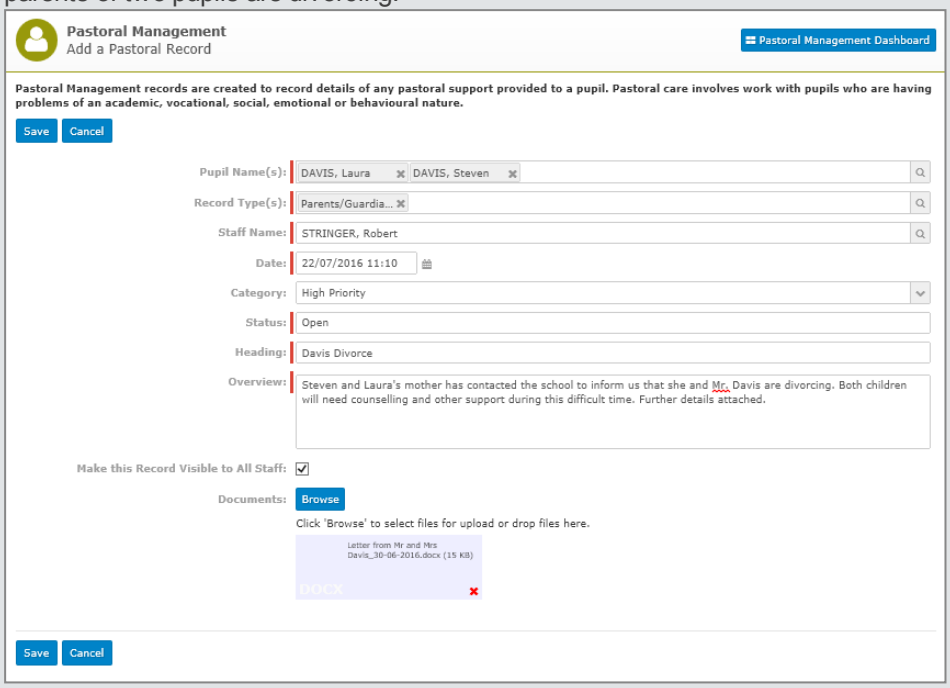
More details...

Do ONE of the following:

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

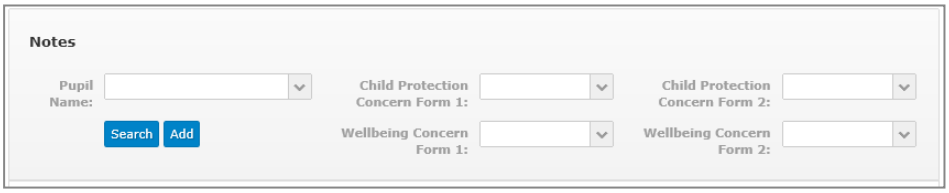
Note: You can attach ANY file type to the record, including MP3s and film clips.

Example: This screenshot provides an example of a pastoral record where the parents of two pupils are divorcing.



11. Click **Save**.

    The relevant **Edit a Pastoral Record** screen appears, showing the newly created record with a **Notes** section now available at the bottom of the screen.



12. (Optional) Add notes to the record. For more information, see "Adding Pastoral Record Notes" below.

Adding Pastoral Record Notes

HOW TO ADD A PASTORAL RECORD NOTE

1. Find the pastoral record which requires a note.

   More details...

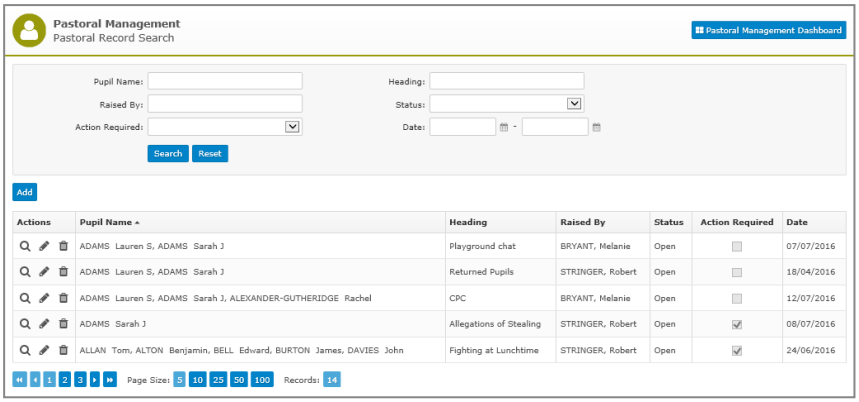
   a. Do ONE of the following:

      » Go to **Pastoral / Behaviour > Pastoral Management > Search**.

      » Go to **Pastoral / Behaviour > Pastoral Management** and click **Search** in the **Management** menu.

      » Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

   The **Pastoral Record Search** screen appears.



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

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

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.

Note: To begin a completely new search, click **Reset**. To search on more than one criterion, complete multiple fields before clicking **Search** OR do successive searches WITHOUT clicking **Reset**. This means you gradually narrow down the list of results.

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

- Click ◀ or ▶ or on the numbers underneath the grid on the left-hand side to move between pages.
- Click ⏮ to go to the first page or ⏭ to go to the last page.
- Use the **Page Size** options to see more records on each page.

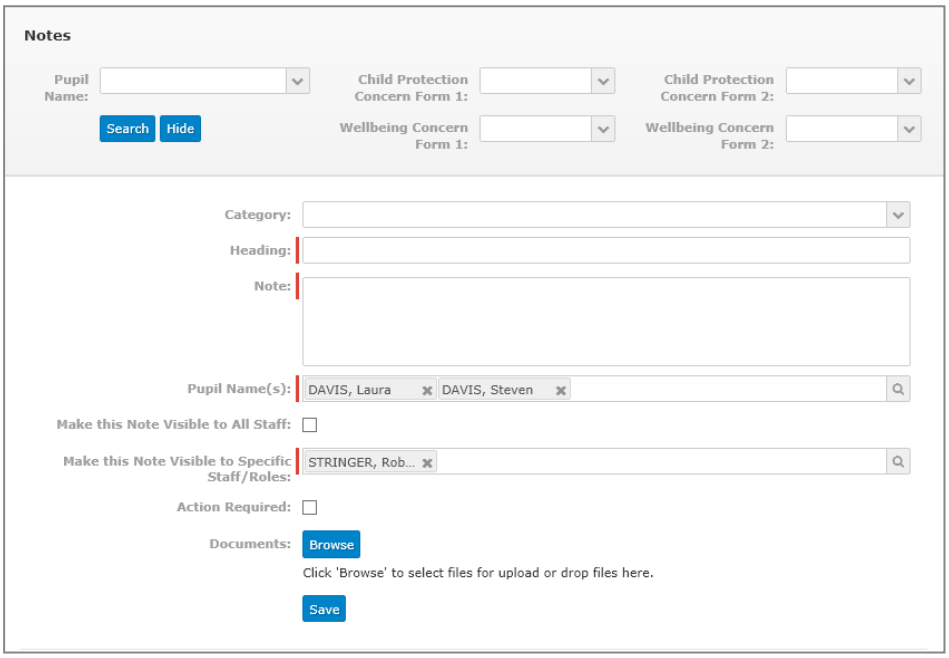
2. Click ✎ next to the relevant record.

   The related **Edit a Pastoral Record** screen appears.

   Note: The **Edit a Pastoral Record** screen also appears when a record is first created, meaning you can also add notes immediately, if required.

3. (Optional) In the **Notes** section under the main record, use the **Pupil Name** drop list to select the pupil your note relates to.
4. Click **Add** in the **Notes** section.

   Further fields appear.



   Note: To hide this section, click **Hide**.

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

5. Select an option using the **Category** drop list.

   Note: (Scottish Schools Only) If you select a category with GIRFEC requirements, links to the relevant forms appear.

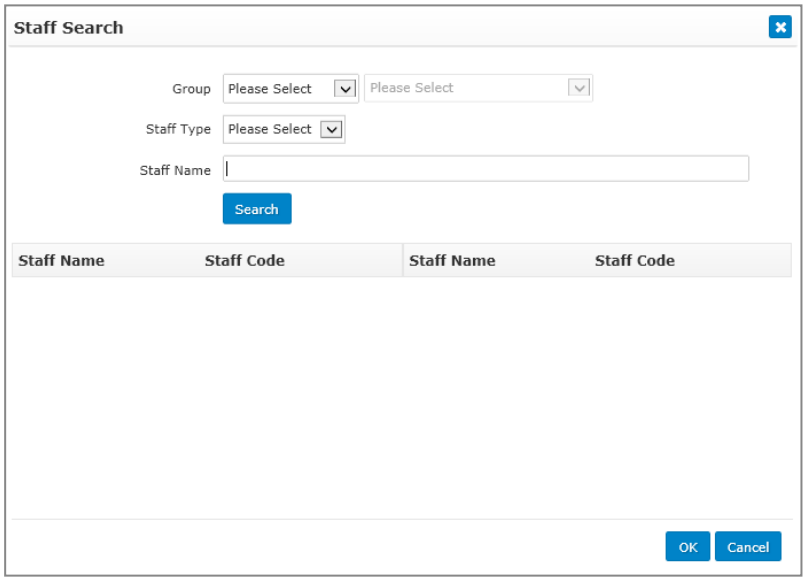
6. Type a heading for the note in the **Heading** field and more information in the **Note** field.
7. (Optional) Remove unrelated pupils from the **Pupil Name(s)** field, if required, e.g. if several pupils were involved in an incident, but the note only applies to some of them.

8. Do ONE of the following:
   - Tick the check box to make the note visible to all staff.
   - Select specific staff who can see the record.

More details...

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

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

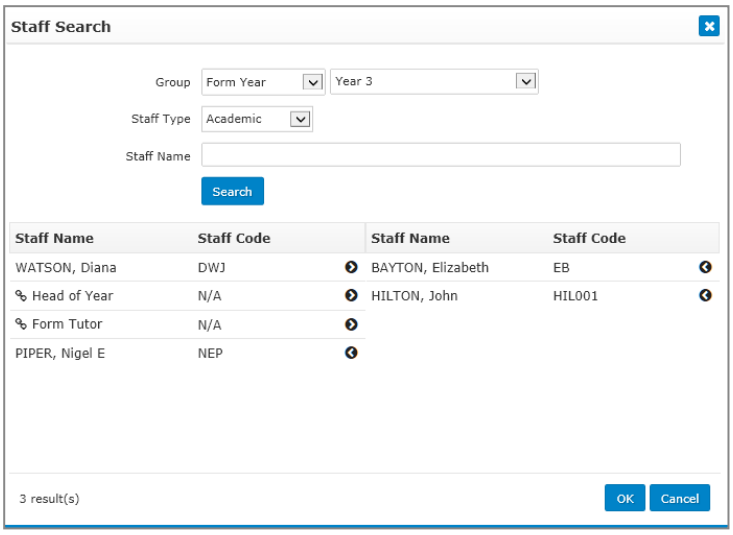


a. In the top part of the dialog, enter your search criteria and click **Search**. You can filter by:
   - ***Group*** – From the first **Group** drop list, select the group type you want, e.g. boarding house, form or subject set, and from the second **Group** drop list, select the person's specific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

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

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

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



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

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

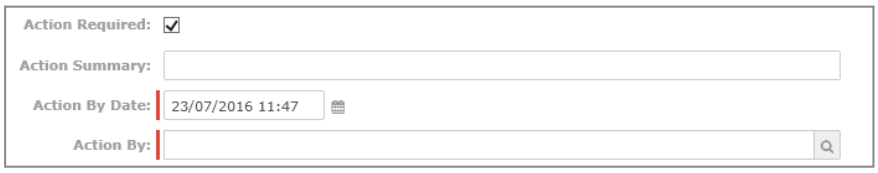
d. When done, click **OK**.

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

9. (Optional) If further or follow up action is required, such as contacting parents/guardians, interviewing pupils or liaising with the authorities, do the following:

a. Tick the **Action Required** check box.

Additional fields appear.



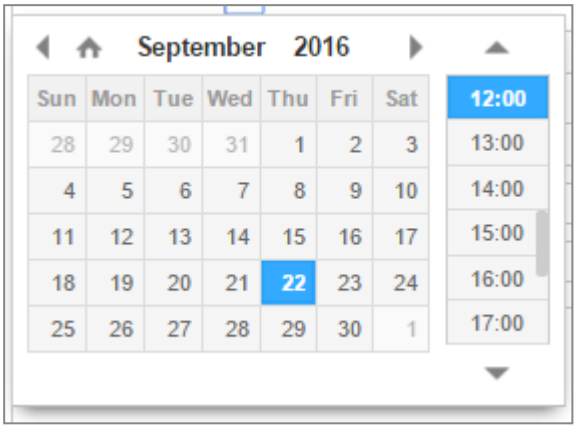
b. Complete the **Action By Date** field.

More details...

Do ONE of the following:

» Type the required date and time in the field using the format DD/MM/YYYY and HH:MM.

» Click to display the **Calendar and Time** popup and select your preferred date and time. (To go to other months use the arrows in the top left and right-hand corners of the calendar. To see other times, use the arrows at the top and bottom on the right-hand side.)



Note: If an action is overdue, appears next to the note's heading in the pastoral record.

c. Add each member of staff who should complete the action in the **Action By** field.

Note: Staff assigned actions MUST have been given access to 3sysACADEMIC by your System Administrator.

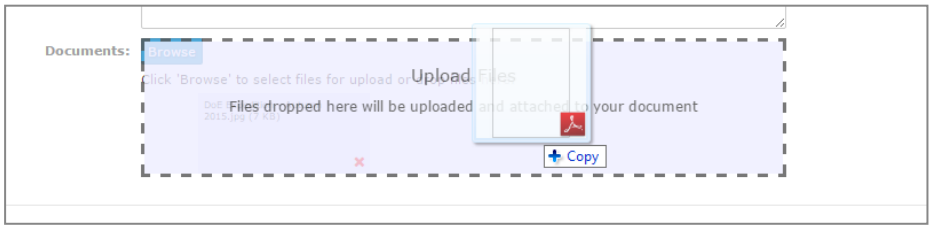
10. (Scottish Schools Only) If applicable, click on the relevant GIRFEC form and complete it according to Scottish Council of Independent Schools (SCIS) guidance. Some fields are completed automatically. When done, click **Save**.
11. (Optional) Attach related documents, such as reports, statements or correspondence.

More details...

Do ONE of the following:

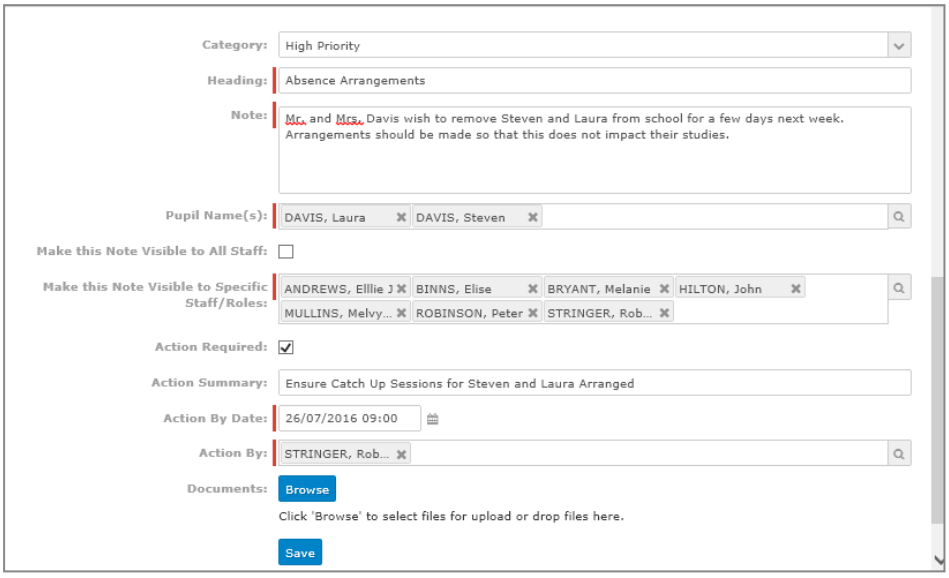
» Click **Browse** and find the file(s) you would like to add. Double-click on each file to add them one at a time OR hold the CTRL button down on your keyboard and click on each file once to select it, then click **Open** to add one or more simultaneously.

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



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

12. Click **Save**.



Maintaining Pastoral Records

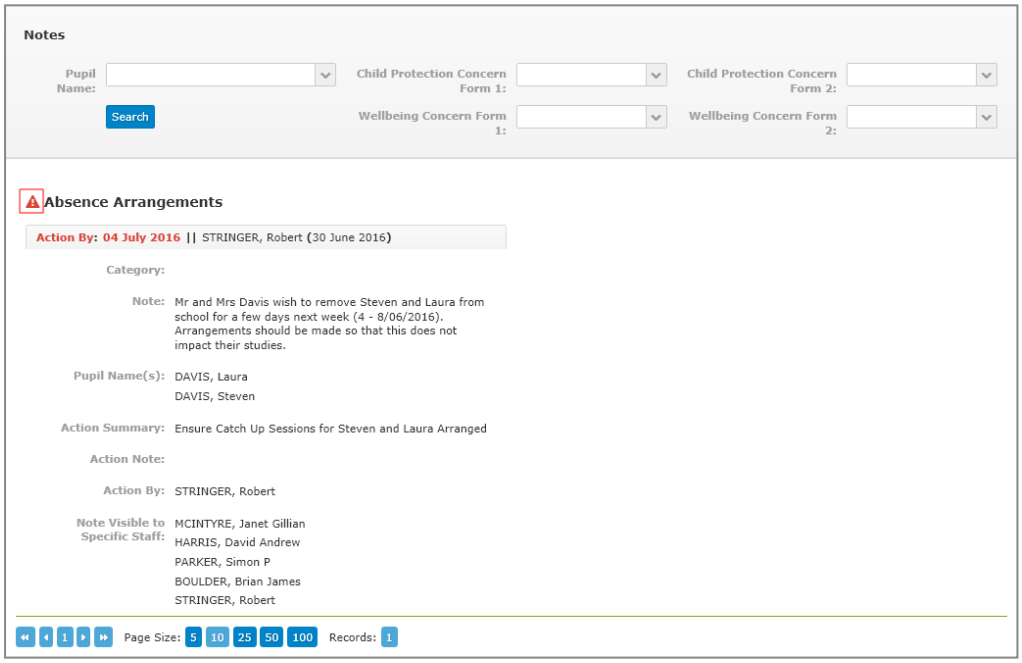
The **Pastoral Management** module can be used to view, delete and make amendments and additions to pastoral records.

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

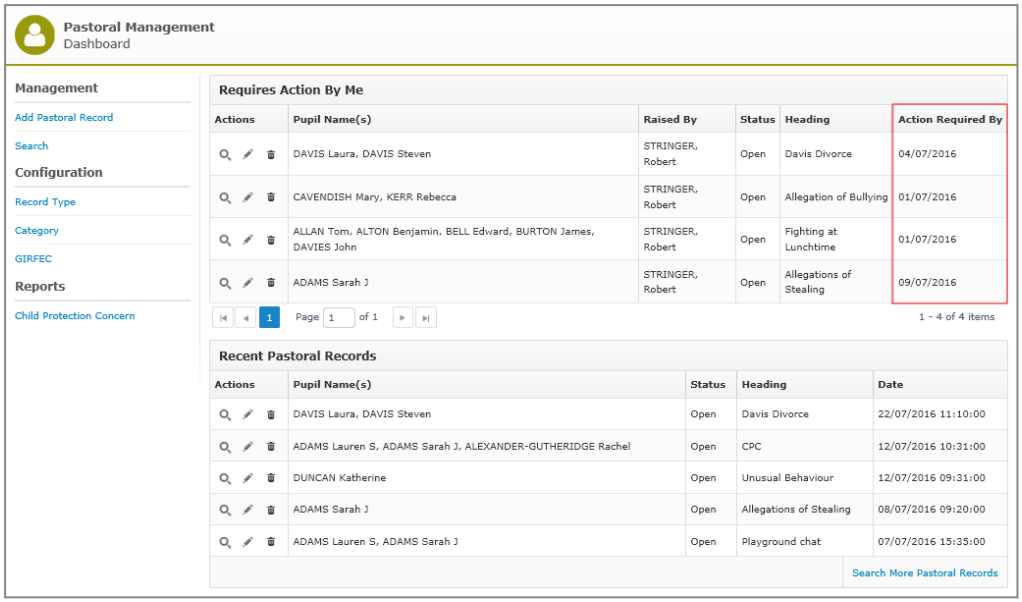
Staff access to pastoral records can be limited to protect pupil confidentiality. Records are normally available to the person who created them and the staff linked to the record's category. For more information about categories, see "Configuring Pastoral Management" on page 58.

As well as being able to update records, users with appropriate access can augment them by adding **Notes** with further information or more recent developments. In addition, **Actions** can be added and assigned to staff as part of a note. See "Adding Pastoral Record Notes" on page 23 for details.

Actions have an alert system which means any that have not been completed by the specified deadline include ⚠.



The action deadline appears on the **Pastoral Management** dashboard of the relevant staff, providing a convenient, single place where staff can see what they need to do and when they need to have completed the action.



Once an action, e.g. interviewing a pupil, has been completed, it must be marked as such in the software and any relevant information added. A ☑ alert appears on a completed task.

For more information about how to complete Pastoral Management tasks, see:

- "Viewing Pastoral Records" on the next page.
- "Viewing GIRFEC Forms (Scottish Schools Only)" on page 35.
- "Printing GIRFEC Forms (Scottish Schools Only)" on page 38.
- "Editing Pastoral Records" on page 41 (including how to add GIRFEC forms).
- "Editing Pastoral Record Notes" on page 44 (including how to edit GIRFEC forms).
- "Marking Pastoral Record Actions 'Complete'" on page 47.
- "Accessing the Child Protection Concern Report" on page 50.
- "Deleting Pastoral Records" on page 53.

Note: If actions are incomplete, the related note's status CANNOT be changed to 'Closed'.

Viewing Pastoral Records

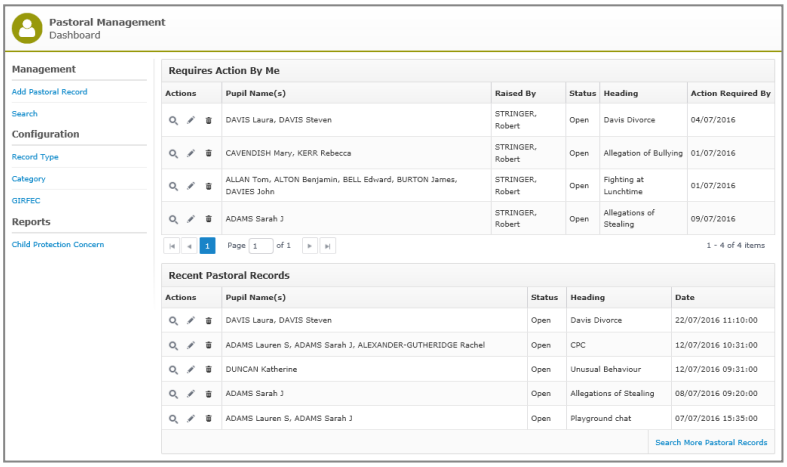
HOW TO VIEW A PASTORAL RECORD

1. Find the pastoral record that you would like to view via ONE of the following:
   - The **Pastoral Management** dashboard.

More details...

a. Do ONE of the following:
   - Go to **Pastoral / Behaviour > Pastoral Management**.
   - Click **Pastoral Management Dashboard** on any Pastoral Management screen.

Your **Pastoral Management** dashboard appears, listing actions you are due to complete and recently added records that you can access.



> **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. (Optional) Use the icons beneath a grid to navigate between pages of records.
   - Click ◄ or ► 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.
   - Click in the **Page** field and type the number of the page you want.

» The **Pastoral Record Search** screen.

More details...

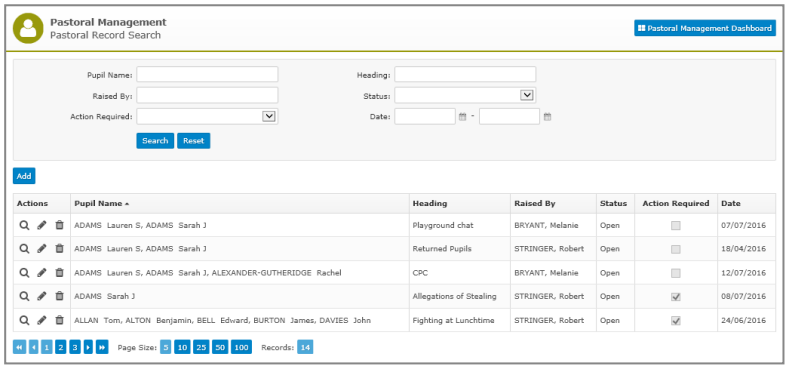
a. Do ONE of the following:

» Go to **Pastoral / Behaviour > Pastoral Management > Search**.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search** in the **Management** menu.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.



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

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

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.

> **Note:** To begin a completely new search, click **Reset**. To search on more than one criterion, complete multiple fields before clicking **Search** OR do successive searches WITHOUT clicking **Reset**. This means you gradually narrow down the list of results.

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

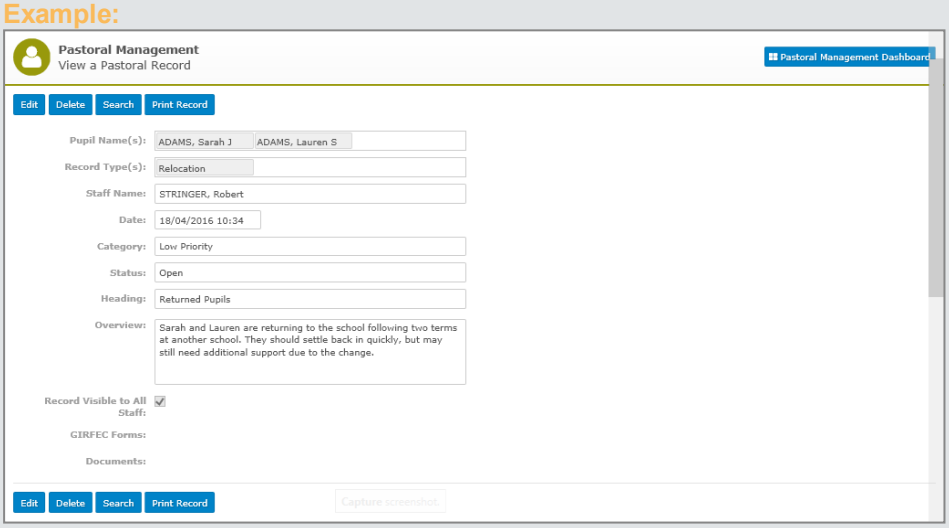
- Click or or on the numbers underneath the grid on the left-hand side to move between pages.
- Click to go to the first page or to go to the last page.
- Use the **Page Size** options to see more records on each page.

Page Size: 5 10 25 50 100

2. Click next to the record you would like to see in more detail.

   The relevant **View a Pastoral Record** screen appears.

Example:



3. (Optional) Do ONE of the following:
   - Click **Edit** to amend the record. For more details, see "Editing Pastoral Records" on page 41.
   - Click **Search** to leave the **View a Pastoral Record** screen and go to the **Pastoral Record Search** screen.
   - Click **Print Record** to open a **Print** dialog. Select a printer and click **Print** to print the record.

Viewing GIRFEC Forms (Scottish Schools Only)

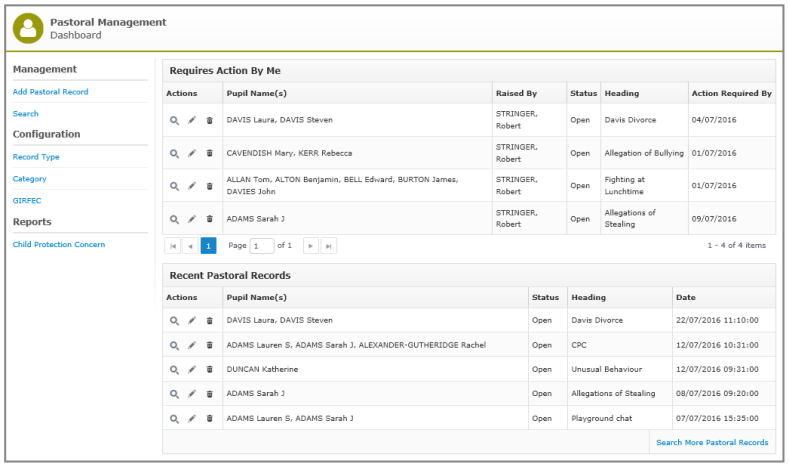
HOW TO VIEW A GIRFEC FORM (SCOTTISH SCHOOLS ONLY)

1. Find the pastoral record to which the GIRFEC form is attached via ONE of the following:
   - The **Pastoral Management** dashboard.

More details...

a. Do ONE of the following:
   - Go to **Pastoral / Behaviour > Pastoral Management**.
   - Click **Pastoral Management Dashboard** on any Pastoral Management screen.

Your **Pastoral Management** dashboard appears, listing actions you are due to complete and recently added records that you can access.



> **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. (Optional) Use the icons beneath a grid to navigate between pages of records.
   - Click ◄ or ► 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.
   - Click in the **Page** field and type the number of the page you want.

» The **Pastoral Record Search** screen.

More details...

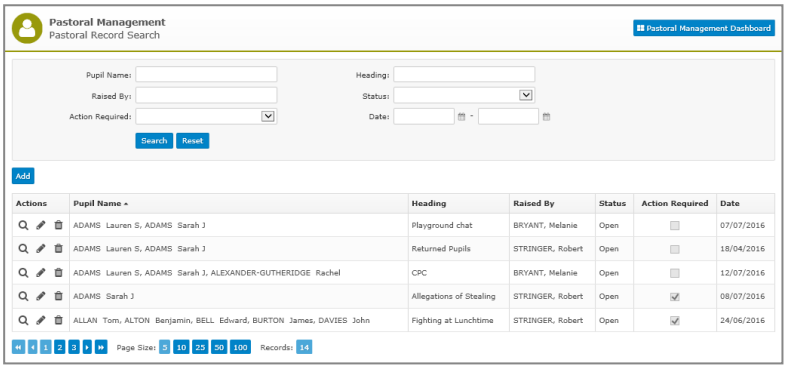
a. Do ONE of the following:

» Go to **Pastoral / Behaviour > Pastoral Management > Search**.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search** in the **Management** menu.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.



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

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

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.

> **Note:** To begin a completely new search, click **Reset**. To search on more than one criterion, complete multiple fields before clicking **Search** OR do successive searches WITHOUT clicking **Reset**. This means you gradually narrow down the list of results.

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

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

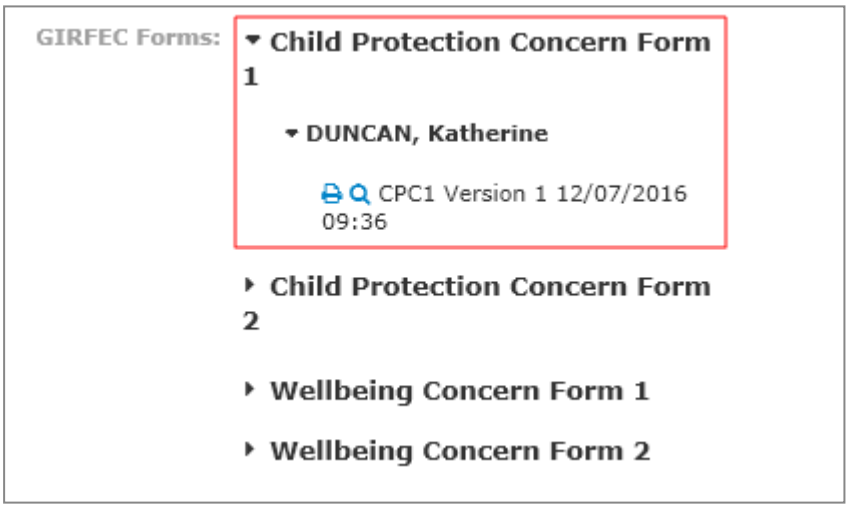
Page Size: 5 10 25 50 100

2. Click next to the relevant record.

   The required **View a Pastoral Record** screen appears.
3. Click on the name of the GIRFEC form you would like to view.

   The text expands to show a list of pupils that forms have been completed for.
4. Click on the name of the relevant pupil.

   The text expands to show a list of forms completed about this pupil.



5. Click next to the relevant form.

   The selected form appears.
6. When you have finished viewing the record, do ONE of the following:
   - Click **Cancel** to go to the record's **Edit a Pastoral Management** screen.
   - Click **Pastoral Management Dashboard** to go to the module's dashboard.

Printing GIRFEC Forms (Scottish Schools Only)

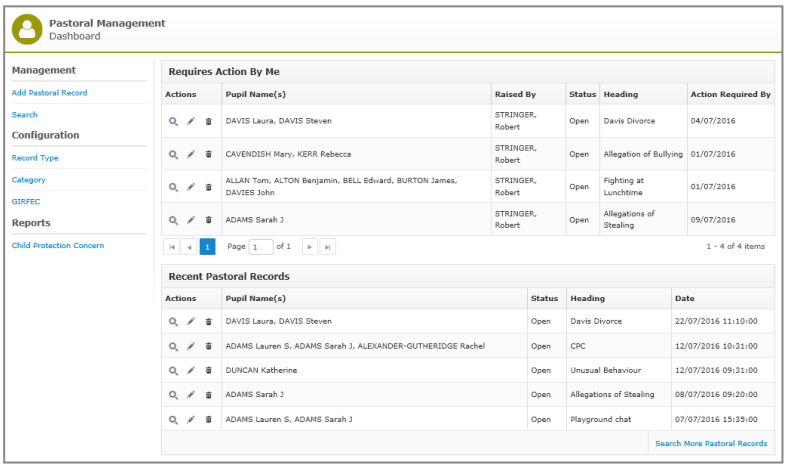
HOW TO PRINT A GIRFEC FORM (SCOTTISH SCHOOLS ONLY)

1. Find the pastoral record associated with the GIRFEC form you want to print via ONE of the following:
   - The **Pastoral Management** dashboard.

     More details...

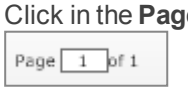
     a. Do ONE of the following:
     - Go to **Pastoral / Behaviour > Pastoral Management**.
     - Click **Pastoral Management Dashboard** on any Pastoral Management screen.

Your **Pastoral Management** dashboard appears, listing actions you are due to complete and recently added records that you can access.



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. (Optional) Use the icons beneath a grid to navigate between pages of records.
- Click ◄ or ► 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.
- Click in the **Page** field and type the number of the page you want.



» The **Pastoral Record Search** screen.

More details...

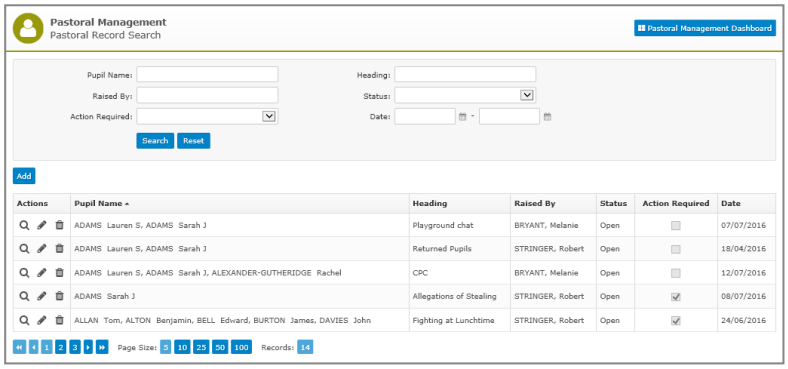
a. Do ONE of the following:

» Go to **Pastoral / Behaviour > Pastoral Management > Search**.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search** in the **Management** menu.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.



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

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

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.

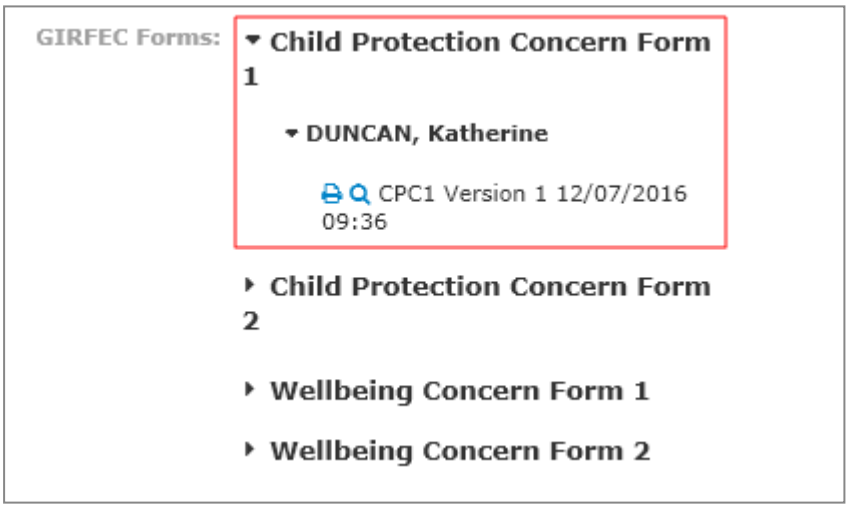
> **Note:** To begin a completely new search, click **Reset**. To search on more than one criterion, complete multiple fields before clicking **Search** OR do successive searches WITHOUT clicking **Reset**. This means you gradually narrow down the list of results.

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

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

Page Size: 5 10 25 50 100

2. Click next to the relevant record.
   The required **View a Pastoral Record** screen appears.
3. Click on the name of the GIRFEC form you would like to view.
   The text expands to show a list of pupils that forms have been completed for.
4. Click on the name of the relevant pupil.
   The text expands to show a list of forms completed about this pupil.



5. Click next to the relevant form.
   A print friendly version of the form appears and the **Print** dialog opens.
6. Select the relevant printer and click **Print**.

Editing Pastoral Records

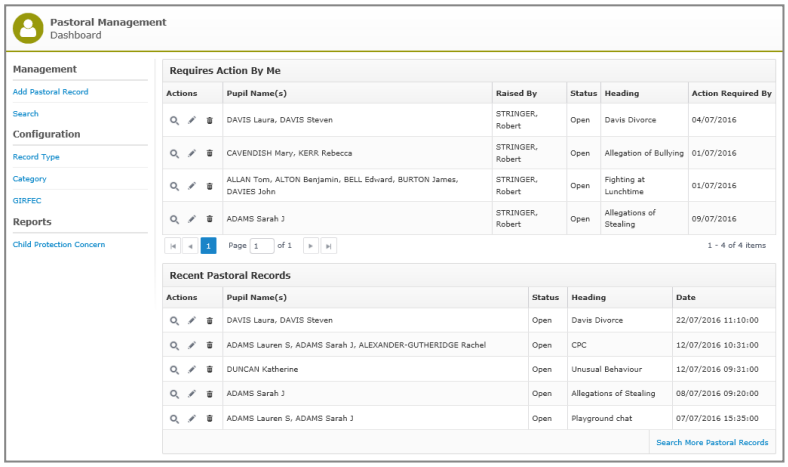
HOW TO EDIT A PASTORAL RECORD

1. Find the pastoral record that you would like to edit via ONE of the following:
   - The **Pastoral Management** dashboard.

More details...

a. Do ONE of the following:
   - Go to **Pastoral / Behaviour > Pastoral Management**.
   - Click **Pastoral Management Dashboard** on any Pastoral Management screen.

Your **Pastoral Management** dashboard appears, listing actions you are due to complete and recently added records that you can access.



> **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. (Optional) Use the icons beneath a grid to navigate between pages of records.
   - Click ◄ or ► 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.
   - Click in the **Page** field and type the number of the page you want.

» The **Pastoral Record Search** screen.

More details...

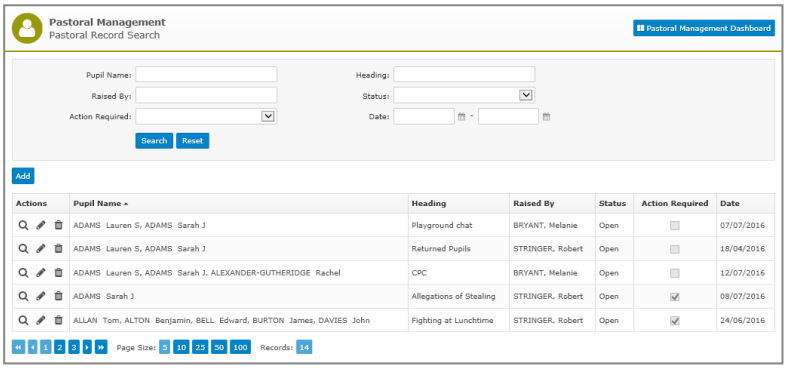
a. Do ONE of the following:

» Go to **Pastoral / Behaviour > Pastoral Management > Search**.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search** in the **Management** menu.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.



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

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

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.

> **Note:** To begin a completely new search, click **Reset**. To search on more than one criterion, complete multiple fields before clicking **Search** OR do successive searches WITHOUT clicking **Reset**. This means you gradually narrow down the list of results.

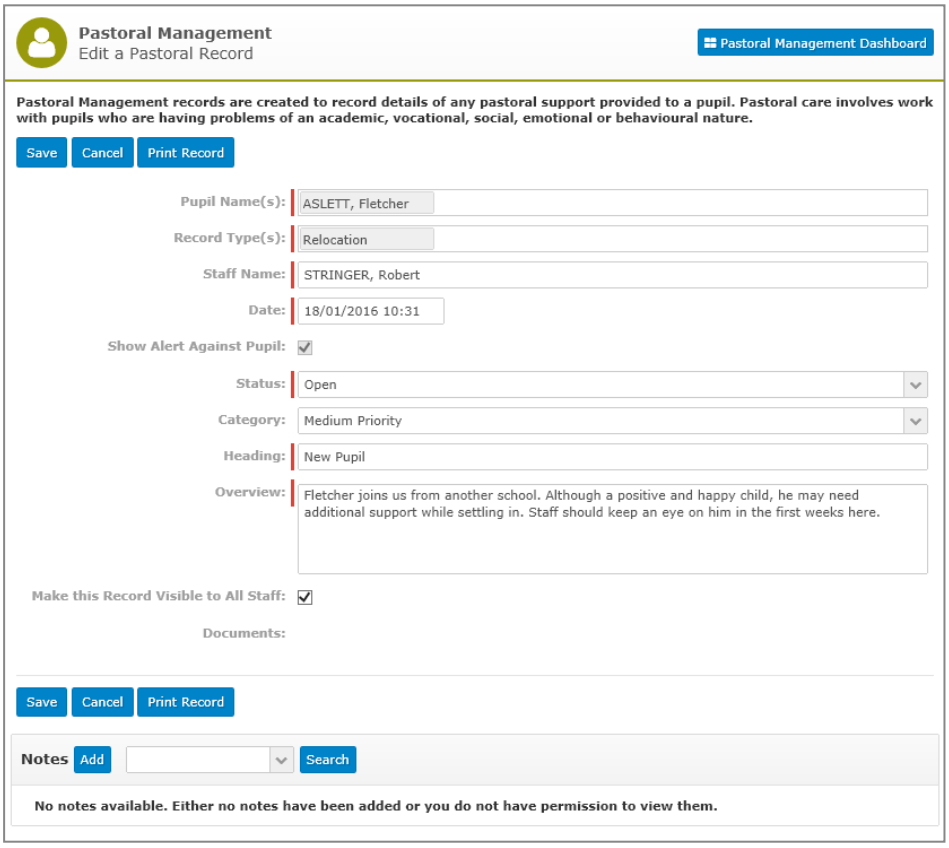
c. (Optional) Use the **Page** icons beneath the grid to navigate between pages of results.

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

Page Size: 5 10 25 50 100

2. Click next to the record you would like to edit.

   The relevant **Edit a Pastoral Record** screen appears.



3. Make your changes to the following fields, as required:
   - **Status**
   - **Make this Record Visible to All Staff** / **Make this Record Visible to Specific Staff**
   - **GIRFEC Forms** - Scottish schools only. If forms were not completed when the record was added, it is possible to do so subsequently.

> **Note:** Security relating to pastoral management records means that you may only edit certain fields.

4. Click **Save**.

Editing Pastoral Record Notes

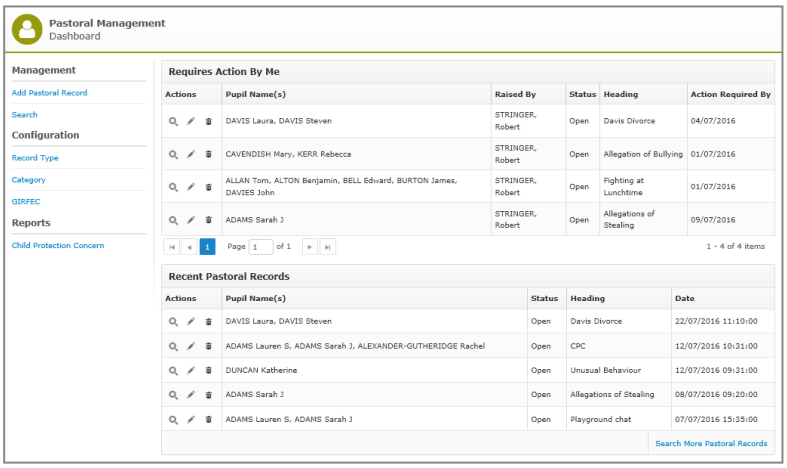
HOW TO EDIT A PASTORAL RECORD NOTE

1. Find the record to which the note is attached via ONE of the following:
   - The **Pastoral Management** dashboard.

   More details...

   a. Do ONE of the following:
      - Go to **Pastoral / Behaviour > Pastoral Management**.
      - Click **Pastoral Management Dashboard** on any Pastoral Management screen.

      Your **Pastoral Management** dashboard appears, listing actions you are due to complete and recently added records that you can access.

      > **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. (Optional) Use the icons beneath a grid to navigate between pages of records.
      - Click ◀ or ▶ 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.
      - Click in the **Page** field and type the number of the page you want.

» The **Pastoral Record Search** screen.

More details...

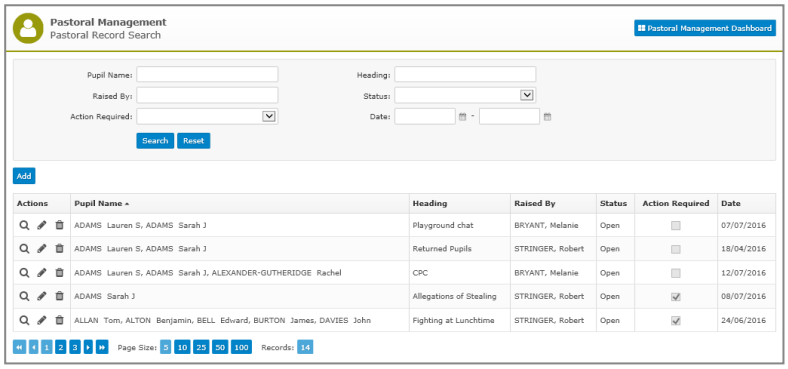
a. Do ONE of the following:

» Go to **Pastoral / Behaviour > Pastoral Management > Search**.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search** in the **Management** menu.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.



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

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

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.

> **Note:** To begin a completely new search, click **Reset**. To search on more than one criterion, complete multiple fields before clicking **Search** OR do successive searches WITHOUT clicking **Reset**. This means you gradually narrow down the list of results.

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

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

Page Size: 5 10 25 50 100

2. Click next to the relevant record.
   The appropriate **Edit a Pastoral Record** screen appears.
3. Find the note you would like to amend.

More details...

a. Scroll down the **Edit a Pastoral Record** screen to the **Notes** section.

b. Enter your search criteria in one or more of the fields. You can search by:

Field	Action
Pupil Name	Type all or part of the pupil's name into this field OR click to select from the drop list. Click on your choice in the list that appears.
Child Protection Concern Form 1 / Child Protection Concern Form 2 / Wellbeing Concern Form 1 / Wellbeing Concern Form 2	(Scottish Schools Only) Use a drop list to select a GIRFEC form to search by.

c. Click **Search**.
   The results appear below.

4. Click **Edit** next to the heading of the note you would like to amend.
5. Make your changes to the available fields, as required. They may include:
   - **Action Summary**
   - **Action Note**
   - **Action By**
   - **Make this Note Visible to All Staff / Make this Note Visible to Specific Staff**
   - **Documents**
   - **GIRFEC Forms** - Scottish schools only. If a note has an action associated with it, users can create updated forms. Click next to the form you want to amend.

> **Note:** Security relating to pastoral management records means that you may only edit certain fields. If the note does NOT require action, only its visibility can be changed. If action IS required, more details can be updated.

6. Click **Save**.

Marking Pastoral Record Actions 'Complete'

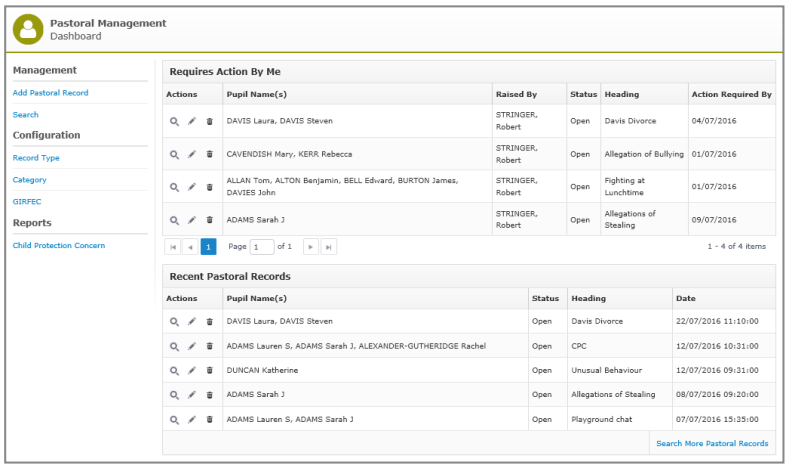
HOW TO MARK A PASTORAL RECORD ACTION 'COMPLETE'

1. Access the record to which the action/note is attached via ONE of the following:
   - The **Pastoral Management** dashboard.

More details...

a. Do ONE of the following:
   - Go to **Pastoral / Behaviour > Pastoral Management**.
   - Click **Pastoral Management Dashboard** on any Pastoral Management screen.

Your **Pastoral Management** dashboard appears, listing actions you are due to complete and recently added records that you can access.



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. (Optional) Use the icons beneath a grid to navigate between pages of records.
   - Click ◄ or ► 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.
   - Click in the **Page** field and type the number of the page you want.

» The **Pastoral Record Search** screen.

More details...

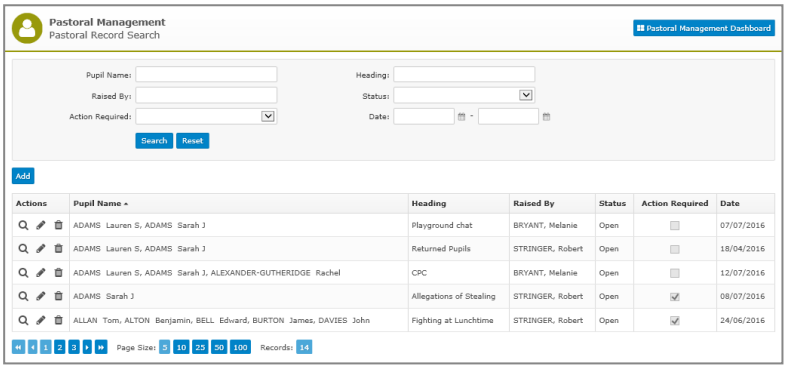
a. Do ONE of the following:

» Go to **Pastoral / Behaviour > Pastoral Management > Search**.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search** in the **Management** menu.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.



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

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

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.

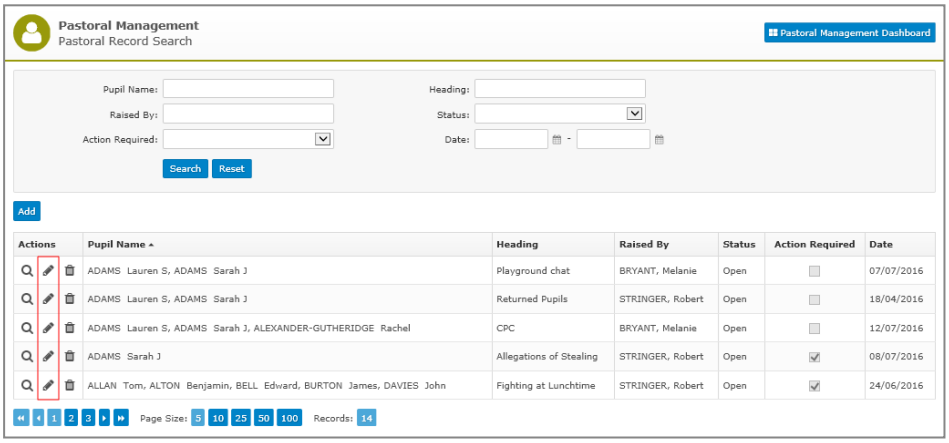
> **Note:** To begin a completely new search, click **Reset**. To search on more than one criterion, complete multiple fields before clicking **Search** OR do successive searches WITHOUT clicking **Reset**. This means you gradually narrow down the list of results.

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

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

Page Size: 5 10 25 50 100

2. Click next to the relevant record.



3. Find the note to which the action relates.

More details...

a. Scroll down the **Edit a Pastoral Record** screen to the **Notes** section.

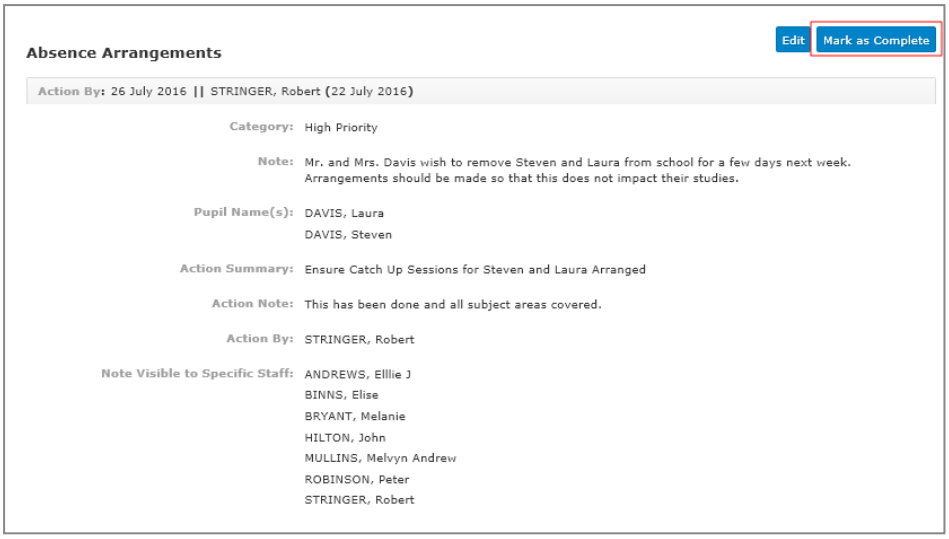
b. Enter your search criteria in one or more of the fields. You can search by:

Field	Action
Pupil Name	Type all or part of the pupil's name into this field OR click to select from the drop list. Click on your choice in the list that appears.
Child Protection Concern Form 1 / Child Protection Concern Form 2 / Wellbeing Concern Form 1 / Wellbeing Concern Form 2	(Scottish Schools Only) Use a drop list to select a GIRFEC form to search by.

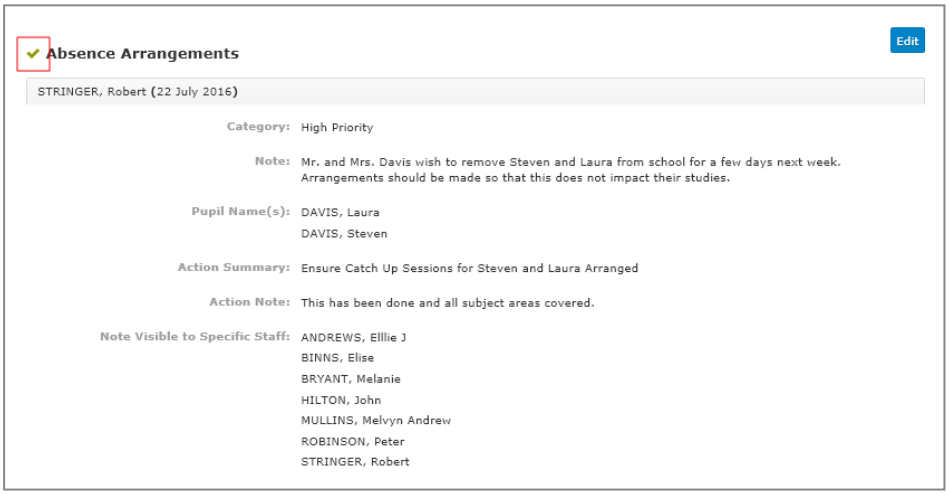
c. Click **Search**.

The results appear below.

4. Alongside the relevant note's header, click **Mark as Complete** in the top, right-hand corner.



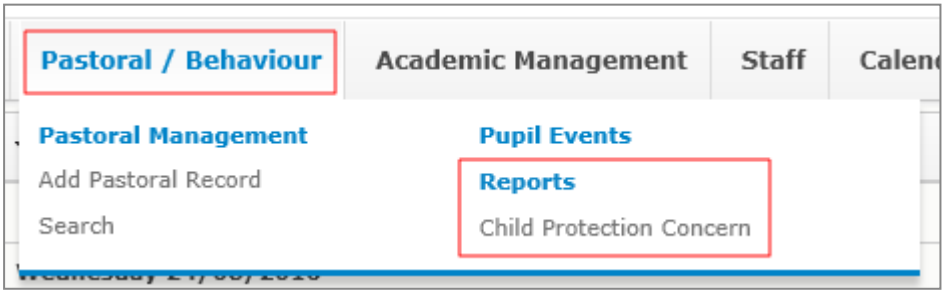
The record is updated and ☑ appears next to the note's heading.



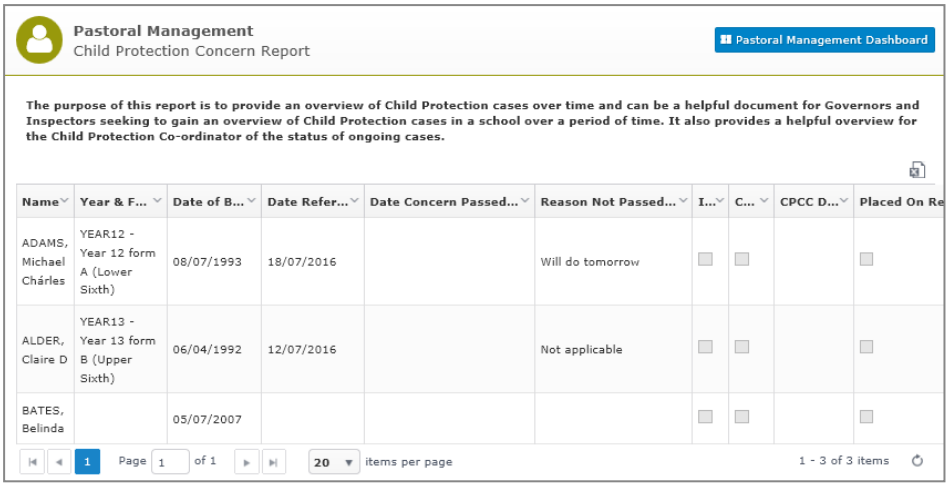
Accessing the Child Protection Concern Report

HOW TO ACCESS THE CHILD PROTECTION CONCERN REPORT

1. Go to **Pastoral / Behaviour > Reports > Child Protection Concern**.

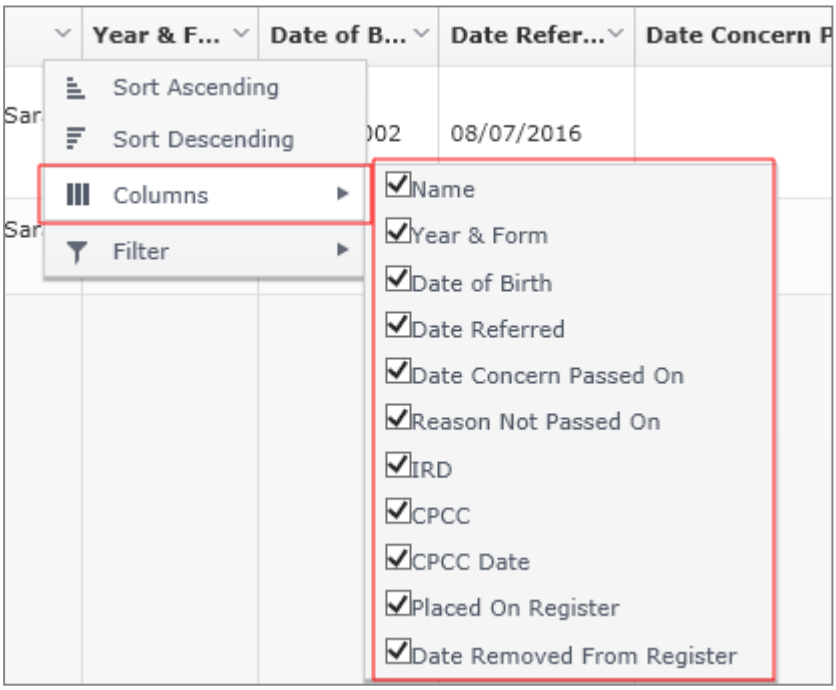


The **Child Protection Concern Report** screen appears, showing details of the child concern cases that you have access to.

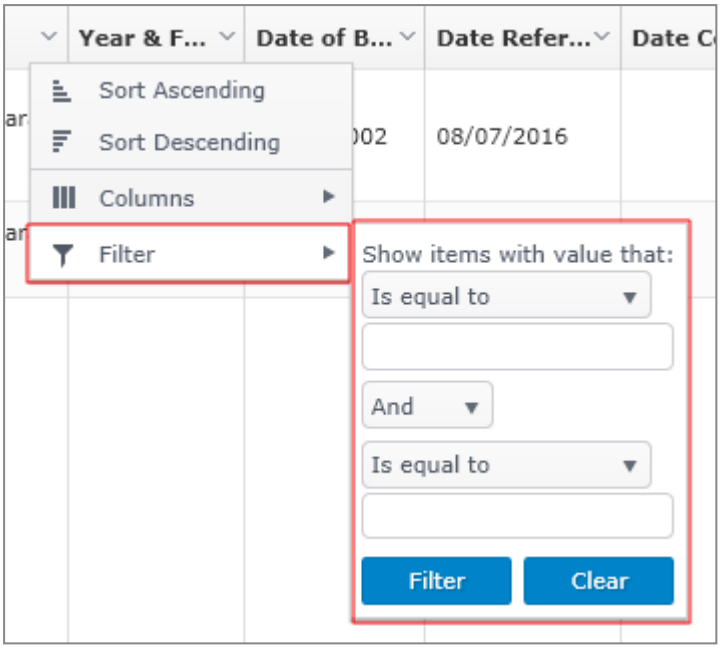


Note: The options you see depend upon the permissions set by your System Administrator.

2. (Optional) Sort the data by a particular column by clicking ⌄ next to the relevant column heading and selecting 'Sort Ascending' or 'Sort Descending'.
3. Show or hide columns as required by clicking any ⌄ and 'Columns'. Tick the check boxes for each column that should be visible.



4. Filter the data by clicking ⌄ in the relevant header(s) and 'Filter' to adjust the relevant options, as required.



More details...

a. Click next to the heading you would like to filter by and click **Filter** in the menu that appears.

b. In the **Filter** popup, use the first drop list to select how the field contents should relate to your filter criterion, e.g. 'Is equal to', 'Starts with', 'Contains', 'Is null' or 'Is empty'.

c. Type your filter criterion in the second field.

d. (Optional) To filter by two criteria:

- Use the second drop list to select 'And' to filter by both criteria OR select 'Or' for the software to look for either feature specified.
- Use the third drop list to select how the field contents should relate to your second filter criterion, e.g. 'Is equal to', 'Starts with', etc.
- Type your filter criteria in the bottom, empty field.

e. Click **Filter**.

f. To clear a filter, click **Clear**.

5. (Optional) Click above the **Child Protection Concern Report** grid to export the data to MS Excel.

More details...

a. Click .

b. Do ONE of the following:

- Click **Open** to open the spreadsheet.
- Click **Save** to save the file to your computer and **Open** to see it once it has been downloaded.
- Click and **Save as** to save the spreadsheet in your preferred location.
- Click and **Save and open** to save and automatically open the file.
- Click **Cancel** or to abort the export.

Deleting Pastoral Records

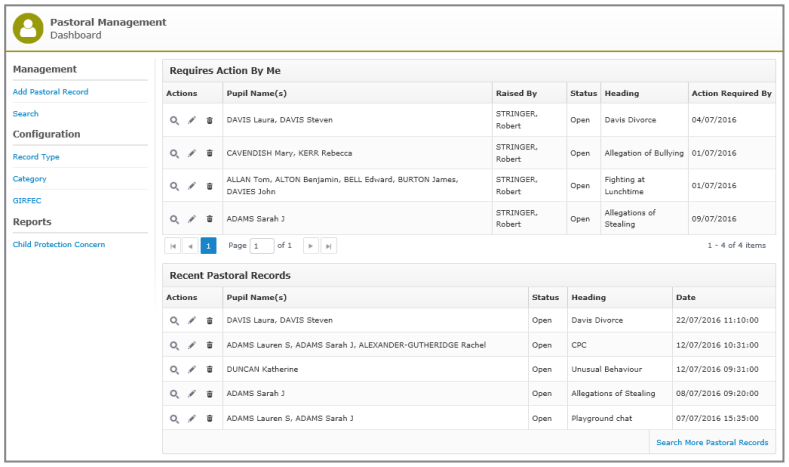
HOW TO DELETE A PASTORAL RECORD

1. Find the pastoral record that you would like to delete via ONE of the following:
   - The **Pastoral Management** dashboard.

More details...

a. Do ONE of the following:
   - Go to **Pastoral / Behaviour > Pastoral Management**.
   - Click **Pastoral Management Dashboard** on any Pastoral Management screen.

Your **Pastoral Management** dashboard appears, listing actions you are due to complete and recently added records that you can access.



> **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. (Optional) Use the icons beneath a grid to navigate between pages of records.
   - Click ◄ or ► 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.
   - Click in the **Page** field and type the number of the page you want.

» The **Pastoral Record Search** screen.

More details...

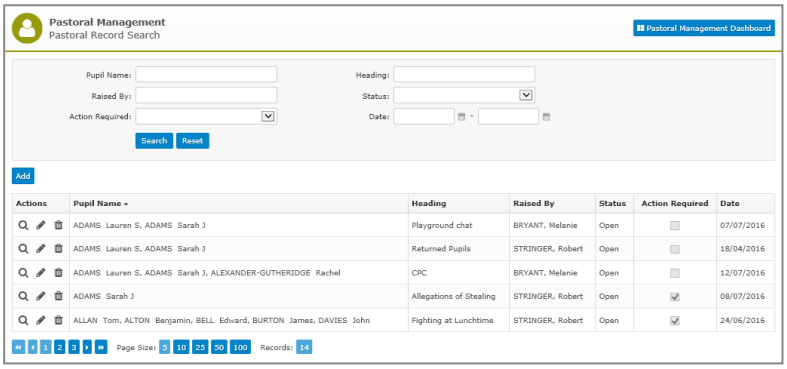
a. Do ONE of the following:

» Go to **Pastoral / Behaviour > Pastoral Management > Search**.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search** in the **Management** menu.

» Go to **Pastoral / Behaviour > Pastoral Management** and click **Search More Pastoral Records** in the bottom right-hand corner of the **Pastoral Management** dashboard.

The **Pastoral Record Search** screen appears.



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

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

Field	Action
Pupil Name	Type all or part of a pupil's name into this field.
Heading	Type all or part of a heading into this field.
Raised By	Type all or part of a colleague's name into this field.
Status	Use this drop list to select the required option.
Action Required	Use this drop list to select 'Yes' or 'No'.
Date	Use these two fields to find records by when issues were reported. Put the same date in both fields to see records added on a single day OR different dates to see those logged in a set time period. Click in a field and type the required date OR click on it in the calendar that appears.

> **Note:** To begin a completely new search, click **Reset**. To search on more than one criterion, complete multiple fields before clicking **Search** OR do successive searches WITHOUT clicking **Reset**. This means you gradually narrow down the list of results.

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

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

Page Size: 5 10 25 50 100

2. In the **Actions** column, click next to the record you would like to delete.

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

The relevant **Delete a Pastoral Record** screen appears.

3. Click **Delete**.

The **Pastoral Record Search** screen appears with the record removed from the grid.

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CHAPTER 3

Configuring Pastoral Management

This chapter discusses the following:

Configuring Pastoral Management 58
- Setting up Record Types 58
- Editing Record Types 59
- Deleting Record Types 60
- Setting up Categories 61
- Viewing Categories 65
- Editing Categories 66
- Deleting Categories 67
- Allocating Access to Pastoral Management 69

Configuring GIRFEC 72
- Activating GIRFEC Options (Scottish Schools Only) 72
- Allocating Access to the Child Protection Concern Report (Scottish Schools Only) 72

Configuring Pastoral Management

Using the **Pastoral Management** module, you can create and maintain the categories and record types used when recording pastoral issues.

Categories help organisations to manage staff access to pastoral records, providing a quick and simple way to ensure that only the appropriate members of staff can see sensitive information, where required. Alternatively, users can make records visible to all staff with access to the module.

GIRFEC forms required in Scotland are also associated with specific pastoral record categories. Selecting the appropriate category immediately links the record with the required GIRFEC forms.

Pastoral record types allow schools to group records by theme, depending upon the organisation's particular preference.

To use the **Pastoral Management** module effectively, your System Administrator must configure and manage the categories and record types to best suit your school's needs. As such, users are able to:

- Set up record types - See "Setting up Record Types" below.
- Edit record types - See "Editing Record Types" on the facing page.
- Delete record types - See "Deleting Record Types" on page 60.
- Set up categories - See "Setting up Categories" on page 61.
- View categories - See "Viewing Categories" on page 65.
- Edit categories - See "Editing Categories" on page 66.
- Delete categories - See "Deleting Categories" on page 67.

This section also describes how System Administrators can allocate user access to the **Pastoral Management** module. For details, see "Allocating Access to Pastoral Management" on page 69.

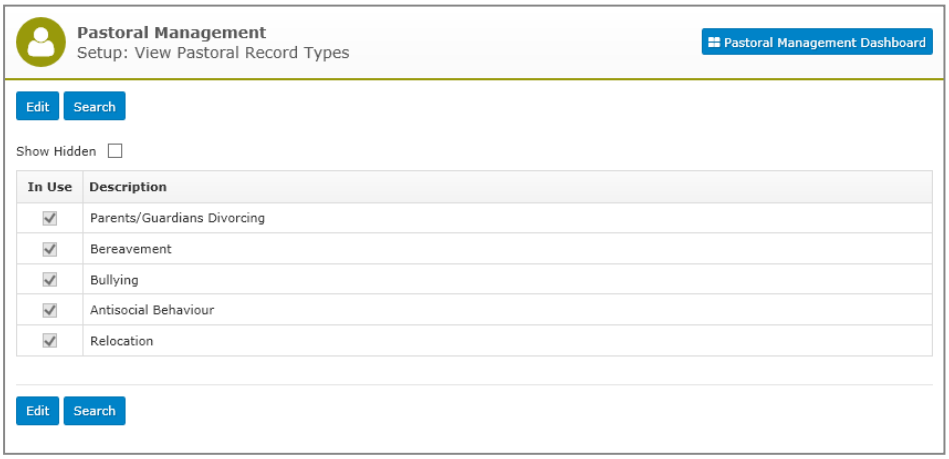
Note: Normally, pastoral record types and categories are configured by your System Administrator. As such, you may not be able to see this section when you log in.

Setting up Record Types

HOW TO SET UP A RECORD TYPE

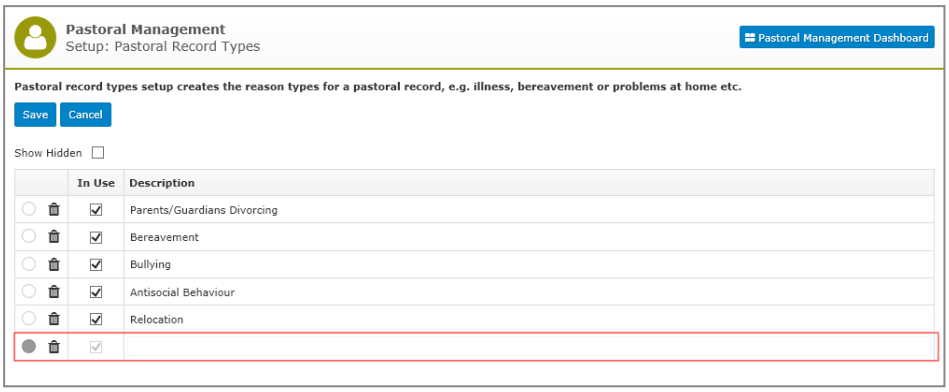
1. Go to **Pastoral / Behaviour > Pastoral Management** and click **Record Type** in the **Configuration** menu.

   The **Setup: View Pastoral Record Types** screen appears.



2. Click **Edit**.

3. Click in the empty **Description** field in the bottom row and type the name of the new pastoral record type.



Note: The colour of the dot in the first column denotes the status of the row. For more information, see the Getting Started User Guide.

4. In the same row, tick the **In Use** check box to make the new pastoral record type live and available for others to use.
5. Click **Save**.

Editing Record Types

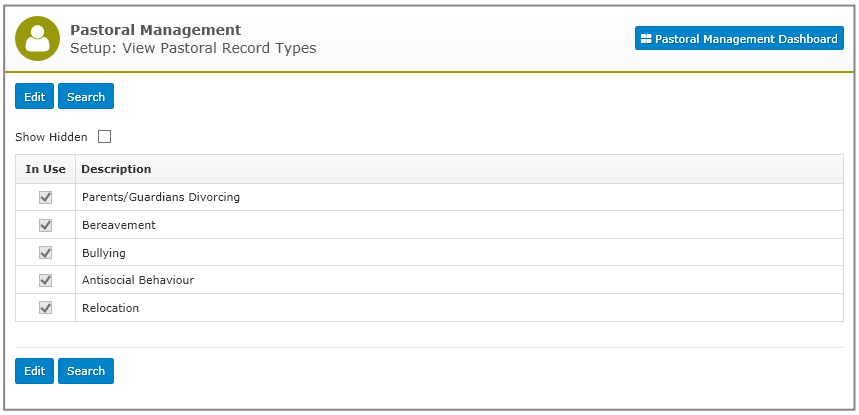
HOW TO EDIT A RECORD TYPE

1. Find the record type that you would like to edit.

   More details...

   a. Go to **Pastoral / Behaviour > Pastoral Management** and click **Record Type** in the **Configuration** menu.

   The **Setup: View Pastoral Record Types** screen appears.



   b. (Optional) Check the **Show Hidden** check box to show a complete list of pastoral record types, including those that are not currently in use.

2. Click **Edit**.
3. Make the required changes.

> **Note:** The colour of the dot in the first column denotes the status of the row. For more information, see the Getting Started User Guide.

4. (Optional) If you make a change in error, you can click the adjacent ↺ to undo it.

> **Note:** You CANNOT undo changes once you have clicked **Save**. Instead, you must edit the pastoral record type.

5. Click **Save**.
6. (Optional) To make further amendments, click **Edit** and repeat steps 2 to 4.

Deleting Record Types

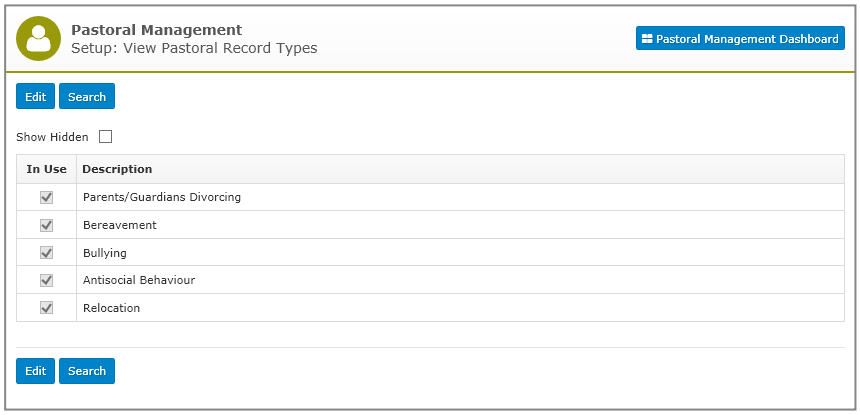
HOW TO DELETE A RECORD TYPE

1. Find the record type you would like to delete.

   More details...

   a. Go to **Pastoral / Behaviour > Pastoral Management** and click **Record Type** in the **Configuration** menu.

   The **Setup: View Pastoral Record Types** screen appears.



   b. (Optional) Check the **Show Hidden** check box to show a complete list of pastoral record types, including those that are not currently in use.

2. Click **Edit**.
3. Click 🗑 next to the category you would like to delete.

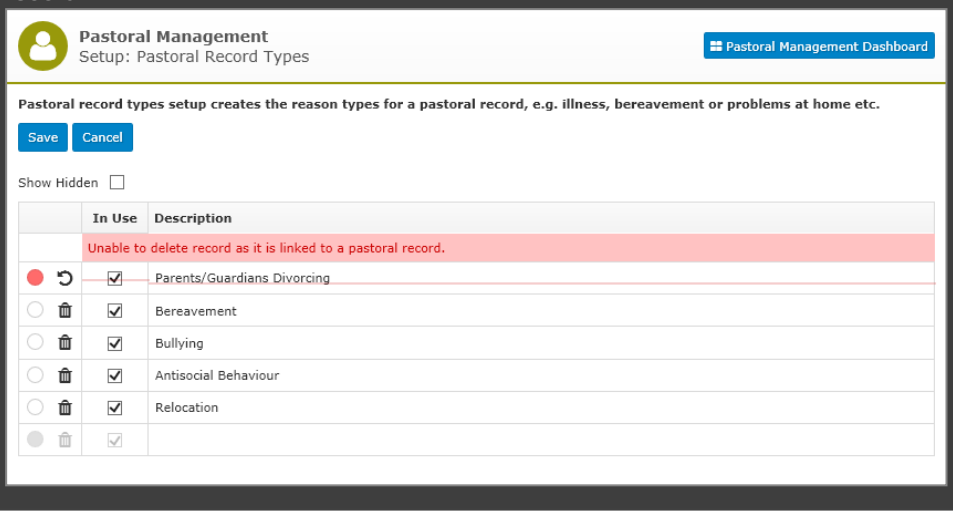
   A red line strikes through the row you are deleting.

> **Note:** You can reverse a deletion by clicking the adjacent ↺. You CANNOT undo a deletion once you have clicked **Save**.

> **Note:** The colour of the dot in the first column denotes the status of the row. For more information, see the Getting Started User Guide.

4. Click **Save**.

Note: You cannot delete a pastoral record type that is already associated with a record.

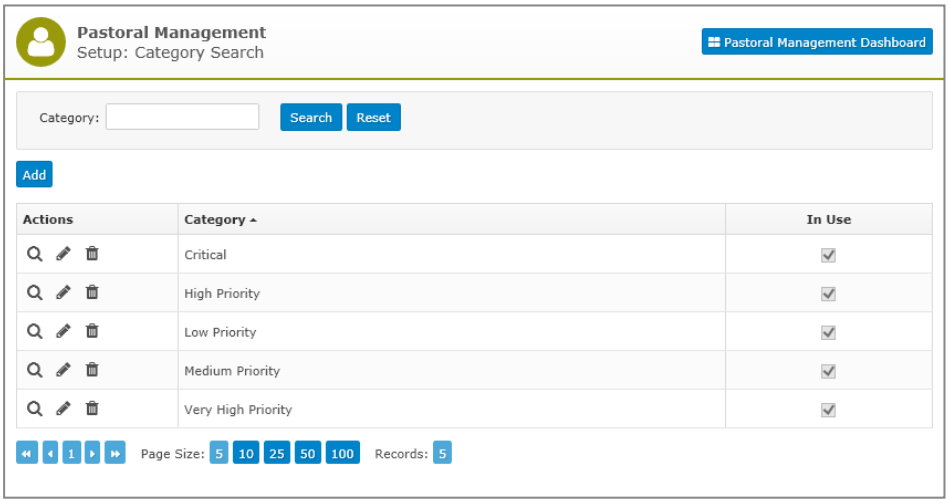


Setting up Categories

HOW TO SET UP A CATEGORY

1. Go to **Pastoral / Behaviour > Pastoral Management** and click **Category** in the **Configuration** menu.

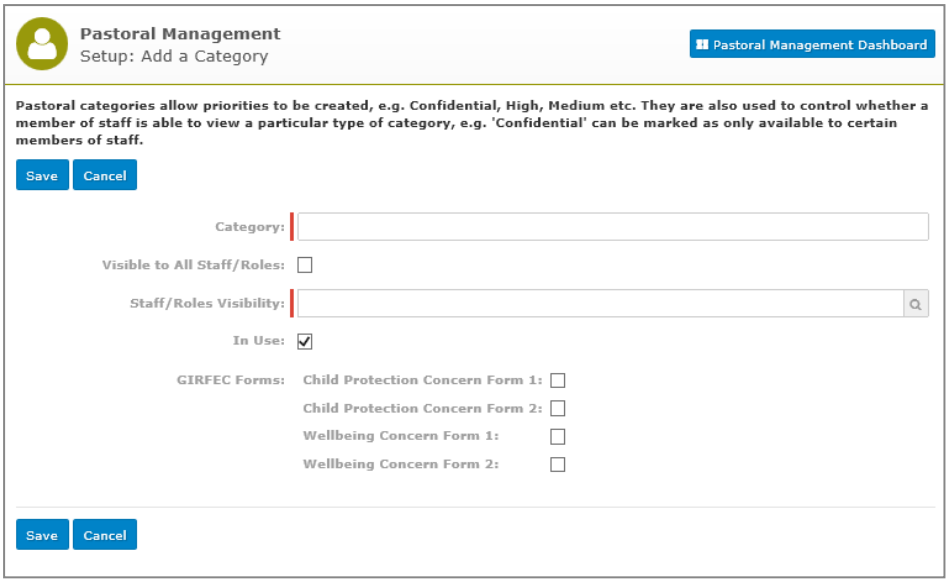
   The **Setup: Category Search** screen appears.



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

2. Click **Add**.

   The **Setup: Add a Category** screen appears.



Note: GIRFEC options apply to Scottish schools only. Access must be configured by your System Administrator.

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

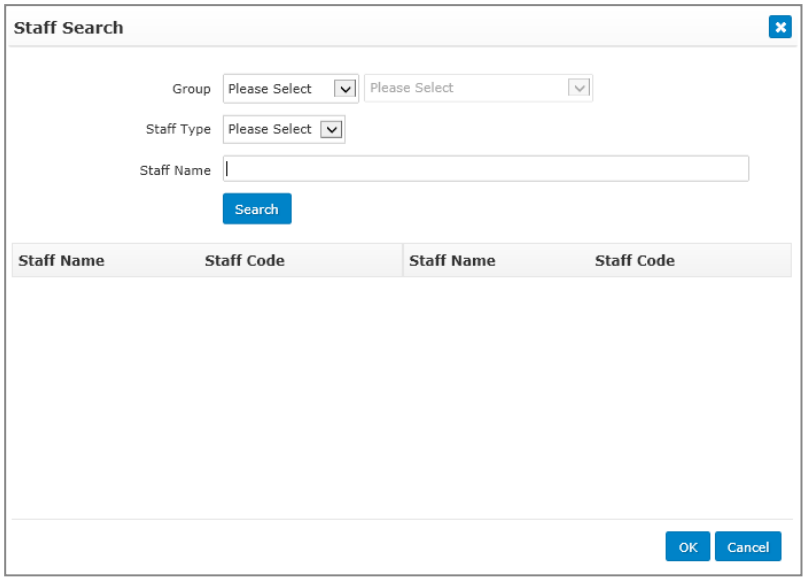
3. Click in the **Category** field and add the name of the new pastoral management category.
4. Do ONE of the following:
   - If the category should be available to everyone, tick the **Visible to All Staff/Roles** check box.

     Note: If this box is checked, the **Staff/Roles Visibility** field disappears.
   - If the category is limited to specific colleagues, add one or more names to the **Staff/Roles Visibility field** using auto complete or the **Staff Search** dialog. If you know how to do this, proceed to step 6.

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

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

Search dialog appears.

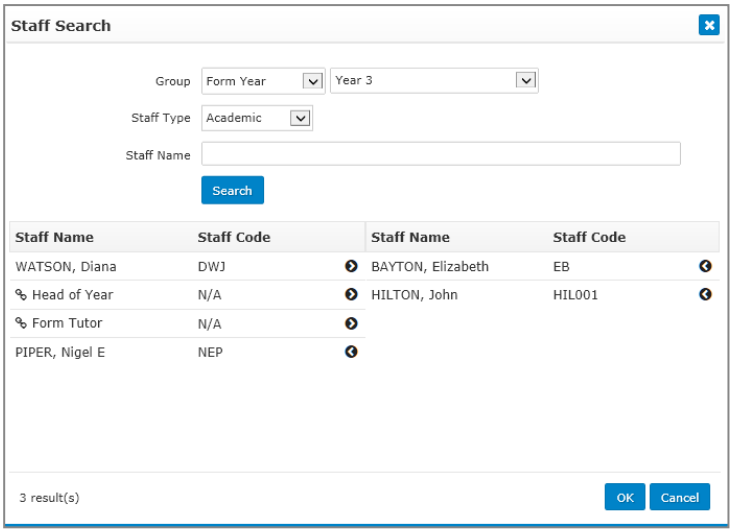


a. In the top part of the dialog, enter your search criteria and click **Search**. You can filter by:
   - ***Group*** – From the first **Group** drop list, select the group type you want, e.g. boarding house, form or subject set, and from the second **Group** drop list, select the person's specific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

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

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

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



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

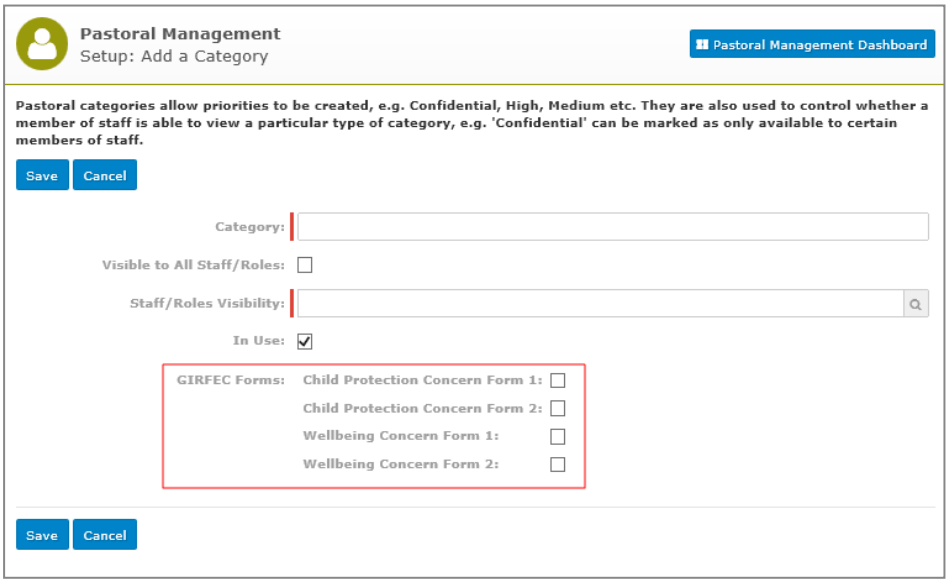
c. (Optional) Repeat steps a to b to search for and add other staff members to the list of selected individuals on the right-hand side of the screen.

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

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

5. Check the **In Use** check box is ticked to ensure that the category is live and available when pastoral management issues are recorded.

6. (Optional) (Scottish Schools Only) Tick the relevant **GIRFEC Forms** check boxes to indicate which forms can be completed for this category.



Your System Administrator must configure GIRFEC settings for these options to appear. For more information, see "Configuring GIRFEC" on page 72.

7. Click **Save**.

Viewing Categories

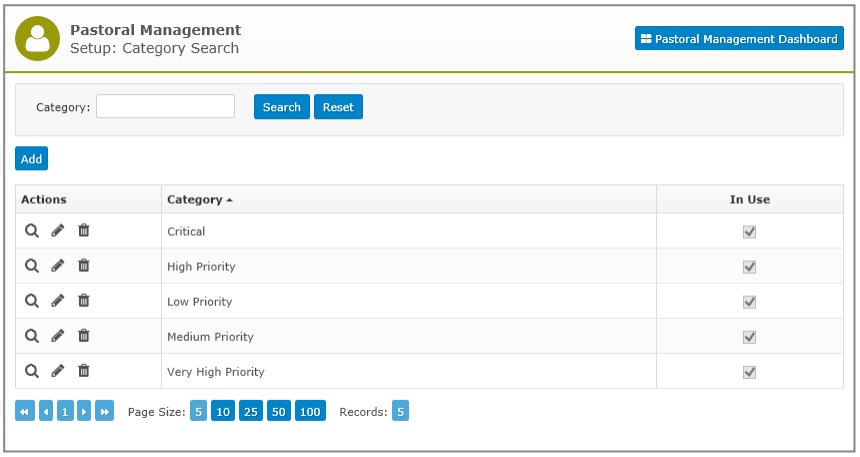
HOW TO VIEW A CATEGORY

1. Find the pastoral management category you would like to view.

   More details...

   a. Go to **Pastoral / Behaviour > Pastoral Management** and click **Category** in the **Configuration** menu.

      The **Setup: Category Search** screen appears.



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

   b. (Optional) Enter all or part of the name of the category you are looking for in the **Category** field and click **Search**.

      Note: To clear previous searches, click **Reset**.

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

      More details...

      » 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.

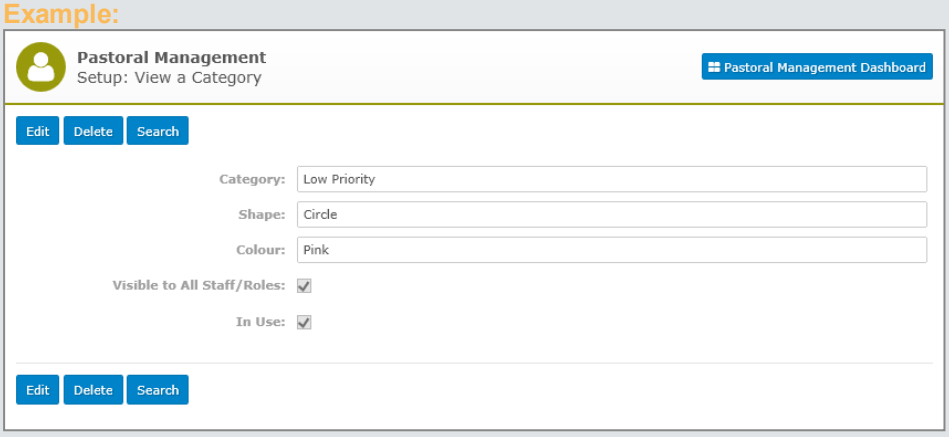
      » Use the **Page Size** options to see more records on each page.

      Page Size: 5 10 25 50 100

2. Click 🔍 next to the category you would like to view in more detail.

   The relevant **Setup: View a Category** screen appears.

Example:



3. When you have finished viewing the category, do ONE of the following:
   - Click **Pastoral Management Dashboard** to go to the **Pastoral Management** dashboard.
   - Click **Edit** to amend the category.
   - Click **Delete** to remove the category from the system.
   - Click **Search** to go to the **Setup: Category Search** screen.

Editing Categories

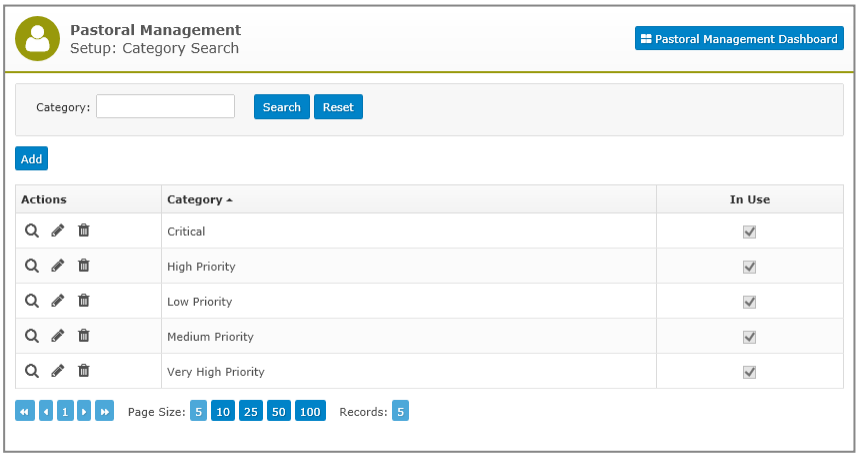
HOW TO EDIT A CATEGORY

1. Find the pastoral management category you would like to edit.

   More details...

   a. Go to **Pastoral / Behaviour > Pastoral Management** and click **Category** in the **Configuration** menu.

   The **Setup: Category Search** screen appears.



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

b. (Optional) Enter all or part of the name of the category you are looking for in the **Category** field and click **Search**.

> **Note:** To clear previous searches, click **Reset**.

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

More details...

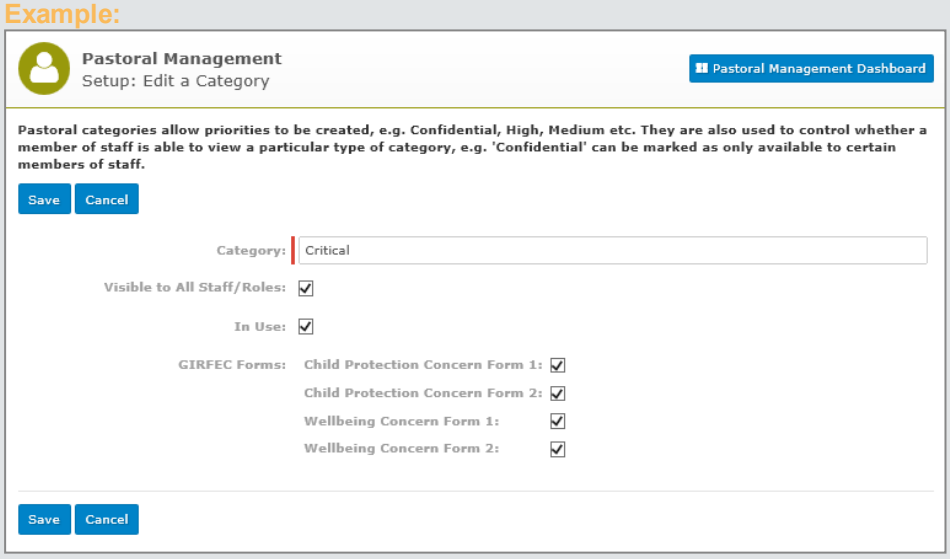
- Click or or on the numbers underneath the grid on the left-hand side to move between pages.
- Click to go to the first page or to go to the last page.
- Use the **Page Size** options to see more records on each page.

Page Size: 5 10 25 50 100

2. On the **Setup: Category Search** screen, do ONE of the following:
   - Click next to your chosen category and select **Edit**.
   - Click next to your chosen category.

   The relevant **Setup: Edit a Category** screen appears.

Example:



3. Make the required changes to the pastoral management category.
4. Click **Save**.

   You are returned to the **Setup: Category Search** screen.

Deleting Categories

HOW TO DELETE A CATEGORY

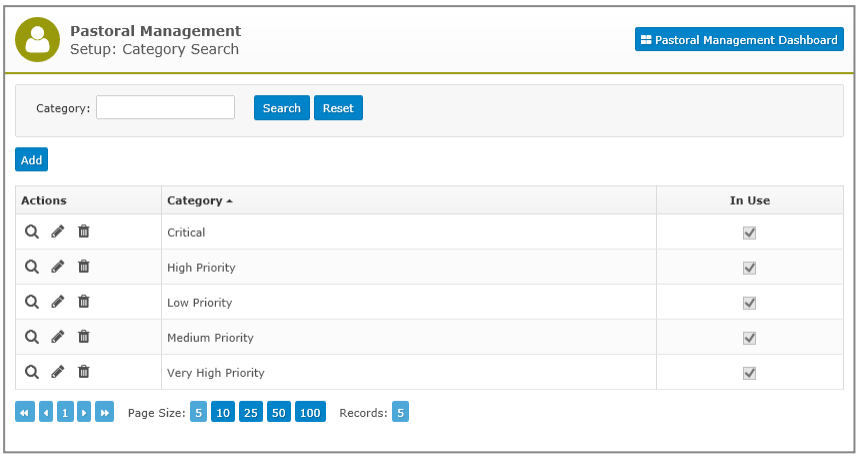
1. Find the pastoral management category that you would like to delete.

   More details...

   a. Go to **Pastoral / Behaviour > Pastoral Management** and click **Category** in the

Configuration menu.

The **Setup: Category Search** screen appears.



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

b. (Optional) Enter all or part of the name of the category you are looking for in the **Category** field and click **Search**.

Note: To clear previous searches, click **Reset**.

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

More details...

» 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.

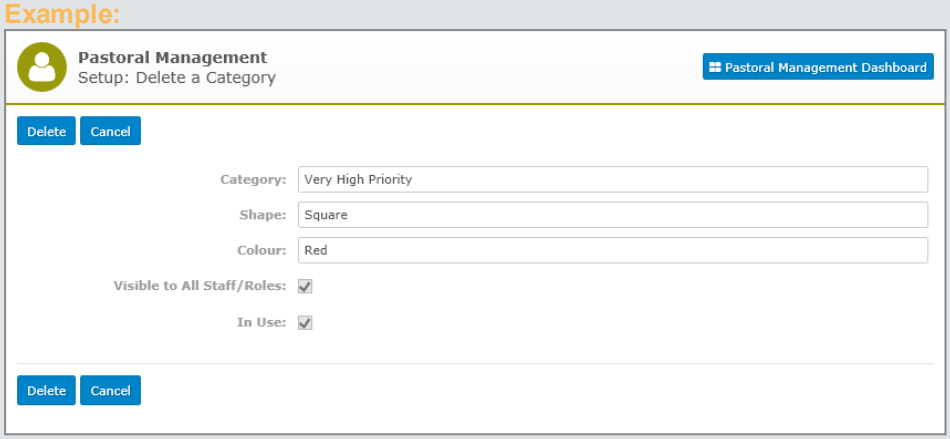
» Use the **Page Size** options to see more records on each page.

Page Size: 5 10 25 50 100

2. Click 🗑 next to the category you would like to delete.

The relevant **Setup: Delete a Category** screen appears.

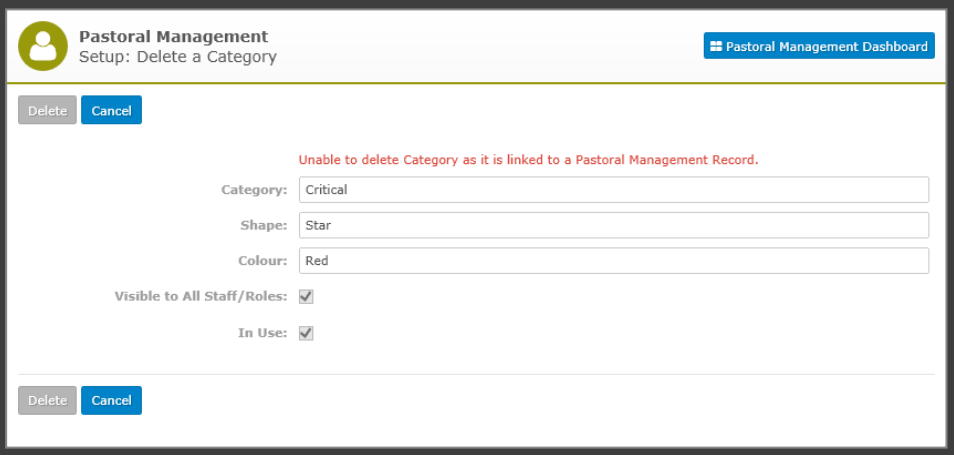
Example:



3. Click **Delete**.

   If the category is not associated with a record, it is deleted and you are returned to the **Setup: Category Search** screen.

Note: You CANNOT delete a category that is already associated with a pastoral management record.



Allocating Access to Pastoral Management

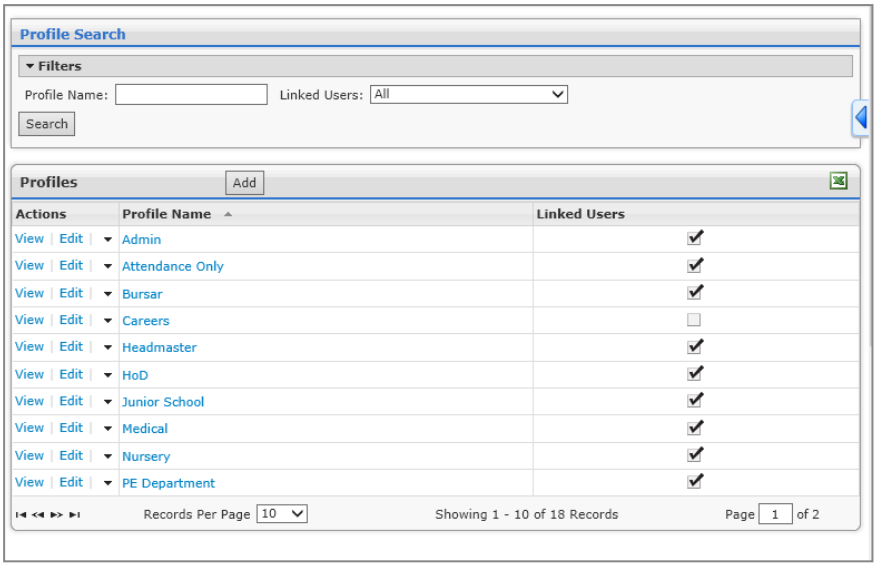
HOW TO ALLOCATE ACCESS TO PASTORAL MANAGEMENT

1. Find the profile you would like to have access to the **Pastoral Management** module.

   More details...

   a. Go to **Setup > Users and profiles > Profiles**.

      The **Profile Search** and **Profiles** screen appears.



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

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

Field	Action
Profile Name	Type all or part of the name of the profile you are looking for into this field.
Linked Users	Use the drop list to select the user(s) linked to the profile you are looking for.

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.

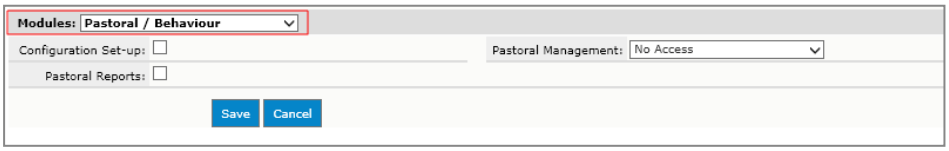
  Records Per Page 25

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

  Page 1 of 1

2. Click **Edit** next to the relevant profile.
3. Use the **Modules** drop list to select 'Pastoral / Behaviour'.

   The **Pastoral / Behaviour** options appear, including pastoral management.



4. (Optional) If users should be able to configure Pastoral Management options, e.g. create categories, tick the **Configuration Set-up** check box.
5. Use the **Pastoral Management** drop list to select the level of access required.
6. (Optional) Tick the **Pastoral Reports** check box if access to pastoral reports is required. (Scottish Schools Only.)
7. Click **Save**.

Configuring GIRFEC

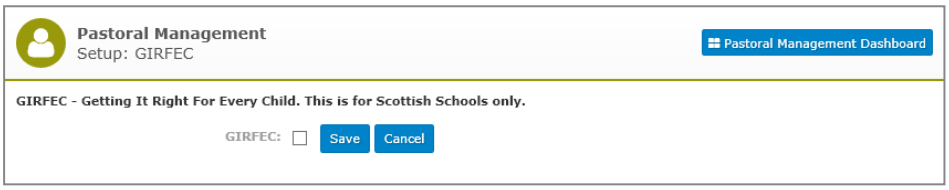
If you are a Scottish school, you can record GIRFEC data using the **Pastoral Management** module. In order to do this, you need to activate the GIRFEC option. Relevant staff also need to be given access to the **Child Protection Concern** report, which is set via profiles.

Activating GIRFEC Options (Scottish Schools Only)

HOW TO ACTIVATE GIRFEC OPTIONS (SCOTTISH SCHOOLS ONLY)

1. Go to **Pastoral / Behaviour > Pastoral Management** and select **GIRFEC** from the **Configuration** menu.

   The **Setup: GIRFEC** screen appears.



2. Tick the **GIRFEC** check box.
3. Click **Save**.

Allocating Access to the Child Protection Concern Report (Scottish Schools Only)

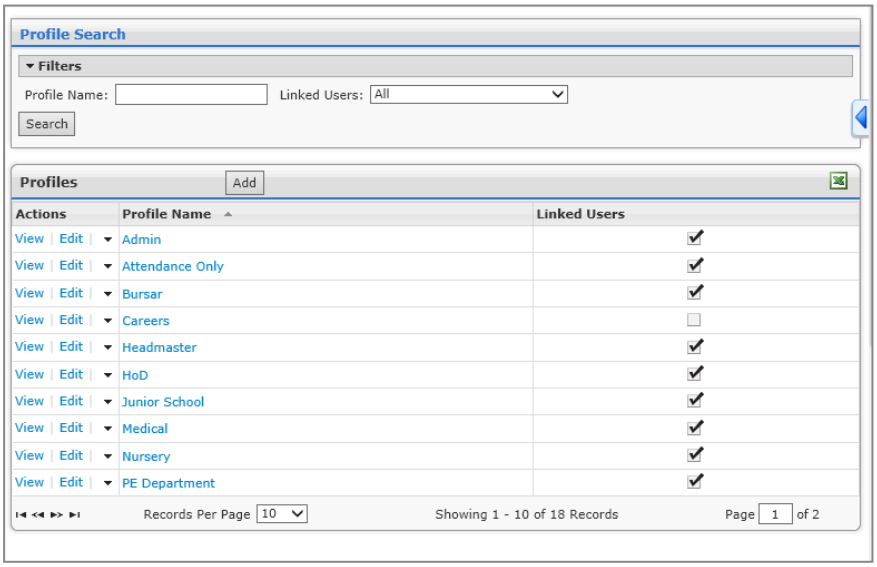
HOW TO ALLOCATE ACCESS TO THE CHILD PROTECTION CONCERN REPORT (SCOTTISH SCHOOLS ONLY)

1. Find the profile you want to have access to the **Child Protection Concern** report.

   More details...

   a. Go to **Setup > Users and profiles > Profiles**.

      The **Profile Search** and **Profiles** screen appears.



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

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

Field	Action
Profile Name	Type all or part of the name of the profile you are looking for into this field.
Linked Users	Use the drop list to select the user(s) linked to the profile you are looking for.

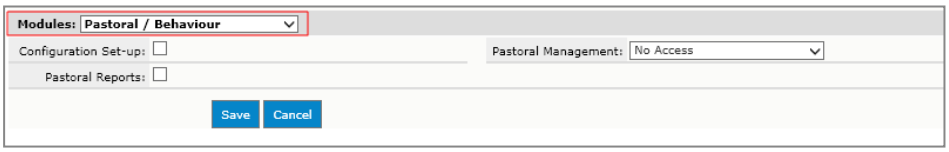
c. (Optional) Use the icons beneath the grid to navigate between pages of records.

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

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

2. Click **Edit** next to the relevant profile.
3. Use the **Modules** drop list to select 'Pastoral / Behaviour'.

   The **Pastoral / Behaviour** options appear, including pastoral management.



4. Tick the **Pastoral Reports** check box.
5. Click **Save**.

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