Markbook Academic Profiles
User Guide

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Contents

Introduction

The **Markbook Academic Profiles** module enables you to create sophisticated views of your existing markbook data. You can use a range of filtering criteria to ensure your Academic Profile is restricted to a specific set of tasks, and you can determine the order in which these tasks appear.

You can set a target task against an Academic Profile, which enables you to easily view the pupils' level of achievement against that target task. You can also set any task displayed within the **Mark Inquiry** Task grid to be the target task. In addition, you can view how well pupils have done on a progressive task by task basis.

As part of creating an Academic Profile, you can utilise the **Staff Custom Group** functionality, which allows you to set up specific groups of staff. You can then grant access to particular Academic Profiles to specific staff groups, giving you the ability to restrict the Profiles to only the relevant staff. You can also configure Academic Profiles to be accessible to only individual members of staff, or to all users with access to Academic Profiles.

For example, you could create a staff custom group for each subject set, and assign the relevant teachers to each group. Subsequently, you could create an Academic Profile for each subject set for each form year, which incorporates all the tasks you expect your pupils to complete over the year. As part of the Academic Profile, you could set the autumn ½ term results as the target task against which the other results are compared. You can even set up Academic Profiles to cross academic years, so you could set up the target task to be the last task of the summer term in the previous academic year, to enable you to assess progress since the new academic year began.

NOTE: In order to quickly create a set of tasks for a specific pupil group, such as a subject set, you can use the **Markbook Generic Export** module to export a pupil template to Excel. You can then add the required tasks as new columns in the template, and import these into **3Sys Markbooks** using the **Markbook Generic Import** module.

About this Guide

This Guide has been developed for the end user who wishes to create and maintain Academic Profiles and to set a target task within an Academic Profile, and for the System Administrator to configure the relevant permissions within **Setup** settings.

The following conventions are used in this Guide:

- **3Sys Academic** is referred to as **3Sys**.
- 'Target RAG calculation' refers to the calculation performed against tasks with the same marking method, with the results being displayed visually by the use of various shades of red, amber and green. (RAG stands for red, amber and green.)

Creating and Maintaining Academic Profiles

To create and maintain Academic Profiles you need to know about the following:

- *About Creating Markbook Academic Profiles on p.5.*
- *Creating Academic Profiles on p.18.*
- *Viewing Academic Profiles and the Target RAG Calculation on p.26.*
- *Performing the Target RAG Calculation on p.28.*
- *Performing the Column by Column RAG Calculation on p.29.*
- *About Maintaining Academic Profiles on p.31.*
- *Maintaining Academic Profiles on p.32.*

About Creating Markbook Academic Profiles

You use the **Markbook Academic Profiles** module or the **Mark Inquiry** module to create Academic Profiles; these enable you to create sophisticated views of your existing markbook data. When you create an Academic Profile, you can:

- Specify the required pupil groups based on a range of criteria, including:
  - Pupil Group Type, such as 'Subject', 'Subject Set' or 'Form'.
  - Pupil Group Year, i.e. the academic years across which the Academic Profile retrieves data, enabling you to view tasks across multiple academic years.
- Restrict who can view and use this Academic Profile, using Staff Custom Groups or individual members of staff. (By default, the visibility of new Academic Profiles is set to global; all users with access to Academic Profiles are able to view and use these Academic Profiles.)
- Specify which tasks to include within the Academic Profile.
- Specify the order in which the tasks appear within the Academic Profile in the **Mark Inquiry** module.
- Specify a task as the target grade/mark, enabling you to measure pupils' achievement against that target. A traffic light colour system highlights how well pupils have performed against the target. This is known as the 'Target RAG calculation'; RAG stands for red, amber and green. As part of this system, arrows are also used to indicate pupils' progress, so users with colour vision deficiency can immediately assess pupils' progress. (You can hide these arrows.)
- Specify a task as the starting point for the Column by column RAG calculation; the RAG (red, amber and green) denotes the comparison between each task with the one immediately before it in the Task grid.

When you create a new Academic Profile, you are guided through the process by the **Add Academic Profile** wizard. There are three steps to creating an Academic Profile. The screenshots below show an example of each step.

The **Add Academic Profile** wizard **- Step 1 – Main Details** screen:

The **Add Academic Profile** wizard **- Step 2 – Additional Academic Years** screen:

The **Add Academic Profile** wizard **- Step 3 – Choose the Task Profiles, Task Categories and Task Types** screen:

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Once you have created an Academic Profile, you are able to select it and view and manipulate the resultant data set using the **Mark Inquiry** module. (For example, you may wish to perform calculations against the data set.)

In the example screenshot below, an Academic Profile has been created for a 'YR7 English' set to assess the pupils' progress over the year, with attainment tests taking place at each half term and at the end of each term. In this example:

- The results for the 'Spring Half Term' onwards have yet to be entered, but the Academic Profile is set up ready to display that data once it has been entered.
- The 'Autumn ½ Term' Attainment task has been set as the target task for this Academic Profile, see the highlighted **Traffic Light** icon below.

NOTE: The pupil 'Aslett, Fletcher' does not have marks entered against the first two tasks yet, consequently those two cells have a dark grey background.

NOTE: If you wish to restrict who can view and use Academic Profiles to specific groups of staff, you need to have configured those groups using the **Staff Custom Groups** module. For details, refer to the *3Sys Academic Release Notes Version 4.3.0.0 (Document Reference: 4300_RN_3/1)*. This document is available from our Customer Centre, see *Contacting Us on p.38*.

Before you start using Academic Profiles, you need to understand the following:

- You can view, create and edit Academic Profiles from within these two modules:
  - **Mark Inquiry** – see *About Academic Profiles within Mark Inquiry on p.8*.
  - **Markbook Academic Profiles** – see *About Markbook Academic Profiles on p.8*. (You can also delete Academic Profiles within this module.)
- How to include marks/grades from **PASS** School Reports in Academic Profiles - see *About Including Grades/Marks from PASS School Reports within Academic Profiles on p.9*.
- How the RAG (red, amber and green) calculations work, see:
  - *About the Target RAG Calculation on p.9*.
  - *About the Column by Column RAG Calculation for Academic Profiles on p.16*.

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About Academic Profiles within Mark Inquiry

From within the **Mark Inquiry** module, you can use the **Academic Profiles** tab to:

- Create new Academic Profiles, by clicking on the **Add Academic Profile** button to open the **Add Academic Profile** wizard.

- View and edit existing Academic Profiles, by selecting the relevant Academic Profile from the **Academic Profile Name** drop list, and clicking the **Edit Academic Profile** button.

- Copy and edit existing Academic Profiles, by selecting the relevant Academic Profile from the **Academic Profile Name** drop list, and clicking the **Copy Academic Profile** button. (This button only appears after you have clicked the **Apply Filter** button to display the resultant data set.)
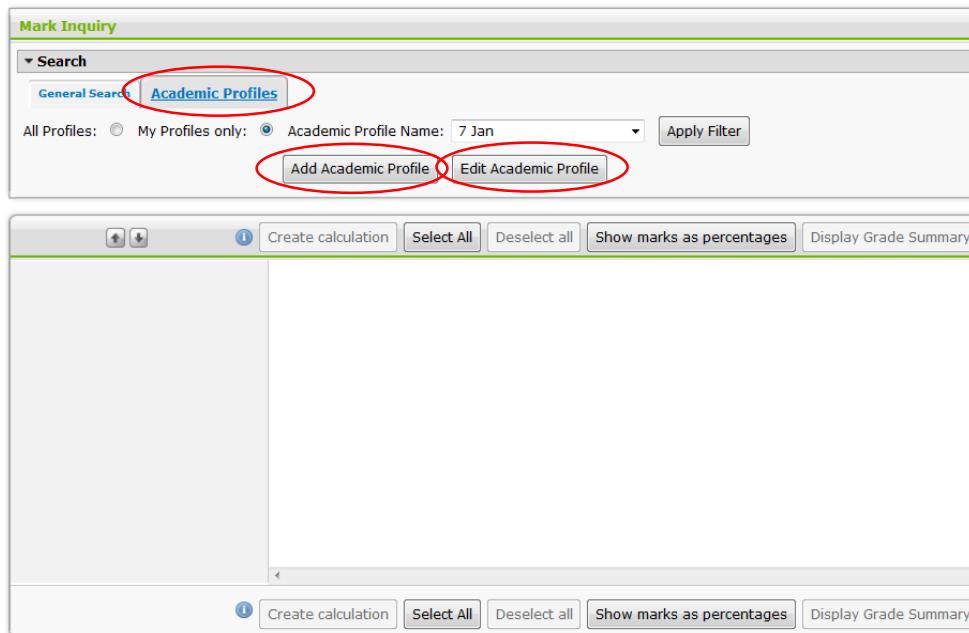
NOTE: If the **Academic Profiles** tab does not appear, you do not have the relevant permissions configured. If the **Academic Profiles** tab appears, but the **Add Academic Profile** and the **Edit Academic Profile** buttons do not appear, then you only have access to view Academic Profiles (to which you have been granted permissions) and manipulate their associated data sets.

NOTE: The standard search functionality within **Mark Inquiry** remains the same, but it appears on the **General Search** tab.

For how to create Academic Profiles, see *Creating Academic Profiles on p.18*.

About Markbook Academic Profiles

From within the **Markbook Academic Profiles** module, you can use the **Academic Profile Search** screen to:

- Create new Academic Profiles, by clicking on the **Add Academic Profile** button to open the **Add Academic Profile** wizard.

- View and edit existing Academic Profiles, by clicking the relevant **Edit** link within the **Actions** column.

- Copy and edit existing Academic Profiles, by clicking the relevant **Copy** link within the **Actions** column.

- Delete existing Academic Profiles, by clicking the relevant **Delete** link within the **Actions** column.

For how to create Academic Profiles, see *Creating Academic Profiles on p.18*.

About Including Grades/Marks from PASS School Reports within Academic Profiles

If you have imported grades/marks from **PASS** School Reports into **3Sys**, you can subsequently create Academic Profiles against these tasks within **3Sys**. Once you have imported School Report data, we recommend that any further updating of this data is undertaken in **3Sys**. The system has been designed to import each set of grades and marks from School Reports just the once; the School Report import is not designed for multiple imports of the same data. Consequently, if you import School Report data into **3Sys**, then subsequently make changes to the School Reports in **PASS** and re-import them into **3Sys**, the second import of the same data will be created as a new set of tasks. You will have to add the new tasks into your existing Academic Profile(s) to view the newly imported data set. For details on how to import School Reports from **PASS** to **3Sys**, see the *3Sys Academic Release Notes Version 4.3.0.0 (Document Reference: 4300_RN_3/1)*. This document is available from our Customer Centre, see *Contacting Us on p.38*.

About the Target RAG Calculation

The Target RAG calculation enables you to specify a task as the target grade/mark for a pupil, so that you can measure pupils' achievement against that target. (RAG stands for red, amber and green.) This target is referred to as the target task.

When you apply the Target RAG calculation, it highlights how well pupils have performed against the target, with red indicating that a pupil has fallen below the target, green indicating that the pupil has achieved above the target, and various colour gradients of orange, yellow and green in between to indicate the proportional level of achievement the pupil has attained against the target task.

As part of the Target RAG calculation, arrows are also used to indicate pupils' progress so any users with colour vision deficiency can still immediately assess pupils' progress, with a **Down** arrow indicating that a pupil has fallen below the target, an **Up** arrow indicating that the pupil has achieved above the target, and a **Horizontal** arrow indicating that the pupil has attained a level in between the two. You are able to switch off the RAG arrows (display the **Mark Inquiry** Task grid, click **More Actions > Show/Hide Rag Arrows**).

You can perform a Target RAG calculation against:

- A task specified as the target task within an Academic Profile.
- Any task within the **Mark Inquiry** Task grid.

The example below shows the target task as the 'Short Story' task against which the achievements of pupils' in the other tasks in the Task grid have been highlighted by the use of colour and arrows.

NOTE: By default unless you have already chosen to view marks as percentages, when you perform a Target RAG calculation on numeric tasks, the actual marks are displayed (see the screenshot above). You can view these marks as percentages, by clicking the **Show marks as percentages** button. (If the numeric tasks have a different maximum mark and the marks have been normalised, the figures make more sense once they are displayed as percentages.) For details, see *About Normalised Numeric Marks on p.12*.

Before you start using Target RAG calculations, you need to understand the following:

- Only those tasks that share the same marking method are compared against one another. For more details, see *About Tasks and Marking Methods on p.11*.

- How to set up your grade sets so that the Target RAG calculation and the Column by column RAG calculation can perform as expected, see *Setting up your Grade Sets appropriately for the RAG Calculations on p.11*.

- What happens when you perform a Target RAG calculation, or a Column by column RAG calculation, against tasks with numeric values with differing maximum marks, see *About Normalised Numeric Marks on p.12*.

- You can set a target task as part of the **Add Academic Profile** wizard (you view the results in the **Mark Inquiry** Task grid). For details, see *About Setting a Target Task within the Add Academic Profile wizard on p.13*.

- You can set a target task within **Mark Inquiry** against any task in the Task grid. You can do this for task data returned as a result of selecting an Academic Profile using the **Academic Profiles** tab, or as the result of specifying search criteria on the **General Search** tab. For details, see *About Setting the Target Task within the Mark Inquiry Task grid on p.15*.

- You can perform Column by column RAG calculations against Academic Profiles. For details, see *About the Column by Column RAG Calculation for Academic Profiles on p.16*.

About Tasks and Marking Methods

When you specify the target task and apply the Target RAG calculation, only those tasks in the Task grid that share the same marking method as the target task will display the Target RAG calculation, i.e. will display the colours and arrows. If the target task has a grade set (with a numeric equivalent), only those tasks within the Task grid that have the matching grade set display the Target RAG calculation. If the target task is numeric, only those tasks within the Task grid that are also numeric display the Target RAG calculation. Equally when you specify a task as the starting point for the Column by column RAG calculation, only those tasks in the Task grid that share the same marking method as the starting point task will display the Column by column RAG calculation.

If the target task is a **numeric task** and you apply the Target RAG calculation or the Column by column RAG calculation:

- Only other numeric tasks within the Task grid will display the colour coding.
- Any grade set tasks or tasks within the Task grid with text marks are ignored.
- If the numeric tasks have different maximum values (the 'Out of' mark), then a message appears requesting confirmation that you would like the results normalised. For further details, see *About Normalised Numeric Marks p.12*.

If the target task is a **grade set with a numeric equivalent** and you apply the Target RAG calculation or the Column by column RAG calculation:

- Only those tasks with a matching grade set will display the colour coding.
- Any task with any other grade set within the Task grid is ignored.
- Any numeric tasks or tasks with text marks within the Task grid are ignored.

NOTE: If a target task has a grade set without a numeric equivalent, then a RAG calculation cannot be performed.

Setting up your Grade Sets appropriately for the RAG Calculations

For the Target RAG calculation and the Column by column calculation to perform as expected, you must ensure that you set up your grade sets so that the higher the grade, the higher the numeric equivalent. For example:

| The RAG calculations will work as expected, if the grade set is configured like this:		Whereas the RAG calculations will NOT work as expected, if the grade set is configured like this:	
A	80	A	1
B	70	B	2
C	60	C	3

You MUST ensure that the grade sets you wish to use with the RAG calculations are configured as described above, otherwise the results of the RAG calculations will be inverted, i.e. in the reverse of how one would expect. For example, if a pupil achieved an improvement between task 1 and task 2 of grade 'B' to grade 'A', and the numeric equivalents of the grade set were set up in reverse, then the RAG calculation would show a decrease rather than an increase.
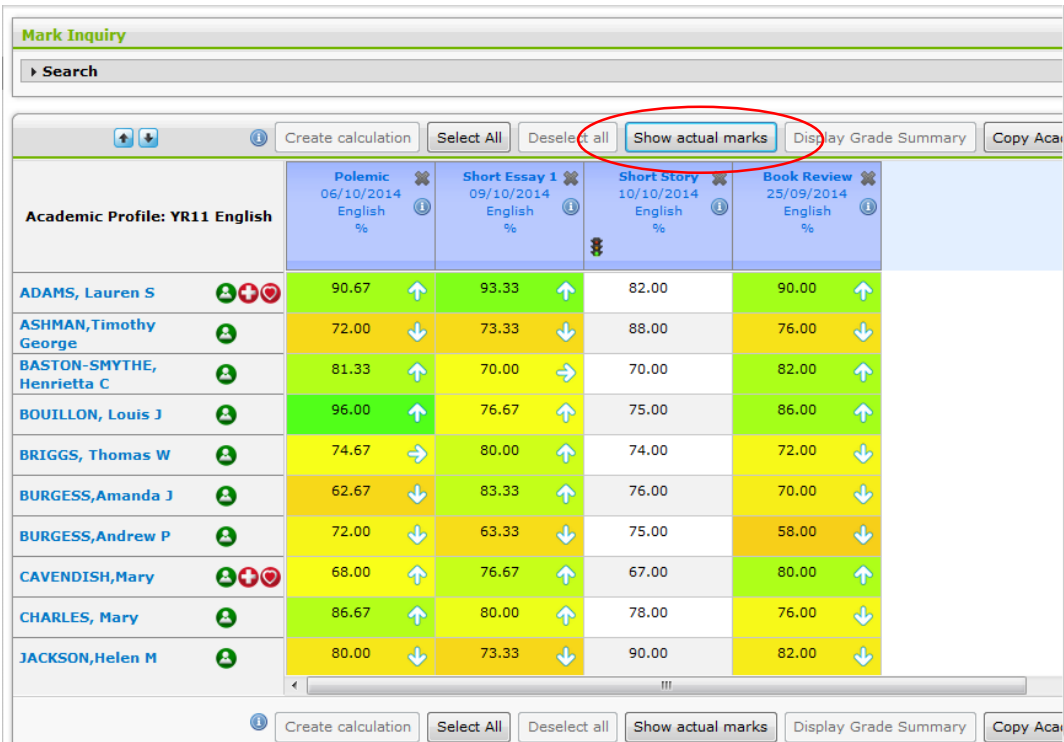
About Normalised Numeric Marks

When you display a view within the **Mark Inquiry** Task grid (using the **General Search** tab or the **Academic Profiles** tab), if there are numeric tasks that have different maximum values, when you choose to perform a RAG calculation (by clicking on the **Traffic Light** icon, or selecting a column heading in the Task grid and clicking **Summaries > Target RAG** or **Summaries > Column by column RAG**), you are asked if you wish to normalise each numeric task. If you click the **Yes** button, the RAG calculation normalises these figures, i.e. uses a percentage equivalent of these marks.
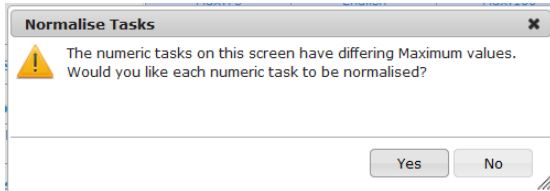
For example in the screenshot below, the maximum mark for each task differs. The 'Polemic' task is 'Out of' a maximum of 75, the 'Short Essay' is 'Out of' a maximum of 30, the 'Short Story' is 'Out of' a maximum of 100, and the 'Book Review' is 'Out of' a maximum of 50.

NOTE: By default unless you have already chosen to view marks as percentages, when you perform a Target RAG calculation or a Column by column RAG calculation on numeric tasks, the actual marks are displayed (see the screenshot above). If you wish to view the percentage marks, which make more sense if the marks have been normalised, click on the **Show marks as percentages** button. The marks are displayed as their percentage equivalents (see the screenshot below).

NOTE: To view the actual marks again, click on the **Show actual marks** button.

About Setting a Target Task within the Add Academic Profile wizard

As part of the **Add Academic Profile** wizard, you can set a target task against which all other tasks within that Academic Profile are compared. In **Step 3** of the Academic Profile wizard, you use the **Select Task to be used as the Target task for this view** drop list to specify which task to use as the target. In this example, the 'Short Story' task has been selected.

Subsequently in the **Mark Inquiry** module, you can display the Academic Profile and its associated data set and view the pupils' progress against the target task. When you view that Academic Profile the **Traffic Light** icon appears in the column heading of the task you specified as the target. By default, the Target RAG calculation is switched off (the **Traffic Light** icon is grey in colour); you switch it on by clicking on the **Traffic Light** icon - the icon changes from grey to colour and the task grid is refreshed to illustrate each pupil's progress against the target task.

For example, the first screenshot below shows the Academic Profile with the Target RAG calculation switched off, and the second screenshot shows the same view with it switched on. The third screenshot displays the marks as percentages.

The Target RAG calculation enables you to immediately and visually track an individual's progress against the specified target. If you have colour vision deficiency, the **Up**, **Down** and **Horizontal** arrows also provide a pictorial representation of pupils' progress. To indicate which task has been set as the target task within the Academic Profile, the column of the target task is not coloured, and the column heading contains the **Traffic Light** icon.

NOTE: If the target task has been set using the **Summaries** menu within the **Mark Inquiry** Task grid, then the **Traffic Light** icon does not appear in the target task's column heading.

NOTE: By default unless you have already chosen to view marks as percentages, when you perform a Target RAG calculation on numeric tasks, the actual marks are displayed (see the screenshot above).

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You can view these marks as percentages, by clicking the **Show marks as percentages** button. (If the numeric tasks have a different maximum mark and the marks have been normalised, the figures make more sense once they are displayed as percentages.) The screenshot below displays the marks as percentages.

About Setting the Target Task within the Mark Inquiry Task grid

Within the **Mark Inquiry** module, you can also set the target task for any task within the Task grid, by clicking on the relevant cell heading and clicking **Summaries > Target RAG**. The relevant tasks within the grid display the Target RAG calculation, in relation to the target task selected.

For example in the screenshot below, the 'Polemic' task has been selected as the target task.

To indicate which task has been set as the target task, the column of the target task is not coloured.

NOTE: If you accidentally select more than one column heading, the **Summaries > Target RAG** menu item is disabled. You can only select the one task against which the RAG calculation will be performed.

About the Column by Column RAG Calculation for Academic Profiles

NOTE: The Column by column RAG calculation is only available for Academic Profiles.

You can apply the RAG (red, amber and green) calculation on a column by column basis for Academic Profiles, by selecting the column heading of a task as the starting point of the calculation and clicking **Summaries > Column by column RAG**. Each task is compared to the one immediately before it in the Task grid. (This is referred to as the 'Column by column RAG calculation'.) This calculation enables you to easily assess pupils' progress for the tasks displayed within the Task grid on a progressive task by task basis.

For example, in the screenshot below the 'Polemic' task has been set as the starting point for the **Column by column** calculation. The 'Short Essay 1' task is colour coded in comparison to the marks gained in the 'Polemic' task; the 'Short Story' task is colour coded in relation to the marks gained in the 'Short Essay 1' task; and the 'Book Review' task is colour coded in relation to the marks gained in the 'Short Story' task.

Mark Inquiry

▸ Search

Create calculation Select All Deselect all Show marks as percentages Display Grade Summary Copy Academic Profile More Actions ▾ Summaries ▾

Academic Profile: YR11 English		Polemic 06/10/2014 English Max:75	Short Essay 1 09/10/2014 English Max:30	Short Story 10/10/2014 English Max:100	Book Review 25/09/2014 English Max:50
ADAMS, Lauren S		68	28	82	45
ASHMAN,Timothy George		54	22	88	38
BASTON-SMYTHE, Henrietta C		61	21	70	41
BOUILLON, Louis J		72	23	75	43
BRIGGS, Thomas W		56	24	74	36
BURGESS,Amanda J		47	25	76	35
BURGESS,Andrew P		54	19	75	29
CAVENDISH,Mary		51	23	67	40
CHARLES, Mary		65	24	78	38
JACKSON,Helen M		60	22	90	41
KENNEDY, Donald		54	25	81	39
MASON, Mary		60	26	64	37

Minimum marks for task
Maximum marks for task
Mean marks for task
Median mark for task
Minimum marks for group
Maximum marks for group
Mean marks for group
Median mark for group
Benchmarks
ⓘ Target RAG
✓ Column by column RAG

Create calculation Select All Deselect all Show marks as percentages Display Grade Summary Copy Academic Profile More Actions ▾ Summaries ▾

NOTE: By default, when you perform a Column by column RAG calculation on numeric tasks, the actual marks are displayed (see the screenshot above). If you wish to view the percentage marks, which make more sense if the marks have been normalised, click on the **Show marks as percentages** button. The marks are displayed as their percentage equivalents (see the screenshot below). For details, see *About Normalised Numeric Marks on p.12*.

Mark Inquiry

▸ Search

Create calculation Select All Deselect all Show actual marks Display Grade Summa...

Academic Profile: YR11 English		Polemic 06/10/2014 English %	Short Essay 1 09/10/2014 English %	Short Story 10/10/2014 English %	Book Review 25/09/2014 English %
ADAMS, Lauren S		90.67	93.33	82.00	90.00
ASHMAN,Timothy George		72.00	73.33	88.00	76.00
BASTON-SMYTHE, Henrietta C		81.33	70.00	70.00	82.00
BOUILLON, Louis J		96.00	76.67	75.00	86.00
BRIGGS, Thomas W		74.67	80.00	74.00	72.00
BURGESS,Amanda J		62.67	83.33	76.00	70.00
BURGESS,Andrew P		72.00	63.33	75.00	58.00
CAVENDISH,Mary		68.00	76.67	67.00	80.00
CHARLES, Mary		86.67	80.00	78.00	76.00
JACKSON,Helen M		80.00	73.33	90.00	82.00
KENNEDY, Donald		72.00	83.33	81.00	78.00
MASON, Mary		80.00	86.67	64.00	74.00
PHILLIPS,James D		77.33	66.67	77.00	86.00

Create calculation Select All Deselect all Show actual marks Display Grade Summa...

NOTE: If you accidentally select more than one column heading, the **Summaries > Column by column RAG** menu item is disabled. You can only select the one task against which the RAG calculation will be performed.
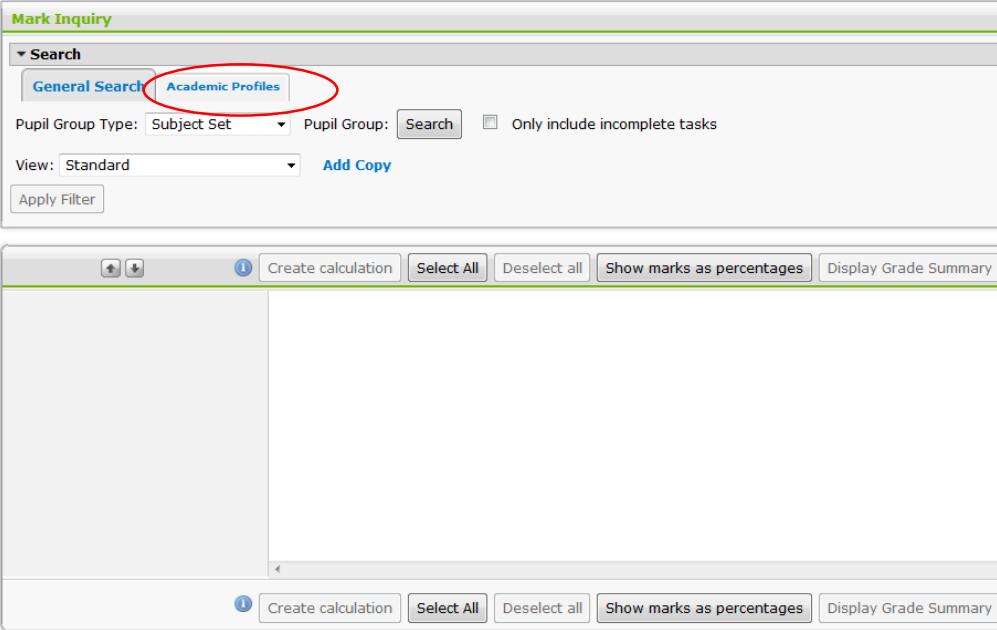
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Creating Academic Profiles

For an overview, see *About Creating Markbook Academic Profiles on p.5*.
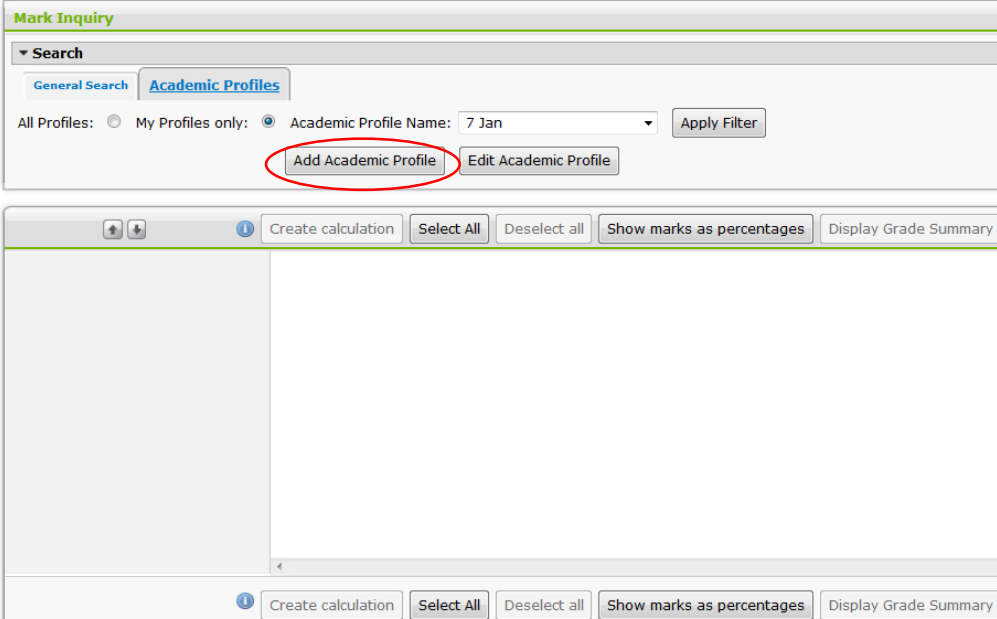
To create an Academic Profile:

1. You can add Academic Profiles from within the **Mark Inquiry** module or the **Markbook Academic Profiles** module (for the former see *Step 1a*, for the latter see *Step 1b*):

   a. To add an Academic Profile using the **Mark Inquiry** module:

   o From the **All Functions** tab, click on the **Mark Inquiry** module icon ![Mark Inquiry]. The **Mark Inquiry** screen appears displaying the **General Search** tab.

   o Click on the **Academic Profiles** tab.

   o Go to *Step 2*.

b. To add an Academic Profile using the **Markbook Academic Profiles** module:

   o From the **All Functions** tab, click on the **Markbook Academic Profiles** module icon

.

       The **Academic Profile Search** screen appears.

   o Go to *Step 2*.

2. Click the **Add Academic Profile** button. (This button is available from within the **Mark Inquiry** and the **Markbook Academic Profiles** modules.)

    The **Add Academic Profile: Step 1 –Main Details** wizard appears.

   a. In the **View Name** field enter the name for the Academic Profile. For example 'YR 7 English'.

   b. From the **Pupil Group Type** drop list, select the relevant Pupil Group Type. For example 'Subject Set'.

   c. The **Owner** field is mandatory, but you may optionally change the staff member. (Optional) If necessary change the owner of the Academic Profile view, by clicking the **Search** button next to the **Owner** field and searching for and selecting another member of staff. (The Owner defaults to the current user, unless the creator of the Academic Profile is a System Administrator, or equivalent, with no associated staff user; if this is the case, the Owner field is blank and you need to search for and select the Owner for this Academic Profile.)

   d. Based on your **Pupil Group Type** selection, you can select the specific Pupil Group:

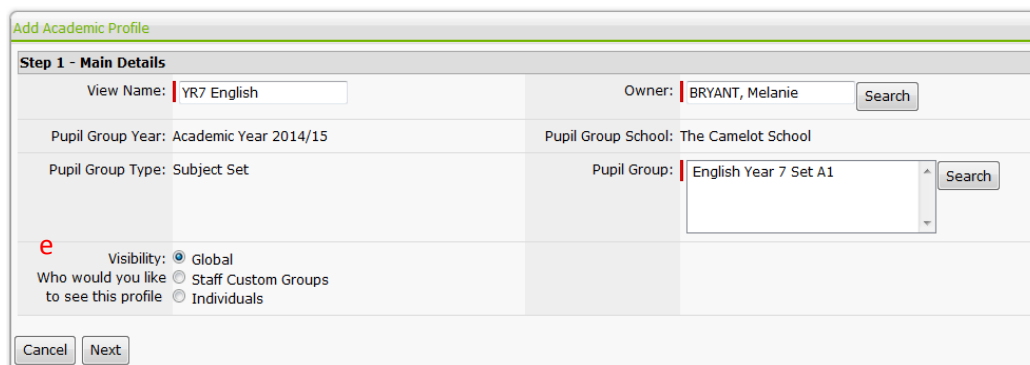o Click the **Search** button next to the **Pupil Group** field. The **Search** screen appears.

o From the **Search** drop list, select the appropriate item, enter search criteria in the **Search** field, for example 'Engl', and click the **Search** button. The list is populated with items that match your search criteria.

o Click on the check boxes next to the required items (you may need to scroll), and click the **Select** button. The selected items are moved to the bottom list.
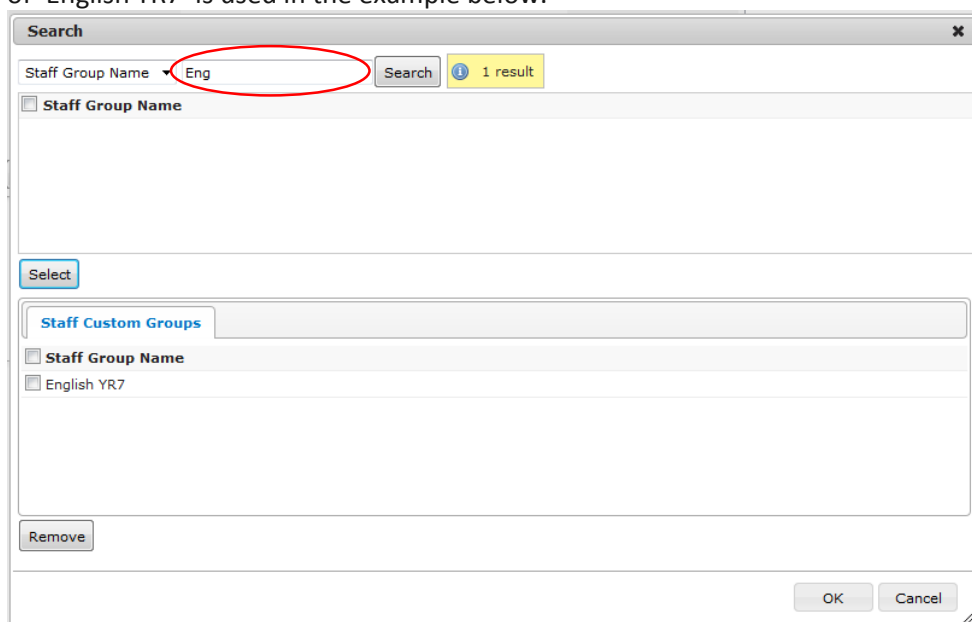
o Click the **OK** button. You are returned to **Step 1** of the **Add Academic Profile** wizard, with the pupil group or groups you selected displayed in the **Pupil Group** field.

For example 'English Year 7 Set 1'.

e. Set the **Visibility: Who would you like to see this profile** option:

- o **Global** - By default, the visibility of new Academic Profiles is set to global; all users with access to Academic Profiles are able to view and use these Academic Profiles (i.e. all users who have the **Academic Profile View** ticked in permissions, for more details, see *Configuring Academic Profiles on p.36*).

- o **Staff Custom Groups** - Click this option to specify the Staff Custom Group or groups that you wish to be able to view and use this Academic Profile - a **Search** button appears. Click on it to display the **Search** screen with the 'Staff Group Name' selected for you in the **Search** drop list. Enter search criteria in the **Search** field (highlighted below) and click the **Search** button. Select the appropriate Staff Custom Groups and click the **Select** button, then click the **OK** button. The Staff Group Name of 'English YR7' is used in the example below.

You are returned to **Step 1** of the **Add Academic Profile** wizard, with the appropriate data displayed.

NOTE: For information about the **Staff Custom Group** module, please refer to the *3Sys Academic Release Notes Version 4.3.0.0 (Document Reference: 4300_RN_3/1)*. This document is available from our Customer Centre, see *Contacting Us on p.38*.

- o **Individuals** - Click this option to specify the individual staff member or members that you wish to be able to view and use this Academic Profile - a **Search** button appears. Click on it to display the **Search** screen with the 'Staff Name' selected for you in the **Search** drop list. Enter search criteria in the **Search** field (highlighted below), specify to restrict the search to **Academic staff only?** and click the **Search** button. Select the appropriate staff and click the **Select** button, then click the **OK** button.

- o You are returned to **Step 1** of the **Add Academic Profile** wizard, with the appropriate data displayed.

3. Click the **Next** button.
   The **Add Academic Profile: Step 2 – Additional Academic Years** screen appears.
   The academic year in which you are logged as is automatically selected (you are unable to de-select this).

- ▪ (Optional) Select additional academic years to add to your Academic Profile, by clicking the relevant check boxes on the left side of the column.

NOTE: From **Step 2** onwards of the wizard, you can use the **Back** button to return to the previous Step.

4. Click the **Next** button.
   The **Add Academic Profile: Step 3 –Choose the Task Profiles, Task Categories and Task Types** screen appears.

a. Select the appropriate **Task Profile** or profiles, by clicking on the relevant check boxes to de-select or select a Task Profile. (The **Task Profile** option defaults to 'Show all'; click on it to de-select it and to apply a more succinct search.)

b. Select the appropriate **Task Type** or types, by clicking on the relevant check boxes. (The available Task Types are filtered based on the selected Task Profiles.)

c. (Optional) Specify the date range to show only tasks within that date range, using the **From** and **To** fields.

d. (Optional) Select the appropriate **Task Category** or categories, by clicking on the relevant check boxes.

e. Click the **Apply Filter** button.
   The **Step 3** screen of the wizard is refreshed and the **Choose the Tasks to be included** panel displays a list of tasks that reflect your selected filters (from Steps 4a – 4d).

   NOTE: If your search criteria only retrieved a small number of tasks, these appear beneath the top filtering panel. If your search returned many tasks, the top filtering panel is hidden from view, as shown in the screenshot below. If you wish to change your filters, click on the **Step 3** link at the top of the screen.
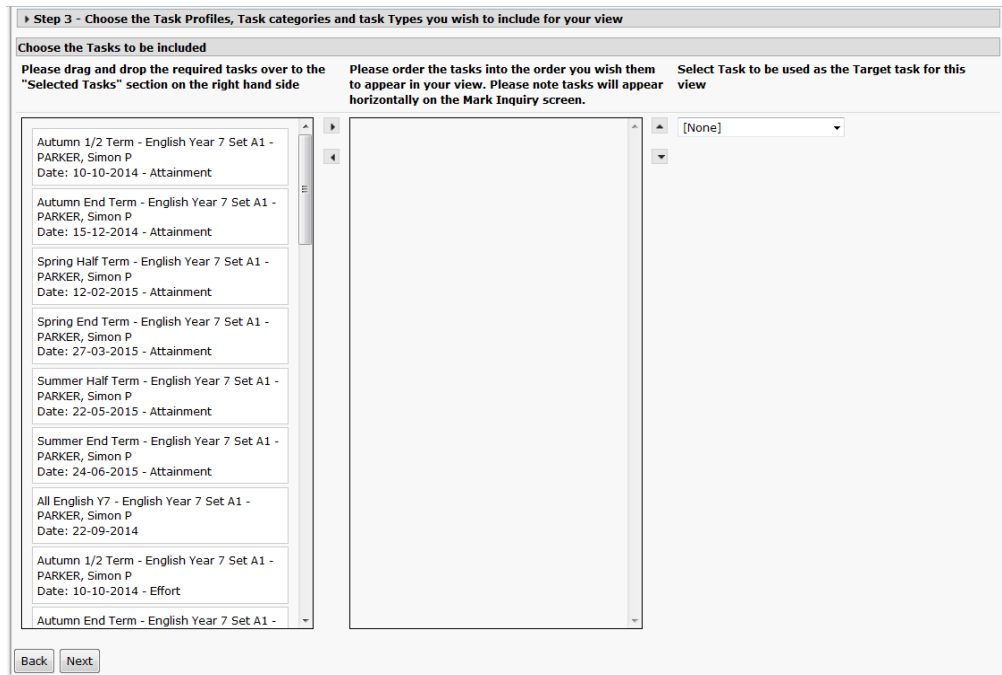
f. To select the tasks to include within the Academic Profile, do one of the following:

- o Click and drag the tasks you require from the first column to the second column.

- o Click on the relevant tasks in the first column and use the **Arrow** buttons to move the tasks to the second column.
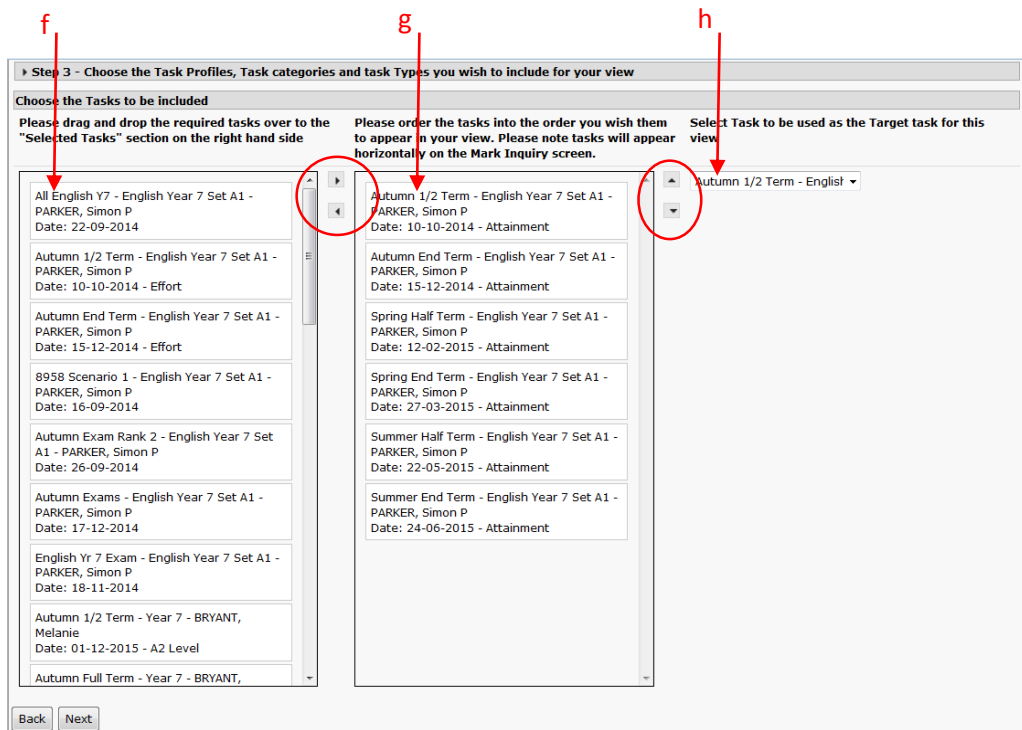
g. Check that the order in which the tasks are displayed (in the second column) is the order in which you want the tasks to appear within the Academic Profile in **Mark Inquiry**. If you wish to alter the order, click and drag the items or click on the relevant task and click on the **Up** or the **Down** arrow to move the tasks up or down the list.

h. (Optional) From the **Select Task to be used as the Target task for this view** drop list, select the appropriate task to set as the target (for example 'Autumn ½ Term – English Year 7 Set A1')

5. Click the **Next** button.
   The data set that matches your new Academic Profile is displayed.

6. Choose one of the following options:

   ▪ Click the **Finish and View** button to see the results of your new Academic Profile within the **Mark Inquiry** module. For details about viewing your Academic Profile, see *Viewing Academic Profiles and the Target RAG Calculation on p.26*.

   ▪ Click the **Finish** button to display the **Academic Profiles Search** screen (within the **Markbook Academic Profiles** module), enabling you to add more Academic Profiles. For details, refer to the start of this procedure.

Viewing Academic Profiles and the Target RAG Calculation

For an overview, see *About Creating Markbook Academic Profiles on p.5.*

To view Academic Profiles and perform the Target RAG calculation against the target task specified in the Academic Profile:

NOTE: If you wish to perform the Target RAG calculation against a task other than the target task specified in the Academic Profile, see *Performing the Target RAG Calculation on p.28.*

1. From the **All Functions** tab, click on the **Mark Inquiry** module icon   .
   The **Mark Inquiry** screen appears.
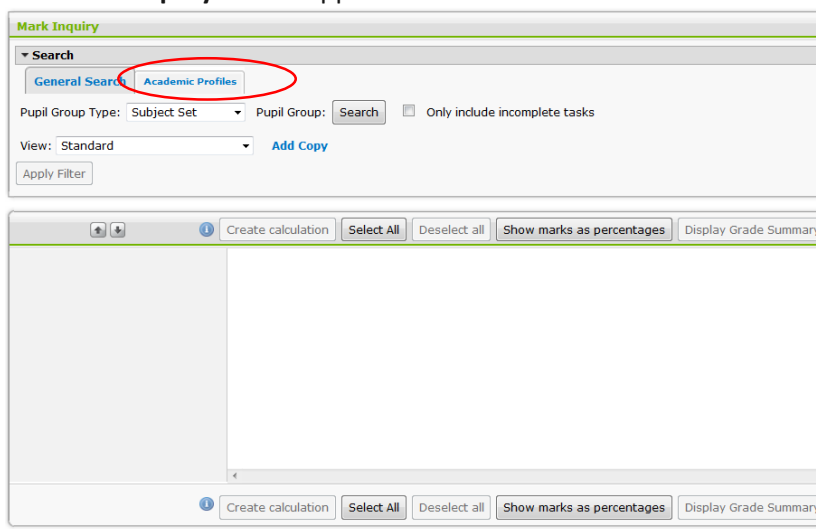
2. Click on the **Academic Profiles** tab.
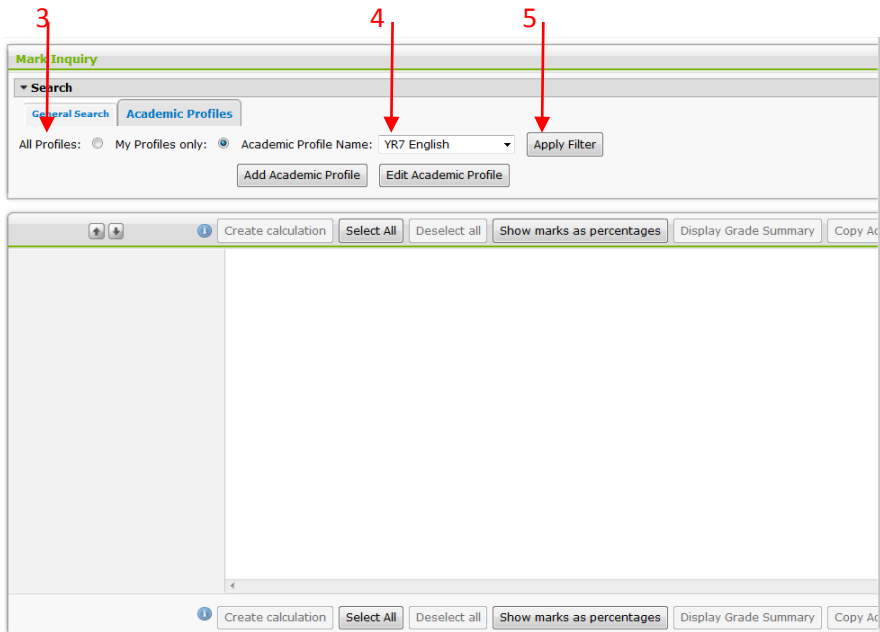
3. Select **All Profiles:** or the **My Profiles only:** option.
   The Academic Profiles available in the **Academic Profile Name** drop list are updated accordingly.

4. Select the required Profile from the **Academic Profile Name** drop list, in this example the 'YR7 English' Academic Profile is selected.

5. Click the **Apply Filter** button to view the pupil group and markbook data which the selected Academic Profile returns.

6. View the Target RAG calculation for the target task specified in the Academic Profile, by clicking on the **Traffic Light** icon.

   NOTE: The example given in this procedure shows tasks with a grade set with associated numeric marks. However, if you had displayed tasks with numeric values with differing maximum marks, when you click the **Traffic Light** icon you are asked if you wish to normalise the marks, i.e. uses a percentage equivalent of these marks. If this message appears, we advise you to click the **Yes** button for the marks to be normalised. For details, see *About Normalised Numeric Marks on p.12*.

   The **Mark Inquiry** Task grid is refreshed to display the Target RAG calculation.

7. (Optional) If the tasks are numeric and you wish to view the marks as percentages, click the **Show marks as percentages** button. To view the actual marks, click the **Show actual marks** button.

8. (Optional) To hide the RAG arrows, click **More Actions > Show/Hide Rag Arrows**.

9. (Optional) To hide the Target RAG calculation, click on the **Traffic Light** icon (as highlighted in the screenshot above).
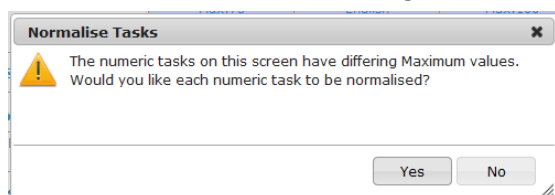
Performing the Target RAG Calculation

For an overview, see *About Creating Markbook Academic Profiles on p.5* and *About Setting the Target Task within the Mark Inquiry Task grid on p.15*.

To perform the Target RAG calculation against any task in the Task grid:

NOTE: This procedure details how to perform the Target RAG calculation against any task in the **Mark Inquiry** Task grid, with the exception of those tasks that have a grade set without a numeric equivalent (for details, see *About Tasks and Marking Methods on p.11*). If you wish to perform the Target RAG calculation using the target task specified within the Academic Profile, see *Viewing Academic Profiles and the Target RAG Calculation on p.26*.

1. Within the **Mark Inquiry** module display the relevant tasks in the Task grid, do one of the following:

   ▪ Use the **General Search** tab to filter for the appropriate pupil view.

   ▪ Use the **Academic Profiles** tab to filter for the appropriate Academic Profile view. If you are unsure, see Step 1-5 of *Viewing Academic Profiles and the Target RAG Calculation on p.26*.

2. Click in the column heading of the task you wish to make the target task.

   NOTE: If you accidentally select more than one column heading, the **Summaries > Target RAG** menu item is disabled. You can only select the one task against which the RAG calculation will be performed.

3. Click **Summaries > Target RAG**.

4. (Data dependent) If the **Normalise Tasks** screen appears your view contains tasks with numeric values with differing maximum marks; click the **Yes** button to normalise the marks, i.e. to display the percentage equivalent of these marks. (The example given in this procedure displays tasks with numeric values with differing maximum marks.)

The Task grid is updated and the Target RAG icon in the **Summarises** menu changes from an 'i' to a tick, for example:

NOTE: If a target task has a grade set without a numeric equivalent, then a RAG calculation cannot be performed. For details, see *About Tasks and Marking Methods on p.11*.

5. (Optional) If the tasks are numeric and you wish to view the marks as percentages, click the **Show marks as percentages** button. To view the actual marks, click the **Show actual marks** button.

6. (Optional) To hide the RAG arrows, click **More Actions > Show/Hide Rag Arrows**.

7. (Optional) To hide the Target RAG calculation, click **Summaries > Target RAG**.

Performing the Column by Column RAG Calculation

For an overview, see *About Creating Markbook Academic Profiles on p.5* and *About the Column by Column RAG Calculation for Academic Profiles on p.16*.

To perform the Column by column RAG calculation:

1. Within the **Mark Inquiry** module use the **Academic Profiles** tab to filter for the appropriate Academic Pupil view. If you are unsure, see Step 1-5 of *Viewing Academic Profiles and the Target RAG Calculation on p.26*.

2. Select the column heading of a task as the starting point of the calculation.

3. Click **Summaries > Column by column RAG**.

   NOTE: The **Column by column RAG** menu item is disabled if you accidentally select more than one column heading (you can only select the one task against which the RAG calculation will be performed). It is also disabled if you are looking at a general view rather than an Academic Profile view.

4. (Data dependent) If the **Normalise Tasks** screen appears your Academic Profile view contains tasks with numeric values with differing maximum marks; click the **Yes** button to normalise the marks, i.e. to display the percentage equivalent of these marks. (The example given in this procedure displays tasks with numeric values with differing maximum marks.)
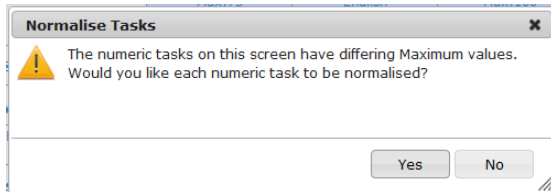
The Task grid is refreshed to display the Column by column RAG calculation, enabling you to view track pupils' achievements on a progressive task by task basis. For example, in the screenshot below the 'Polemic' task has been set as the chosen starting point for the **Column by column** calculation. The 'Short Essay 1' task is colour coded in comparison to the marks gained in the 'Polemic' task; the 'Short Story' task is colour coded in relation to the marks gained in the 'Short Essay 1' task; and the 'Book Review' task is colour coded in relation to the marks gained in the 'Short Story' task.

NOTE: If a target task has a grade set without a numeric equivalent, then a RAG calculation cannot be performed. For details, see *About Tasks and Marking Methods on p.11*.

5. (Optional) If the tasks are numeric and you wish to view the marks as percentages, click the **Show marks as percentages** button. To view the actual marks, click the **Show actual marks** button.

6. (Optional) To hide the RAG arrows, click **More Actions > Show/Hide Rag Arrows**.

7. (Optional) To hide the Column by column RAG calculation, click **Summaries > Column by column RAG**.

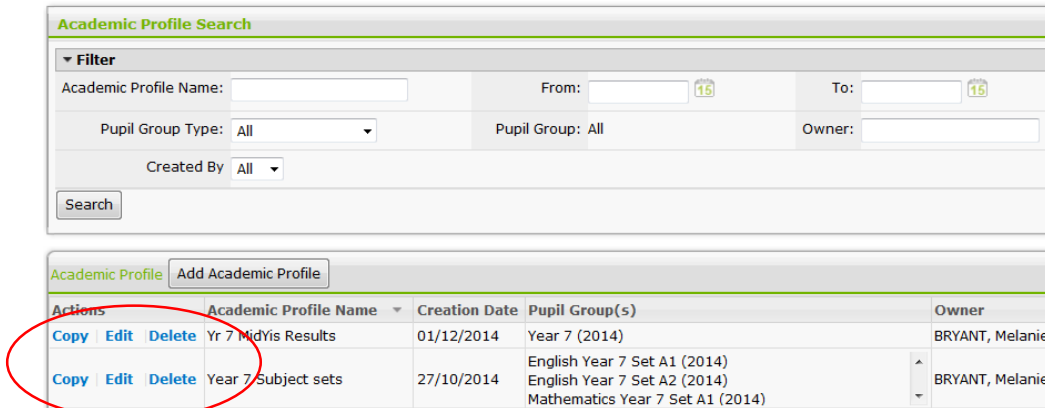# About Maintaining Academic Profiles

For how to maintain Academic Profiles, see *Maintaining Academic Profiles on p.32*.

Once you have created Academic Profiles within the **Mark Inquiry** module or the **Markbook Academic Profile** module, you can edit and copy them from either module. In addition, you can also delete existing Academic Profiles from the **Markbook Academic Profile** module.

In **Mark Inquiry** you can edit and copy existing Academic Profiles (if you have the necessary permissions):
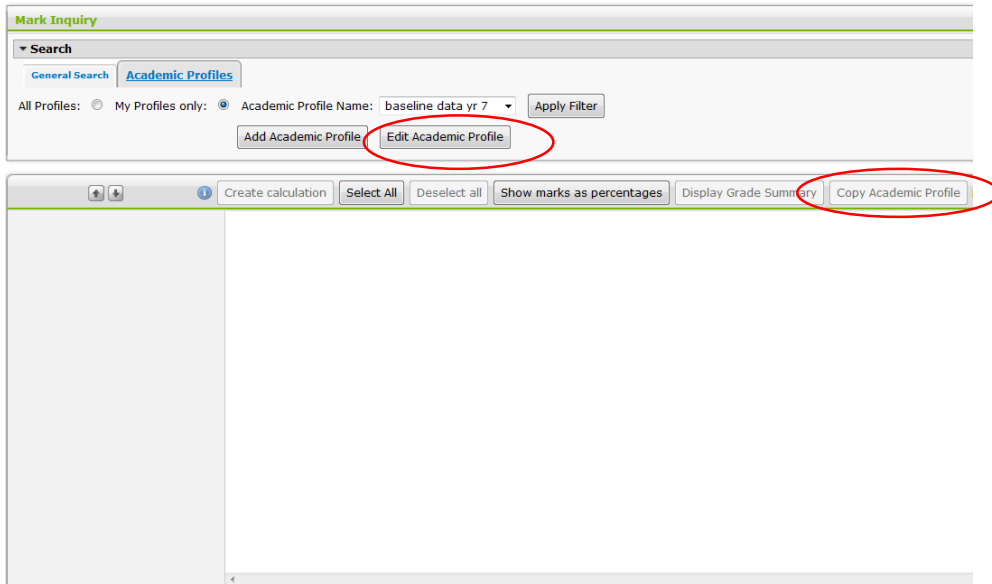
In **Markbook Academic Profiles** you can copy, edit and delete existing Academic Profiles:

Maintaining Academic Profiles

For an overview, see *About Maintaining Academic Profiles on p.31*.

You can maintain Academic Profiles using:

- The **Markbook Academic Profile** module, see *Maintaining Academic Profiles using the Markbook Academic Profiles module on p.32*.
- The **Mark Inquiry** module, see *Maintaining Academic Profiles using the Mark Inquiry module on p.33*.

Maintaining Academic Profiles using the Markbook Academic Profiles module

For an overview, see *About Maintaining Academic Profiles on p.31*.

To edit, copy or delete an Academic Profile within the Markbook Academic Profile module:

1. From the **All Functions** tab, click on the **Markbook Academic Profiles** module icon

    .

    The **Academic Profile Search** screen appears.

2. Use the **Filter** panel to filter the list of existing Academic Profiles:

    a. Enter search criteria, such as the name of the Academic Profile or the date range in which the Profile was created.

    b. Click the **Search** button.
        The list of Academic Profiles that match your search criteria appear in a list in the **Academic Profile** panel.

3. Maintain the appropriate Academic Profile:

    - To edit, see *Step 4*.
    - To copy, see *Step 5*.
    - To delete, see *Step 6*.

    NOTE: For each Step below ensure that you click on the **Copy**, **Edit** or **Delete** link within the appropriate row of the table.

4. To edit:

    a. In the **Actions** column, click on the **Edit** link.

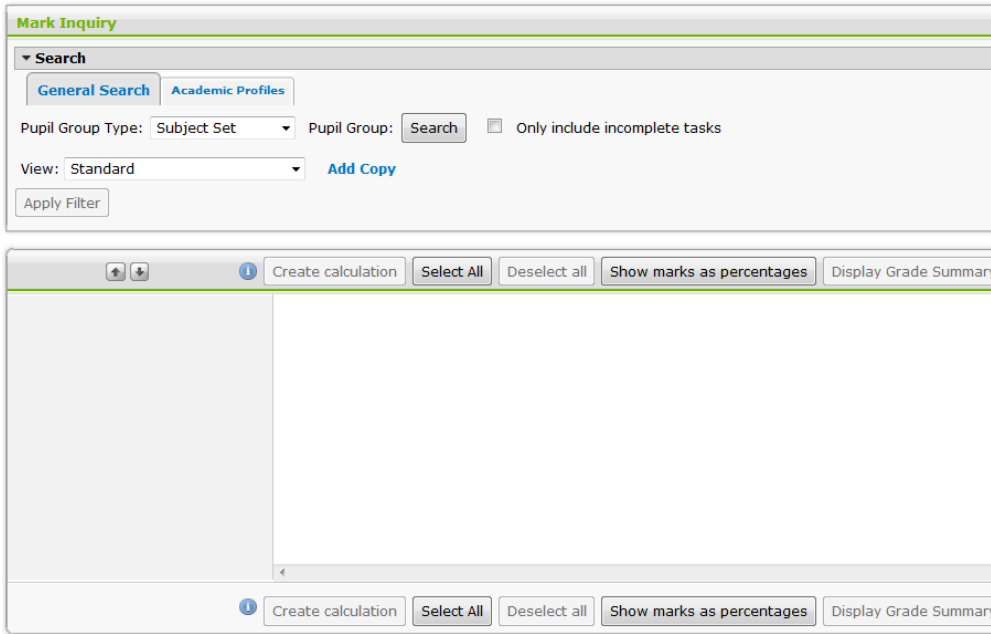   You are taken to the **Add Academic Profile: Step 1 – Main Details** screen.

b. Make any necessary changes to the Academic Profile using the Academic Profile wizard, see Step 2 onwards of *Creating Academic Profiles on p.18*.

5. To copy:

   a. In the **Actions** column, click on the **Copy** link.

   You are taken to the **Add Academic Profile: Step 1 – Main Details** screen. The content of the selected Academic Profile is copied.

   b. In the **View Name** field, enter a new name for the copied Academic Profile.

   c. Make any necessary changes to the Academic Profile using the Academic Profile wizard, see Step 2 onwards of *Creating Academic Profiles on p.18*.

6. To delete:

   a. In the **Actions** column, click on the **Delete** link.

   The **Confirm Delete** message appears requesting confirmation.

   b. Click the **Yes** button to delete the Academic Profile (click the **No** button if you do not wish to delete it).

Maintaining Academic Profiles using the Mark Inquiry module

For an overview, see *About Maintaining Academic Profiles on p.31*.

To edit or copy an Academic Profile within the Mark Inquiry module:

1. From the **All Functions** tab, click on the **Mark Inquiry** module icon . The **Mark Inquiry** screen appears.

2. Click on the **Academic Profiles** tab.
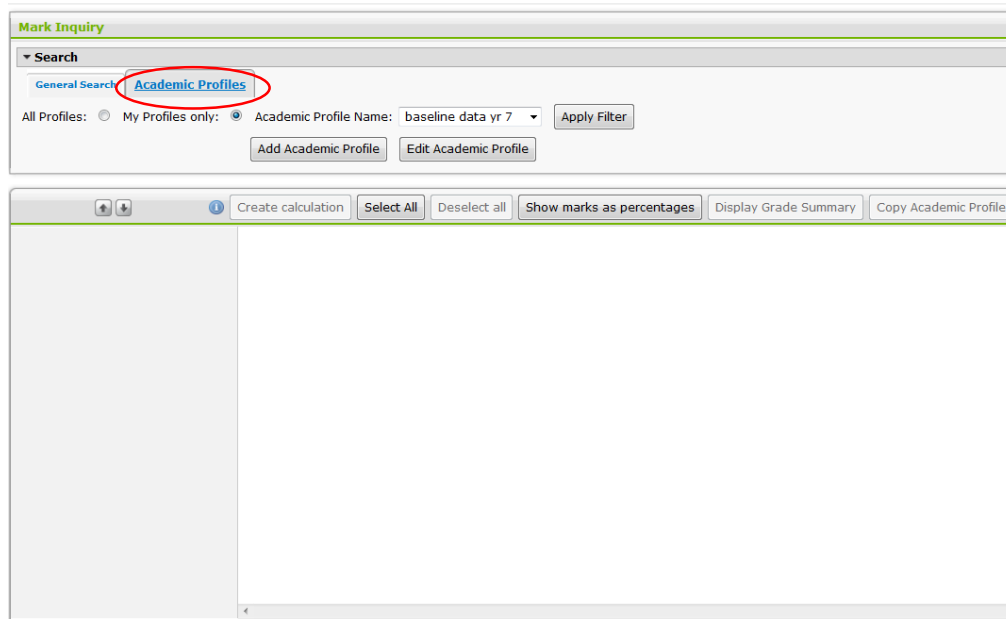
3. Select **All Profiles:** or the **My Profiles only:** option.
    The Academic Profiles available in the **Academic Profile Name** drop list are updated accordingly.

4. Select the required Profile from the **Academic Profile Name** drop list.

5. Maintain the selected Academic Profile:
    - To edit, see *Step 6*.
    - To copy, see *Step 7*.

6. To edit:

    a. Click the **Edit Academic Profile** button.
        You are taken to the **Add Academic Profile: Step 3 – Main Details** screen, enabling you to quickly change the tasks included within the Profile and the order in which the tasks appear. If you need to change the main details or the academic year, you can click the **Back** button to step back through the wizard.

        NOTE: If you choose the wrong Academic Profile by mistake, you can step through the wizard by clicking the **Next** button and then the **Finish** button without making any changes, or you can click the **Back** button to return to Step 1 of the wizard and click the **Cancel** button.

    b. Make any necessary changes to the Academic Profile using the Academic Profile wizard, see Step 2 onwards of *Creating Academic Profile on p.18*.
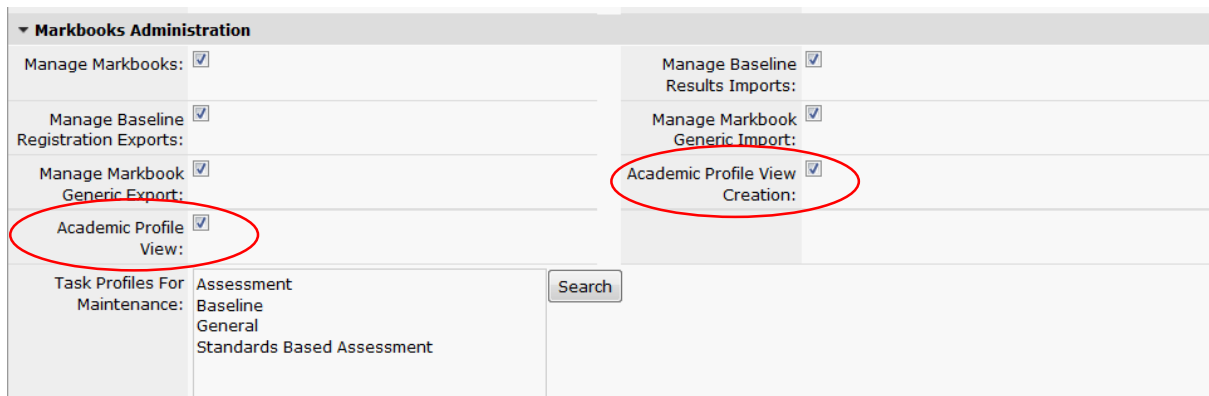
7. To copy:

    a. Click the **Apply Filter** button.
        The **Mark Inquiry** Task grid is populated with the data set for the selected Academic Profile.

NOTE: You are unable to copy an existing Academic Profile until you have displayed the Academic Profile data set.

b. Click the **Copy Academic Profile** button.
   You are taken to the **Add Academic Profile: Step 1 – Main Details** screen. The content of the selected Academic Profile is copied.

c. Enter a new **View Name** for the copied Academic Profile.

d. Make any necessary changes to the Academic Profile using the Academic Profile wizard, see Step 2 onwards of *Creating Academic Profiles on p.18*.

Configuring Academic Profiles

This section details the following:

- *About Configuring Permissions for Academic Profiles on p.36.*
- *Editing Profiles on p.36.*

About Configuring Permissions for Academic Profiles

For all the relevant users within your school to have access to the **Markbook Academic Profiles** module and to the Academic Profiles functionality within the **Mark Inquiry** module, you must ensure that you have configured the following Profile **Setup** settings appropriately:

Field Name	Field Description
Academic Profile View	Tick to allow the selected user or profile to have access to the **Academic Profile** views within the **Mark Inquiry** module.
Academic Profile View Creation	Tick to allow the selected user or profile to create, edit or delete **Academic Profile** views within the **Mark Inquiry** module or within the **Markbook Academic Profiles** module.

If you are unsure how to configure the permissions, see *Editing Profiles on p.36*.
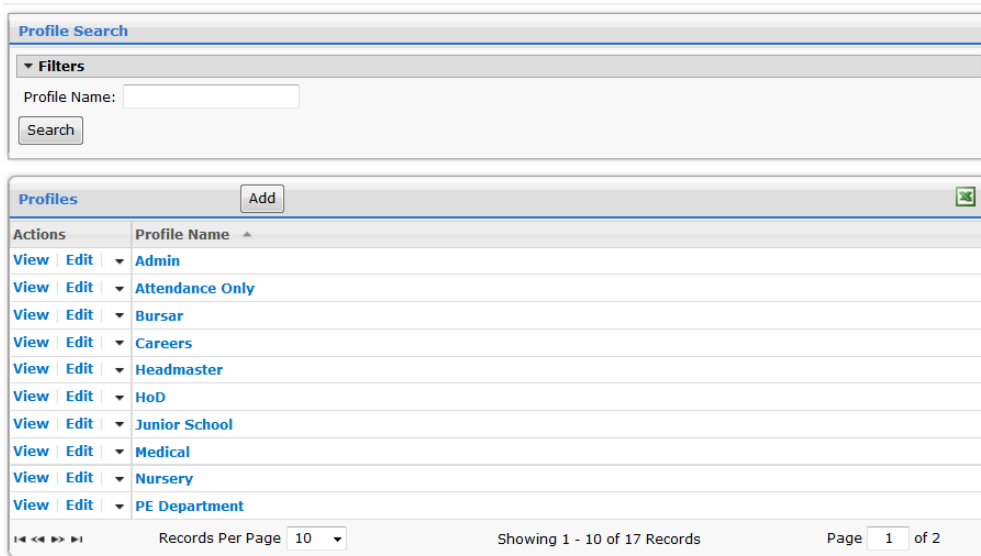
Editing Profiles

For further information about editing profiles, please refer to the **3Sys** online help.

To edit the details of an existing profile

1. In **3Sys** choose **Setup** from the menu at the top of your screen.
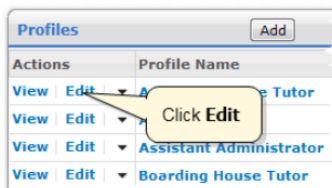   The **Setup** options appear in the **3Sys** side panel.

   NOTE: If the side panel is not currently displayed, click the left-facing arrow button ◄ on the left of your screen, near the top.

2. In the **Users and Profiles** menu, click **Profiles**.
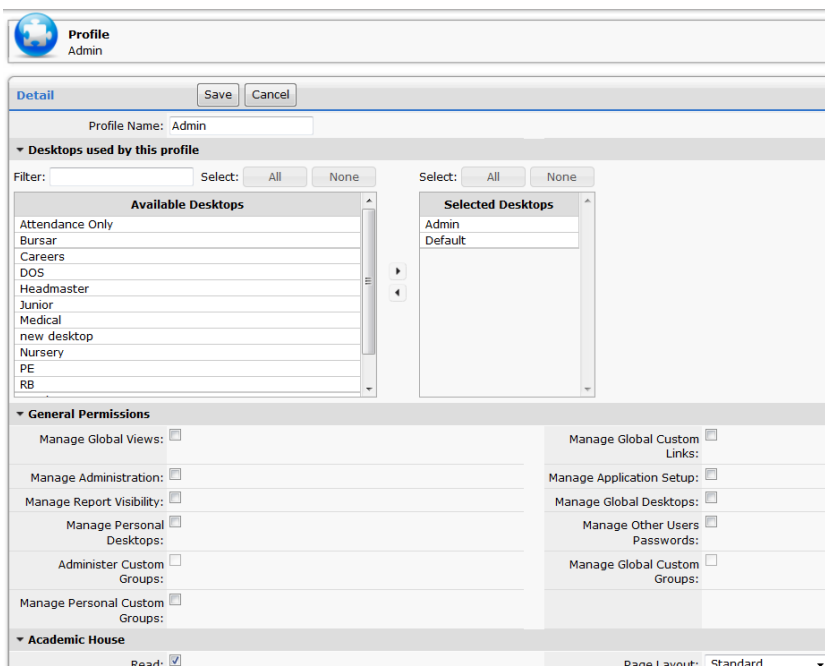   The **Profile Search** screen appears displaying a list of profiles.

3. Find the profile you want to edit.

   If you cannot find the required profile in the list, do one of the following:

   o Enter the name of the profile (or part of the name) in the **Profile Name** field and click **Search**.

   o Use the **Page Scroll** arrows ⏮ ◀ ▶ ⏭ at the bottom of the screen to view the profile records a page at a time.

4. In the **Actions** column, click **Edit** to the left of the name of the profile you want to edit.

The **Profile** screen appears.

NOTE: You can edit the following profile details:

- o Profile permissions (both general and for specific areas of the system).
- o Profile Name.
- o Desktops assigned to the profile.
- o Page layouts assigned to the profile.

5. Find the relevant profile permission you require:

   a. Check the name of the profile permission you need to change – see *About Configuring Permissions for Academic Profiles on p.36*.

   b. Do one of the following:

      ▪ Press CTRL+F to display the **Find** field, enter the name of the permission and press RETURN.
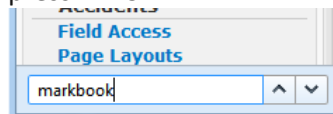
      The first match on the page is highlighted. Use the arrows to move down or up the page to find the required item.

      ▪ Scroll up or down the page to find the required item.

6. Set or disable the individual permission. Tick the box to grant the profile access to this permission, untick the box to disable that permission for this profile.

7. Scroll to the top or the bottom of the page and click the **Save** button.

Contacting Us

For further information on known issues and fixes, please visit our website and click the **Sign in** button to access our Customer Centre: www.wcbs.co.uk

Helpline	●	+ 44 (0)1458 833055	WCBS
Telephone	●	+ 44 (0)1458 833344	Somerset House Magdalene Street
Fax	●	+ 44 (0)1458 835297	Glastonbury Somerset
Email	●	support@wcbs.co.uk	BA6 9EJ
Website	●	www.wcbs.co.uk	UK