3sysACADEMIC

Communication

Overview Guide

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3sys® ACADEMIC

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CHAPTER 1

Introduction

Welcome to the 3sysACADEMIC Communication Overview Guide.

3sysACADEMIC **Communication** enables you to undertake a range of tasks, using the following modules: **Email / Notifications** and **Data / Reporting**. A summary of each is given below.

Email / Notifications Module

3sysACADEMIC includes an integrated email routine which allows you to send messages to any individual known to the school. It also includes a more sophisticated 'related list' option which means you can send emails to people associated with selected pupils, e.g. form tutors or parents, without having to look up each individual's details and enter them manually. Emails are sent directly from 3sysACADEMIC's web server and use a generic 'from' email address that has been set up by your System Administrator.

Notifications can be used to remind individuals or groups of users about forthcoming events, such as meetings. For example, a notification could be used to call and remind attendees of an urgent staff meeting, or a teacher could use a notification to remind them when a pupil is on a final warning regarding homework.

Data / Reporting Module

The **Data / Reporting** module consists of the following functions, as detailed below:

- **Documents** function.
- **Reports** function.
- **Names** function.

For details on each module, please refer to the relevant chapter.

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

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3sys® ACADEMIC

CHAPTER 2

Email and Notifications

This chapter discusses the following:

About the Email / Notifications Module

The **Email / Notifications** module consists of the following functions:

- Email
- Notifications
- Notification Categories

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

Email

3sysACADEMIC includes an integrated email routine which allows you to send messages to any individual known to the school. It also includes a more sophisticated 'related list' option which means you can send emails to people associated with selected pupils, e.g. form tutors or parents, without having to look up each individual's details and enter them manually. Emails are sent directly from 3sysACADEMIC's web server and use a generic 'from' email address that has been set up by your System Administrator. Emails can be sent via:

- The **Email** function (**Communication > Email / Notifications > Email**).
- The **Pupils** module.
- The **Staff** module.

For more information, see "Using Email in 3sysACADEMIC" on the facing page.

Notifications and Notification Categories

Notifications can be used to remind individuals or groups of users about forthcoming events or appointments. For example, a notification could be used to call and remind attendees of an urgent staff meeting, or a teacher could use a notification to remind them when a pupil is on a final warning regarding homework.

Before notifications can be added to 3sysACADEMIC, notification categories must be created. Categories are used to identify and group specific notifications.

For more information, see "Configuring Notification Categories" on page 39 and "Using Notifications" on page 30.

Note: Users MUST be logged in to receive notifications.

Accessing the Email / Notifications Module

HOW TO ACCESS THE EMAIL / NOTIFICATIONS MODULE

- Go to **Communication > Email / Notifications**.

Using Email in 3sysACADEMIC

3sysACADEMIC includes an integrated email routine which allows you to send messages to any individual known to the school and saved on the database. It also includes a more sophisticated 'related list' option which means you can send emails to people associated with selected pupils, e.g. form tutors or parents, without having to look up each individual's details and enter them manually. Emails are sent directly from 3sysACADEMIC's web server and use a generic 'from' email address that has been set up by your System Administrator.

Sending Emails to Pupils and/or their Related Contacts

HOW TO SEND EMAILS TO PUPILS AND/OR THEIR RELATED CONTACTS

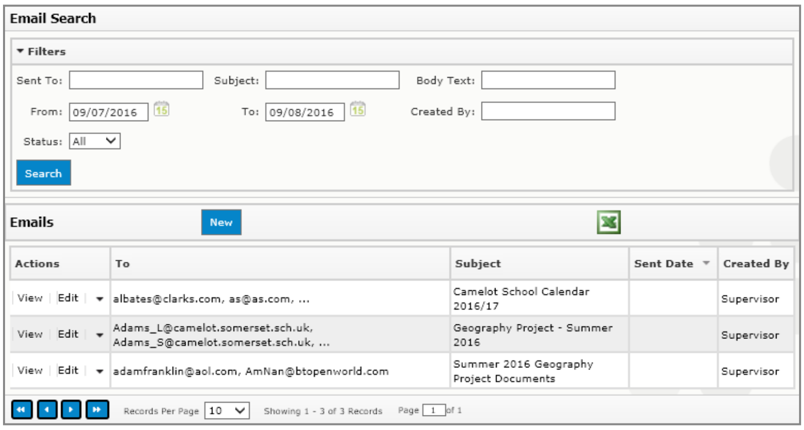
1. Do ONE of the following:

   » Select your recipients via **Communication > Email > Add**.

   More details...

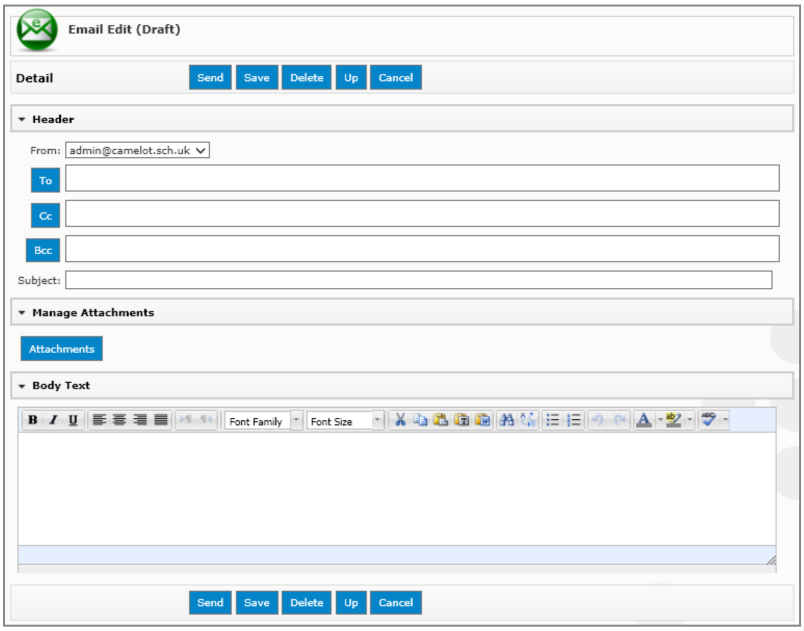
   a. Go to **Communication > Email**.

      The **Email Search** and **Emails** screen appears.



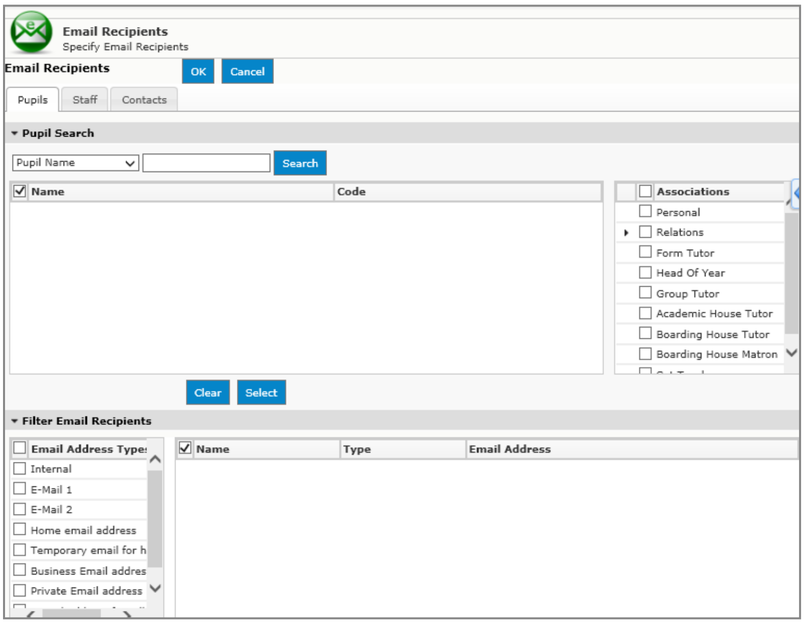
   b. Click **New**.

      The **Email Edit (Draft)** screen appears.



c. Click **To**, **Cc** or **Bcc** depending upon where you want your recipients to appear.

The **Email Recipients** screen appears.



d. Find the recipients of your email.

More details...

a. Use the first drop lists to refine your search. Your selection in the first drop list alters the options available in the second drop list.

Do ONE of the following:

- In the first drop list, select 'Pupil Name'. In the second field, type all or part of the name of the pupil you want.
- Select a group from the first drop list. Use the second drop list to select the specific group you want, e.g. 'Form 10A', 'Year 8' or a tutor group.

b. Click **Search**.

The selected names appear on the **Email Recipients** screen.

- Select your recipients via **Pupil Management > Pupils**.

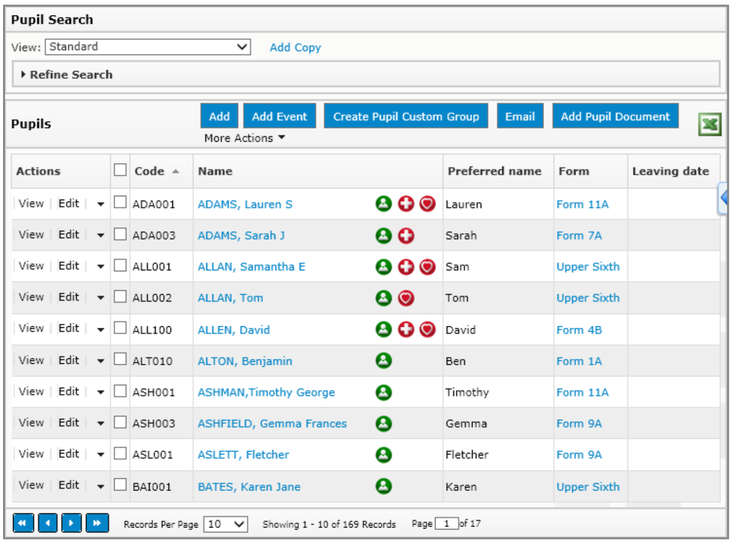
More details...

a. Find the pupils you want to email.

More details...

a. Go to **Pupil Management > Pupils**.

The **Pupil Search** and **Pupils** screen appears, showing a complete list of all pupils.



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
Code	Type all or part of a code in this field.
Name	Type all or part of a name in this field.
Preferred name	Type all or part of a pupil's preferred name in this field.
Form	Type all or part of a form name into this field.
Leaving date	Click and click on the relevant date in the calendar pop up that appears.

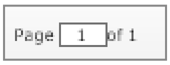
c. (Optional) Use icons beneath the grid to navigate between pages of results.

» Click or or on the numbers underneath the grid on the left-hand side to move between pages.

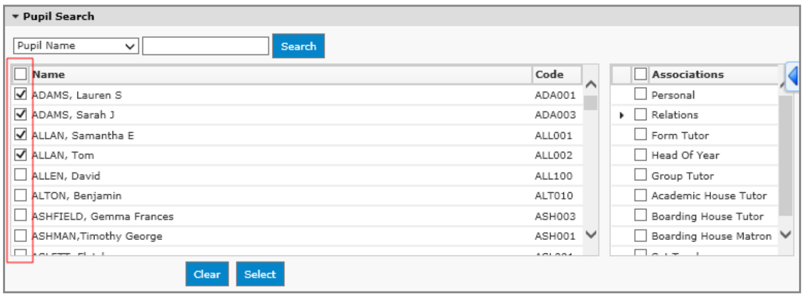
» Click to go to the first page or to go to the last page.

» Use the **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.



b. Tick the check box(es) next to the name(s) you would like to include.



c. Click **Email**.

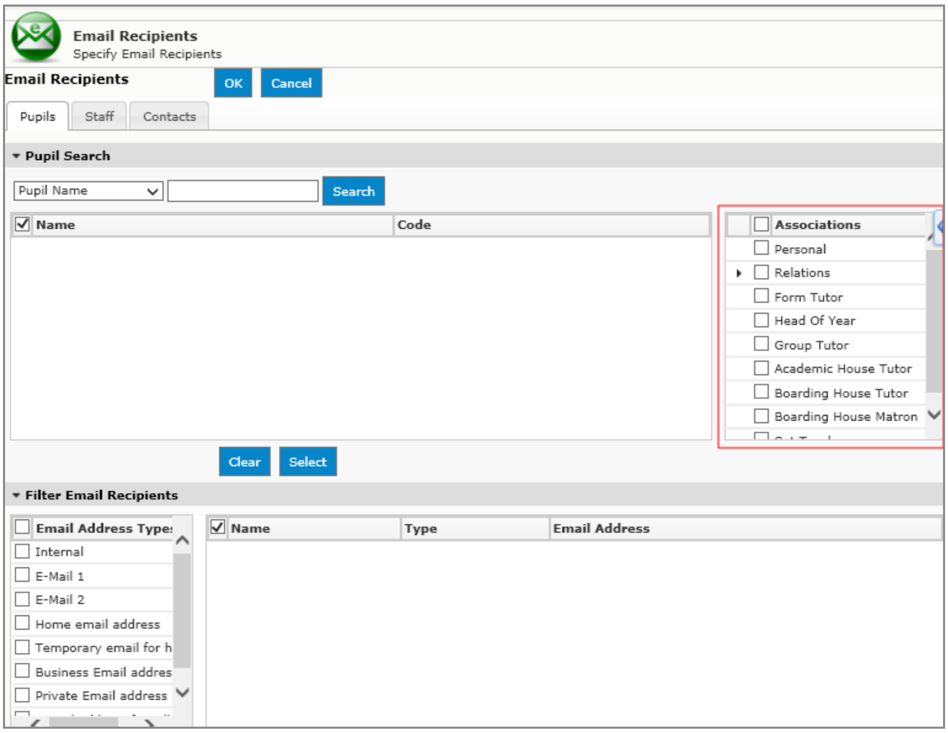
The **Email Recipients** screen appears with the selected pupils listed.

2. Tick the relevant **Associations** check box.

» To send the email to the selected pupils, tick the **Personal** check box.

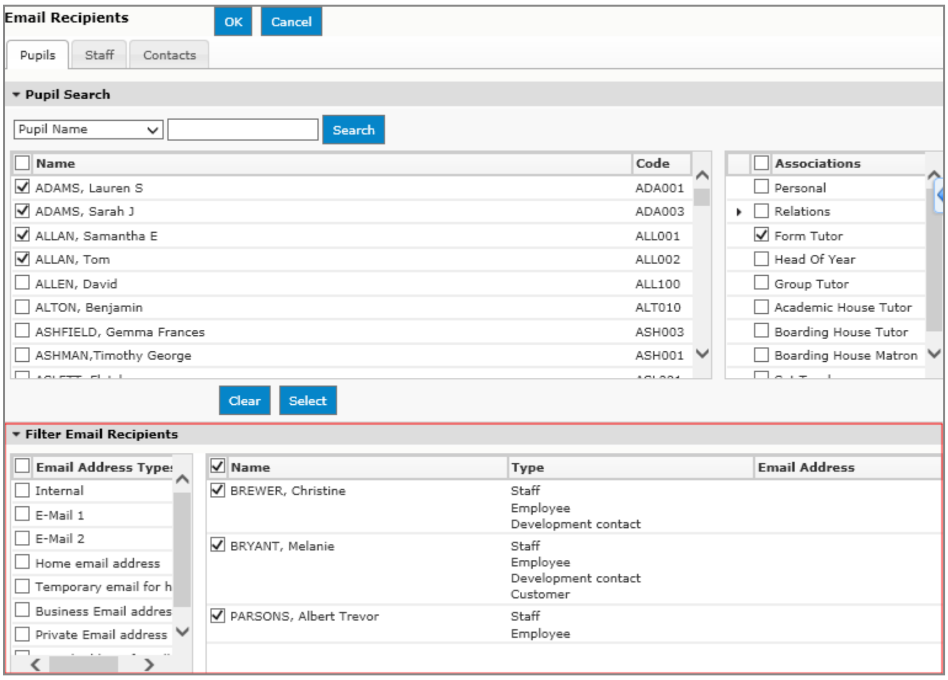
» To send the email to contacts related to each pupil, tick the **Relations** check box.

» To send the email to members of staff associated with the pupils, tick the relevant role's check box, e.g. 'Form Tutor', 'Academic House Tutor' or 'Head of Year'.



3. Click **Select**.

   The recipients appear in the **Filter Email Recipients** section.



4. Use the **Email Address Types** check boxes to select which email addresses should be used.

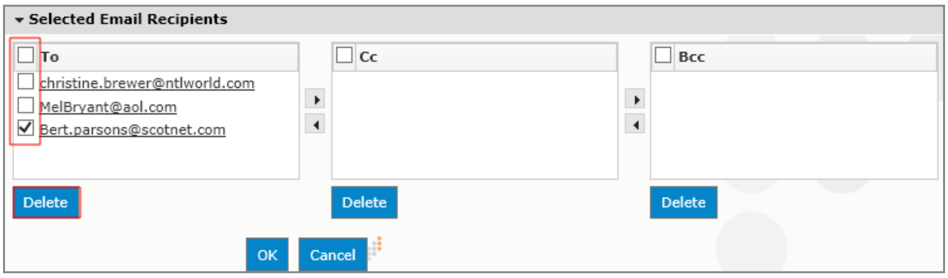
Note: If no email addresses appear, none are logged on the system for this contact. Invalid addresses are highlighted in yellow. Corrections are made in passFINANCE/schoolADMIN by your System Administrator.

5. Click **To**, **Cc** or **Bcc** depending upon whether you would like the emails to be sent directly, copied to or blind-copied to the recipients.

   The email addresses appear in the relevant box at the bottom of the screen.

Note: Emails to parents are automatically sent Bcc. It is recommended that emails sent to pupil contacts are sent Bcc.

6. (Optional) To remove a recipient, tick the check box next to their email address in the **Selected Email Recipients** section and click **Delete** beneath the relevant panel.



7. Click **OK**.

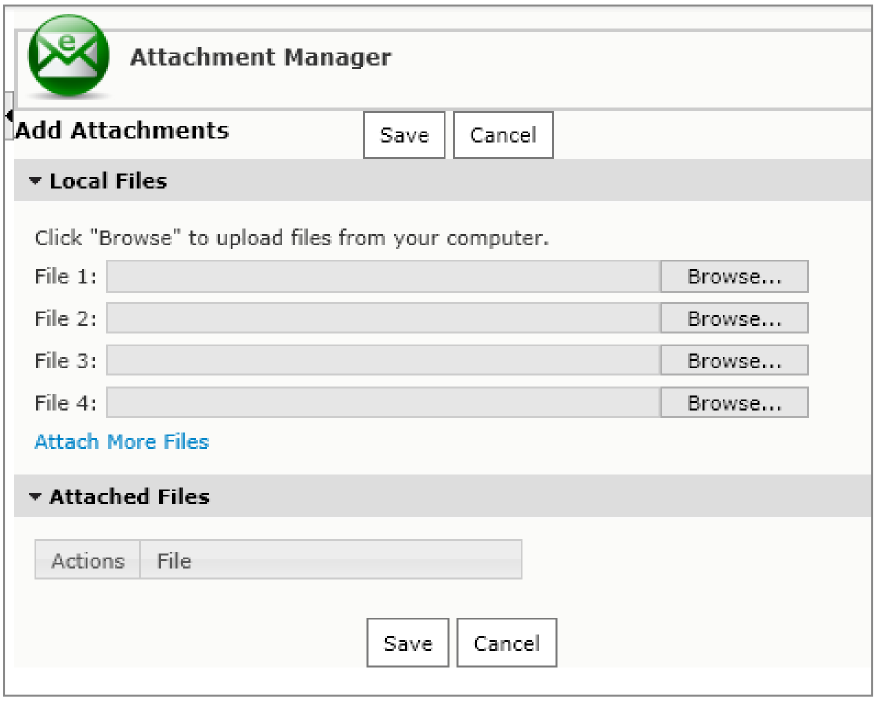
   The **Email Edit (Draft)** screen appears.

8. Complete the **Subject** field, as required.
9. Click **Attachments** to send documents with the email.

More details...

a. Click **Attachments**.

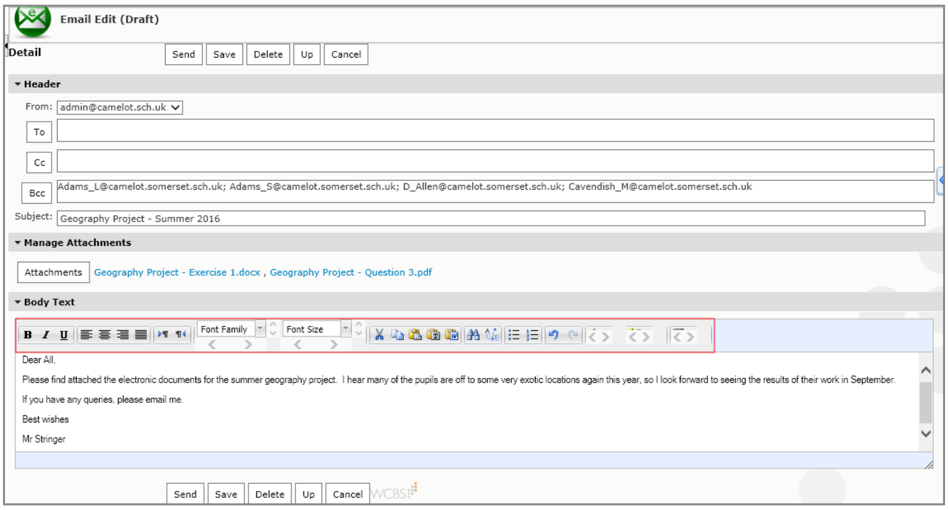
   The **Attachment Manager** screen appears.



b. Click **Browse** and find the file you want to attach.

c. Click on the file and click **Open**.

10. Click in the **Body Text** field and type your message. Use the text editor options above the field, as required.



11. Do ONE of the following:

- To send the email, click **Send**.
- To save the email and send it later, click **Save**.
- To remove the email, click **Delete**.
- To return to the previous screen, click **Up**.
- To leave the email process, click **Cancel**.

Sending Emails to Staff

HOW TO SEND EMAILS TO STAFF

1. Do ONE of the following:

   » Select your recipients via **Staff > Staff**.

   More details...

   a. Find the staff you want to email.

      More details...

      a. Go to **Staff > Staff**.

         The **Staff Search** and **Staff** screen appears, showing a full list of staff recorded on the system.

         Note: Staff searches allow you to select staff with records created in 3sysACADEMIC or passFINANCE/schoolADMIN. As such, you may need to check that selected staff have access to 3sysACADEMIC, if required. To do this, go to **Setup > Users and profiles > Users** and check that the relevant individual's **Is Active** check box is ticked.

         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, as detailed below, and click **Search**.

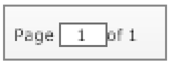
         Relevant matches appear in the grid.

Field	Action
Staff Code	Type all or part of a staff code into this field.
Name	Type all or part of a staff member's name into this field.
Section	Type all or part of a person's section into this field.
Category	Type all or part of a person's category, such as 'Teacher', 'Governor' or 'Administrator', into this field.
Department	Type all or part of a department's name into this field.
Main Subject / Subsidiary subject 1 / Subsidiary subject 2	Type all or part of the person's main subject into this field.
House	Type all or part of the individual's house name into this field.
Status	Type all or part of the person's status (usually 'Academic' or 'Non-academic') into this field.
Full time?	Use the drop list to select 'Yes' to see all full-time staff and 'No' to see any part-time staff.
Working day	Type all or part of the name(s) of the day(s) when the staff member works into this field.
Location	Type all or part of the place where the staff member works into this field.
In use?	Use this drop list to select 'Yes' for active staff accounts or 'No' for dormant staff accounts.
Last amended by	Type all or part of the name of the last person to amend the staff record into this field.
Last amended on	Click in this field or to see a calendar. Click on the date the relevant staff record was amended.

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

c. (Optional) Use the icons beneath the grid to navigate between 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 **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. 

b. Tick the check box(es) next to the name(s) you would like to include.

c. Click **Email**.

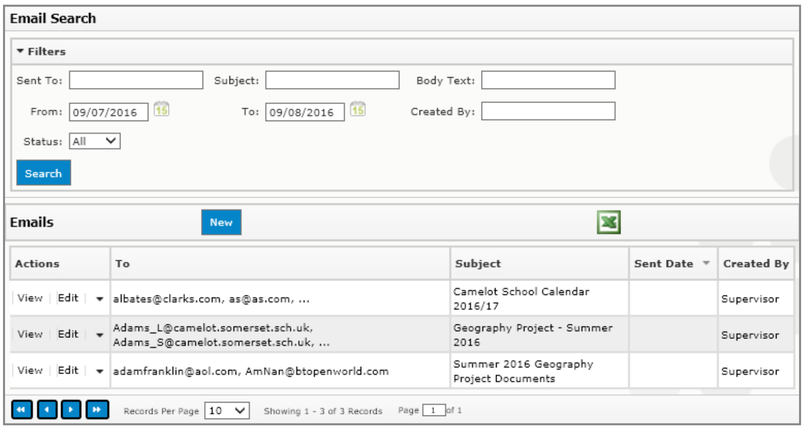
The **Email Recipients** screen appears with the selected staff listed.

» Select your recipients via **Communication > Email > Add**.

More details...

a. Go to **Communication > Email**.

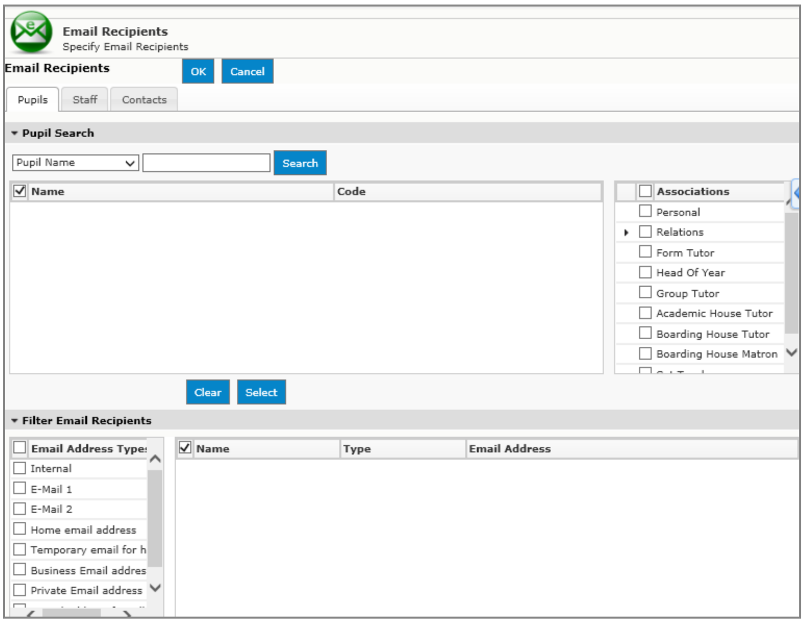
The **Email Search** and **Emails** screen appears.



b. Click **New**.

c. Click **To**, **Cc** or **Bcc** depending upon where you want your recipients to appear.

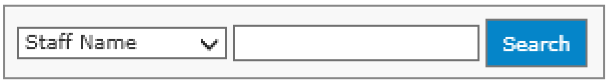
The **Email Recipients** screen appears.



d. Click on the **Staff** tab and find the recipients of your email.

More details...

a. Use the drop lists to refine your search. Your selection in the first drop list alters the options available in the second drop list.



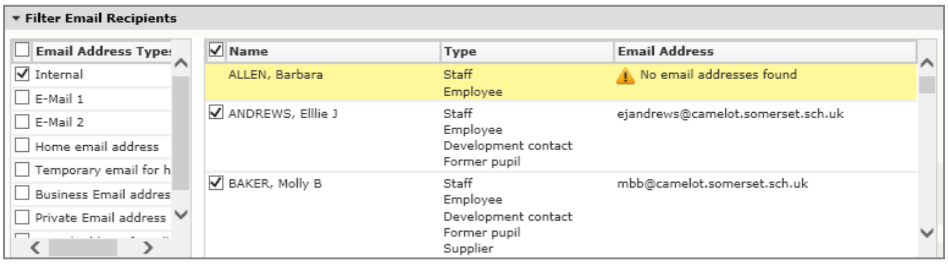
Do ONE of the following:

- In the first drop list, select 'Staff Name'. In the second, field, type all or part of the name of the member of staff that you want.
- Select a group from the first drop list. Use the second drop list to select the specific group you want, e.g. 'Form 10A', 'Year 8' or a tutor group.

b. Click **Search**.

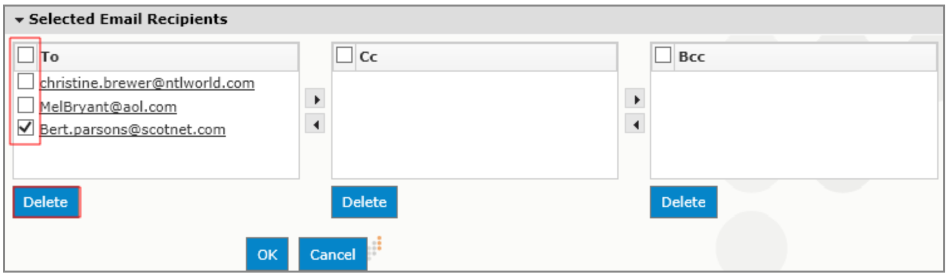
The selected names appear on the **Email Recipients** screen.

2. Use the **Email Address Types** check boxes to select which email addresses should be used.



Note: If no email addresses appear, none are logged on the system for this contact. Invalid addresses are highlighted in yellow. Corrections are made in passFINANCE/schoolADMIN by your System Administrator.

3. Click **To**, **Cc** or **Bcc** depending upon whether you would like the emails to be sent directly, copied to or blind-copied to the recipients.
4. (Optional) To remove a recipient, tick the check box next to their email address in the **Selected Email Recipients** section and click **Delete** beneath the relevant panel.

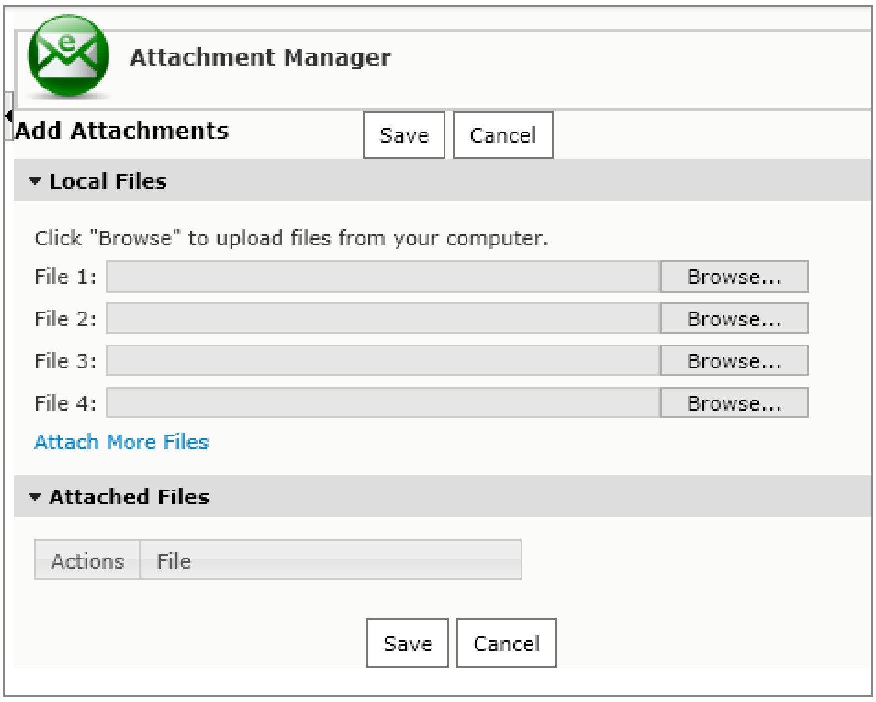


5. Click **OK**.
6. The **Email Edit (Draft)** screen appears.
7. Complete the **Subject** field, as required.
8. Click **Attachments** to send documents with the email.

More details...

a. Click **Attachments**.

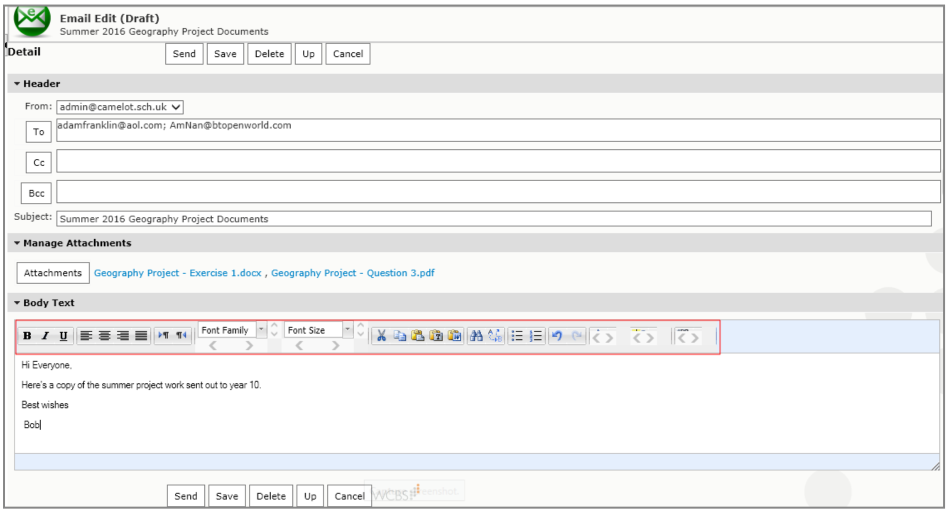
The **Attachment Manager** screen appears.



b. Click **Browse** and find the file you want to attach.

c. Click on the file and click **Open**.

9. Click in the **Body Text** field and type your message. Use the text editor options above the field, as required.



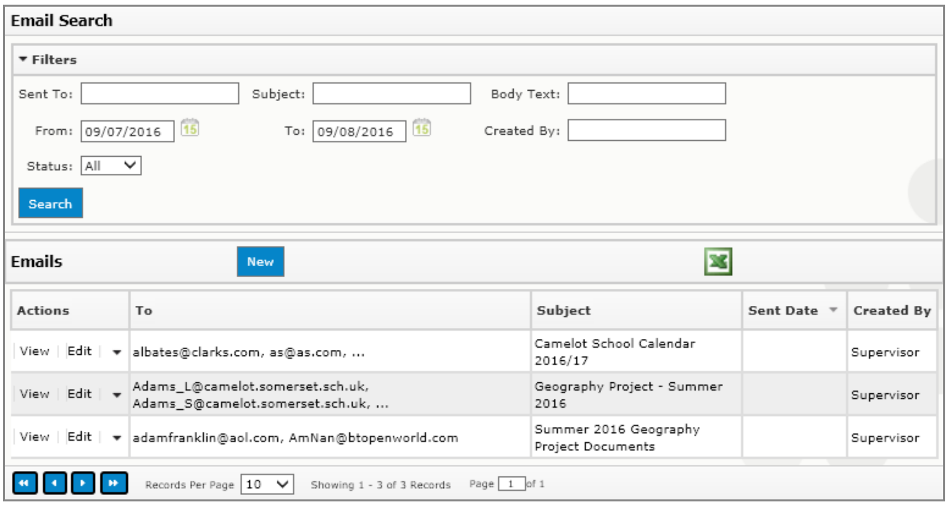
10. Do ONE of the following:
    - To send the email, click **Send**.
    - To save the email and send it later, click **Save**.
    - To remove the email, click **Delete**.
    - To return to the previous screen, click **Up**.
    - To leave the email process, click **Cancel**.

Sending Emails to Contacts

HOW TO SEND EMAILS TO CONTACTS

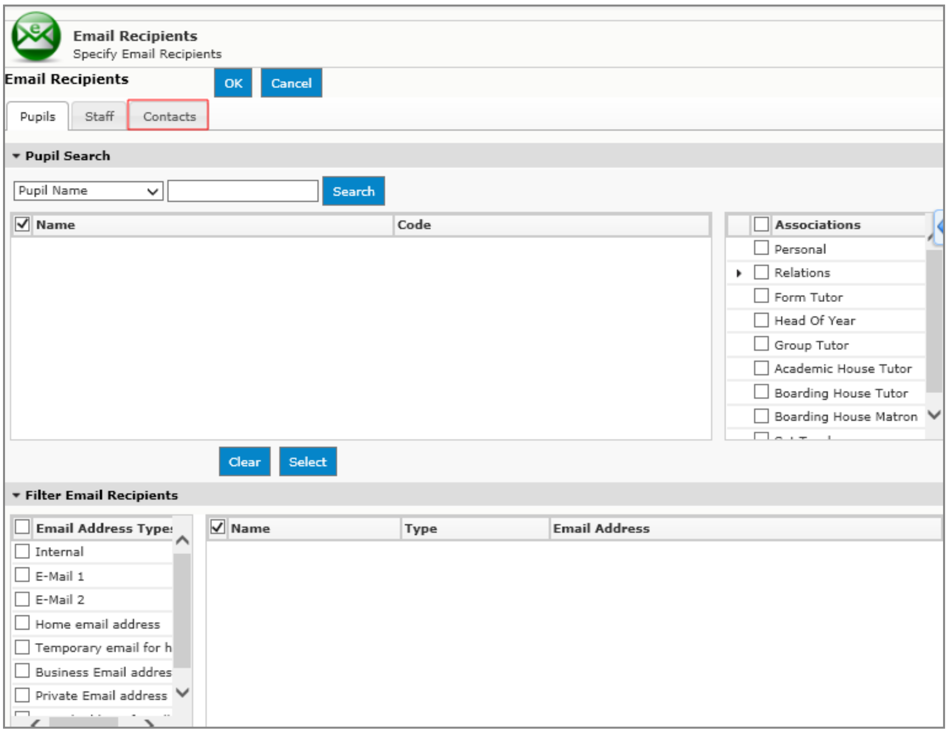
1. Go to **Communication > Email**.

   The **Email Search** and **Emails** screen appears.



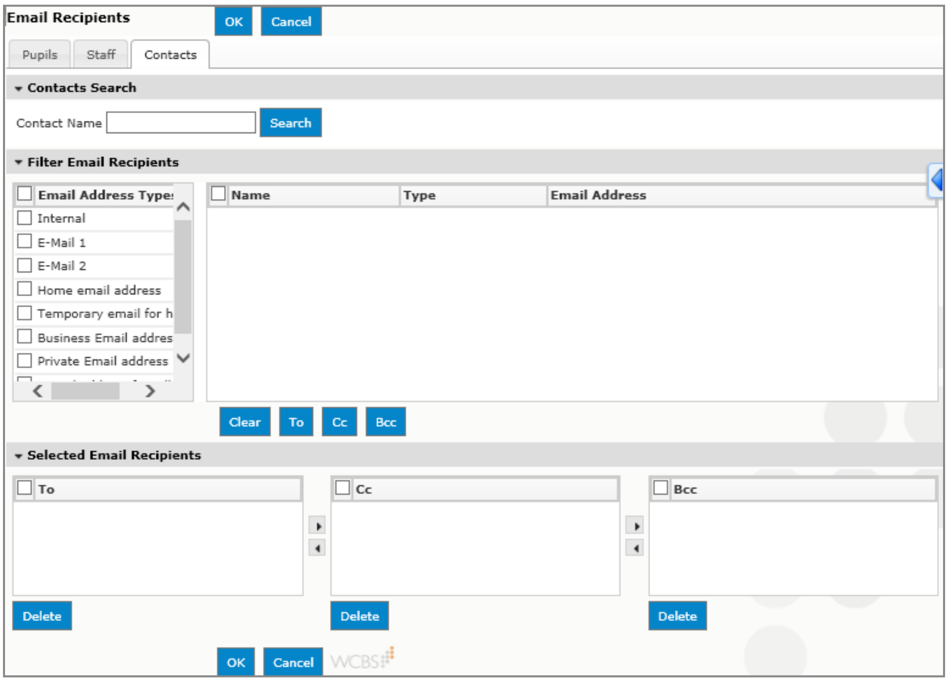
2. Click **New**.
3. Click **To**, **Cc** or **Bcc** depending upon where you want your recipients to appear.

   The **Email Recipients** screen appears.



4. Click the **Contacts** tab.

   The **Contacts** tab appears.

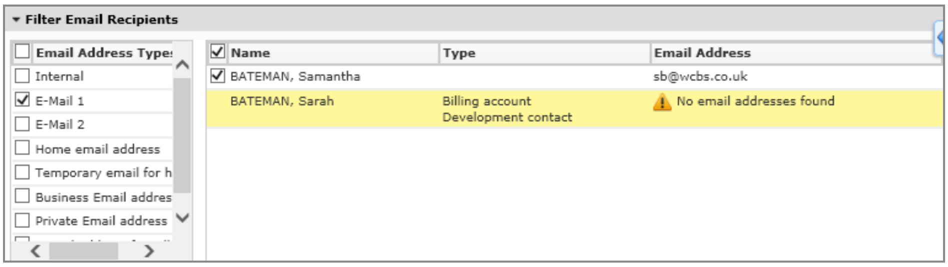


5. Type all or part of the name of the contact you want to send an email to in the **Contact Name** field and click **Search**.

   The matching contact(s) are listed in the **Filter Email Recipients** section.

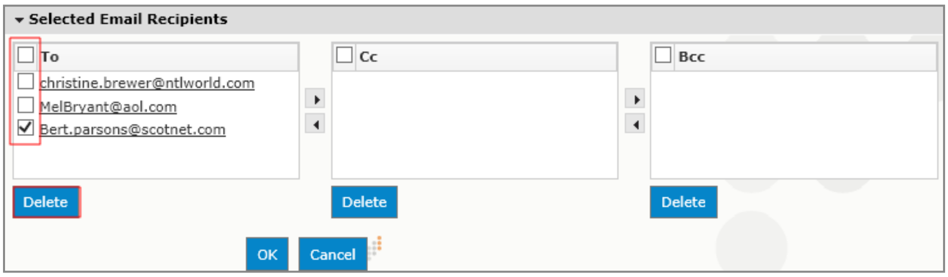
6. Use the **Email Address Types** check boxes to select which email addresses should be

used.



Note: If no email addresses appear, none are logged on the system for this contact. Invalid addresses are highlighted in yellow. Corrections are made in passFINANCE/schoolADMIN by your System Administrator.

7. Click **To**, **Cc** or **Bcc** depending upon whether you would like the emails to be sent directly, copied to or blind-copied to the recipients.
8. (Optional) To remove a recipient, tick the check box next to their email address in the **Selected Email Recipients** section and click **Delete** beneath the relevant panel.



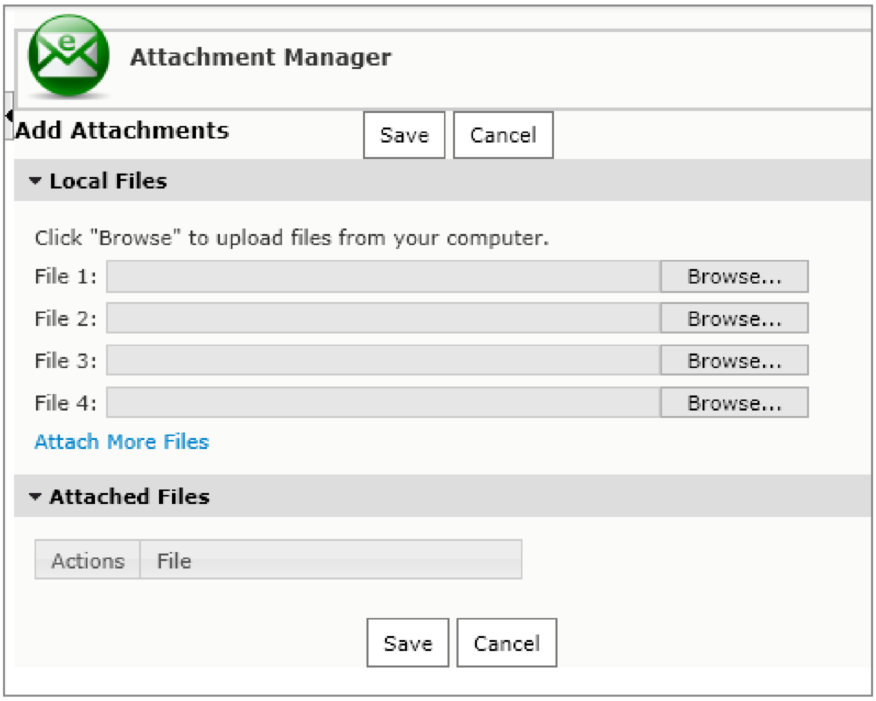
9. Click **OK**.

   The **Email Edit (Draft)** screen appears.
10. Complete the **Subject** field, as required.
11. Click **Attachments** to send documents with the email.

    More details...

    a. Click **Attachments**.

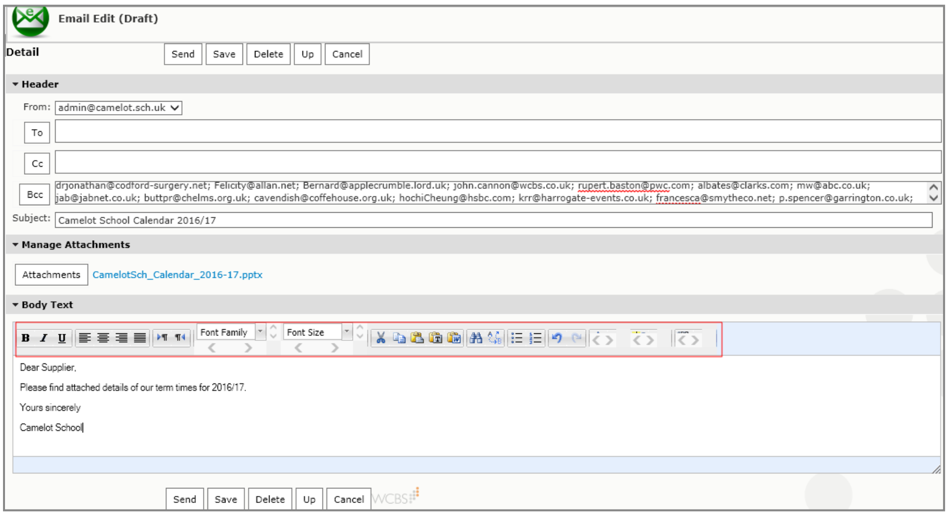
       The **Attachment Manager** screen appears.



b. Click **Browse** and find the file you want to attach.

c. Click on the file and click **Open**.

12. Click in the **Body Text** field and type your message. Use the text editor options above the field, as required.



13. Do ONE of the following:

- To send the email, click **Send**.
- To save the email and send it later, click **Save**.
- To remove the email, click **Delete**.
- To return to the previous screen, click **Up**.
- To leave the email process, click **Cancel**.

Viewing Saved Emails

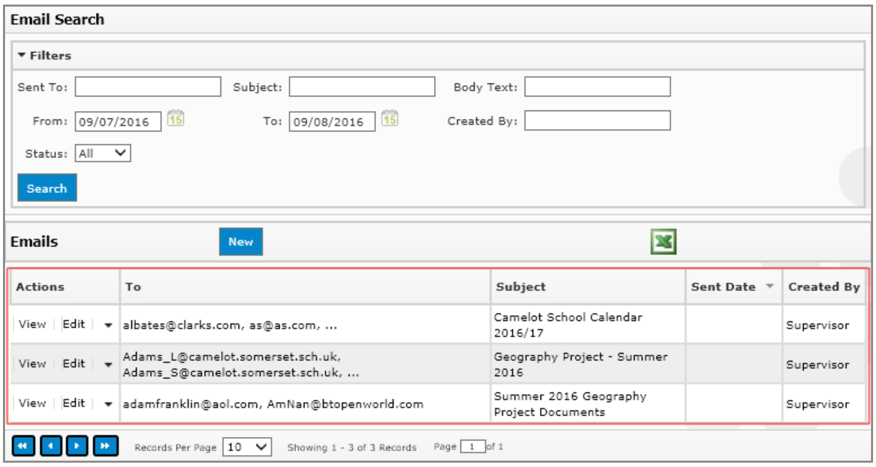
HOW TO VIEW SAVED EMAILS

1. Find the email you want to view.

   More details...

   a. Go to **Communication > Email**.

   The **Email Search** and **Emails** screen appears, showing a grid of saved emails.



> **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.

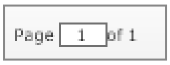
   b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Action	Field
Sent To	Type all or part of the name of the email's recipient into this field.
Subject	Type all or part of the email's subject into this field.
Body Text	Type all or part of keywords in the email's main text into this field.
From / **To**	Either click in the field and replace the existing date(s) OR click and select a date in the calendar.
Created By	Type all or part of the name of the person who created the email into this field.
Status	Use this drop list to select 'All', 'Draft' or 'Sent'.

   c. (Optional) Use the 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 **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 **View** next to the email that you want to see in more detail.

   The relevant **Email Detail (Draft)** screen appears.

3. Do ONE of the following:
   - » Click **Up** to return to the previous screen.
   - » Click **Edit** to make changes to the saved email.
   - » Click **Delete** to delete the saved email.

Editing Saved Emails

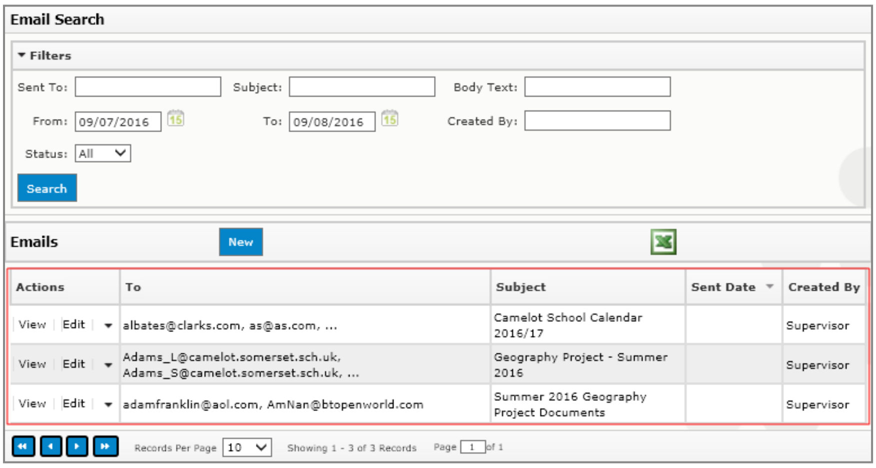
HOW TO EDIT SAVED EMAILS

1. Find the email you want to edit.

   More details...

   a. Go to **Communication > Email**.

   The **Email Search** and **Emails** screen appears, showing a grid of saved emails.



> **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.

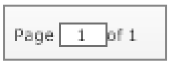
   b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Action	Field
Sent To	Type all or part of the name of the email's recipient into this field.
Subject	Type all or part of the email's subject into this field.
Body Text	Type all or part of keywords in the email's main text into this field.
From / **To**	Either click in the field and replace the existing date(s) OR click and select a date in the calendar.
Created By	Type all or part of the name of the person who created the email into this field.
Status	Use this drop list to select 'All', 'Draft' or 'Sent'.

c. (Optional) Use the 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 **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 email that you want to amend.

   The relevant **Email Edit (Draft)** screen appears.
3. Make your changes, as required.
4. Do ONE of the following:
   - To send the email, click **Send**.
   - To save the email and send it later, click **Save**.
   - To remove the email, click **Delete**.
   - To return to the previous screen, click **Up**.
   - To leave the email process, click **Cancel**.

Deleting Saved Emails

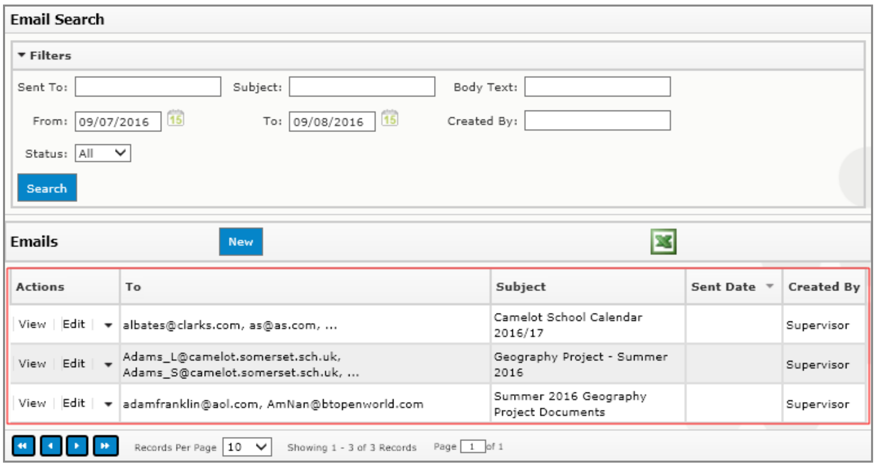
HOW TO DELETE A SAVED EMAIL

1. Find the email you want to delete.

   More details...

   a. Go to **Communication > Email**.

   The **Email Search** and **Emails** screen appears, showing a grid of saved emails.



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:

Action	Field
Sent To	Type all or part of the name of the email's recipient into this field.
Subject	Type all or part of the email's subject into this field.
Body Text	Type all or part of keywords in the email's main text into this field.
From / **To**	Either click in the field and replace the existing date(s) OR click and select a date in the calendar.
Created By	Type all or part of the name of the person who created the email into this field.
Status	Use this drop list to select 'All', 'Draft' or 'Sent'.

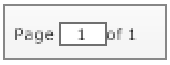
c. (Optional) Use the icons beneath the grid to navigate between pages of results.

» 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 **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 **Delete** next to the email that you want to remove.

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

3. If you are sure that you want to delete the saved email, click **OK** when the message popup appears.

   The email is deleted.

Exporting the Emails Grid to Excel

HOW TO EXPORT THE EMAILS GRID TO EXCEL

1. Go to **Communication > Email**.

   The **Email Search** and **Emails** screen appears.
2. Export the **Emails** grid to Excel.

   More details...

   a. Click .

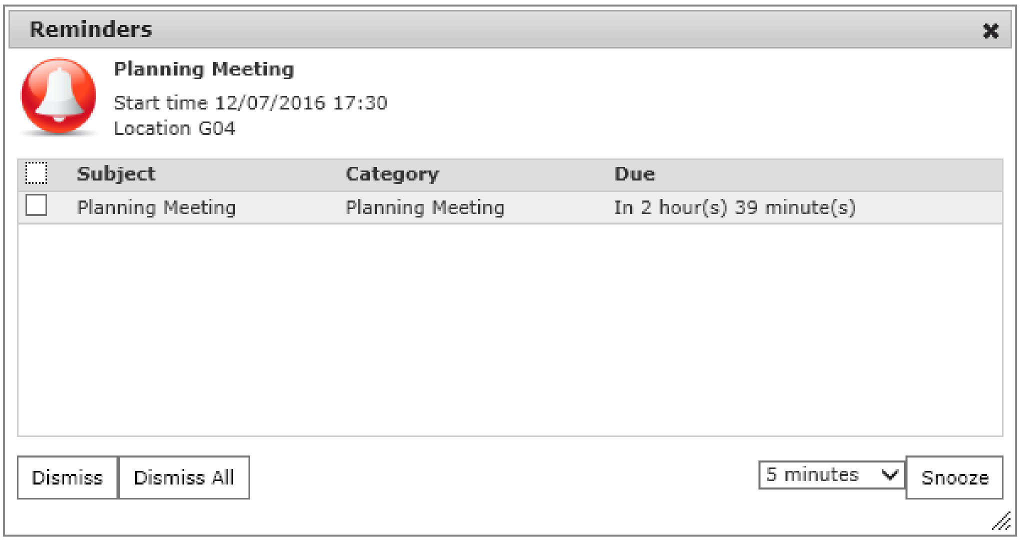
   b. Do ONE of the following:

   - 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.

Using Notifications

Notifications can be used to remind individuals or groups of users about forthcoming events. For example, a notification could be used to call and remind attendees of an urgent staff meeting, or a teacher could use a notification to remind them when a pupil is on a final warning regarding homework.

Notifications appear on the relevant user's screen at the time set. Users can decide whether to dismiss or 'snooze' the message using the options on the popup.



Note: Users MUST be logged in to receive notifications.

Accessing Notifications

HOW TO ACCESS NOTIFICATIONS

» Go to **Communication > Notifications**.

Adding Notifications

HOW TO ADD A NOTIFICATION

1. Go to **Communication > Notifications**.

   The **Notification Search** and **Notifications** screen appears.
2. Click **Add**.

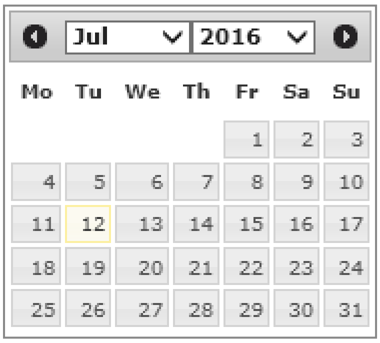
   The **Notifications** screen appears.

   Note: You MUST complete any sections marked with a red bar on the left-hand side.
3. Complete the **Title** field.
4. (Optional) Type a location in the **Location** field.
5. Select an option using the **Category** drop list.
6. Use the **Priority** drop list to select 'Low', 'Normal' or 'High'.
7. Add the dates to the **Start** and **End** fields.

More details...

Do ONE of the following:

- Click in the field and click to delete the existing date. Type the required date in the field using the format DD/MM/YYYY.
- Click to display the **Calendar** 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 months or years, use the drop lists at the top.)



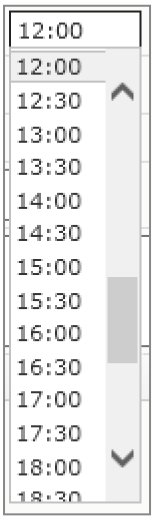
8. Do ONE of the following:

- If the event described begins and finished at specific times, complete the **Start** and **End** fields.

  More details...

  Do ONE of the following:

  - Click in the field and delete the existing time. Type the required time using the format HH:MM.
  - Click in the time field to display the **Time** popup and select your preferred time. (To scroll to different hours, use the arrows at the top and bottom on the right-hand side.)

- If this is an all day event, tick the **All Day Event** check box.

> **Note:** If this option is selected, the time fields disappear and the **Reminder** options change.

9. Amend the owner, if required. (The logged in user's user name appears here automatically.)

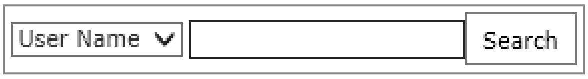
   More details...

   a. Click **Search**.

      The **Search** dialog appears.

   b. Do ONE of the following:

      » Type all or part of the user name you want into the second field and click **Search**. A list of possible matches appears in the **Name** field.

      » Leave the second field blank and click **Search**. A list of all available user names appears in the **Name** field.

   c. Click on the required name.

      You return to the previous screen. The selected user name appears in the relevant field.

10. (Optional) Type notes in the **Comments** field.
11. Add other **Notification Subscribers**, if required.

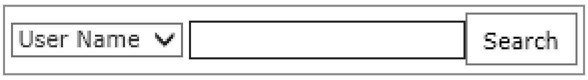
    More details...

    a. Click **Search**.

       A **Search** dialog appears.

    b. Do ONE of the following:

       » Type all or part of the user name you want into the second field and click **Search**. A list of possible matches appears in the **Name** field.

       » Leave the second field blank and click **Search**. A list of all available user names appears in the **Name** field.

    c. Tick the check box next to the name(s) you want.

    d. Click **Select**.

       The selected users appear in a list at the bottom of the screen.

    e. (Optional) To remove names from the selected list, tick the adjacent check box and click **Remove**.

    f. Click **OK**.

12. (Optional) Make this a recurring notification.

    More details...

    a. Tick the **Create Series** check box.

       Additional fields appear.

    b. Select the notification's **Frequency** options.

- **If you select 'Daily'**, pick 'Every weekday' OR 'Every 1 day(s)' and type how many days between notifications there should be in the relevant field.
- **If you select 'Weekly'**, type how many weeks and tick the check box(es) for each day of the week the notification should recur.
- **If you select 'Monthly'**, use the drop list to select the day of the month and type the number of months between recurrences OR use the drop lists to select an instance and the day of the week plus type the number of months into the relevant field.
- **If you select 'Yearly'**, use the drop lists to select a month and date OR the date, day and month.

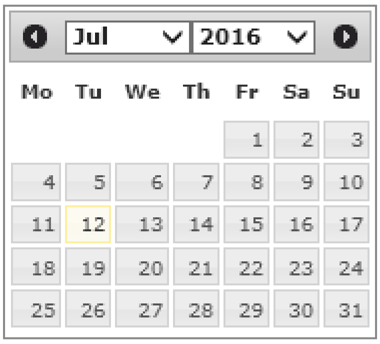
> **Note:** Alternative options appear depending upon which frequency you select.

c. Complete the **Start Date** and **End Date** fields for your recurring notification.

More details...

Do ONE of the following:

- Click in the field and click to delete the existing date. Type the required date in the field using the format DD/MM/YYYY.
- Click to display the **Calendar** 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 months or years, use the drop lists at the top.)



13. (Optional) To add a reminder, tick the **Set Reminder On** check box and set when the reminder should be issued.
    - **If this is an all day event**, complete the **Reminder** date field by typing in the relevant date OR using the calendar dialog and use the **Reminder Time** drop list to select the time the reminder appears.
    - **If this is a recurring, all day event**, use the **Reminder Date & Time** drop lists to select how many days before the event and at what time the reminder should appear.
    - **If this is not an all day event**, use the **Time Before Event** drop list to select how many minutes, hours, days or weeks in advance the reminder should appear.
14. Click **Save**.

Viewing Notifications

HOW TO VIEW A NOTIFICATION

1. Find the notification you would like to view.

   More details...

a. Go to **Communication > Notifications**.

The **Notification Search** and **Notifications** screen appears, showing a list of the notifications owned by the logged in user.

> **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
Category	Type all or part of a category in this field.
Title	Type all or part of a title in this field.
Subscriber(s)	Type all or part of a subscriber's name into this field.
From / **To**	Either type the relevant date(s) into these field(s) OR click to select a date using the calendar popup.
Owned By	Type all or part of the notification's owner's name into this field.

c. (Optional) Use the 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 **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 **View** next to the record you want to see in more detail.

The relevant **Notifications** screen appears.

Editing Notifications

HOW TO EDIT A NOTIFICATION

1. Find the notification you would like to edit.

More details...

a. Go to **Communication > Notifications**.

The **Notification Search** and **Notifications** screen appears, showing a list of the notifications owned by the logged in user.

> **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
Category	Type all or part of a category in this field.
Title	Type all or part of a title in this field.
Subscriber(s)	Type all or part of a subscriber's name into this field.
From / **To**	Either type the relevant date(s) into these field(s) OR click to select a date using the calendar popup.
Owned By	Type all or part of the notification's owner's name into this field.

c. (Optional) Use the 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 **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 record you would like to amend.
3. Make your changes.

> **Note:** To edit the series of notifications rather than the single event, select **Edit Series** in the **Recurrence** section.

4. Click **Save**.

Deleting Notifications

HOW TO DELETE A NOTIFICATION

1. Find the notification you would like to delete.

More details...

a. Go to **Communication > Notifications**.

The **Notification Search** and **Notifications** screen appears, showing a list of the notifications owned by the logged in user.

> **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.

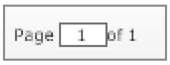
b. Enter your search criteria in one or more of the fields at the top of the screen and click **Search**. Your results populate the grid. You can search by:

Field	Action
Category	Type all or part of a category in this field.
Title	Type all or part of a title in this field.
Subscriber(s)	Type all or part of a subscriber's name into this field.
From / **To**	Either type the relevant date(s) into these field(s) OR click to select a date using the calendar popup.
Owned By	Type all or part of the notification's owner's name into this field.

c. (Optional) Use the 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 **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 **Delete** next to the record you would like to remove.

   The relevant **Notifications (Delete)** screen appears.

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

3. Do ONE of the following:
   - To delete a one off events, click **Yes** if you are sure that you want to delete the record.
   - To delete one event in a series, click **Delete this occurrence**.
   - To delete a whole series of events, click **Delete series**.
   - To abort the action, click **Cancel**.

Exporting the Notifications Grid to Excel

HOW TO EXPORT THE NOTIFICATIONS GRID TO EXCEL

1. Go to **Communication > Notifications**.
2. Export the **Notifications** grid to Excel.

   More details...

   a. Click .

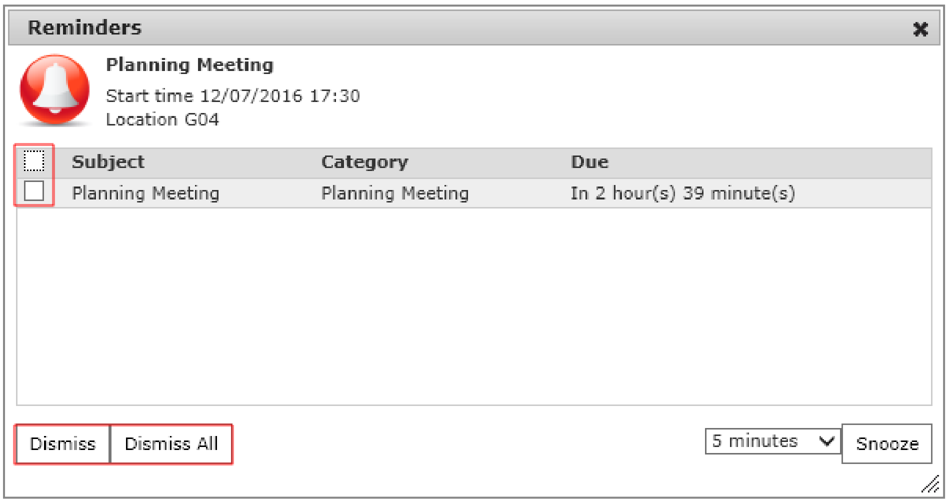
   b. Do ONE of the following:
   - Click **Open** to open the spreadsheet.
   - Click **Save** to save the file to your computer and **Open** to see it once it has been downloaded.
   - Click and **Save as** to save the spreadsheet in your preferred location.

» Click and **Save and open** to save and automatically open the file.
» Click **Cancel** or to abort the export.

Dismissing Notification Reminders

HOW TO DISMISS NOTIFICATION REMINDERS

1. Tick the check box next to the relevant message(s) in the **Reminders** popup.



> **Note:** To select ALL of the notification reminders listed, tick the check box in the header row.

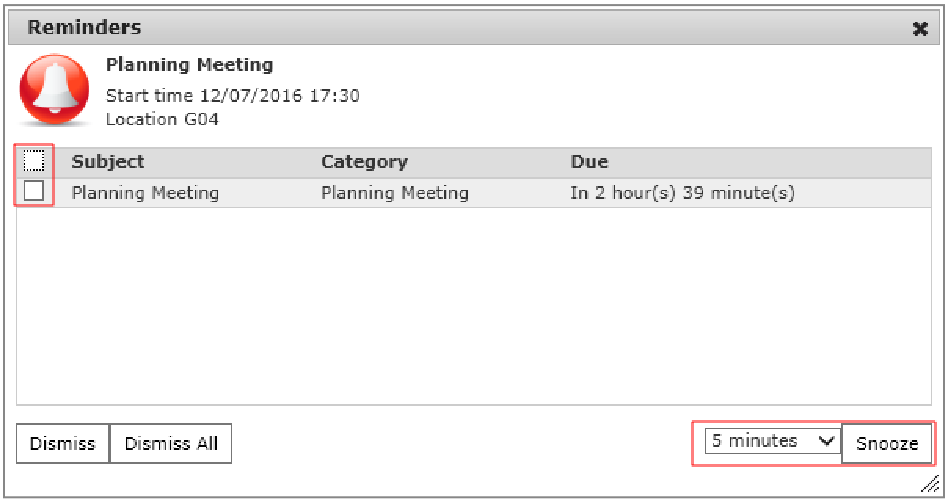
2. Click **Dismiss**.

> **Note:** To remove ALL of the notification reminders listed, click **Dismiss All**.

Snoozing Notification Reminders

HOW TO SNOOZE NOTIFICATION REMINDERS

1. Tick the check box next to the relevant message(s) in the **Reminder** popup.



Note: To select ALL of the notification reminders listed, tick the check box in the header row.

2. Use the drop list in the bottom right-hand corner to select how long you would like to snooze the reminder.
3. Click **Snooze**.

   The reminder reappears after the specified time.

Configuring Notification Categories

Before notifications can be added to 3sysACADEMIC, notification categories must be created. Categories are brief descriptions used to identify and group specific notifications, e.g. 'Reminder', 'SMT Meeting' or 'Inset Training'. Once created, they can be added to a notification via a drop list. Users can add, edit and delete categories and export a list of them to Excel.

Accessing Notification Categories

HOW TO ACCESS A NOTIFICATION CATEGORY

- Go to **Communication > Notification Categories**.

Adding Notification Categories

HOW TO ADD A NOTIFICATION CATEGORY

1. Go to **Communication > Notification Categories**.

   The **Notification Category Search** and **Notification Categories** screen appears.
2. Click **Add**.

   The **Notification Category** screen appears.
3. Type a description in the relevant field.
4. Click **Save**.

Editing Notification Categories

HOW TO EDIT A NOTIFICATION CATEGORY

1. Find the notification category you would like to edit.

   More details...

   a. Go to **Communication > Notification Categories**.

      The **Notification Category Search** and **Notification Categories** 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. Type all or part of the category's description in the **Description** field above the grid.

   c. Click **Search**.

      Matching records appear in the **Notification Categories** grid.

   d. (Optional) Use the 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 **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 category you would like to amend.
3. Make your amendments.
4. Click **Save**.

Deleting Notification Categories

HOW TO DELETE A NOTIFICATION CATEGORY

1. Find the notification category you want to delete.

   More details...

   a. Go to **Communication > Notification Categories**.

      The **Notification Category Search** and **Notification Categories** 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. Type all or part of the category's description in the **Description** field above the grid.
   c. Click **Search**.

      Matching records appear in the **Notification Categories** grid.

   d. (Optional) Use the 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 **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 **Delete** next to the relevant category.

   The **Notification Category (Delete)** screen appears.
3. If you are user you would like to delete the category, click **Yes**.

Exporting the Notification Categories Grid to Excel

HOW TO EXPORT THE NOTIFICATION CATEGORIES GRID TO EXCEL

1. Go to **Communication > Notification Categories**.

   The **Notification Category Search** and **Notification Categories** screen appears.
2. Export the grid to 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.

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CHAPTER 3

Data / Reporting

This chapter discusses the following:

About Data / Reporting

The **Data / Reporting** module consists of the following functions, as detailed below:

- **Documents** function.
- **Reports** function.
- **Names** function.

Documents

If you have the relevant permissions, the **Documents** function enables you to search for and view documents held within your system, and add documents to individuals' records. Typically, these documents are PDF files, but 3sysACADEMIC can display other types of documents, if the user has the relevant software installed on their client machine.

Your System Administrator is likely to restrict the availability of this function to specific users only. For example, documents could include a letter sent to a parent regarding overdue fees. It is unlikely that this type of document would be relevant for teachers, whereas your school's billing/accounts staff would need to have access to this type of document.

Note: The accessibility of the **Documents** function is controlled by profile settings configured within 3sysACADEMIC AND the note category security model as configured within passFINANCE/schoolADMIN.

Reports

The **Reports** function enables those users with the relevant permissions, such as a System Administrator, to view a list of Report Builder reports as available within passFINANCE/schoolADMIN, and to view, edit and run them. If you have the permissions to run a Report Builder report within passFINANCE/schoolADMIN, then you will have the permission to run the report within 3sysACADEMIC. You are also able to add reports to your **Favourite Reports** list, as available on your home page if the necessary widget has been configured.

Note: If you are unable to view, edit or run reports, and you expect to be able to do so, please contact your System Administrator.

Note: As the System Administrator with access to reports, if you want to make a specific report available to a particular user, you can impersonate that user (via **Setup**), and make a report a favourite for that user. The 'favourite' report is then available for that user in their **Favourite Reports** widget on their home page (if the home page has been set up appropriately for this user). This enables you to make specific Report Builder reports available to specific users without the need to alter permissions.

Names

The **Names** function enables you to search for individual records held within your database, including people and organisation records, such as suppliers. Using 3sysACADEMIC views you are able to search for and view records. You are also able to add notes to individual records, and add pupil documents to pupil records.

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INVESTORS IN PEOPLE

WCBS