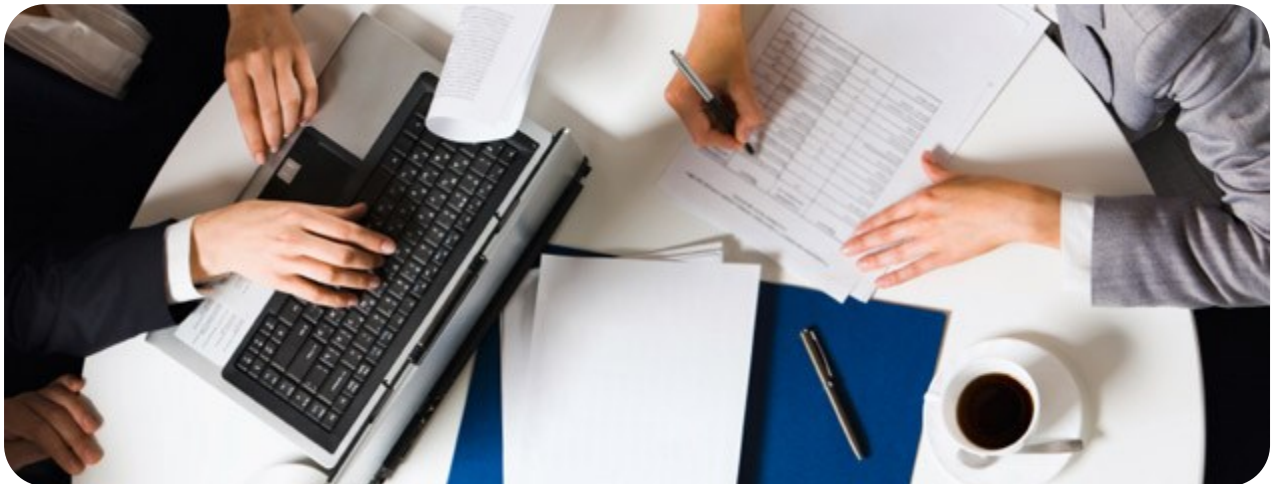


# Bulk Import of Markbook Data User Guide



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## Introduction

You can bulk import markbook data from Excel files into **3Sys Markbooks**, such as tasks and pupils' marks/grades. However, before you can bulk import markbook data, you need to have exported the relevant pupil groups into Excel files, and added the appropriate tasks and marks/grades to these files. In order to bulk import markbook data, you need to follow this process:

1. Specify and export pupil groups to a Microsoft Excel xls file, using the **Generic File Export** wizard. This file is referred to as the 'pupil group template'. (This wizard **ONLY** allows you to export pupil group records to a file. It does **NOT** allow you to export markbook data.)
2. Use Excel to input task and mark data in the pupil group template file. You can add task columns and enter marks/grades, or copy and paste existing markbook data from other systems. The tasks you enter in the pupil group template file appear as tasks within **3Sys Markbooks**, and the marks for pupils appear within the relevant tasks.
3. Import the task and mark data from the pupil group template file into **3Sys Markbooks**, using the **Generic File Import** wizard.

For example, if a subject leader wanted to export a pupil group template for each of his teaching staff for separate subject sets, so that each teacher could enter the relevant marks/grades for an internal assessment, the following process could be undertaken:

1. Subject Leader: Export a pupil group template for each of his teaching staff.
2. Subject Leader: Specify the name of the internal assessment as a task column in each exported pupil group template. (This is to ensure that the name of the internal assessment task is consistent.)
3. Subject Leader: Send each teacher the relevant pupil group template file.
4. Teacher: Enter the marks/grades into their pupil group template file. (This could be undertaken at home and offline.)
5. Teacher: Send their pupil group template file back to the Subject Leader to import the markbook data. (Alternatively, the teachers could import their own pupil group template file.)
6. Subject Leader: Import each pupil group template file. The markbook data is then available for view and manipulation within **3Sys Markbooks**. For example, to perform calculations using this data, and to use the Target RAG (red, amber and green) traffic light system to assess pupils' progress against a specific task.

Alternatively if teachers have already recorded pupils' marks for tasks, for example in Word or Excel, they could bulk enter these marks into the exported pupil group template by copying and pasting the mark data.

## About this Guide

This Guide has been developed for the end user who wishes to bulk import markbook data from Excel files into **3Sys Markbooks**, and for the System Administrator to configure the relevant permissions within **Setup** settings.

The following conventions are used in this Guide:

- Microsoft Excel is referred to as Excel.
- **3Sys Academic** is referred to as **3Sys**.
- The terms 'pupil group template' and 'pupil group template file' are used to refer to the Excel files which are generated using the **Generic File Export** wizard (and contain a list of pupils), and are subsequently edited to include markbook data which is then imported using the **Generic File Import** wizard.

## About the Export and Import Process

The **Generic File Export** and the **Generic File Import** wizards enable you to undertake the following steps:

### Step 1

Export a template with pupil details.  
(Referred to as the 'pupil group template'.)



### Step 2

Copy grade/mark data into that pupil group template from other sources and/or add tasks and enter marks within that file, using Excel.



### Step 3

Import the markbook data from within that pupil group template into 3Sys Markbooks.  
(Task columns in the pupil group template file are added as tasks within 3Sys Markbooks; and all pupil marks are added to the relevant tasks.)

For example, if you've recently joined a school as a Head of Subject and you've inherited a department that is not yet recording pupils' tasks and marks within **3Sys Markbooks**, you can use the **Generic File Export** and **Generic File Import** wizards to simplify and initiate this process. In this scenario, you have a team of teachers all of whom have recorded pupils' marks for tasks in different formats, some within a paper-based markbook, some in Excel, and some in Word. For each teacher, you can export the relevant pupil groups into an Excel file (or enable the teacher to do this), and send each teacher the Excel file you wish them to update. Each teacher can then enter or copy the appropriate tasks and marks from their existing marking system. (Some may manually enter the tasks and marks, and some may copy and paste from other sources.) This can be completed offline. Once you have the updated Excel files, you can then import the markbook data into **3Sys Markbooks**, where you can utilise the target grades and traffic light system to effectively monitor pupils' progress.

**NOTE:** The **Markbook Generic Export** module ONLY allows you to export pupil group records to a template file. It does NOT allow to you export markbook data. (Subsequently you use the pupil group template file to input markbook data, and then import that markbook data into **3Sys Markbooks**.)

The example on the next page demonstrates the movement of data, see *About the Movement of Data on p.7*.

As the movement of data is process driven, this Guide is separated into the followings steps:

- *Step1: Exporting Pupil Groups to Templates on p.8.*
- *Step 2: Editing Pupil Group Templates on p.18.*
- *Step 3: Importing Markbook Data on p.24.*

## About the Movement of Data

The example below demonstrates the movement of data between the three steps: Step 1 the generation of the pupil group template file; Step 2 the entering of task and markbook data; and Step 3 the importing of that markbook data into **3Sys Markbooks**. In this example, the import automatically generated the three tasks and all the related markbook data, as viewed within the **Mark Inquiry** module.

### Step 1: Export Pupil Groups

Step 2: Edit  
- Add markbook data

Step 3: Import markbook data

	Short Story 30/03/2015 attainment English	Long Essay 20/04/2015 attainment English	Short Essay 06/05/2015 English Max:100
ADAMS, Lauren S	C	C	66.000
ADAMS, Sarah J	B	D	86.000
ALLAN, Samantha E	C	A	75.000
ALLAN, Tom	B	A	83.000
ALLEN, David	B	B	55.000
ALTON, Benjamin	C	B	46.000
ASHFIELD, Gemma Frances	D	C	85.000
ASHMAN, Timothy George	C	C	47.000
ASLETT, Fletcher	A	D	66.000
BARRETT, Jane	A	B	55.000
BARRETT, Lyndsey	B	B	77.000
BASTON-SMYTHE, Henrietta C	B	C	55.000
BATEMAN, Christopher	C	C	84.000
BATES, Andrea Mary	C	C	75.000

## Step1: Exporting Pupil Groups to Templates

You export specific sets of pupil groups using the **Generic File Export** wizard, which appears when you click on the **Markbook Generic Export** module icon. For details, see:

- *About Exporting Pupil Groups to Template, see below.*
- *Exporting Pupil Groups to Templates on p.12.*

**NOTE:** The **Markbook Generic Export** module ONLY allows you to export pupil group records to a template file. It does NOT allow to you export markbook data. (Subsequently you use the pupil group template file to input markbook data, and then import that markbook data into **3Sys Markbooks**.)

### About Exporting Pupil Groups to Templates

For how to export pupil group data, see *Exporting Pupil Groups to Templates on p.12*.

The **Generic File Export** wizard enables you to define and export pupil groups into a pupil group template file, which you can open using Excel. (This wizard is sometimes referred to as the **Export** wizard.) You can export one pupil group only to an individual Excel file. You are able to export as many pupil groups within one export as you require; an individual Excel file is created for each pupil group. You also have the option to download the pupil group template files within a zip file.

The **Generic File Export** wizard has two steps. For details of these steps and the resultant pupil group template file, see:

- *About the Generic File Export – Step 1 on p.8.*
- *About the Generic File Export – Step 2 on p.10.*
- *About the Exported Pupil Group Template file on p.11.*

### About the Generic File Export – Step 1

**Step 1** of the **Generic File Export** wizard enables you to specify the pupil group or groups you wish to export. In order to ensure that the subsequent import of the markbook data for each pupil group is quick and effective, you can also specify the following:

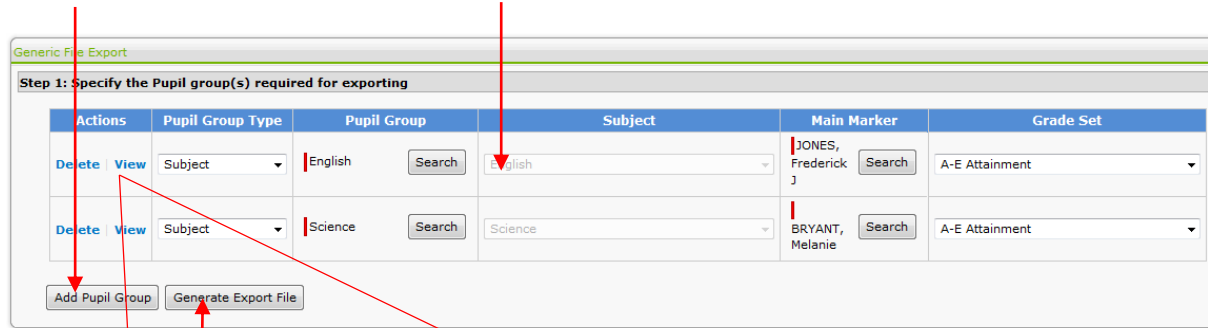
- The **Subject** to which you wish the markbook data for each pupil group to be assigned on import. (If you export pupil groups by anything other than Subject and Subject Set, such as Form Year, Academic House, Boarding House and Tutor Group, then there is no subject assigned by default. However, you are able to specify a subject as part of the **Export** wizard.)
- The **Main Marker** to whom you wish the markbook data for each pupil group to be assigned on import.
- The **Grade Set** to which the grades that are entered in the pupil group template file must adhere, and to which the task is associated with on import. If you know that the tasks you wish to add will be numeric, you must leave the **Grade Set** drop list blank.



The example screenshot below shows **Step 1** of the **Generic File Export** wizard, with two pupil groups specified:

**Add Pupil Group** button – click to add another pupil group to the export. (Another row is added to the table.)

**Subject** field – is automatically populated when a Subject or Subject Set pupil group is selected

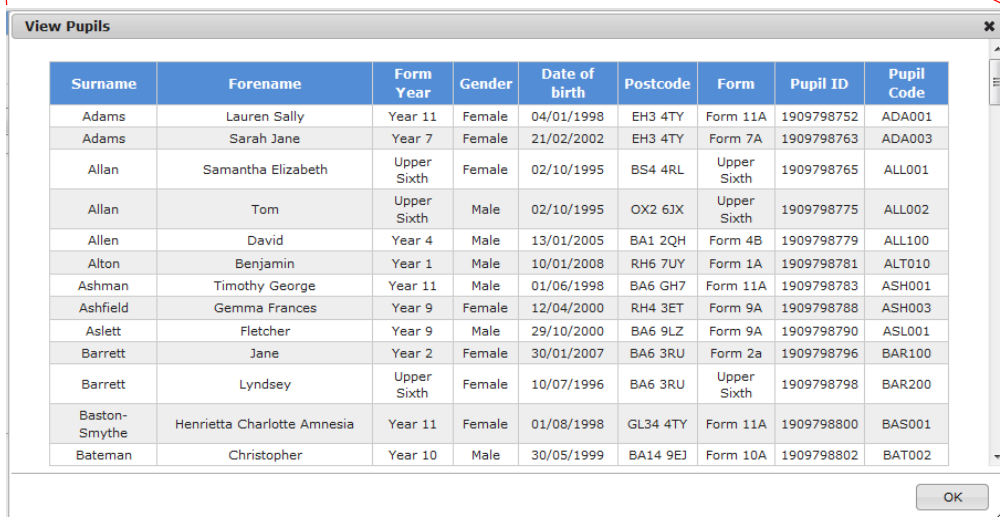


Actions	Pupil Group Type	Pupil Group	Subject	Main Marker	Grade Set
Delete View	Subject	English <input type="text" value="Search"/>	English	JONES, Frederick J <input type="text" value="Search"/>	A-E Attainment
Delete View	Subject	Science <input type="text" value="Search"/>	Science	BRYANT, Melanie <input type="text" value="Search"/>	A-E Attainment

Buttons: Add Pupil Group, Generate Export File

**Generate Export File** button – click to export pupil data for all pupil groups specified.

**View** link – click to view a list of the pupils in the selected pupil group. The **View Pupils** screen appears.



Surname	Forename	Form Year	Gender	Date of birth	Postcode	Form	Pupil ID	Pupil Code
Adams	Lauren Sally	Year 11	Female	04/01/1998	EH3 4TY	Form 11A	1909798752	ADA001
Adams	Sarah Jane	Year 7	Female	21/02/2002	EH3 4TY	Form 7A	1909798763	ADA003
Allan	Samantha Elizabeth	Upper Sixth	Female	02/10/1995	BS4 4RL	Upper Sixth	1909798765	ALL001
Allan	Tom	Upper Sixth	Male	02/10/1995	OX2 6JX	Upper Sixth	1909798775	ALL002
Allen	David	Year 4	Male	13/01/2005	BA1 2QH	Form 4B	1909798779	ALL100
Alton	Benjamin	Year 1	Male	10/01/2008	RH6 7UY	Form 1A	1909798781	ALT010
Ashman	Timothy George	Year 11	Male	01/06/1998	BA6 GH7	Form 11A	1909798783	ASH001
Ashfield	Gemma Frances	Year 9	Female	12/04/2000	RH4 3ET	Form 9A	1909798788	ASH003
Aslett	Fletcher	Year 9	Male	29/10/2000	BA6 9LZ	Form 9A	1909798790	ASL001
Barrett	Jane	Year 2	Female	30/01/2007	BA6 3RU	Form 2a	1909798796	BAR100
Barrett	Lyndsey	Upper Sixth	Female	10/07/1996	BA6 3RU	Upper Sixth	1909798798	BAR200
Baston-Smythe	Henrietta Charlotte Amnesia	Year 11	Female	01/08/1998	GL34 4TY	Form 11A	1909798800	BAS001
Bateman	Christopher	Year 10	Male	30/05/1999	BA14 9EJ	Form 10A	1909798802	BAT002

OK

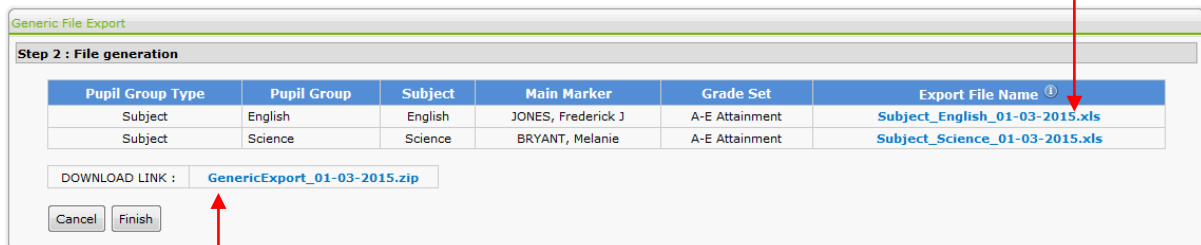
## About the Generic File Export – Step 2

Step 2 of the **Generic File Export** wizard enables you to:

- Check the list of pupil groups you have chosen to export.
- Download the individual pupil group templates as Excel files one at a time.
- Download all the pupil group templates listed within one zip file.

The example screenshot below shows **Step 2** of the **Generic File Export** wizard, with two pupil group templates generated ready for you to download:

**Export File Name** – click on the relevant file name to download just that pupil group to an Excel file.



**DOWNLOAD LINK** – click to download pupil data for all pupil groups listed to a zip file.

## About the Exported Pupil Group Template file

The screenshot below shows an example pupil group template file, opened in Excel. This file, 'Subject\_English\_01-03-2015.xls', was generated as a result of the 'English Subject' example used in the two **Export** wizard steps above.

	A	B	C	D	E
1	Template ID:		22		
2	Pupil Group:	English			
3	Academic Year:	Academic Year 2014/15			
4	School:	The Camelot School			
5	Main Marker:	JONES, Frederick J:			
6					
7			Example Task 1	Example Task 2	
8		Date:(DD/MM/YY)	00/00/00	00/00/00	
9		Pupil Name			
10	1909798752	ADAMS, Lauren S			
11	1909798763	ADAMS, Sarah J			
12	1909798765	ALLAN, Samantha E			
13	1909798775	ALLAN, Tom			
14	1909798779	ALLEN, David			
15	1909798781	ALTON, Benjamin			
16	1909798783	ASHMAN, Timothy George			
17	1909798788	ASHFIELD, Gemma Frances			
18	1909798790	ASLETT, Fletcher			
19	1909798796	BARRETT, Jane			
20	1909798798	BARRETT, Lyndsey			
21	1909798800	BASTON-SMYTHE, Henrietta C			
22	1909798802	BATEMAN, Christopher			
23	1909798806	BATES, Andrea Mary			
24	1909798810	BELL, Edward			
25	1909798812	BENNETT-JONES, Charlotte Francesca			
26	1909798815	BERKETT, Davina			
27	1909798819	BOUILLON, Louis J			
28	1909798820	BOULTON, Adam			
29	1909798822	BRANGWEN, Ursula			
30	1909798825	BRIGGS, Thomas W			
31	1909798836	BROOKS, Maria			
32	1909798840	BROWN, James			
33	1909798842	BRYANTON, William G			
34	1909798848	BRYANT, Poppy R			
35	1909798849	BURGESS, Amanda J			
36	1909798852	BURGESS, Andrew P			
37	1909798856	BURTON, James			
38	1909798858	BUTTERWORTH, Janine			
39	1909798862	CABRAL, Juan			
40	1909798865	CAVENDISH, Mary			

For information about which parts of the pupil group template file you can and cannot edit, see *About Editing Pupil Group Templates on p.18.*

## Exporting Pupil Groups to Templates

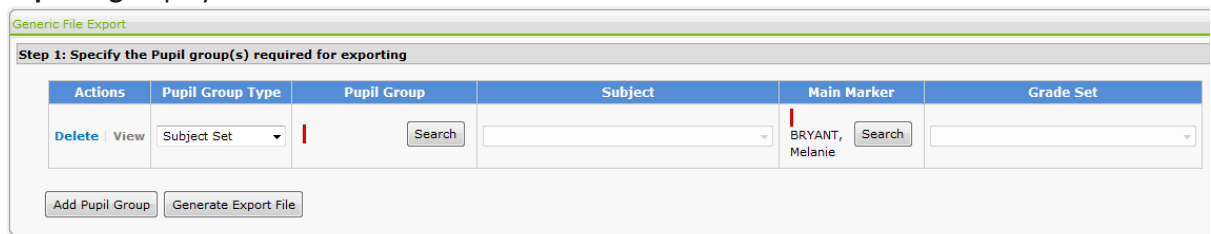
For an overview of exporting data, see *About Exporting Pupil Groups to Templates on p.8.*

### To Export a Pupil Group or Groups to a Template:

1. Click on the **All Functions** tab and click the **Markbook Generic Export** icon

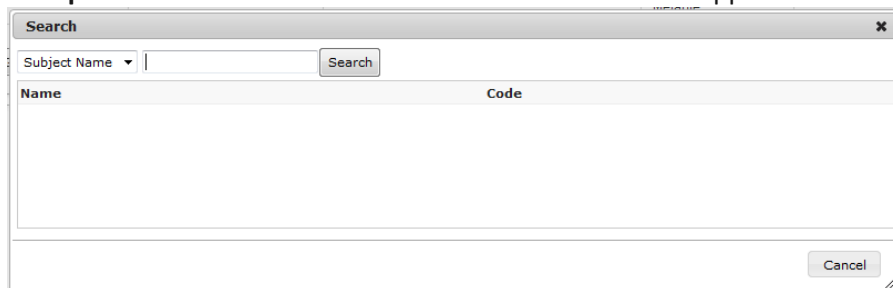


The **Generic File Export** wizard appears, with **Step 1: Specify the Pupil group(s) required for exporting** displayed.



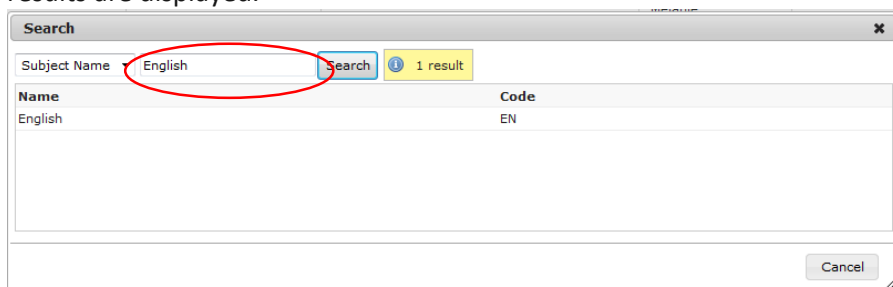
The screenshot shows the 'Generic File Export' wizard at 'Step 1: Specify the Pupil group(s) required for exporting'. It features a table with columns: Actions, Pupil Group Type, Pupil Group, Subject, Main Marker, and Grade Set. The 'Pupil Group Type' is set to 'Subject Set'. The 'Main Marker' is 'BRYANT, Melanie'. Buttons for 'Add Pupil Group' and 'Generate Export File' are at the bottom.

2. Specify the pupil group or groups for which you wish to subsequently import markbook data:
  - a. From the **Pupil Group Type** drop list, select the relevant option and in the **Pupil Group** column click the **Search** button. The **Search** screen appears.



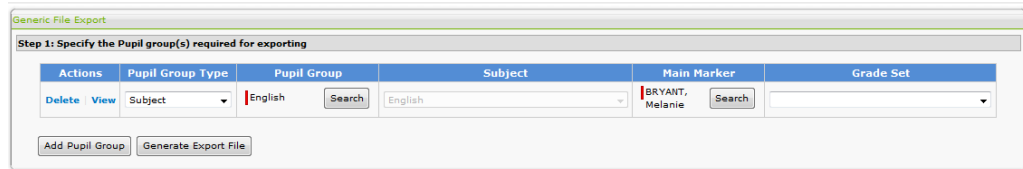
The screenshot shows a 'Search' dialog box with a 'Subject Name' dropdown and a 'Search' button. Below is a table with columns 'Name' and 'Code'.

- b. (Data Dependent and Optional) From the **Search** drop list, select another item if required. By default, the list displays an item that relates to your **Pupil Group Type** selection. Some **Pupil Group Type** selections do not allow you to select an alternative item from the list (as they are not relevant to the type of pupil group selected).
- c. In the **Search** field, enter search criteria and click the **Search** button. Your search results are displayed.

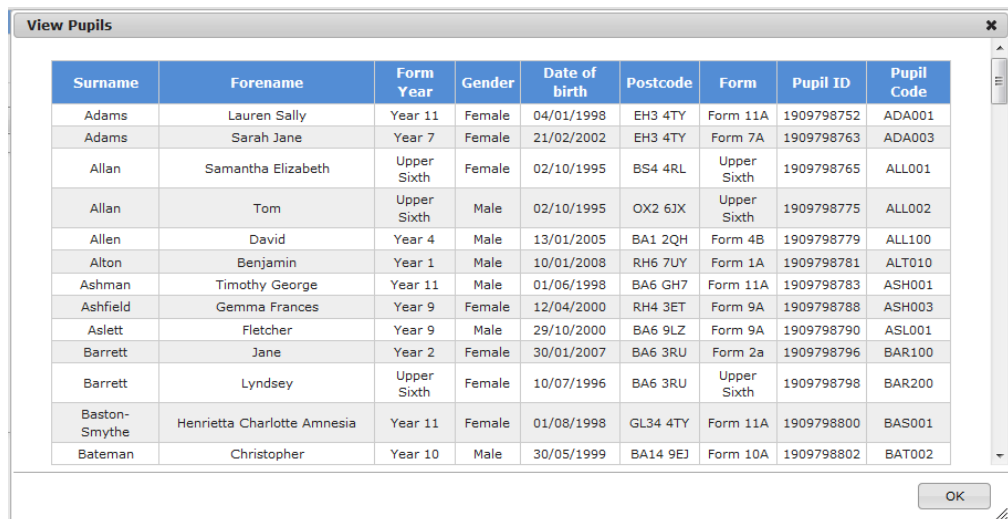


The screenshot shows the 'Search' dialog box with 'English' entered in the 'Subject Name' field. The 'Search' button is highlighted with a red circle. A yellow notification says '1 result'. The table below shows one result: 'English' with code 'EN'.

- d. Click on the required item.  
You are returned to **Step 1** of the **Generic File Export** wizard, with your selected pupil group displayed in the **Pupil Group** column.



- e. (Optional) In the **Actions** column, click on the **View** link. The **View Pupils** screen appears displaying a list of the pupils for the selected pupil group. This enables you to check that you have selected the intended pupil group.



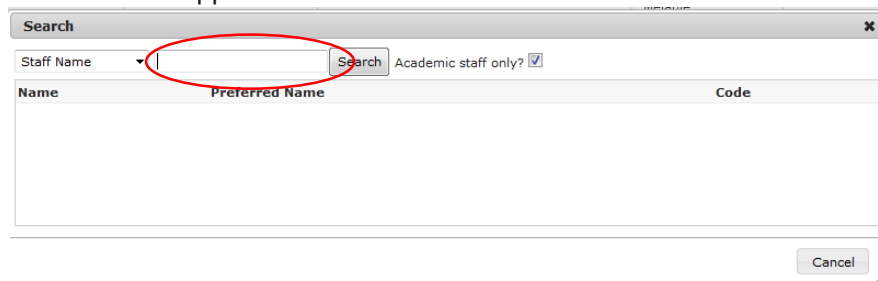
Surname	Forename	Form Year	Gender	Date of birth	Postcode	Form	Pupil ID	Pupil Code
Adams	Lauren Sally	Year 11	Female	04/01/1998	EH3 4TY	Form 11A	1909798752	ADA001
Adams	Sarah Jane	Year 7	Female	21/02/2002	EH3 4TY	Form 7A	1909798763	ADA003
Allan	Samantha Elizabeth	Upper Sixth	Female	02/10/1995	BS4 4RL	Upper Sixth	1909798765	ALL001
Allan	Tom	Upper Sixth	Male	02/10/1995	OX2 6JX	Upper Sixth	1909798775	ALL002
Allen	David	Year 4	Male	13/01/2005	BA1 2QH	Form 4B	1909798779	ALL100
Alton	Benjamin	Year 1	Male	10/01/2008	RH6 7UY	Form 1A	1909798781	ALT010
Ashman	Timothy George	Year 11	Male	01/06/1998	BA6 GH7	Form 11A	1909798783	ASH001
Ashfield	Gemma Frances	Year 9	Female	12/04/2000	RH4 3ET	Form 9A	1909798788	ASH003
Aslett	Fletcher	Year 9	Male	29/10/2000	BA6 9LZ	Form 9A	1909798790	ASL001
Barrett	Jane	Year 2	Female	30/01/2007	BA6 3RU	Form 2a	1909798796	BAR100
Barrett	Lyndsey	Upper Sixth	Female	10/07/1996	BA6 3RU	Upper Sixth	1909798798	BAR200
Baston-Smythe	Henrietta Charlotte Amnesia	Year 11	Female	01/08/1998	GL34 4TY	Form 11A	1909798800	BAS001
Bateman	Christopher	Year 10	Male	30/05/1999	BA14 9EJ	Form 10A	1909798802	BAT002

**NOTE:** If you add a pupil group by mistake, in the **Actions** column click on the appropriate **Delete** link. (Ensure you click within the correct row.)

3. (Data Dependent and Optional) From the **Subject** column for the appropriate row, select the relevant subject from the drop list.

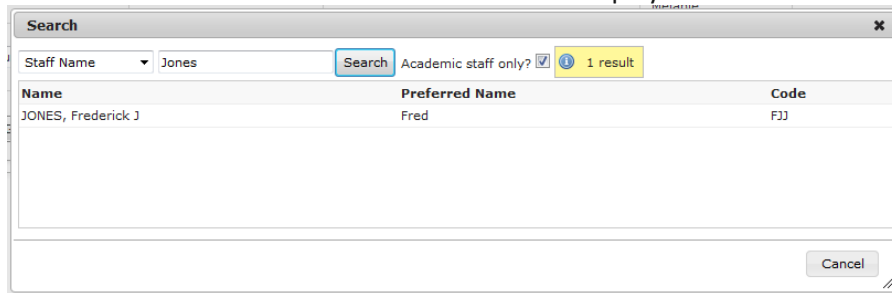
**NOTE:** If you have specified a 'Subject' or 'Subject Set' pupil group, the **Subject** field is automatically populated, and you cannot edit it.

4. (Optional) Alter the main marker:
  - a. In the **Main Marker** column for the appropriate row, click the **Search** button. The **Search** screen appears.



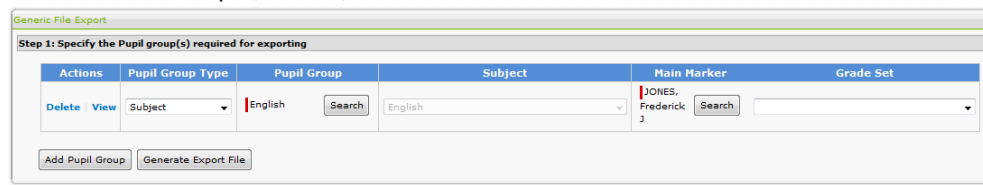
- b. (Optional) From the **Search** drop list, select another item. By default, the 'Staff Name' item is selected.
  - c. In the **Search** field (highlighted in the screenshot above), enter search criteria.
  - d. (Optional) Click on the **Academic staff only** check box to de-select it.

- e. Click the **Search** button. Your search results are displayed.



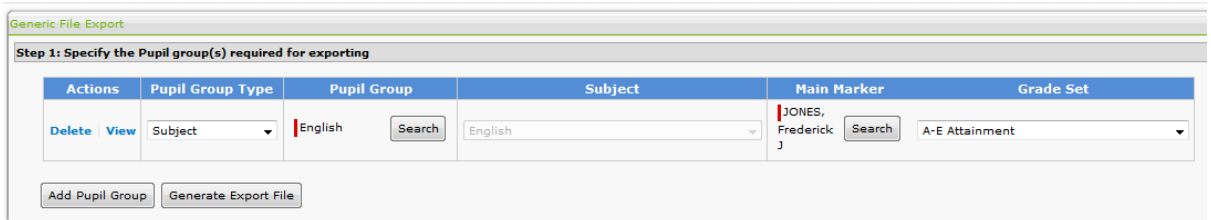
Name	Preferred Name	Code
JONES, Frederick J	Fred	FJJ

- f. Click on the required item.  
You are returned to **Step 1** of the **Generic File Export** wizard, with the updated main marker. For example, 'Jones, Frederick'.



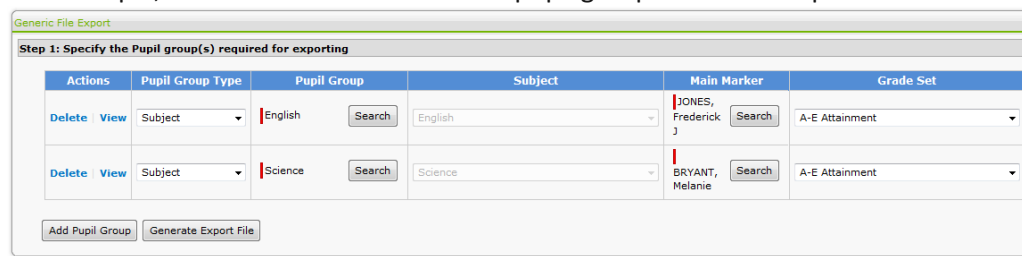
Actions	Pupil Group Type	Pupil Group	Subject	Main Marker	Grade Set
Delete View	Subject	English	English	JONES, Frederick J	

5. From the **Grade Set** column, select one of the following:
- If the majority of the tasks you plan to create for this pupil group will have a numeric marking method, ensure the **Grade Set** drop list is blank.
  - If the majority of the tasks you plan to create for this pupil group will have a grade set marking method, select the relevant grade set for each pupil group.



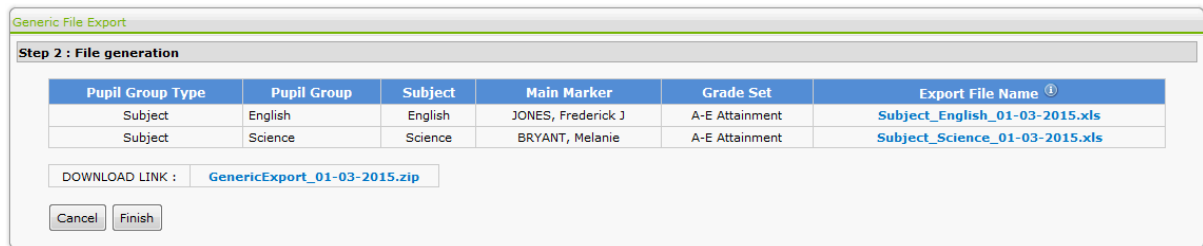
Actions	Pupil Group Type	Pupil Group	Subject	Main Marker	Grade Set
Delete View	Subject	English	English	JONES, Frederick J	A-E Attainment

6. (Optional) Add additional pupil groups:
- Click on the **Add Pupil Group** button. A new row appears for each pupil group.
  - Enter the relevant data for each group, as detailed in the Steps 2-5 above.  
For example, in the screenshot below two pupil groups have been specified.



Actions	Pupil Group Type	Pupil Group	Subject	Main Marker	Grade Set
Delete View	Subject	English	English	JONES, Frederick J	A-E Attainment
Delete View	Subject	Science	Science	BRYANT, Melanie	A-E Attainment

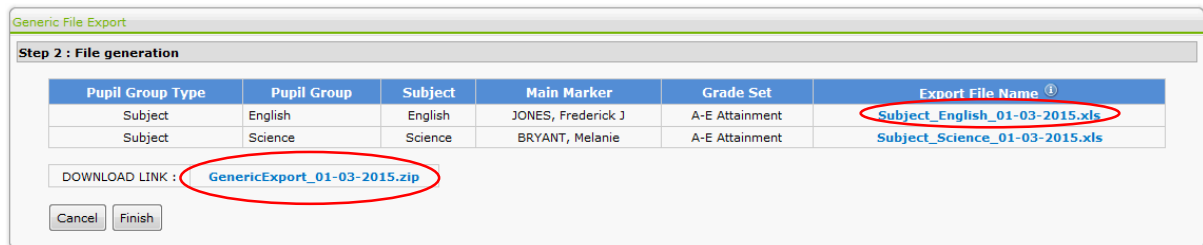
7. Click the **Generate Export File** button.  
The **Step 2: File generation** screen appears displaying a list of the exported files generated.



**NOTE:** A separate Excel file is generated for each pupil group specified. For example in the screenshot above, two .xls files have been generated.

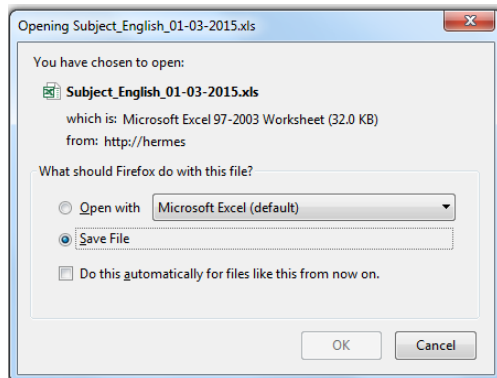
**NOTE:** If you've realised that you've made a mistake, click the **Cancel** button. You are returned to the **All Functions** tab.

8. Do one of the following to save the file(s) to your machine:
  - Within the **Export File Name** column, click on the relevant link. Go to Step 9.
  - Click on the **DOWNLOAD LINK**. Go to Step 10.



9. Having clicked on a relevant link within the **Export File Name** column, the **Opening** screen appears.

In this example, the 'Subject\_English\_01-03-2015.xls' was chosen.



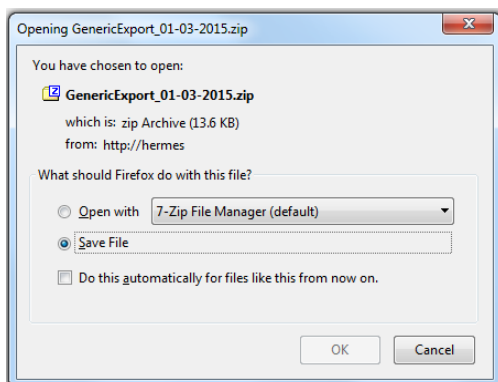
- a. Click the **Save File** option, if not already selected, and click the **OK** button. The file is downloaded to your **Downloads** folder. (A blue **Download** arrow briefly appears at the top of the **3Sys** screen.)
- b. Click the **Finish** button. The **Generic File Export** wizard is closed and you are returned to the **All Functions** tab.
- c. In your **Downloads** folder, typically a sub folder of your **Favourites** folder, locate the relevant .xls file and copy it into a relevant folder.

- d. Double-click the file to open it. For example, this screenshot shows the 'English' pupil group template created by the process detailed above.

	A	B	C	D	E
1	Template ID:		22		
2	Pupil Group:	English			
3	Academic Year:	Academic Year 2014/15			
4	School:	The Camelot School			
5	Main Marker:	JONES, Frederick J:			
6					
7			Example Task 1	Example Task 2	
8	Date:(DD/MM/YY)		00/00/00	00/00/00	
9	Pupil Name				
10	1909798752	ADAMS, Lauren S			
11	1909798763	ADAMS, Sarah J			
12	1909798765	ALLAN, Samantha E			
13	1909798775	ALLAN, Tom			
14	1909798779	ALLEN, David			
15	1909798781	ALTON, Benjamin			
16	1909798783	ASHMAN,Timothy George			
17	1909798788	ASHFIELD, Gemma Frances			
18	1909798790	ASLETT, Fletcher			
19	1909798796	BARRETT, Jane			
20	1909798798	BARRETT, Lyndsey			
21	1909798800	BASTON-SMYTHE, Henrietta C			
22	1909798802	BATEMAN, Christopher			
23	1909798806	BATES, Andrea Mary			
24	1909798810	BELL, Edward			
25	1909798812	BENNETT-JONES, Charlotte Francesca			
26	1909798815	BERKETT, Davina			
27	1909798819	BOUILLON, Louis J			
28	1909798820	BOULTON, Adam			
29	1909798822	BRANGWEN, Ursula			
30	1909798825	BRIGGS, Thomas W			
31	1909798836	BROOKS, Maria			
32	1909798840	BROWN, James			
33	1909798842	BRYANTON, William G			
34	1909798848	BRYANT, Poppy R			
35	1909798849	BURGESS, Amanda J			
36	1909798852	BURGESS, Andrew P			
37	1909798856	BURTON, James			
38	1909798858	BUTTERWORTH, Janine			
39	1909798862	CABRAL, Juan			
40	1909798865	CAVENDISH, Mary			

**NOTE:** The order of the pupils is based on the Pupil ID. You can use Excel functionality to alter the order in which the rows appear, if required.

10. Having clicked on the **DOWNLOAD LINK**, the **Opening** screen appears displaying the exported zip file.



- a. Click the **Save File** option, if not already selected, and click the **OK** button. The zip file containing all the pupil group files you exported, as individual xls files, is copied to your **Downloads** folder. (A blue **Download** arrow briefly appears at the top of the **3Sys** screen.)



- b. Click the **Finish** button.  
The **Generic File Export** wizard is closed and you are returned to the **All Functions** tab.
- c. In your **Downloads** folder, typically a sub folder of your **Favourites** folder, locate the relevant .zip file and copy it into a relevant folder.  
**NOTE:** If you don't have zip software already installed, please consult your System Administrator.
- d. Use your zip software to unzip and extract the relevant .xls file.
- e. Double-click the file to open it. For example, this screenshot shows the 'Science' pupil group template created by the process detailed above.

	A	B	C	D	E
1	Template ID:	25			
2	Pupil Group:	Science			
3	Academic Year:	Academic Year 2014/15			
4	School:	The Camelot School			
5	Main Marker:	BRYANT, Melanie:			
6					
7			Example Task 1	Example Task 2	
8		Date:(DD/MM/YY)	00/00/00	00/00/00	
9		Pupil Name			
10	1909798763	ADAMS, Sarah J			
11	1909798840	BROWN, James			
12	1909798872	CHEUNG, Fung L (Harry)			
13	1909798878	COLES,Mark			
14	1909798902	DAVIDSON, Nicola M			
15	1909798928	DYER, Jonathan			
16	1909798932	FLEET, Helena			
17	1909798934	FRIDAY,Anna			
18	1909798939	FRY, Jordan			
19	1909798940	FRY, Gemma			
20	1909798944	GALLAGHER, Philip			
21	1909798946	GERRARD, Amy			
22	1909798952	GREEN,Michael L			
23	1909798954	GREYHOUND, Tom			
24	1909798955	GREYHOUND, Richard			
25	1909798956	GREYHOUND, Harry			
26	1909798957	GRIGGS, Alexander			
27	1909798972	HENDERSON, Mary			
28	1909798986	HURST,Alexander			
29	1909798997	JEFFERY, Kate			
30	1909799005	JONES, Emily Ann			
31	1909799021	KNOLE-PERKINS, Henry J			
32	1909799024	KNOLE,Anna			
33	1909799025	KOUNELLIS, Stephan			
34	1909799045	MILTON, James William			
35	1909799078	NIGHTINGALE, Michael			
36	1909799093	o'SULLIVAN, James			
37	1909799098	PARRY, James A			
38	1909799107	POPHAM, Martin			

11. You now need to edit each pupil group template file, using Excel, and input the relevant markbook data, such as tasks and grades/marks. For details, see *Step 2: Editing Pupil Group Template on p.18*.

## Step 2: Editing Pupil Group Templates

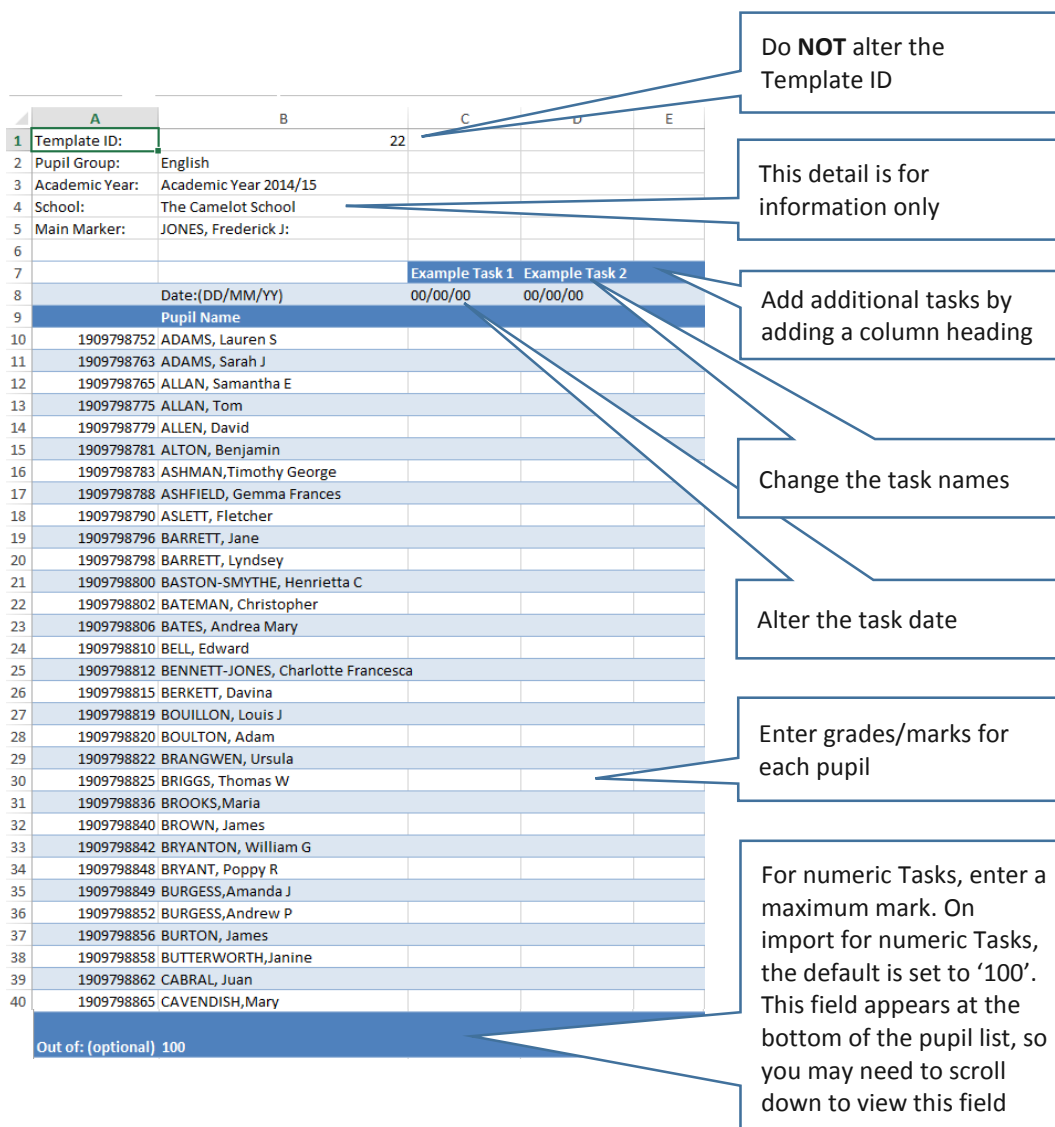
Once you have exported pupil groups, you need to add the appropriate markbook data, such as marks and grades, to the pupil group templates using Excel. For details, see:

- *About Editing Pupil Group Templates on p.18.*
- *Editing Pupil Group Templates on p.20.*

### About Editing Pupil Group Templates

Once you have exported a list of pupils to a pupil group template, you can open it in Excel and input your markbook data. There are certain fields in this file which you should NOT change, as detailed below.

The screenshot below gives an example of the content of an exported pupil group template, as opened in Excel, with the two example task columns of 'Example Task 1' and 'Example Task 2'.



	A	B	C	D	E
1	Template ID:		22		
2	Pupil Group:	English			
3	Academic Year:	Academic Year 2014/15			
4	School:	The Camelot School			
5	Main Marker:	JONES, Frederick J:			
6					
7					
8			Example Task 1	Example Task 2	
9	Date:(DD/MM/YY)		00/00/00	00/00/00	
10	Pupil Name				
11	1909798752	ADAMS, Lauren S			
12	1909798763	ADAMS, Sarah J			
13	1909798765	ALLAN, Samantha E			
14	1909798775	ALLAN, Tom			
15	1909798779	ALLEN, David			
16	1909798781	ALTON, Benjamin			
17	1909798783	ASHMAN, Timothy George			
18	1909798788	ASHFIELD, Gemma Frances			
19	1909798790	ASLETT, Fletcher			
20	1909798796	BARRETT, Jane			
21	1909798798	BARRETT, Lyndsey			
22	1909798800	BASTON-SMYTHE, Henrietta C			
23	1909798802	BATEMAN, Christopher			
24	1909798806	BATES, Andrea Mary			
25	1909798810	BELL, Edward			
26	1909798812	BENNETT-JONES, Charlotte Francesca			
27	1909798815	BERKETT, Davina			
28	1909798819	BOUILLON, Louis J			
29	1909798820	BOULTON, Adam			
30	1909798822	BRANGWEN, Ursula			
31	1909798825	BRIGGS, Thomas W			
32	1909798836	BROOKS, Maria			
33	1909798840	BROWN, James			
34	1909798842	BRYANTON, William G			
35	1909798848	BRYANT, Poppy R			
36	1909798849	BURGESS, Amanda J			
37	1909798852	BURGESS, Andrew P			
38	1909798856	BURTON, James			
39	1909798858	BUTTERWORTH, Janine			
40	1909798862	CABRAL, Juan			
	1909798865	CAVENDISH, Mary			
	Out of: (optional) 100				

Callouts from the image:

- Do **NOT** alter the Template ID
- This detail is for information only
- Add additional tasks by adding a column heading
- Change the task names
- Alter the task date
- Enter grades/marks for each pupil
- For numeric Tasks, enter a maximum mark. On import for numeric Tasks, the default is set to '100'. This field appears at the bottom of the pupil list, so you may need to scroll down to view this field

## About data you CAN change and enter

You **CAN** alter or add the following information within the pupil group template file:

- Alter the name of the tasks, for example you could change 'Example Task 1' to 'English Literature Assessment'.
- Add additional tasks.
- Specify the task date for each task.
- For numeric tasks, enter a maximum mark if you do not wish the default of '100' to be used.
- Enter markbook data against each pupil against the appropriate task, i.e. marks/grades.

**NOTE:** Instead of manually entering the marks and grades, you could copy and paste existing markbook data. For details, see *About Copying Markbook Data from Other Sources on p.19*.

When you import markbook data from a pupil group template file, all the task columns in the Excel file are created as new tasks in **3Sys Markbooks**, and all the marks are imported against the relevant pupils and tasks. You can view them using the **Mark Inquiry** module.

## About data you must NOT change

You must **NOT** alter the following information within the pupil group template file in Excel:

- **Template ID:** If you alter this, you will be unable to import markbook data from this file, as the **Generic File Import** wizard requires the **Template ID** in order to link the exported pupil group template to the data it is about to import.
- **Pupil ID:** If you alter this for any pupil record, when you come to import the markbook data, the system will not be able to link it to an existing pupil record. The **Generic File Import** wizard matches the exported pupil records and the markbook data it is about to import on the **Pupil ID**.

**NOTE:** If you add new pupil records in the pupil group template file, they are ignored by the **Generic File Import** wizard; the import process has to be able to match an existing pupil record with the markbook data you are importing. (Only markbook data is imported, not the **Pupil ID** or **Pupil Name**.)

In addition, we recommend that you do not change the following information (this data is there for your information only):

- Data contained in cells A2 – A5 and B2 – B5.
- Pupil Name fields.

## About Copying Markbook Data from Other Sources

You can copy and paste existing markbook data from other sources, such as other Excel or Word files. However, before you copy and paste markbook data from other sources, you must ensure that the order of the pupil list from which you are copying matches that given in the pupil group template file. You can use Excel functionality to alter the order of the rows, if necessary. When the markbook data is imported, each row is imported individually using the Pupil ID as the match, so the order of the rows in the pupil group template file does not impact the import process.

For example, you have an existing Excel file containing a GCSE Science pupil group with a set of 15 tasks and associated marks for each pupil, and you wish to import this markbook data into **3Sys Markbooks**. To do this, you would need to undertake the following:

1. Use the **Generic File Export** wizard to export a list of pupils for the relevant GCSE Science group, and open that file in Excel.
2. Ensure that the order of the pupil group list is identical in both files.

3. Copy and paste the task columns containing the pupils' marks from the 'other source' into the relevant columns in the pupil group template file.
4. Use the **Generic File Import** wizard to import that markbook data.

If you are an Excel expert and you have the relevant knowledge, you could potentially set up scripts or macros to transfer markbook data from a third party system into a pupil group template file. The match between the pupil records within **3Sys Markbooks** and the pupil data in pupil group template files is undertaken on the Pupil ID.

## Editing Pupil Group Templates

For an overview, see *About Editing Pupil Group Templates on p.18*.

### To Edit a Pupil Group Template file:

1. Locate and open the relevant pupil group template file in Excel. The screenshot below shows an example file, as generated in the procedure *Exporting Pupil Groups to Templates on p.12*.

	A	B	C	D	E
1	Template ID:	22			
2	Pupil Group:	English			
3	Academic Year:	Academic Year 2014/15			
4	School:	The Camelot School			
5	Main Marker:	JONES, Frederick J:			
6					
7			Example Task 1	Example Task 2	
8	Date:(DD/MM/YY)		00/00/00	00/00/00	
9	Pupil Name				
10	1909798752	ADAMS, Lauren S			
11	1909798763	ADAMS, Sarah J			
12	1909798765	ALLAN, Samantha E			
13	1909798775	ALLAN, Tom			
14	1909798779	ALLEN, David			
15	1909798781	ALTON, Benjamin			
16	1909798783	ASHMAN, Timothy George			
17	1909798788	ASHFIELD, Gemma Frances			
18	1909798790	ASLETT, Fletcher			
19	1909798796	BARRETT, Jane			
20	1909798798	BARRETT, Lyndsey			
21	1909798800	BASTON-SMYTHE, Henrietta C			
22	1909798802	BATEMAN, Christopher			
23	1909798806	BATES, Andrea Mary			
24	1909798810	BELL, Edward			
25	1909798812	BENNETT-JONES, Charlotte Francesca			
26	1909798815	BERKETT, Davina			
27	1909798819	BOUILLON, Louis J			
28	1909798820	BOULTON, Adam			
29	1909798822	BRANGWEN, Ursula			
30	1909798825	BRIGGS, Thomas W			
31	1909798836	BROOKS, Maria			
32	1909798840	BROWN, James			
33	1909798842	BRYANTON, William G			
34	1909798848	BRYANT, Poppy R			
35	1909798849	BURGESS, Amanda J			
36	1909798852	BURGESS, Andrew P			
37	1909798856	BURTON, James			
38	1909798858	BUTTERWORTH, Janine			
39	1909798862	CABRAL, Juan			
40	1909798865	CAVENDISH, Mary			

**NOTE:** DO NOT edit the **Template ID** or the **Pupil ID** for any record. For details on data you can and cannot edit, see *About Editing Pupil Group Templates on p.18*.

**NOTE:** By default, the Excel the file might open in a 'Protected View'. If this is the case, you will

need to enable editing by clicking on the **Enable Editing** button. If you are unsure how to do this, please consult the Excel documentation.

- (Optional) In the Column Heading for each task, alter the task name. In the example below, the task names have been altered from 'Example Task 1' and 'Example Task 2' to 'Short Story' and 'Long Essay' respectively.

D7 : Long Essay				
	A	B	C	D
1	Template ID:		24	
2	Pupil Group:	English		
3	Academic Year:	Academic Year 2014/15		
4	School:	The Camelot School		
5	Main Marker:	JONES, Frederick J:		
6				
7			Short Story	Long Essay
8	Date:(DD/MM/YY)		00/00/00	00/00/00
9	Pupil Name			
10	1909798752	ADAMS, Lauren S		
11	1909798763	ADAMS, Sarah J		
12	1909798765	ALLAN, Samantha E		
13	1909798775	ALLAN, Tom		
14	1909798779	ALLEN, David		
15	1909798781	ALTON, Benjamin		
16	1909798783	ASHMAN, Timothy George		
17	1909798788	ASHFIELD, Gemma Frances		

**NOTE:** It is possible to give a task the same name as an existing task within **3Sys Markbooks**. When the **Import** wizard imports the tasks, a new task is created for each task column.

- (Optional) Add tasks by adding additional columns to the spreadsheet.

E7 : Short Essay					
	A	B	C	D	E
1	Template ID:		24		
2	Pupil Group:	English			
3	Academic Year:	Academic Year 2014/15			
4	School:	The Camelot School			
5	Main Marker:	JONES, Frederick J:			
6					
7			Short Story	Long Essay	Short Essay
8	Date:(DD/MM/YY)		00/00/00	00/00/00	
9	Pupil Name				
10	1909798752	ADAMS, Lauren S			
11	1909798763	ADAMS, Sarah J			
12	1909798765	ALLAN, Samantha E			
13	1909798775	ALLAN, Tom			
14	1909798779	ALLEN, David			
15	1909798781	ALTON, Benjamin			
16	1909798783	ASHMAN, Timothy George			
17	1909798788	ASHFIELD, Gemma Frances			

- (Optional) Enter the date you wish to associate with each task. For example if the task is an exam, you would set the task date as the date on which the exam is due.

**NOTE:** The task date must be within the academic year you have specified in top right corner of the **3Sys** screen (normally within the current academic year).

Setup | Help | Sign Out | The Camelot School | Academic Year 2014/15

The screenshot below shows tasks with task dates entered.

E8		06/05/2015			
A	B	C	D	E	
1	Template ID:	24			
2	Pupil Group:	English			
3	Academic Year:	Academic Year 2014/15			
4	School:	The Camelot School			
5	Main Marker:	JONES, Frederick J:			
6					
7			Short Story	Long Essay	Short Essay
8	Date:(DD/MM/YY)	30/03/2015	20/04/2015	06/05/2015	
9	Pupil Name				
10	1909798752 ADAMS, Lauren S				
11	1909798763 ADAMS, Sarah J				
12	1909798765 ALLAN, Samantha E				
13	1909798775 ALLAN, Tom				
14	1909798779 ALLEN, David				
15	1909798781 ALTON, Benjamin				
16	1909798783 ASHMAN, Timothy George				
17	1909798788 ASHFIELD, Gemma Frances				

5. Enter the marks against each task. The screenshot below gives an example with the grades/marks entered against each task.

F133						F
A	B	C	D	E		
1	Template ID:	24				
2	Pupil Group:	English				
3	Academic Year:	Academic Year 2014/15				
4	School:	The Camelot School				
5	Main Marker:	JONES, Frederick J:				
6						
7			Short Story	Long Essay	Short Essay	
8	Date:(DD/MM/YY)	30/03/2015	20/04/2015	06/05/2015		
9	Pupil Name					
10	1909798752 ADAMS, Lauren S	C	C		66	
11	1909798763 ADAMS, Sarah J	B	D		86	
12	1909798765 ALLAN, Samantha E	C	A		75	
13	1909798775 ALLAN, Tom	B	A		83	
14	1909798779 ALLEN, David	B	B		55	
15	1909798781 ALTON, Benjamin	C	B		46	
16	1909798783 ASHMAN, Timothy George	C	C		47	
17	1909798788 ASHFIELD, Gemma Frances	D	C		85	
18	1909798790 ASLETT, Fletcher	A	D		66	
19	1909798796 BARRETT, Jane	A	B		55	
20	1909798798 BARRETT, Lyndsey	B	B		77	
21	1909798800 BASTON-SMYTHE, Henrietta C	B	C		55	
22	1909798802 BATEMAN, Christopher	C	C		84	
23	1909798806 BATES, Andrea Mary	C	C		75	
24	1909798810 BELL, Edward	D	C		68	
25	1909798812 BENNETT-JONES, Charlotte Frances	B	C		55	
26	1909798815 BERKETT, Davina	B	B		48	
27	1909798819 BOUILLON, Louis J	C	B		77	
28	1909798820 BOULTON, Adam	C	B		58	
29	1909798822 BRANGWEN, Ursula	C	A		88	
30	1909798825 BRIGGS, Thomas W	C	A		67	
31	1909798836 BROOKS, Maria	C	B		86	
32	1909798840 BROWN, James	B	C		77	
33	1909798842 BRYANTON, William G	B	B		69	
34	1909798848 BRYANT, Poppy R	B	B		55	
35	1909798849 BURGESS, Amanda J	A	C		85	
36	1909798852 BURGESS, Andrew P	A	B		76	

6. (Optional) For each numeric task enter the 'Out of' mark.

**NOTE:** By default, when numeric Tasks are imported the maximum mark is set to '100', so if you wish a numeric task to have a maximum mark of 100, you can leave the **Out of** field blank for that Task column. For example, the maximum mark for the first Task column is '100', so the **Out of** field for that Task column is left blank, and the maximum mark for the second Task column is '30', so '30' has been entered in the **Out of** field.

- a. Scroll down to the bottom of the pupil group template Excel file.
- b. For each relevant task column, enter a maximum mark.

1909799179 THOMPSON, Paula	65	11
1909799183 TODD, Susan J	47	24
1909799184 TRINDER, Jane	68	15
1909799199 WALLING, Fergus	57	27
1909799204 WALKER, Hannah	87	24
1909799211 WALLACE, Peter	65	9
1909799222 WILSON, Helen	84	26
1909799224 WISHART, Emma	44	14
1909799226 WOOD, Joanna	70	17
Out of: (optional) 100		30

7. Save the file.
8. You now need to import the pupil group template file. For details, see *Step 3: Importing Markbook Data on p.24.*

## Step 3: Importing Markbook Data

Once you have exported specific sets of pupil groups using the **Generic File Export** wizard, and have made the necessary changes to the pupil group template file in Excel, you can then import that file using the **Markbook Generic Import** module. For details, see:

- *About Importing Markbook Data on p.24.*
- *Importing Markbook Data on p.32.*

### About Importing Markbook Data

You use the **Generic File Import** wizard to import markbook data into **3Sys Markbooks**. (This wizard is sometimes referred to as the **Import** wizard.) Task columns in the pupil group template file are created as tasks within **3Sys Markbooks**, and any pupil marks/grades are added within the relevant tasks. This wizard appears when you click on the **Markbook Generic Import** icon on the **All Functions** page.

**NOTE:** If you cannot see this icon, you do not have the relevant profile permission configured. For details about permissions, see *Configuring the Markbook Generic Export and Import modules on p.37.*

When you import markbook data from the pupil group template files, the **Generic File Import** wizard undertakes a series of checks to validate that the data in the file is suitable to import, and that it matches the relevant data held within **3Sys Markbooks**. (The **Import** wizard uses the IDs contained in the template file to recognise the pupil group, pupil group type, subject, grade set, school and academic year.)

**NOTE:** A pupil group template file is associated with an academic year (normally the current academic year). This means that you cannot use a pupil group template file generated last academic year to import tasks into this academic year.

The match between the pupil records within **3Sys Markbooks** and the pupil data in the pupil group template file is undertaken on the **Pupil ID**. Each row is imported individually using the **Pupil ID** as the match, so the order of the rows in the pupil group template file does not matter. You can import single or multiple tasks and associated markbook data from a pupil group template file.

When you import markbook data using the **Generic File Import** wizard, for each task you about to import you can alter the following:

- Subject
- Task Name
- Task Date
- Task Type
- Marking Method
- Main Marker to whom each task is linked
- Grade Set to which each task is associated, if relevant. (You must leave this blank if the task is numeric.)
- Weighting
- Minimum Mark
- Maximum Mark



**NOTE:** Within the import process you can specify which tasks and mark data you wish to import. For example if you had ten tasks within the pupil group template file, but you had only entered the mark data for three of the tasks, you can select to just import the three tasks for which you have entered data.

A record is kept of the pupil group template files imported.

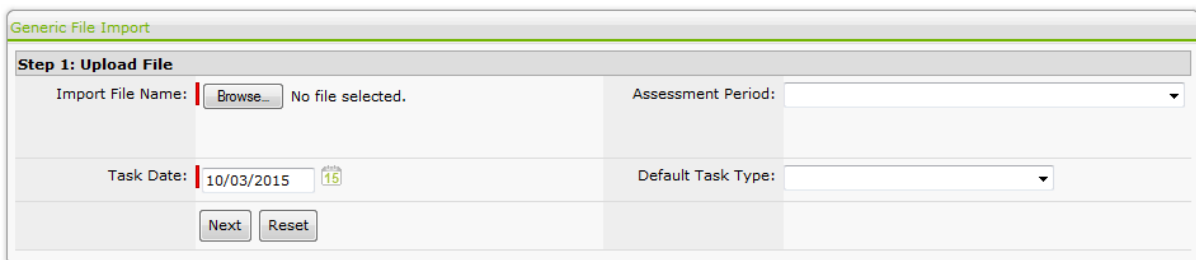
This **Generic File Import** wizard has three steps:

- **Step 1: Upload File** – see *About the Generic File Import - Step 1 on p.25.*
- **Step 2: Import Columns** - see *About the Generic File Import - Step 2 on p.26.*
- **Step 3: View and complete report** - see *About the Generic File Import - Step 3 on p.31.*

### About the Generic File Import - Step 1

The first step of the **Generic File Import** wizard enables you to specify the file that you wish to import, and some additional settings to refine the import process.

This screenshot shows the first step of the **Generic File Import** wizard – **Step 1: Upload File**.



The fields in the **Step 1: Upload File** screen are described in the table below:

Field Name	Field Description
<b>Import File Name</b>	Click the <b>Browse...</b> button to display the <b>File Upload</b> screen, enabling you to browse for and select the relevant pupil group template file.
<b>Task Date</b>	This field defaults to a valid date within the current academic year, normally today's date. Click on the <b>Calendar</b> icon to use the <b>Calendar</b> popup to alter the date, if necessary. If you have blank or invalid dates within the pupil group template file (under each task heading), the date you enter in this field is used.
<b>Assessment Period</b>	Click to choose the relevant <b>Assessment Period</b> from the drop list. This list includes all Assessment Periods for the school and academic year as specified at the top of the <b>3Sys</b> screen. This field is only mandatory if required by the <b>Default Task Type</b> chosen; if this field is required, and you have not chosen an Assessment Period, when you click <b>Next</b> , you are asked to complete this field.
<b>Default Task Type</b>	Click to choose the <b>Default Task Type</b> from the drop list, which will be applied to the tasks imported from the selected pupil group template file. The list includes all Task Types in the system for the school specified at the top of the <b>3Sys</b> screen.

**NOTE:** Any mandatory fields not completed are highlighted. You are unable to proceed to the next step in the wizard until you have entered the required data.

## About the Generic File Import - Step 2

The second step of the **Generic File Import** wizard enables you to alter some of the markbook data before it is imported, such as the grade set to which specific tasks are associated. (You cannot alter the marks and grades within the **Import** wizard.)

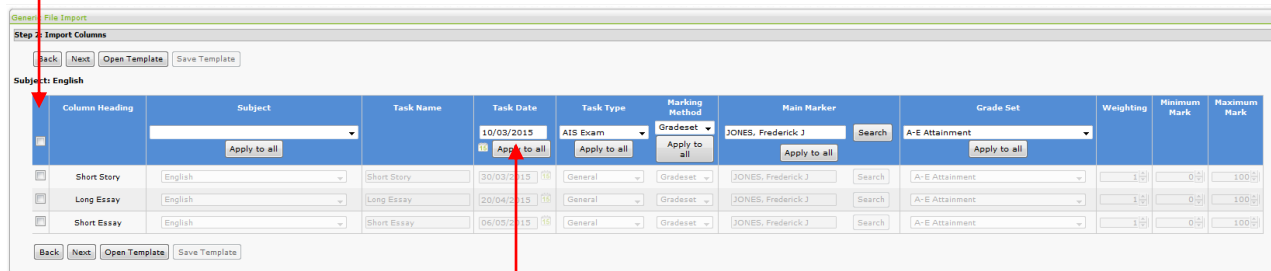
The **Step 2: Import Columns** screen of the **Generic File Import** wizard gives you the option to tailor your import. The **Import** wizard presents you with an **Import** table containing data derived from your specified pupil group template file. The **Import** wizard has performed some intelligent assumptions based on the data in the selected file. The example screenshot below displays the columns available. (A description of these columns is provided in the table below, and a larger image with the page set to landscape is given in *About the Markbook Generic Import: Step 2 – Import table on p.30*).

Before you can change the settings in the **Import** table, you need to select the task or tasks that you wish to import at this stage. You don't have to import all the tasks from within the selected pupil group template file. For example, you may have ten tasks in a pupil group template file but you have only entered mark data for three of those tasks, so you would only import those three tasks that contain markbook data.

You use the first column in the **Import** table to select all tasks or to select specific tasks. Click on the check box in the first cell of the table to select and enable all tasks in the table, or click on specific check boxes for each task. Once you have selected tasks, you can then alter the import settings in the table. For those columns with an **Apply to all** button in the column heading, you can use the drop list or popup filter in the column heading to select an item, and then apply that selection to all selected tasks. You can also save the import settings you specify in the **Import** table, and re-apply these settings to subsequent imports. For details, see *About the Import Settings Template on p.29*.

The first screenshot below gives an example of **Step 2** of the **Import** wizard before tasks have been selected, the second screenshot shows the same screen with the tasks selected and enabled. After the two screenshots, a table provides a summary of each field.

**Selected** check boxes - click on the relevant check box to enable the selected task or tasks to be imported from the pupil group template file, and to enable you to edit the import settings within the **Import** table. Click on the check box in the first column heading to select ALL tasks displayed in the table.

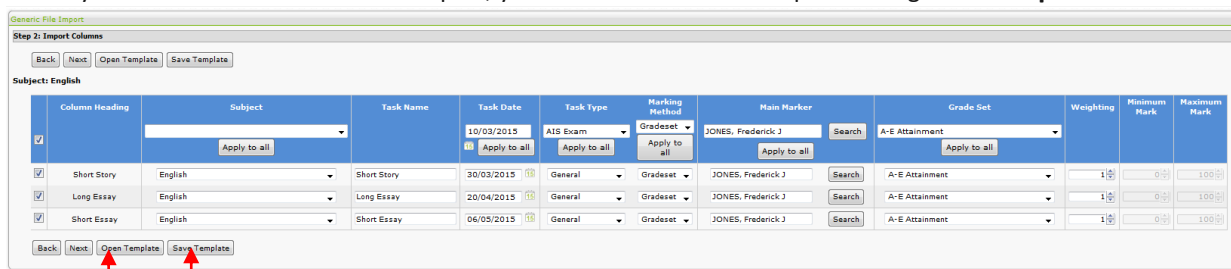


The screenshot shows the 'Import Columns' table with the following data:

Column Heading	Subject	Task Name	Task Date	Task Type	Marking Method	Main Marker	Grade Set	Weighting	Minimum Mark	Maximum Mark
<input type="checkbox"/>	<input type="text" value="English"/>	<input type="text" value="Short Story"/>	10/03/2015	AIS Exam	Gradeset	JONES, Frederick J	A-E Attainment			
<input type="checkbox"/>	English	Short Story	30/03/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100
<input type="checkbox"/>	English	Long Essay	20/04/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100
<input type="checkbox"/>	English	Short Essay	06/05/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100

Click the **Apply to all** button to apply the selection in the column heading to all selected tasks.

Once you have selected the tasks to import, you are able to alter the import settings in the **Import** table.



The screenshot shows the 'Import Columns' table with the following data:

Column Heading	Subject	Task Name	Task Date	Task Type	Marking Method	Main Marker	Grade Set	Weighting	Minimum Mark	Maximum Mark
<input checked="" type="checkbox"/>	<input type="text" value="English"/>	<input type="text" value="Short Story"/>	10/03/2015	AIS Exam	Gradeset	JONES, Frederick J	A-E Attainment			
<input checked="" type="checkbox"/>	English	Short Story	30/03/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100
<input checked="" type="checkbox"/>	English	Long Essay	20/04/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100
<input checked="" type="checkbox"/>	English	Short Essay	06/05/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100

**Save Template** button – click to save a snapshot of your **Import** table settings.

**Open Template** button – click to apply the **Import** table settings from an existing 'Import Setting Template'.

For more information about each field, see the table below:

Column Name	Column Description
<b>Column Heading</b>	This displays a row and name for each Task column within the pupil group template file.
<b>Subject</b>	<p>The <b>Import</b> wizard checks if a subject is contained within the pupil group template file:</p> <ul style="list-style-type: none"> <li>If there is no subject specified in the file, the <b>Import</b> wizard leaves the <b>Subject</b> field blank for all tasks created. You will need to add the subject to which each task relates, using the <b>Subject</b> drop list. (Otherwise, the <b>Import</b> wizard will not know which subject to which to assign the tasks it needs to create.)</li> <li>If there is a subject within the file, the <b>Subject</b> field is automatically populated with that subject.</li> </ul> <p><b>NOTE:</b> If a subject is not relevant for a specific task, you can select a blank subject.</p>
<b>Task Name</b>	By default the column headings from the pupil group template file are used as the Task Names. You can alter these, if required.
<b>Task Date</b>	Displays the date for each task as in the pupil group template file, if the date is valid. If the file contains invalid dates, i.e. not within the current academic year or an invalid date format, the <b>Task Date</b> specified in <b>Step 1</b> of the <b>Import</b> wizard is used for all task dates. You can change this date if necessary.

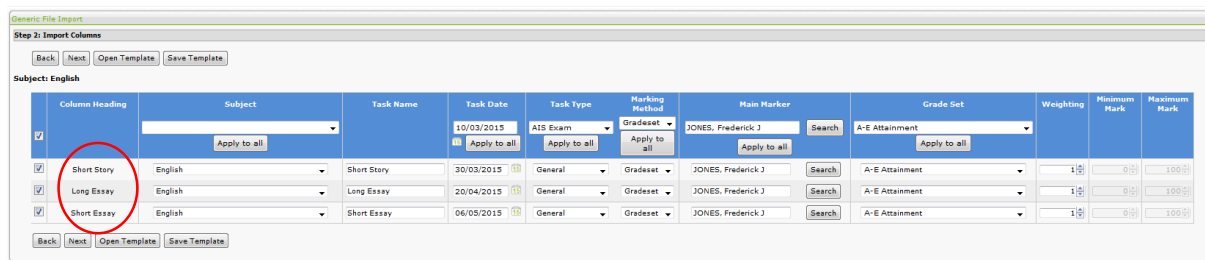
<p><b>Task Type</b></p>	<p>The <b>Task Type</b> drop list displays the <b>Default Task Type</b> chosen in <b>Step 1</b> of the <b>Import</b> wizard. The drop list includes all Task Types for the school in which you are logged in as.</p> <p>You can change each entry if necessary. You can also select a <b>Task Type</b> from the drop list in the column heading, which you can then apply to all the selected tasks below it.</p>
<p><b>Marking Method</b></p>	<p>The <b>Import</b> wizard sets the <b>Marking Method</b> to grade set or numeric for all tasks in the <b>Import</b> table:</p> <ul style="list-style-type: none"> <li>• If a grade set was specified in the export of the pupil group template file, the <b>Marking Method</b> is set to 'Grade Set'.</li> <li>• If a grade set was NOT specified in the export of the pupil group template file, the <b>Marking Method</b> is set to 'Numeric'.</li> </ul> <p>You can also select a <b>Marking Method</b> from the drop list in the column heading, which you can then apply to all selected tasks below it.</p>
<p><b>Main Marker</b></p>	<p>For all tasks displayed in the <b>Import</b> table, the <b>Main Marker</b> field defaults to the <b>Main Marker</b> as specified for each task in the pupil group template file.</p> <p>You can alter the <b>Main Marker</b> for each task. You can also select a <b>Main Marker</b> using the <b>Search</b> button in the column heading, which you can then apply to all selected tasks below it.</p>
<p><b>Grade Set</b></p>	<p>The <b>Import</b> wizard checks if a grade set was specified within the pupil group template file:</p> <ul style="list-style-type: none"> <li>• If there was a grade set specified, the <b>Grade Set</b> field is automatically populated with that grade set.</li> <li>• If not, this field is blank. If the task has grades associated with it, you need to specify to which grade set they relate by selecting the appropriate item from the <b>Grade Set</b> drop list.</li> </ul> <p><b>NOTE:</b> The grade set you select from the drop list must match with the data you wish to import. For example if the grades within the pupil group template file range from A – F, and the grade set you select from the drop list only allows A – E, then a message appears requesting that you make the necessary corrections. You are unable to continue with the import process until you have made the necessary corrections.</p> <p>You can also select a <b>Grade Set</b> from the drop list in the column heading, which you can then apply to all selected tasks below it.</p>
<p><b>Weighting</b></p>	<p>The default is set to '1.00', you may change this required.</p> <p>(Text marks do not have weightings, so if you select 'Text' from the <b>Marking Method</b> drop list, the <b>Weighting</b> field is disabled.)</p>
<p><b>Minimum Mark</b></p>	<p>By default for numeric tasks, the Minimum Mark is set to '0'. You are able to alter this if appropriate. When you click the <b>Next</b> button, validation is performed against the markbook data in the pupil group template file, to check that there are no marks below the minimum. A warning message appears if there are marks below the minimum specified.</p>
<p><b>Maximum Mark</b></p>	<p>By default for numeric tasks, the Maximum Mark field is '100', unless you specified a maximum in the 'Out of' field for tasks in the pupil group template file. You are able to alter this if appropriate. When you click the <b>Next</b> button, validation is performed against the markbook data in the pupil group template file, to ensure that the maximum mark is not exceeded. A warning message appears if there are marks above the maximum specified.</p>

## About the Import Settings Template

You can save the import settings you specify in the **Import** table, and re-apply these settings to subsequent imports. To do this, you use the **Save Template** and the **Open Template** buttons respectively.

For example, if your Year 7 pupils always undertake a specific assessment at a set period during the year with a set task type, marking method and grade set, you can save these import settings as a template. Subsequently, in the next academic year when your new Year 7 pupils sit the same assessment, you can copy these settings from the existing Year 7 'Import Settings Template'.

When you save the current **Import** table settings as a snapshot to use later, all settings for all tasks (regardless of whether or not they are selected) are saved. The match is undertaken on the name of the task given in the Column Heading in the Excel file, as displayed in **Step 2** in the **Column Heading** column, as highlighted below.



Column Heading	Subject	Task Name	Task Date	Task Type	Marking Method	Main Marker	Grade Set	Weighting	Minimum Mark	Maximum Mark
Short Story	English	Short Story	30/03/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100
Long Essay	English	Long Essay	20/04/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100
Short Essay	English	Short Essay	06/05/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100

When you open an existing 'Import Settings Template', the system checks for task matches based on the task name, as given in the **Column Heading** column highlighted above (which is derived directly from the pupil group template file). If it finds a matching task name in that column, regardless of whether or not the task is selected, the **Import** table settings are applied from that template to the matching task.

## About the Markbook Generic Import: Step 2 – Import table

The **Step 2: Import Columns** screen of the **Generic File Import** wizard contains numerous columns, which give you the option to tailor your import. The example screenshots below display the columns available (a description of these columns is provided above). The first screenshot below gives an example of **Step 2** of the **Import** wizard before tasks have been selected, and the second screenshot shows the same screen with the tasks selected and enabled.

Generic File Import

Step 2: Import Columns

Back Next Open Template Save Template

Subject: English

Column Heading	Subject	Task Name	Task Date	Task Type	Marking Method	Main Marker	Grade Set	Weighting	Minimum Mark	Maximum Mark
<input type="checkbox"/>	<input type="text" value="Apply to all"/>		10/03/2015 <input type="text" value="Apply to all"/>	AIS Exam <input type="text" value="Apply to all"/>	Gradeset <input type="text" value="Apply to all"/>	JONES, Frederick J <input type="text" value="Apply to all"/>	A-E Attainment <input type="text" value="Apply to all"/>			
<input type="checkbox"/>	Short Story	Short Story	30/03/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100
<input type="checkbox"/>	Long Essay	Long Essay	20/04/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100
<input type="checkbox"/>	Short Essay	Short Essay	06/05/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100

Back Next Open Template Save Template

### Step 2: Import Columns screen – with ALL tasks enabled.

Generic File Import

Step 2: Import Columns

Back Next Open Template Save Template

Subject: English

Column Heading	Subject	Task Name	Task Date	Task Type	Marking Method	Main Marker	Grade Set	Weighting	Minimum Mark	Maximum Mark
<input checked="" type="checkbox"/>	<input type="text" value="Apply to all"/>		10/03/2015 <input type="text" value="Apply to all"/>	AIS Exam <input type="text" value="Apply to all"/>	Gradeset <input type="text" value="Apply to all"/>	JONES, Frederick J <input type="text" value="Apply to all"/>	A-E Attainment <input type="text" value="Apply to all"/>			
<input checked="" type="checkbox"/>	Short Story	Short Story	30/03/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100
<input checked="" type="checkbox"/>	Long Essay	Long Essay	20/04/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100
<input checked="" type="checkbox"/>	Short Essay	Short Essay	06/05/2015	General	Gradeset	JONES, Frederick J	A-E Attainment	1	0	100

Back Next Open Template Save Template

### About the Generic File Import - Step 3

The third step of the **Generic File Import** wizard enables you to view a list of the pupils from the pupil group template file and the associated tasks you are about to import into **3Sys Markbooks**, along with the marks against each pupil for each task. This enables you to check the tasks and marks before the import takes place. If you wish to make any changes, click the **Back** button.

**NOTE:** Only those tasks that are ticked in **Step 2** of the **Import** wizard are displayed in **Step 3**. Any tasks not ticked in **Step 2** are excluded from the import.

The screenshot below displays the pupils and associated marks for the tasks selected in **Step 2** (as shown in the screenshot on the previous page.)

Generic File Import

Step 3: View and complete report

Back Finish

Name	Pupil Code	Short Story	Long Essay	Short Essay
ADAMS, Lauren S	ADA001	C	C	66
ADAMS, Sarah J	ADA003	B	D	86
ALLAN, Samantha E	ALL001	C	A	75
ALLAN, Tom	ALL002	B	A	83
ALLEN, David	ALL100	B	B	55
ALTON, Benjamin	ALT010	C	B	46
ASHMAN, Timothy George	ASH001	C	C	47
ASHFIELD, Gemma Frances	ASH003	D	C	85
ASLETT, Fletcher	ASL001	A	D	66
BARRETT, Jane	BAR100	A	B	55
BARRETT, Lyndsey	BAR200	B	B	77
BASTON-SMYTHE, Henrietta C	BAS001	B	C	55
BATEMAN, Christopher	BAT002	C	C	84
BATES, Andrea Mary	BAT100	C	C	75
BELL, Edward	BEL020	D	C	68
BENNETT-JONES, Charlotte Francesca	BEN001	B	C	55
BERKETT, Davina	BER010	B	B	48
BOUILLON, Louis J	BOU001	C	B	77
BOULTON, Adam	BOU010	C	B	58
BRANGWEN, Ursula	BRA001	C	A	88
BRIGGS, Thomas W	BR1002	C	A	67
BROOKS, Maria	BRO001	C	B	86
BROWN, James	BRO100	B	C	77
BRYANTON, William G	BRY001	B	B	69
BRYANT, Poppy R	BRY002	B	B	55
BURGESS, Amanda J	BUR001	A	C	85
BURGESS, Andrew P	BUR002	A	B	76
BURTON, James	BUR010	B	C	67
BUTTERWORTH, Janine	BUT001	C	C	67
CABRAL, Juan	CAB010	B	C	69
CAVENDISH, Mary	CAV001	B	D	58
CHARLES, Mary	CHA002	C	A	88

## Importing Markbook Data

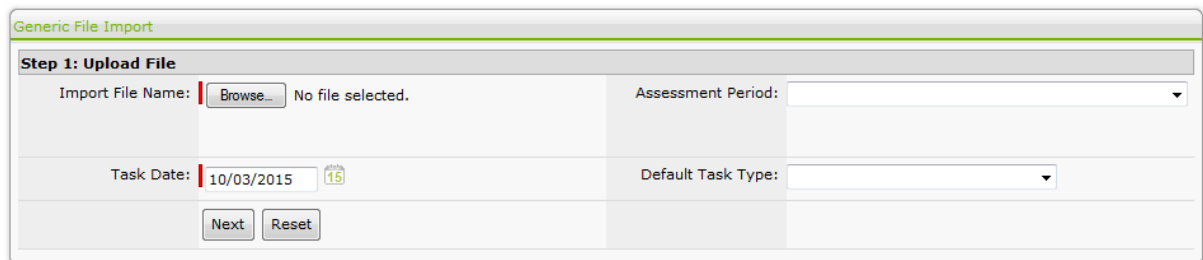
For an overview, see *About Importing Markbook Data on p.24*.

### To Import Markbook Data:

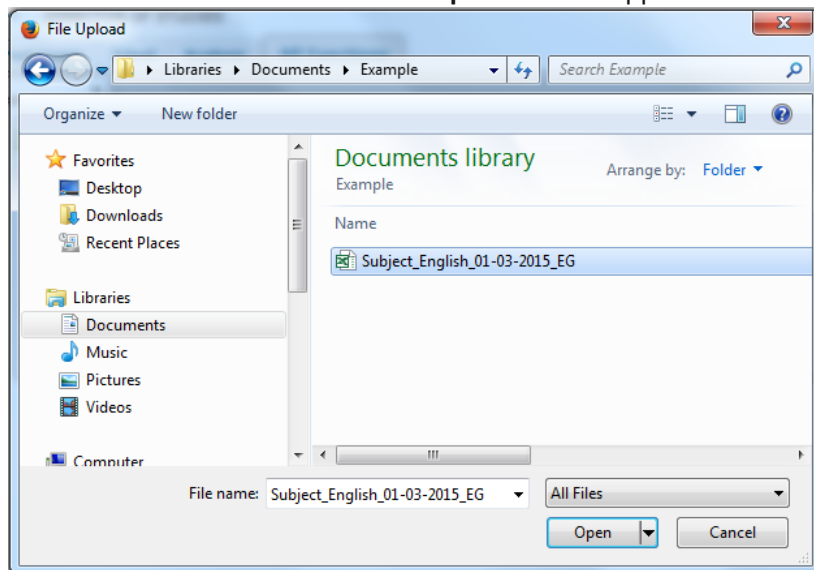
1. Ensure you have made the necessary changes and additions to the relevant pupil group template file.
2. Click on the **All Functions** tab and click the **Markbook Generic Import** icon



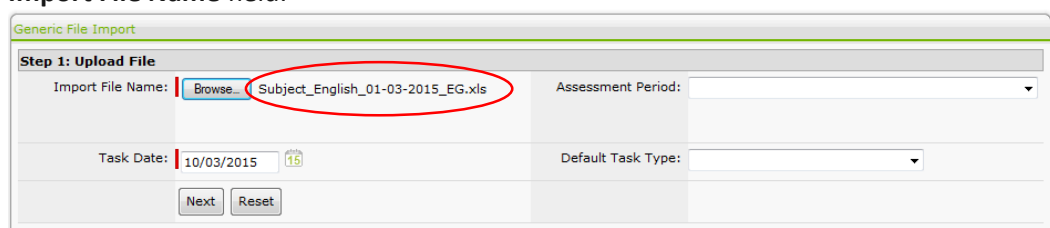
The **Generic File Import** wizard appears, with the **Step 1: Upload File** screen displayed.



3. Locate and select the relevant pupil group template file:
  - a. Click the **Browse...** button. The **File Upload** screen appears.



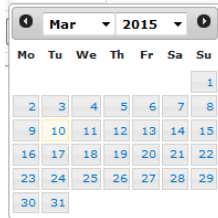
- b. Select the relevant pupil group template file and click the **Open** button. You are returned to the **Generic File Import** wizard, with the file name displayed in the **Import File Name** field.





- Alter the **Task Date** if applicable (this is the date which is used if there is no valid date against the task in the pupil group template file):

- Click the **Calendar** icon  to display the **Calendar** popup.



- Use the **Left** and **Right** arrows or the drop lists to select the relevant month and year, then select a specific date.

- (Optional) From the **Assessment Period** drop list, select the relevant assessment period.

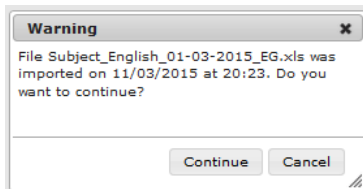
If you alter the **Default Task Type** to one that requires an **Assessment Period**, you must return to this field and choose the appropriate period from the list.

- From the **Default Task Type** drop list, select the appropriate task type to use as the default for the tasks you are about to import.

- Click the **Next** button.

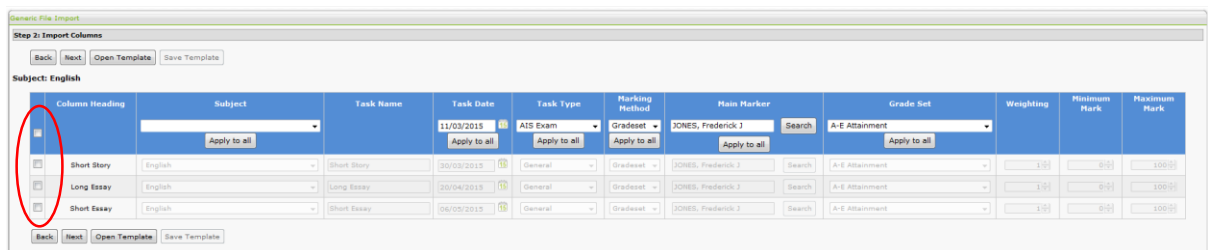
**NOTE:** All the fields are validated and a check is performed to ensure that the file being imported is of an acceptable format and file type. For example, if you choose a default task type which requires an assessment period and you haven't yet specified one, a message appears informing you of this.

**NOTE:** An import log is automatically created. A check is performed to ensure that this is not a duplicate file; if it is, a message appears warning you of this. For example:



Click the **Yes** button if you wish to continue, and the **No** button to stop the import process.

The **Step 2 – Import Columns** screen appears. This screen contains a large table, which is not possible to show in detail below. For a larger image, refer to *About the Markbook Generic Import: Step 2 – Import table on p.30*.

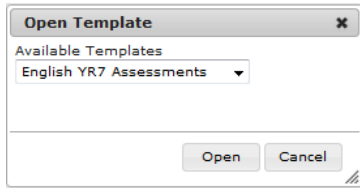


- In the first column, click on the relevant check box to enable the selected task or tasks to be imported from the pupil group template file, and to enable you to edit the import settings within the **Import** table. (See the highlighted column in the screenshot above.)

**NOTE:** To select and enable ALL the tasks displayed in the table, click on the check box in the first column heading.

9. (Optional) Click the **Open Template** button to open an existing 'Import Settings Template'. (An 'Import Settings Template' is just a snapshot of the settings specified in the **Import** table.)

The **Open Template** screen appears.

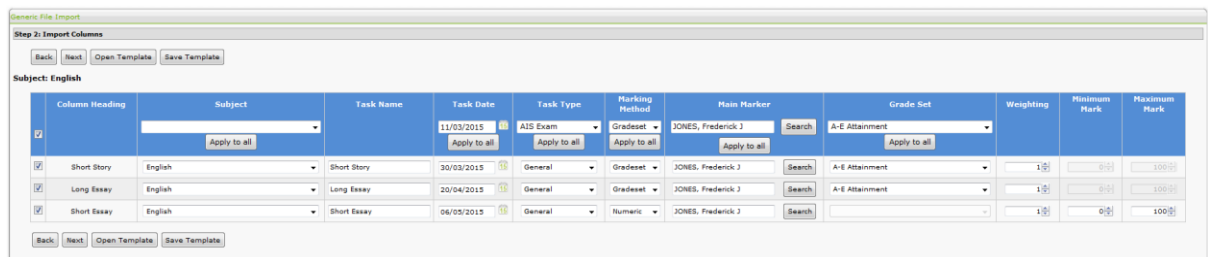


- a. From the **Available Templates** drop list, select the relevant 'Import Settings Template'.
- b. Click the **Open** button. The **Success** message appears, confirming that the 'Import Settings Template' has been applied successfully to the table. The **Success** message fades from view and you are returned to **Step 2** of the **Import** wizard. (Alternatively, you can click the **OK** button.)

**NOTE:** For further details, see *About the Import Settings Template on p.29*.

10. Make changes to the required columns in the **Import** table for the selected tasks, as specified in Step 8.

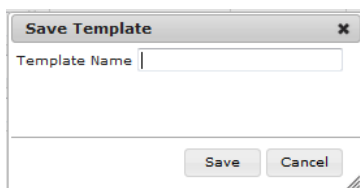
For example, the marks entered for the 'Short Essay' task were numeric, so the **Marking Method** has been set to 'Numeric', which automatically sets the **Grade Set** drop list to 'blank'.



For details on the fields in each column, see *About the Generic File Import - Step 2 on p.26*.

11. (Optional) Click the **Save Template** button to save a copy of the settings you have specified in the **Import** table. For details, see *About the Import Settings Template on p.29*.

The **Save Template** screen appears.



- a. Enter an appropriate name for the 'Import Settings Template'.
- b. Click the **Save** button. The **Success** message appears.
- c. Click the **OK** button to return to **Step 2** of the **Import** wizard. The **Success** message fades from view and you are returned to **Step 2** of the **Import** wizard. (Alternatively, you can click the **OK** button.)

12. Click the **Next** button.

The **Step 3: View and complete report** screen appears.

Generic File Import

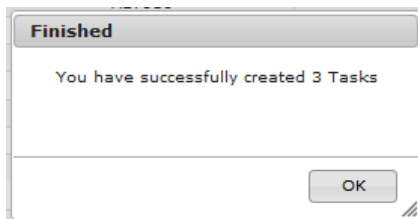
**Step 3: View and complete report**

Back Finish

Name	Pupil Code	Short Story	Long Essay	Short Essay
ADAMS, Lauren S	ADA001	C	C	66
ADAMS, Sarah J	ADA003	B	D	86
ALLAN, Samantha E	ALL001	C	A	75
ALLAN, Tom	ALL002	B	A	83
ALLEN, David	ALL100	B	B	55
ALTON, Benjamin	ALT010	C	B	46
ASHMAN, Timothy George	ASH001	C	C	47
ASHFIELD, Gemma Frances	ASH003	D	C	85
ASLETT, Fletcher	ASL001	A	D	66
BARRETT, Jane	BAR100	A	B	55
BARRETT, Lyndsey	BAR200	B	B	77
BASTON-SMYTHE, Henrietta C	BAS001	B	C	55
BATEMAN, Christopher	BAT002	C	C	84
BATES, Andrea Mary	BAT100	C	C	75
BELL, Edward	BEL020	D	C	68
BENNETT-JONES, Charlotte Francesca	BEN001	B	C	55
BERKETT, Davina	BER010	B	B	48
BOULLON, Louis J	BOU001	B	B	77
BOULTON, Adam	BOU010	C	B	58
BRANGWEN, Ursula	BRA001	C	A	88
BRIGGS, Thomas W	BR1002	C	A	67
BROOKS, Maria	BRO001	C	B	86
BROWN, James	BRO100	B	C	77
BRYANTON, William G	BRY001	B	B	69
BRYANT, Poppy R	BRY002	B	B	55
BURGESS, Amanda J	BUR001	A	C	85
BURGESS, Andrew P	BUR002	A	B	76
BURTON, James	BUR010	B	C	67
BUTTERWORTH, Janine	BUT001	C	C	67
CABRAL, Juan	CAB010	B	C	69
CAVENDISH, Mary	CAV001	B	D	58
CHARLES, Mary	CHA002	C	A	88

- Check that you are happy with the markbook data about to be imported. If not, click the **Back** button to make any necessary changes. If you are, click the **Finish** button.

A processing message appears before the **Finished** message, the latter confirms how many tasks have been successfully created. For example:



- Click the **OK** button.

You are returned to the **Step 1** of the **Import** wizard.

- You can now open the **Mark Inquiry** module and search for the relevant pupil group to view the newly created tasks and newly imported marks/grades. For example, see the screenshot on the next page.

This screenshot shows the **Mark Inquiry** screen, with the three newly imported tasks and associated markbook data displayed.

Mark Inquiry				
Search				
<span>↑ ↓</span> <span>?</span> Create calculation <span>Select All</span> <span>Deselect all</span> <span>Show m</span>				
		Short Story 30/03/2015 attainment English	Long Essay 20/04/2015 attainment English	Short Essay 06/05/2015 English Max:100
ADAMS, Lauren S		C	C	66.000
ADAMS, Sarah J		B	D	86.000
ALLAN, Samantha E		C	A	75.000
ALLAN, Tom		B	A	83.000
ALLEN, David		B	B	55.000
ALTON, Benjamin		C	B	46.000
ASHFIELD, Gemma Frances		D	C	85.000
ASHMAN, Timothy George		C	C	47.000
ASLETT, Fletcher		A	D	66.000
BARRETT, Jane		A	B	55.000
BARRETT, Lyndsey		B	B	77.000
BASTON-SMYTHE, Henrietta C		B	C	55.000
BATEMAN, Christopher		C	C	84.000
BATES, Andrea Mary		C	C	75.000

## Configuring the Markbook Generic Export and Import modules

This section details the following:

- *About Configuring Permissions for the Markbook Generic Export and Import on p.37.*
- *Editing Profiles on p.38.*

### About Configuring Permissions for the Markbook Generic Export and Import modules

For all the relevant users within your school to have access to the **Markbook Generic Export** and **Markbook Generic Import** modules, you must ensure that you have configured the following Profile **Setup** settings appropriately:

Field Name	Field Description
<b>Manage Markbook Generic Export</b>	Tick to allow the selected user or profile to have access to the <b>Markbook Generic Export</b> module.
<b>Manage Markbook Generic Import</b>	Tick to allow the selected user or profile to have access to the <b>Markbook Generic Import</b> module.

**▼ Markbooks Administration**

Manage Markbooks: <input checked="" type="checkbox"/>	Manage Baseline Results Imports: <input checked="" type="checkbox"/>
Manage Baseline Registration Exports: <input checked="" type="checkbox"/>	Manage Markbook Generic Import: <input checked="" type="checkbox"/>
Manage Markbook Generic Export: <input checked="" type="checkbox"/>	Academic Profile View Creation: <input checked="" type="checkbox"/>
Academic Profile View: <input checked="" type="checkbox"/>	
Task Profiles For Maintenance:	<div style="border: 1px solid #ccc; padding: 5px; display: inline-block;">             Assessment              Baseline              General              Standards Based Assessment           </div> <input type="button" value="Search"/>

If you are unsure how to configure the **Setup** settings, see *Editing Profiles on p.38.*


## Editing Profiles

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

### To edit the details of an existing profile:

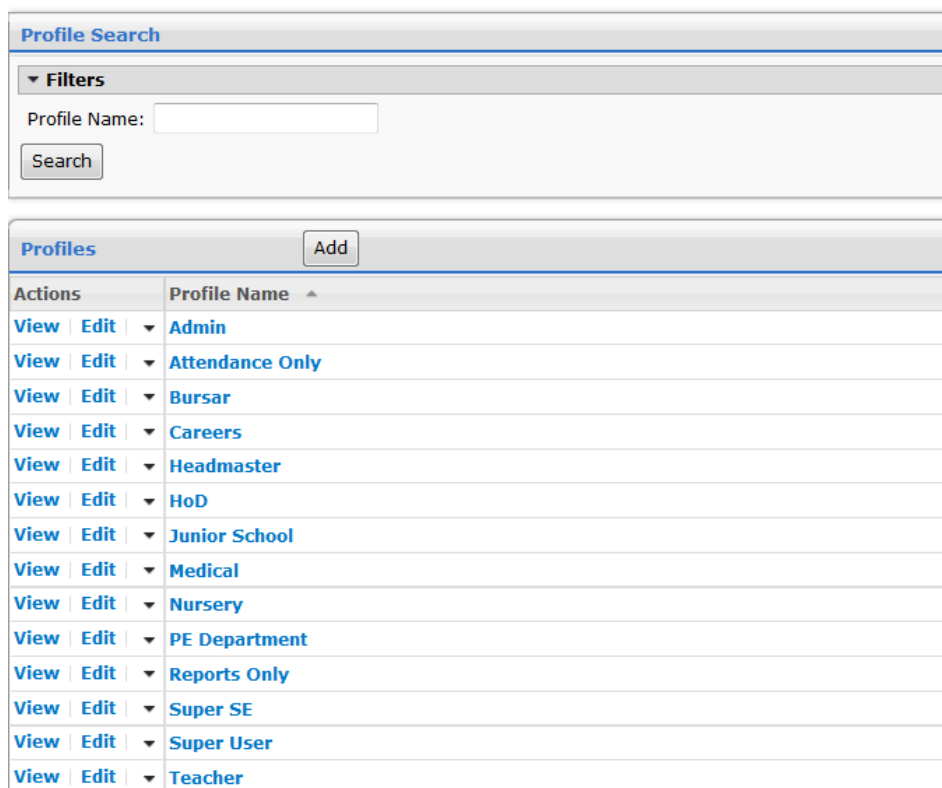
1. In **3Sys** choose **Setup** from the menu at the top of your screen.

The Setup options appear in the **3Sys** side panel.

**NOTE:** If the side panel is not currently displayed, click the right-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.



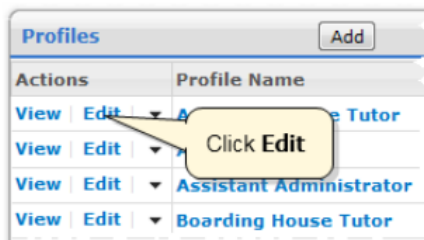
Profile Search	
▼ Filters	
Profile Name:	<input type="text"/>
<input type="button" value="Search"/>	
Profiles <input type="button" value="Add"/>	
Actions	Profile Name ▲
<a href="#">View</a> <a href="#">Edit</a> ▼	Admin
<a href="#">View</a> <a href="#">Edit</a> ▼	Attendance Only
<a href="#">View</a> <a href="#">Edit</a> ▼	Bursar
<a href="#">View</a> <a href="#">Edit</a> ▼	Careers
<a href="#">View</a> <a href="#">Edit</a> ▼	Headmaster
<a href="#">View</a> <a href="#">Edit</a> ▼	HoD
<a href="#">View</a> <a href="#">Edit</a> ▼	Junior School
<a href="#">View</a> <a href="#">Edit</a> ▼	Medical
<a href="#">View</a> <a href="#">Edit</a> ▼	Nursery
<a href="#">View</a> <a href="#">Edit</a> ▼	PE Department
<a href="#">View</a> <a href="#">Edit</a> ▼	Reports Only
<a href="#">View</a> <a href="#">Edit</a> ▼	Super SE
<a href="#">View</a> <a href="#">Edit</a> ▼	Super User
<a href="#">View</a> <a href="#">Edit</a> ▼	Teacher

3. Find the profile you want to edit.

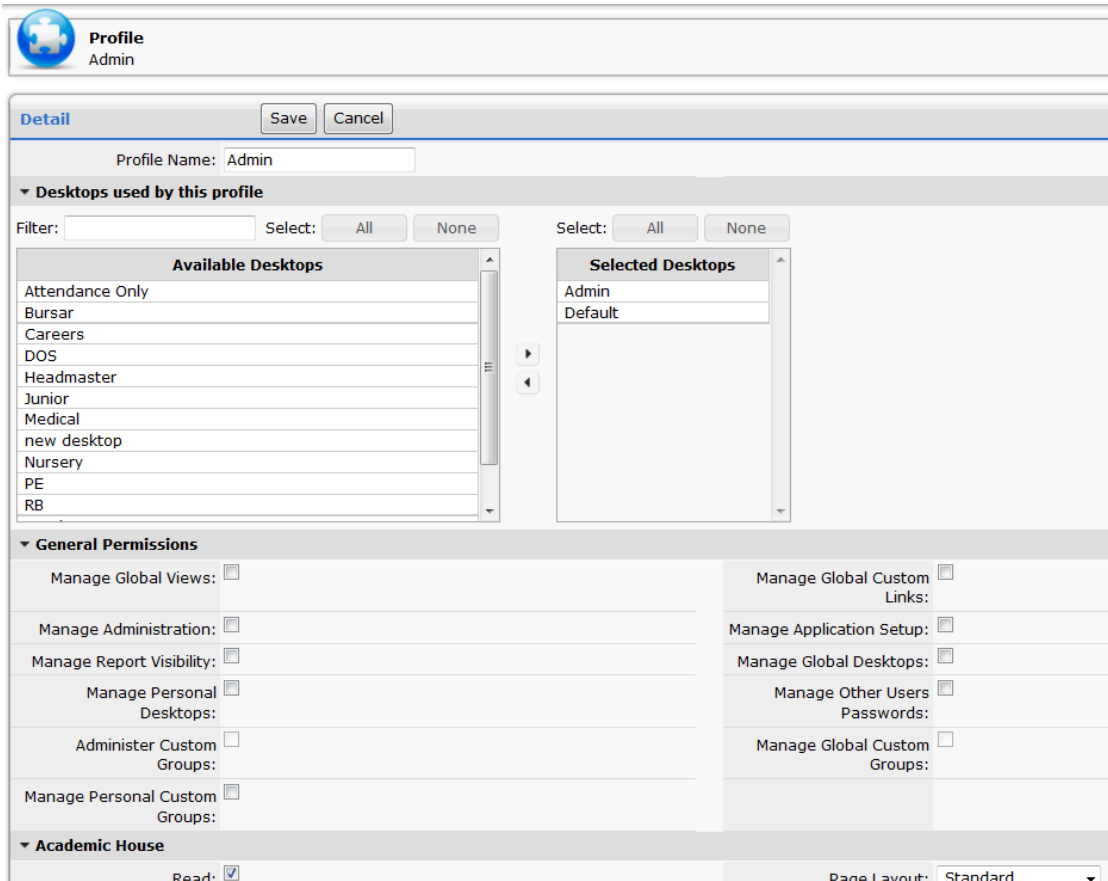
If you cannot find the required profile in the list, undertake one of the following:

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



3Sys displays the **Profile** screen.



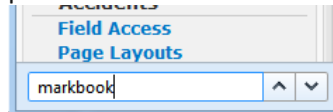
**NOTE:** You can edit the following profile details:

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

This procedure details the profile permissions that may need to be altered after an upgrade. For information about the other options, please see the **3Sys** online help.

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 the Markbook Generic Export and Import modules on p.37*).
  - 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.

OR

- 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](http://www.wcbs.co.uk)

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