



**Release Version 11.0.0.0**

**Authors Details**

	<b>Name</b>	<b>Date</b>	<b>Sign</b>
<b>Prepared by</b>	Suresh Vishwanath	14/03/2018	
<b>Reviewed by</b>	Chetan Bharadwaj	17/04/2018	
<b>Approved by</b>	Sara Bolton	30/05/2018	

**Document History**

<b>Version No</b>	<b>Changes</b>	<b>Date</b>
11.0.0.0	Release Version	17/04/2018
11.0.0.0	Proof read and prepared for release	15/05/2018
11.0.0.0	Proof Read	30/5/2018

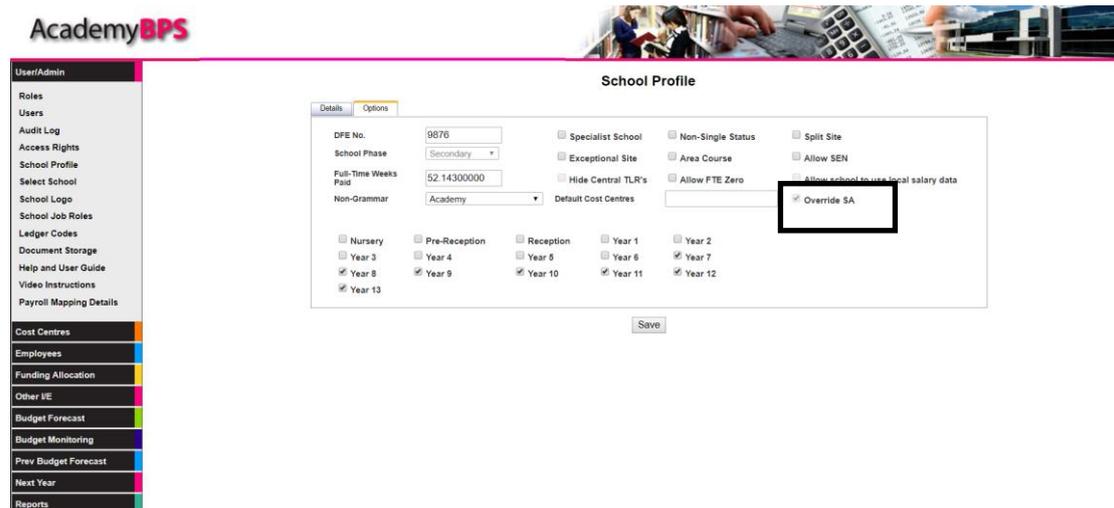
## Contents

New functionality.....	3
Override Superannuation .....	3
Role switch .....	4
Enhancement list .....	6
Gender reporting .....	6
Tagging Report for 3/5 Years .....	8
Payroll Reconciliation Order .....	9
TLR Rates (Pro Rata).....	10
Other Income/Expenditure -Budget Builder.....	11
Copy/Export employee from One School to another School: .....	11

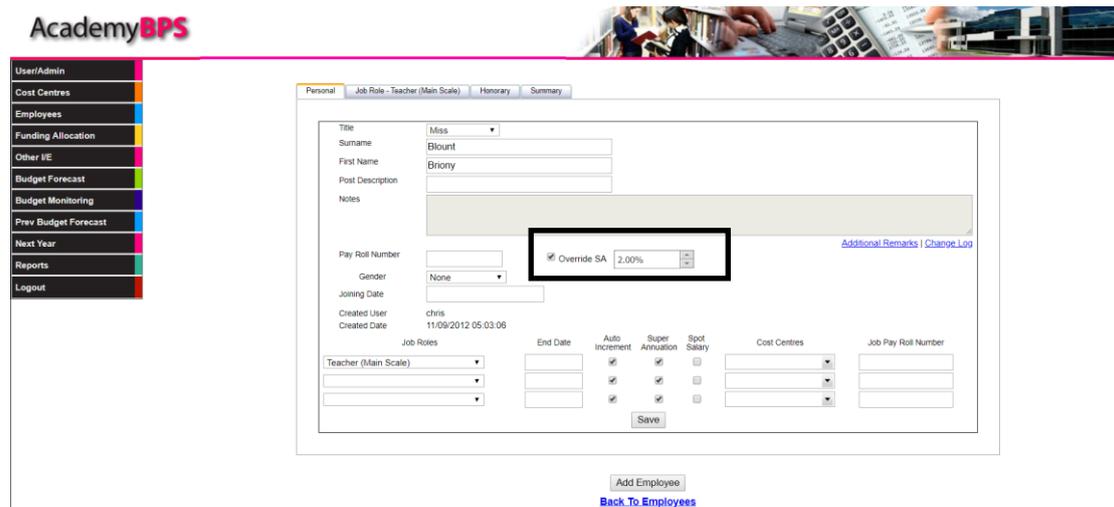
# New functionality

## Override Superannuation

In version 11 users have the option to override the predefined employers pension contribution rate and enter an alternative rate just for that individual. This feature must first be enabled by going to User/Admin -> School Profile and ticking the 'Override SA' box on the Options Tab.



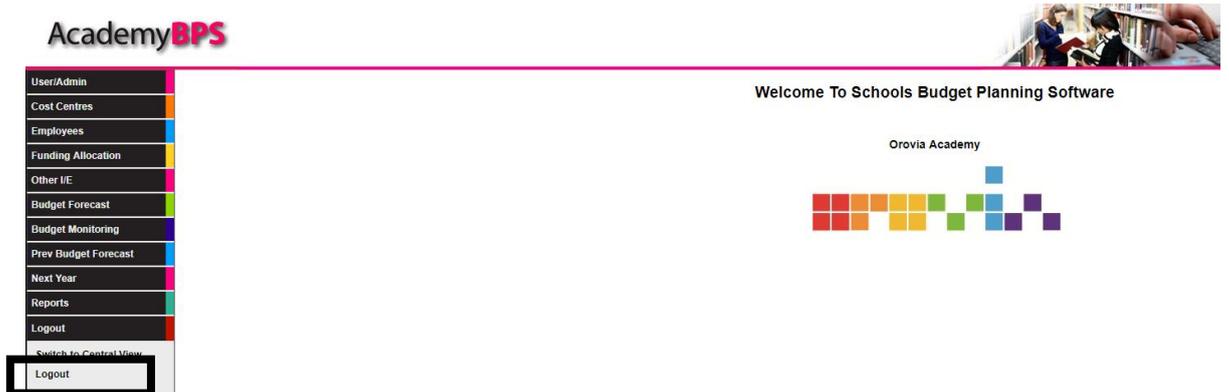
Once enabled, employees will have an 'Override SA' box on the Personal tab. If this is ticked a box will appear which will allow an alternative percentage rate to be entered for that individual employee.



## Role switch

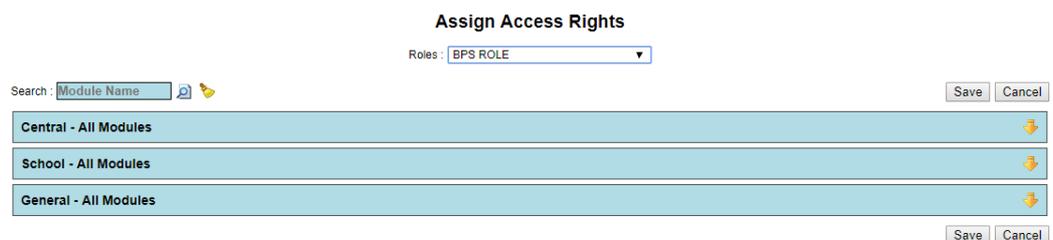
If you are a school and central user, 'Role Switch' will allow you to stay logged in but switch between both sides of the software.

For example, if you were inputting a staff member and the job role that you required was missing you could simply switch between the two sides, without having to change the user and re-enter a password. By clicking the link at the bottom of the page, or the tab under the logout menu option, you can then move seamlessly between the central and school sides of the software.



Therefore, if you have access to all schools and the central side, you will not need to log out.

If you choose this role all the access rights will be set up at a role level as with a standard user. The access rights screen is also slightly different as you have a dual set of access rights to set up to use this function. You will now see settings for the school, the central side and general which will cover anything that interchanges on either side, an example of this is the payscales.



### Assign Access Rights

Roles: BPS ROLE

Search:

Central - All Modules					
Select All	<input checked="" type="checkbox"/>				
Module Name	Read	Add	Modify	Delete	Bulk
<input checked="" type="checkbox"/> Access Rights	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Assign Schools For User	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Benchmark Report	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Budget Forecast Reports	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Budget Monitoring Details	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Budget Output File Mapping	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Budget Section Details Future	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Budget Sections	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Centralised Payroll Reconciliation	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Centralised Payroll Reconciliation Future	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> CFR Defaults	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Cluster Details	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Document Store	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Employees Reports	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Financial Summary Report	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> Forecast Cluster Report	<input checked="" type="checkbox"/>				
<input checked="" type="checkbox"/> FTE Benchmark Report	<input checked="" type="checkbox"/>				

Use the yellow arrow or click anywhere on the blue bar to reveal the options of selection and then click save to amend the rights.

N.B. You will be setting the rights to any user set against that particular job role.

Another feature of this is the user has the option to choose a preferential side; this will be the side that you predominantly use to be the default access side you are always logged into.

You can also easily select all schools for an individual user, with a tick box rather than choosing each individual school.

### User Details

Role: BPS ROLE

User Details			
Title	<input type="text" value="Mr"/>	Login	<input type="text" value="demouser1"/>
Surname	<input type="text" value="demo"/>	Email ID	<input type="text" value="chethan.b@orovia.com"/>
First Name	<input type="text" value="User"/>	Expire on	<input type="text" value="dd/mm/yyyy"/> <input type="button" value="Calendar"/>
Active	<input checked="" type="checkbox"/>		
Default access mode	<input type="radio"/> Central <input checked="" type="radio"/> School		Allow all schools <input type="checkbox"/>
Created by	FMS Master On 24/04/2018 08:39:03	Updated by	User demo On 25/04/2018 08:30:40
<input type="button" value="Cancel"/>			

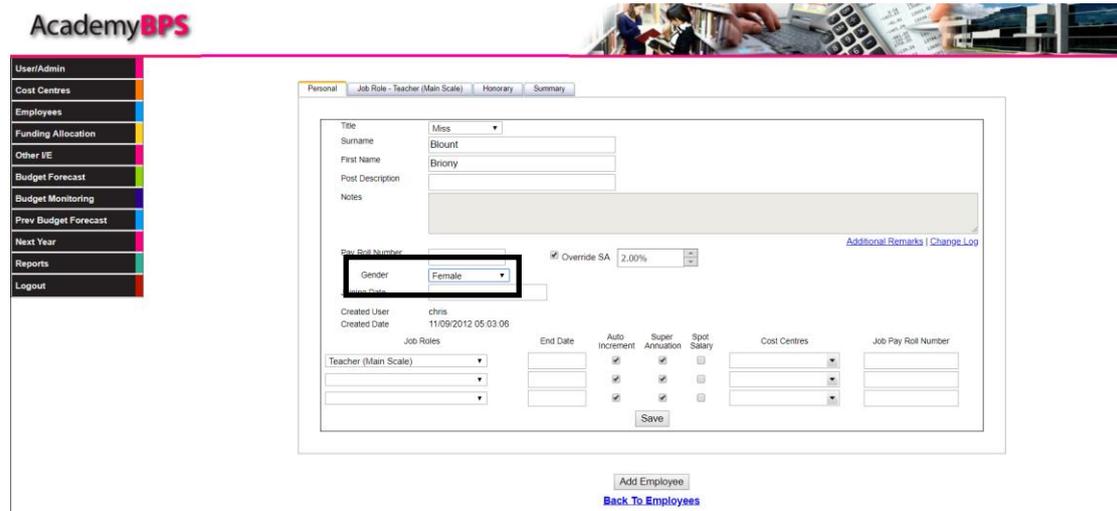
[Back To Users](#)

# Enhancement list

## Gender reporting

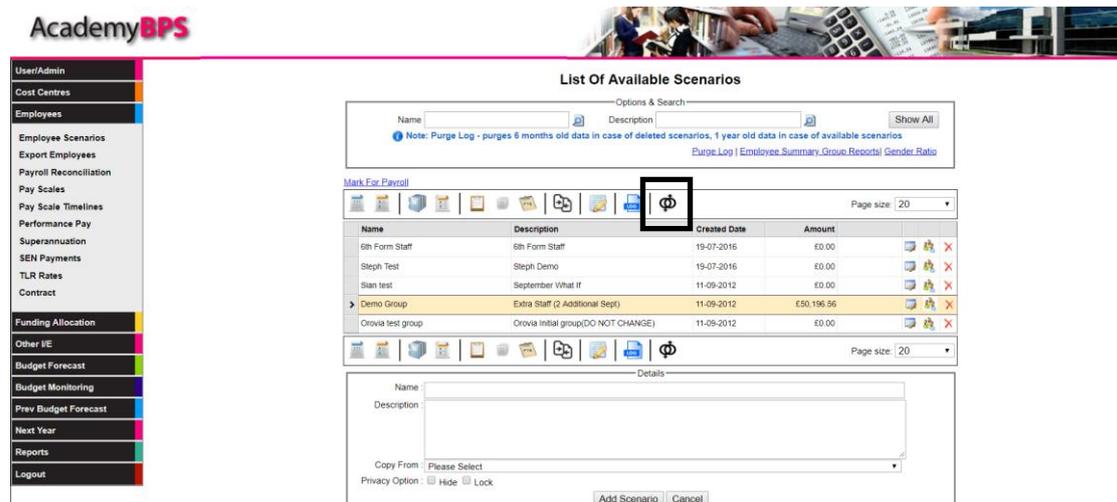
Gender reporting has been added to BPS to enable users to see gender balance and pay differentials in the employee scenarios. On the Personal tab of employee records is a new option to select a gender; male, female, none or N/A.

N/A is to cover for vacant roles, we have none if it has not been selected or an employee would not like to disclose their gender.



The screenshot shows the 'Personal' tab of an employee record in AcademyBPS. The employee's name is Miss Blount, Briony. The 'Gender' dropdown menu is highlighted with a black box and set to 'Female'. Other fields include 'Override SA' at 2.00%, 'Created User' as chris, and 'Created Date' as 11/09/2012 05:03:06. The 'Job Roles' section shows 'Teacher (Main Scale)'. There are 'Add Employee' and 'Back To Employees' buttons at the bottom.

The gender reporting icon is the gender sex symbols interlinked on the employee scenario list:



The screenshot shows the 'List Of Available Scenarios' page in AcademyBPS. A toolbar above the table contains various icons, with the 'Gender Ratio' icon (interlinked male and female symbols) highlighted with a black box. The table lists scenarios with columns for Name, Description, Created Date, and Amount. The 'Demo Group' scenario is highlighted in yellow. Below the table is a 'Details' section with 'Copy From' and 'Privacy Option' fields, and 'Add Scenario' and 'Cancel' buttons.

Name	Description	Created Date	Amount
6th Form Staff	6th Form Staff	19-07-2016	£0.00
Steph Test	Steph Demo	19-07-2016	£0.00
Sian test	September What If	11-09-2012	£0.00
Demo Group	Extra Staff (2 Additional Sept)	11-09-2012	£50,196.56
Orovia test group	Orovia Initial group(DO NOT CHANGE)	11-09-2012	£0.00

**Staff Details**

Personal | Job Role - BPSrv10.1 Test Job Role Name 1 | Job Role - BPSrv10.1 Test Job Role Name 1-2 | Job Role - BPSrv10.1 Test Job Role Name 1-3 | Honorary | Summary

---

Title: Mr

Surname: gender reporting surname

First Name: gender reporting firstname

Post Description: gender reporting post description

Notes: gender reporting additional remarks.

[View / Edit Remarks](#) | [Change Log](#)

Pay Roll Number: 5-3-18

Gender: Male

Joining Date: 05/03/2018

Created User: schmaster

Created Date: 05/03/2018 10:39:25

Job Roles	End Date	Auto Increment	Super Annuation	Spot Salary	Cost Centres	Job Pay Roll Number
BPSrv10.1 Test Job Role Name 1	05/06/2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		5-3-18
BPSrv10.1 Test Job Role Name 1	05/07/2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		5-3-18
BPSrv10.1 Test Job Role Name 1	06/08/2018	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		5-3-18

[Save](#)

The gender report will show the numbers of men and women employed and the ratio of men to women, as well as the split of the total cost of the scenario between the specified genders. To download the report, click on the Excel or PDF icon.

### Gender Ratio & Financial Year Details

Scenario : Initial Staff Upload Changes for Sept Term Amount : £2,425,861.56




**Gender Ratio & Financial Details**

	Male	Female	N/A	Undefined	Total
Count	23	29	2	1	55
Ratio (%)	41.82	52.73	3.64	1.82	100.00

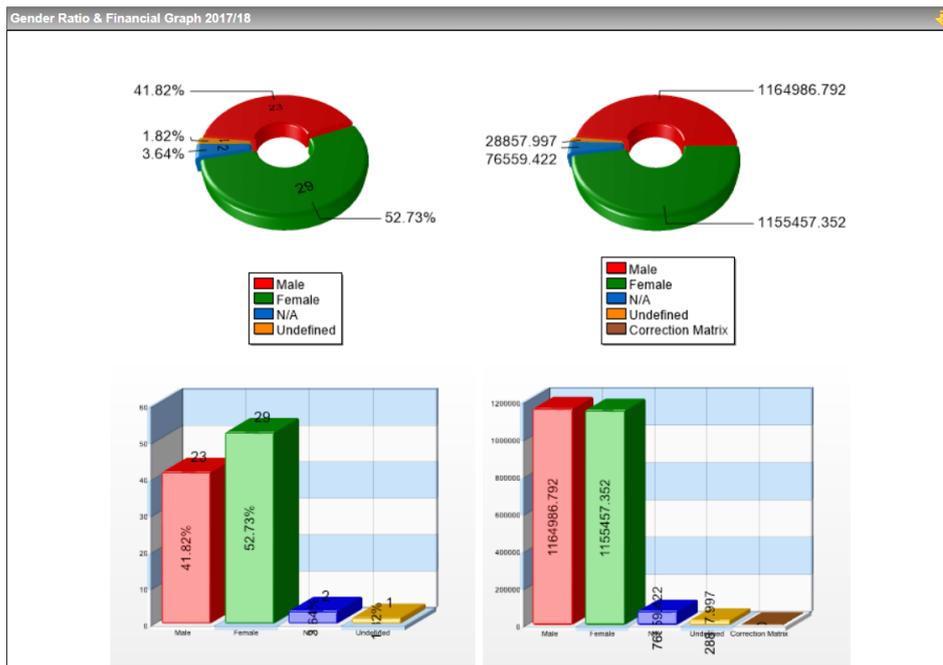
  

	2017/18 (£)	2018/19 (£)	2019/20 (£)	2020/21 (£)	2021/22 (£)
Male (£)	1,164,986.79	1,193,025.54	1,226,439.73	1,245,711.19	1,254,405.04
Female (£)	1,155,457.35	1,181,471.33	1,211,715.99	1,228,154.53	1,216,518.52
N/A (£)	76,559.42	78,045.19	79,902.93	80,698.35	80,698.35
Undefined (£)	28,858.00	29,785.84	30,938.64	31,719.00	32,529.34
Correction (£)	0.00	0.00	0.00	0.00	0.00
<b>Total (£)</b>	<b>2,425,861.56</b>	<b>2,482,327.90</b>	<b>2,548,997.30</b>	<b>2,586,283.07</b>	<b>2,584,151.26</b>

Gender Ratio & Financial Graph 2017/18

[Back To Scenarios](#)

The report can also be generated as a graphical report which displays the same information, but as a pie and bar chart. Select the bottom grey bar to view this:



[Back To Scenarios](#)

## Tagging Report for 3/5 Years

In version 11 tagging has been enhanced to allow reports to cover 3/5 years rather than just the current year as it has been in previous versions.

### Tag Report

Search

Modules: **All** Tag: **Pupil Premium**

Financial Year: **2017** Budget Forecast: **first Indicative** **Show**

2017/18 to 2021/22 (5 Years)
  2017/18 to 2019/20 (3 Years)
 | Export To:

Ledger Codes

Ledger Codes	Description	2017/18 (£)	2018/19 (£)	2019/20 (£)	2020/21 (£)	2021/22 (£)
<b>Revenue Income</b>		<b>123</b>	<b>0</b>	<b>0</b>	<b>0</b>	<b>0</b>
A3205	School Standards Grant	123	0	0	0	0
<b>Employees</b>		<b>2,602</b>	<b>2,602</b>	<b>2,602</b>	<b>2,602</b>	<b>2,602</b>
	Holly Hope - Teacher (Main Scale)	2,602	2,602	2,602	2,602	2,602

Page 1 of 1 (2 items)

Revenue Balance	Details	2017/18 (£)	2018/19 (£)	2019/20 (£)	2020/21 (£)	2021/22 (£)
Income Totals		123	0	0	0	0
Expenditure Totals		2,601	2,601	2,601	2,601	2,601
Balance In Year Position		-2,478	-2,601	-2,601	-2,601	-2,601
Balance B/F		0	0	0	0	0
Balance C/F		-2,478	-2,601	-2,601	-2,601	-2,601

Capital Balance	Details	2017/18 (£)	2018/19 (£)	2019/20 (£)	2020/21 (£)	2021/22 (£)
Capital Income Totals		0	0	0	0	0
Capital Expenditure Totals		0	0	0	0	0
Capital Balance In Year Position		0	0	0	0	0
Capital Balance B/F		0	0	0	0	0
Capital Balance C/F		0	0	0	0	0

Ledger Codes

## Payroll Reconciliation Order

When generating a payroll reconciliation employees will now be displayed in alphabetical order according to their surname, rather than ordering them by payroll number as was the case in previous versions.

			February 2017/18							
			Basic				NI			
Name	Job Pay Roll Number		Calculated	Actual	Variance	Variance %	Calculated	Actual	Variance	Variance %
<b>A3901G - Teachers Gross Pay</b>										
<a href="#">Andrews Steven (Teaching Test)</a>	12345		£2,561.17	£2,700.00	£-138.83	-5.42	£259.56	£300.00	£-40.44	-15.25
<a href="#">Angler Mark (Teacher (Qualified))</a>	123456		£2,374.08	£2,350.58	£23.50	0.99	£233.74	£231.09	£2.65	1.14
<a href="#">Salmon Melissa (Deputy Head)</a>	234567		£4,303.17	£4,164.67	£138.50	3.22	£499.95	£481.44	£18.51	3.73
<a href="#">Smith John (Teacher (Qualified))</a>	111111		£2,791.00	£2,763.33	£27.67	0.99	£291.27	£288.05	£3.22	1.11
<a href="#">Smith Mark (Teacher (Qualified))</a>	34567		£2,791.00	£2,535.83	£255.17	9.14	£291.27	£256.66	£34.61	11.91
<b>A4102 - Premises</b>										
<a href="#">Halibut Charles (Premises Band 10)</a>	77689		£1,155.51	£1,100.00	£55.51	4.80	£65.58	£60.00	£5.58	8.51
<a href="#">Hayworth Charles (Premises Band 10)</a>	45332		£1,155.51	£800.00	£355.51	30.77	£65.58	£20.00	£45.58	69.58
<b>A4103 - Admin &amp; Clerical</b>										
<a href="#">Goldfish Lucy (Admin Band 15)</a>	445112		£2,236.96	£2,236.96	£0.00	0.00	£214.81	£215.41	£-0.60	-0.28
<a href="#">Haddock Leah (Admin Band 11)</a>	444567		£2,081.79	£2,061.15	£20.64	0.99	£193.40	£191.15	£2.25	1.17
<a href="#">Matthews Sarah (Admin Band 11)</a>	44356		£2,081.79	£2,061.15	£20.64	0.99	£193.40	£191.15	£2.25	1.17
<a href="#">Matthews Steven (Admin Band 11)</a>	66785		£2,081.79	£2,061.15	£20.64	0.99	£193.40	£191.15	£2.25	1.17

## TLR Rates (Pro Rata)

In previous versions of BPS the TLR rates were always pro-rated according to the employee's FTE. In version 11 there is the option to choose whether or not to pro-rata the amount.

If the 'P/R' tick box is checked the amount will be proportionate to the FTE, but if it's unchecked they will receive the full value, this will still be split across the year and a monthly amount displayed on the summary tab.

Personal | Job Role - Teacher (Main Scale) | Honorary | Summary

[Generate salary statement](#) | Salary Guideline Notes 

Name: Mr Angler Mark

Applies From	Hours	FTE	Weeks Paid	Payscale	Incremental Progression	TLR Rate		
01/09/2012	32.5	1	0	Main Scale Teachers-1	Manual			
01/09/2013	32.5	1	0	Main Scale Teachers-2	Auto			
01/09/2014	32.5	1	0	Main Scale Teachers-3	Auto			
01/09/2015	32.5	1	0	Main Scale Teachers-4	Auto			
01/09/2016	32.5	1	0	Main Scale Teachers-4	Auto			
01/09/2017	32.5	1	0	Main Scale Teachers-4	Auto			
01/09/2018	32.5	1	0	Main Scale Teachers-5	Auto			
01/09/2019	32.5	1	0	Main Scale Teachers-6	Auto			

Applies From	<input type="text"/>	Pay Scale	Points
Hours	<input type="text"/>	Main	1 ▼
FTE	<input type="text"/>	Scale	
Recruitment Retention	<input type="text"/>	Teachers	
Salary Protection	<input type="text"/>		
Other Allowances (Cash)	<input type="text"/>		
Overtime (Actual Amount)	<input type="text"/>		
TLR Rate	P/R <input checked="" type="checkbox"/> <input type="text"/>		
TLR 3	P/R <input type="checkbox"/> <input type="text"/>		
SEN Amount	<input type="text"/>		
SEN Hours	<input type="text" value="32.50"/>		

[Back To Employees](#)

## Other Income/Expenditure -Budget Builder

In this version we have added the functionality to adjust the balance and update the Other IE. This means that customers who use the budget building tool no longer have to go in to Other IE to adjust balances assigned to cost centres as it can all be handled through the budget builder itself.

**Other Income And Expenditure Budget Builder**

Name: Working Copy - Initial Other Income and Expenditure, Version No: 2

Search

Builder Details

Note: Please make sure search criteria is valid, if newly added record is not visible

Cost Centres  Ledger Codes

Item Description	2017/18 (£)	2018/19 (£)	2019/20 (£)	2020/21 (£)	2021/22 (£)	Cost Centres	Ledger Codes	Comments
Fire Extinguishers	200	200	200	200	200	PREM - Pre...	A4301 - Bui...	
Contingency	3000	3000	3000	3000	3000	PREM - Pre...	A4301 - Bui...	
<b>Budget Builder Total</b>								

**Adjust Balance & Update Other IE**

Add | Update

Budget Item  Type  Income  Expense

Cost Centres  Ledger Codes

Budget Value	2017/18 (£)	2018/19 (£)	2019/20 (£)	2020/21 (£)	2021/22 (£)
	£0.000	£0.000	£0.000	£0.000	£0.000

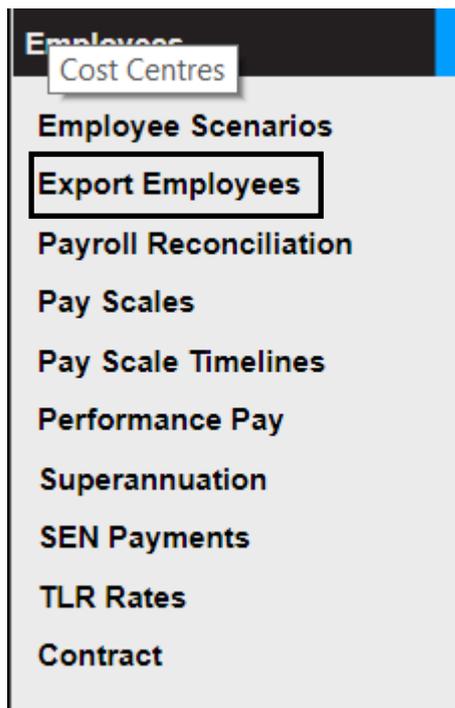
Notes

Add Update Cancel  Inflation Calculation

[Back To Other Income and Expenditure Version Details](#)

## Copy/Export employee from One School to another School:

In version 11 you can now **'Export/Copy'** employees from one School to another School within the site using **'Export employees'** Menu or even the **'Export to'** option provided in the list of available employees Screen.



List of available employees

Page size: 20

Initials	Name	Job Role			
> Miss	Alder Angela	Teacher (Unqualified) (2 job roles)			
Mr	Apple Adam	Teacher (Main Scale) (2 job roles)			
Mrs	Ash Aileen	Teacher (Main Scale)			
Miss	Beech Belinda	Teacher (Unqualified)			
Mrs	Birch Jane (MAT)	Teacher (Main Scale) (3 job roles)			
Miss	Bladdernut Briony	Teacher (Main Scale)			
Mrs	Cedar Caroline	Admin. Band 3			

On the left hand of the screen you can select the source school; the school you are taking the employee from and source employee scenario from 'Select Group', then select the chosen employee(s) you wish to move across, by ticking the box next to their name.

Then select the destination school and click on the 'Copy' button.

Export Employees to Scenarios

**Source Employee Scenarios**

Select School: [9876]-Orovia Academy

Select Group: A New Teacher

Job Role:

Only EduPay Employees

Name:

Name	Job Roles
<input checked="" type="checkbox"/> Miss Alder Angela	Teacher (Unqualified), Admin. Band 10 - 2
<input type="checkbox"/> Mr Apple Adam	Teacher (Main Scale), Admin. Grade14 - 2
<input type="checkbox"/> Mrs Ash Aileen	Teacher (Main Scale)
<input type="checkbox"/> Miss Beech Belinda	Teacher (Unqualified)
<input type="checkbox"/> Mrs Birch Jane (MAT)	Teacher (Main Scale), Maternity Pay - 2, Teacher (Main Scale) - 3
<input type="checkbox"/> Miss Bladdernut Briony	Teacher (Main Scale)
<input type="checkbox"/> Mrs Cedar Caroline	Admin. Band 3
<input type="checkbox"/> Miss Cherry Kelly	Teacher (Advanced Skills)
<input type="checkbox"/> Mrs Chestnut Anne	Admin. Band 12, Catering Band 10 - 2
<input type="checkbox"/> Mr Cork Charlie	Tech. Band 14

Page 1 of 6 (56 items)

**Destination Employee Scenarios**

Select School: [9876]-Orovia Academy

Group Name / Description:

Group Name	Description	No of Employees
<input type="checkbox"/> Actual for payroll	Actual for payroll-21/03/2018	55
<input type="checkbox"/> Initial Staff Upload Changes for Sept Term	Initial Staffing	55

Page 1 of 1 (2 items)

Copy

Cancel

Create New Group

[Back To Employees](#)

Then select the destination School, and the name of the employee scenario (Group) you wish to add the employee(s) to and click on the 'Copy' button.

Alternatively, you can create a new employee scenario by selecting the **'Create New Group'** and click on the **'Copy'** button.

A New Teacher

Job Role :   Only EduPay Employees

Group Name / Description :

<input type="checkbox"/> Group Name	Description
<input type="checkbox"/> Actual for payroll	Actual for payroll-
<input type="checkbox"/> Initial Staff Upload Changes for Sept Term	Initial Staffing

**Job Roles**

- Teacher (Unqualified), Admin, Band 10 - 2
- Teacher (Ma
- Teacher (Ma
- Teacher (Un
- Teacher (Ma
- Teacher (Ma
- Teacher (Ma
- Admin, Band
- Teacher (Ad
- Admin, Band 12, Catering Band 10 - 2
- Admin, Band 14

**Enter New Group Details**

Name

Description

Page 1 of 6 (56 items) 1