



VERSION 14.2

October 2022



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User Interface

We have redesigned the user interface for BPS, bringing a more modern feel and look to the system as well as making many enhancements to functionality.

School Side

Select School

When selecting a school now, all schools will appear by default. We have brought in filter options to allow you to search (e.g., for a specific school).

BPS Budget planning software

Select School

Logged In User: Welcome, SCH Master

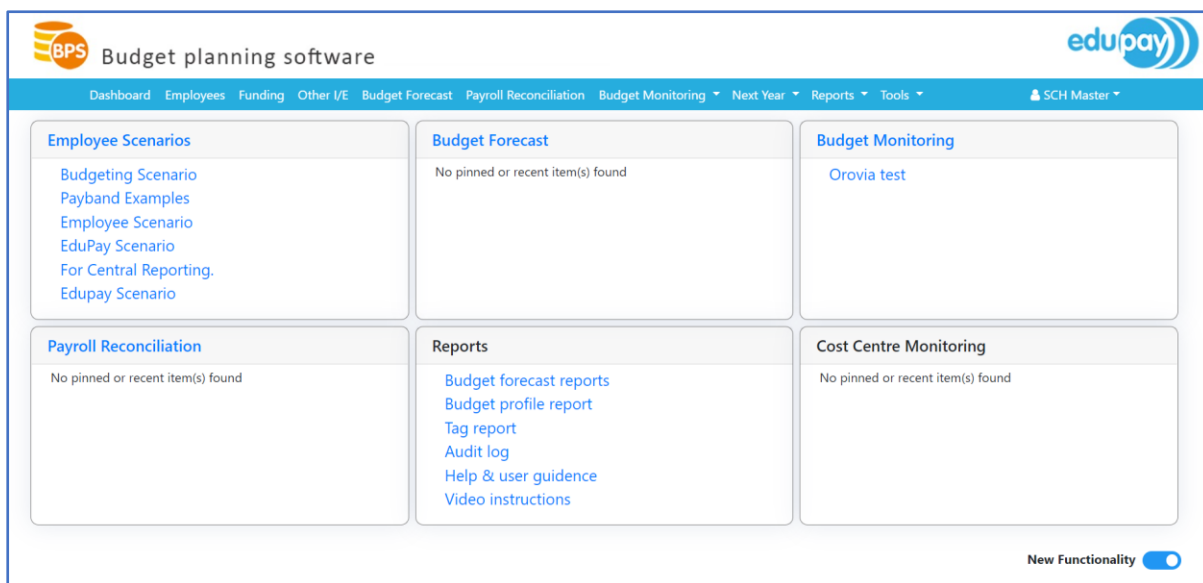
| DFE No. | Name | Phase | Reference No. | Principle Officer | Master User | Latest Submission | |
|---------|--------------------------|-----------|---------------|-------------------|--------------|-------------------|--------|
| 5566 | Bristol Demo Academy | Primary | | Orovia Support | bristoladmin | | Select |
| 8888 | Cal F's Special School | Primary | | | cflogin123 | | Select |
| 9801 | Cal test DFE | Primary | | | admin9801 | | Select |
| 3456 | Callum F's Academy | Primary | | | TestCallum | | Select |
| 9801 | Callum Marley Academy | Primary | | | callum | | Select |
| 9876 | Collick Academy | Primary | | Orovia Support | admin1812 | | Select |
| 7262 | Dan Academy | Primary | | Orovia Support | admin7262 | | Select |
| 0006 | Del Monte Demo School 06 | Secondary | SL | | admin0006 | | Select |
| 8411 | Demo Academy 01 | Primary | Test 2 | | admin8411 | | Select |
| 8412 | Demo School 02 | Secondary | | | admin8412 | | Select |
| 2222 | Dev Test child school | Secondary | | | devchild | | Select |

You can click into the school by clicking anywhere along the line or into the 'Select' button on the right-hand side.

Dashboard

Once you have selected a school you will be taken to the new dashboard functionality. This will allow you to pin specific elements or will display 'recent' areas of the system you have been working on. The current cards we have are:

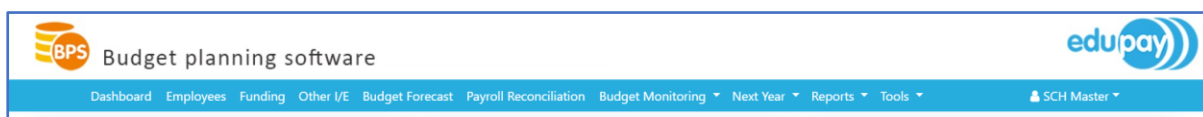
- Employee Scenarios
- Budget Forecast
- Budget Monitoring
- Payroll Reconciliation
- Report
- Cost Centre Budget Monitoring



To pin a scenario, click the pin icon while in the desired scenario.

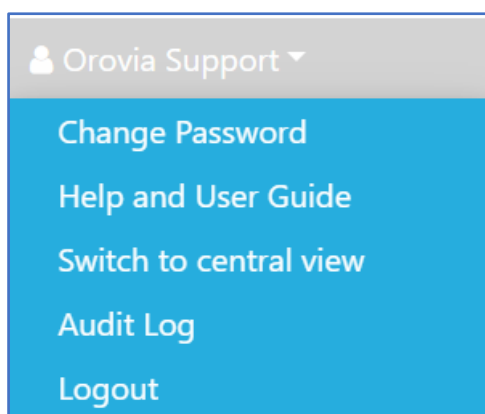
Menu

We have made a big change to the layout of the menu options, now displaying these across the top of the screen to allow for a less cramped feel. We have also rearranged the location of the options within the menus.



Username

There is now a name drop down on the right hand-side with the following options under (the same as within Edupay) –



Dashboard



This will take you back to the dashboard you see when you are first logging in.

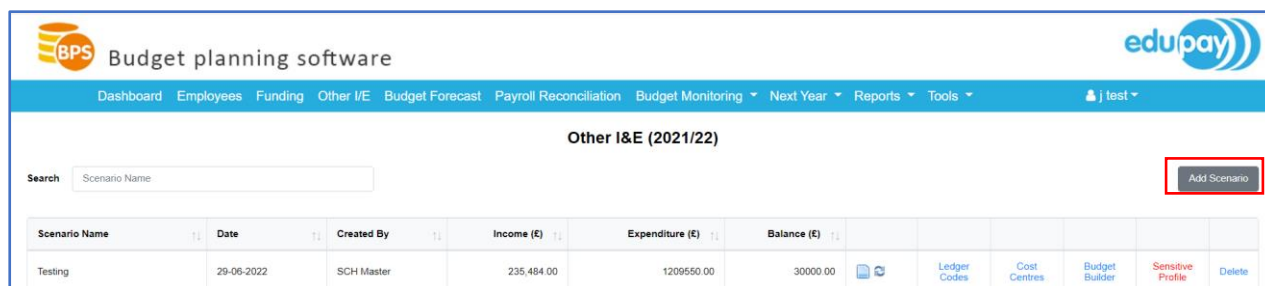
Employees, Funding & Other I/E



When clicking into these options now you are taken directly to the list of scenarios for each area.

Other I/E – List

Along with the changes to how the Other I/E now looks we have also improved the functionality within here too.



To add a scenario, you now have the option of creating a new blank scenario or copying from an existing scenario and working from there.

Add Scenario ✕

Scenario Name

Copy From

-----Choose-----
▼

Save
Clear

To create a blank scenario, enter a scenario name and click 'Save'. Alternatively, if you are copying from an existing scenario choose the scenario during the creation of the new scenario.

Once the scenario is created, you will then have the option of going into ledger codes or cost centre level (depending on which way you prefer to work). These are the same options as before, but the icons have been removed for clarity.

| Other I&E (2021/22) | | | | | | | | | | |
|---|------------|------------|------------|-----------------|-------------|--|------------------------------|------------------------------|--------------------------------|---|
| Search <input type="text" value="Scenario Name"/> | | | | | | | | | | Add Scenario |
| Scenario Name | Date | Created By | Income (£) | Expenditure (£) | Balance (£) | | | | | |
| Testing | 29-06-2022 | SCH Master | 235,484.00 | 1209550.00 | 30000.00 | | Ledger Codes | Cost Centres | Budget Builder | Sensitive Profile Delete |
| TEST | 05-04-2022 | SCH Master | 0.00 | 0.00 | 0.00 | | Ledger Codes | Cost Centres | Budget Builder | Sensitive Profile Delete |

Other I/E – Ledger Code

Budget planning software

Dashboard Employees Funding Other I/E Budget Forecast Payroll Reconciliation Budget Monitoring Next Year Reports Tools
SCH Master

Other I&E (2021/22) Testing

[Report with Cost Centres](#) | [Report without Cost Centres](#)

Line / Ledger Codes

☒ Auto Fill
 Save As
Refresh
Clear Comments

Revenue
Capital

Income
Expenditure
Balance

| Totals | | | | | | | | | | |
|--|-------------|--------------|-----------------|---------|-------------|-------------|-------------|-------------|-------------|-------|
| | | | | | £235484 | £237594 | £240106 | £243100 | £246672 | |
| Ledger Codes | Line Number | Cost Centre | Profile | Tagging | 2021/22 (£) | 2022/23 (£) | 2023/24 (£) | 2024/25 (£) | 2025/26 (£) | Notes |
| 1011 - Pupil Premium | A2 | Cost Centres | Manual | Tagging | 10000 | 12000 | 14400 | 17280 | 20736 | ✓ |
| 1075 - Other YPLA Grants - excluding Capital | A2 | | May, July 80/20 | Tagging | 5484 | 5594 | 5706 | 5820 | 5936 | + |

We have removed the line number as a filter option and brought it into its own column, with ledger codes in numerical order (these can be sorted using the headings at the top).

In addition to this we are now displaying the profile of the ledger code. As part of our enhancement to this section you can click on the profile link; this will then allow the user to manually control the budget spend. If manually amended, this will override the existing profile and saves a 'manual profile'.

Email: support@orovia.com
 Website: www.orovia.com
 Twitter: [@OroviaEducation](https://twitter.com/OroviaEducation)

PHONE: 0113 8800 999
 Address: **Orovia Group, Melton Court**
Melton, East Yorkshire, HU14 3HH

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1011 - Pupil Premium

Current Profile: Manual

2021/22 (£) 2022/23 (£) 2023/24 (£) 2024/25 (£) 2025/26 (£)

Currently Allocated £ 10000

| | Months | | | | | | | | | | | | |
|--------|-----------|---------|----------|----------|---------|----------|--------|--------|--------|--------|--------|--------|--------|
| Values | September | October | November | December | January | February | March | April | May | June | July | August | Total |
| £ | 833.33 | 833.33 | 833.33 | 833.33 | 833.33 | 833.33 | 833.33 | 833.33 | 833.33 | 833.33 | 833.33 | 833.33 | 10000 |
| % | 8.33 | 8.33 | 8.33 | 8.33 | 8.33 | 8.33 | 8.33 | 8.33 | 8.33 | 8.33 | 8.33 | 8.33 | 100.00 |

Note: Total months percentage should be 100

Save

N.B. The percentage should equal back to 100 if profiling manually. When cost centres are full allocated the wording 'Cost centre' will go green

All changes in your Other I/E scenario will now automatically save however when amending a phasing profile, the save button will still be required.

☒ **Auto Fill** **Save As** **Refresh** **Clear Comments**

In the top right-hand side of the page the above options are available.

Auto Fill - We have renamed the inflation tick box to be 'Auto Fill'. This means it will automatically fill the future years when entering a value.

Save As – Renamed from new version, this allows you to save a new scenario by copying from this one under a new name.


Refresh – Another new piece of functionality; when inflation for ledger codes is changed within the background you can now refresh the scenario and pull these changes into it rather than having to manually update lines.


Clear Comments – A small bug fix, this option will now clear comments from cost centre level too.

Other I/E – Cost Centre

The cost centre view has changed too –

Again, we have brought the line number into its own column rather than a filter option (you can search at the top if needed) we are also now displaying the budget builder via the cost centre view.

Budget planning software



DashboardEmployeesFundingOther I/EBudget ForecastPayroll ReconciliationBudget MonitoringNext YearReportsTools

SCH Master

Other I&E (2021/22) Testing

Search

Save As

Refresh

| Cost Centres | | 2021/22 (£) | 2022/23 (£) | 2023/24 (£) | 2024/25 (£) | 2025/26 (£) |
|---------------------|---|-------------|-------------|-------------|-------------|-------------|
| EDU - SUPPORT STAFF | <div>Budget Builder</div> <div>Ledger Codes</div> | 50550 | 50551 | 50552 | 50553 | 50554 |
| ENG - ENGLISH | <div>Budget Builder</div> <div>Ledger Codes</div> | 550 | 551 | 552 | 553 | 554 |
| FIN - FINANCE | <div>Budget Builder</div> <div>Ledger Codes</div> | 10700 | 10900 | 11104 | 11312 | 11524 |

Using the cost centre view, you are able to allocate this back to the ledger codes by selecting the ledger codes options.

| | |
|--|--------------|
| Budget Forecast Payroll Reconciliation Budget Monitoring | |
| Other I&E (2021/22) Testing | |
| | 20 |
| Budget Builder | Ledger Codes |
| Budget Builder | Ledger Codes |
| Budget Builder | Ledger Codes |

We are again now displaying the profile and the tagging option here too.

| | | | | | | | | | |
|--------------------------------------|-------------|-----------|---------|-------------|-------------|-------------|-------------|-------------|-------|
| EDU - SUPPORT STAFF | | | | | | | | | |
| Search Ledger Code | | | | | | | | | |
| Ledger Codes | Line Number | Profiling | Tagging | 2021/22 (£) | 2022/23 (£) | 2023/24 (£) | 2024/25 (£) | 2025/26 (£) | Notes |
| Total Allocated (£) | | | | 50550 | 50551 | 50552 | 50553 | 50554 | |
| 1011 - Pupil Premium | A2 | Manual | Tagging | 0 | 0 | 0 | 0 | 0 | + |
| 2295 - Technicians - Overtime | B1 | Monthly | Tagging | 0 | 0 | 0 | 0 | 0 | + |
| 2300 - Premises Staff - Salaries | B2 | Monthly | Tagging | 0 | 0 | 0 | 0 | 0 | + |
| 3000 - Building Projects/Maintenance | C0 | Monthly | Tagging | 0 | 0 | 0 | 0 | 0 | + |
| 3220 - Rent | C1 | Monthly | Tagging | 0 | 0 | 0 | 0 | 0 | + |
| 4757 - 16/9/19 | E04 | Monthly | Tagging | 500 | 500 | 500 | 500 | 500 | ✓ |
| Total Ledger Codes : 8 | | | | | | | | | |
| Save Cancel | | | | | | | | | |

When you select 'Tagging' you can apply the percentage you would like to go to each tag.

☒ Fixed Percentage
 ☐ Inflation
 ☐ None
 Amount allocated to Ledger Code (£) 0

| Tag Name | 2021/22 (£) | | 2022/23 (£) | | 2023/24 (£) | | 2024/25 (£) | | 2025/26 (£) | | Notes |
|-----------------|-------------|------|-------------|------|-------------|------|-------------|------|-------------|------|-------|
| | % | £ | % | £ | % | £ | % | £ | % | £ | |
| Pupil Premium | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | + |
| Sport Grant | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | + |
| Maths | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | + |
| School A | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | + |
| School B | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | + |
| English | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | + |
| Trips | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | + |
| Teaching School | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | 0 | 0.00 | + |

Total Tag Allocation: 8

Payroll Reconciliation & Budget Monitoring

| | | |
|------------------------|---------------------|-----------|
| Payroll Reconciliation | Budget Monitoring ▼ | Next Year |
| Budget Forecast | Ledger Code | |
| | Cost Centres | |

We are now displaying payroll reconciliation as its own tab across the top.

Budget Monitoring now has the options of Ledger Code (Budget Profile) and Cost Centres (Cost Centres Budget Profile)

Next Year

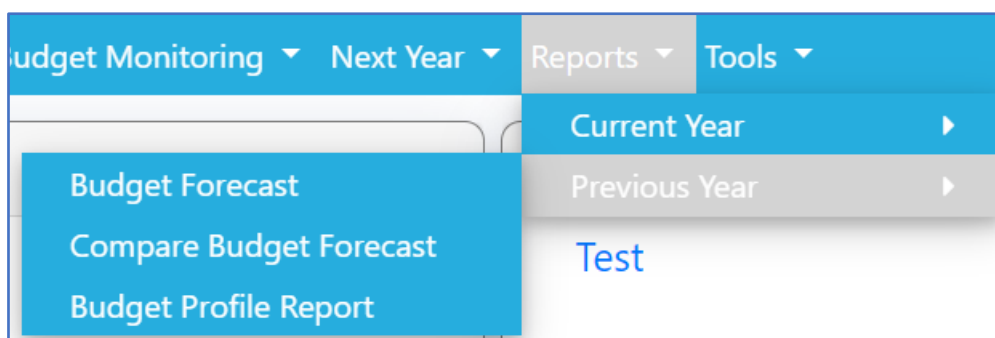
Employees, Funding and Other I/E again will take you directly into those scenarios.

The main change to the next year area is the pay elements option. Under here we are displaying the systems pay elements -

Reports

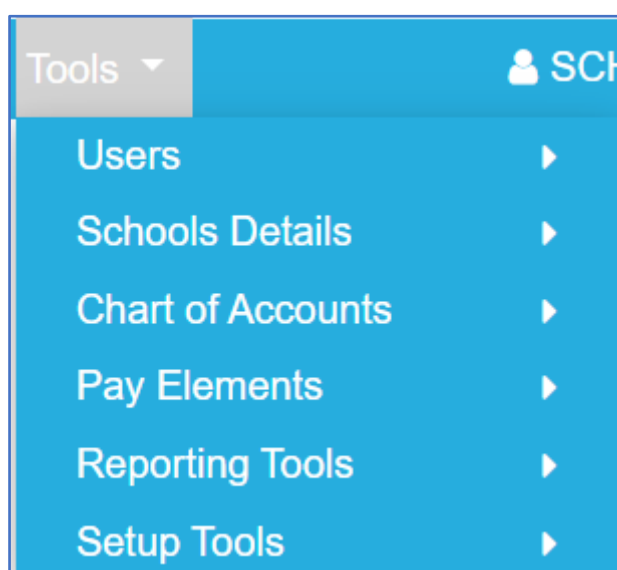
| | | | |
|-------------------------|-------------------------|-----------------------|----------------------------|
| Budget Monitoring ▼ | Next Year ▼ | Reports ▼ | Tools ▼ |
| Budget Forecast | Compare Budget Forecast | Budget Profile Report | Cost Centre Budget Profile |
| Previous Budget Profile | Tag Report | Current Year ▶ | Previous Year ▶ |
| | | Test | |

If you click into previous year > Budget forecast, this is where your previous budget forecasts can be found.



Tools

Tools, this is a new menu option added where we have the following



Users – This is where new accounts can be created. Roles, user, and access rights.

School Details – We have school logo and school profile under here.

Chart of Accounts – Under this menu option we have the previous menus, Ledger Codes, Cost Centres, Unassigned ledger codes, Cost Centres > Ledger Codes, Cost Centres vs Funding, Nodes, Nodes vs Cost Centres

Pay Elements – Pay Scales, Pay scale Timelines, TLR Rates, SEN Payments, Superannuation, Performance Pay, Contract,

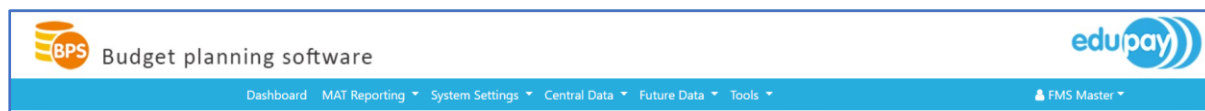
Reporting Tools – Sensitive Profiles, Tagging, Quick Calculator, Cost Centre Allocation

Setup Tools – Move Employees, Payroll Mapping Details

Central Side

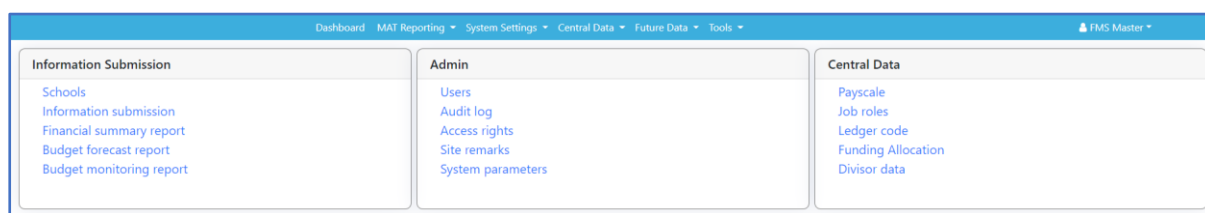
Menu

We have also made the same change to central side menus. These are mainly changes to the layout of the menu items.



Dashboard

You will also see the dashboard central side too which shows commonly used items.



MAT Reporting



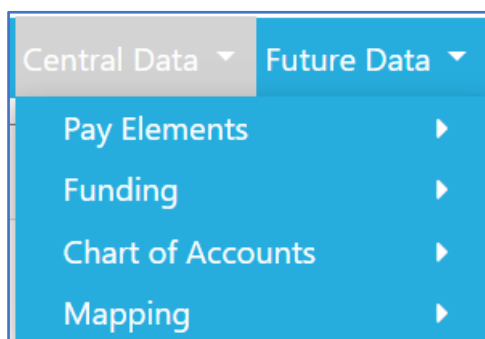
If you are not an academy this will be referred to as 'Consolidated Reporting'

Under this menu, we have the options of Central Employees (v12.2) along with our budget reporting.

This central reporting area is being used as what will work towards enhanced functionality for a 'MAT Level' in future releases.

Central Data

We have made some changes to the central data/Future data layouts as shown below



Pay Elements

Central Data ▾ Future Data ▾ Tools ▾

Pay Elements ▸

Funding ▸

Chart of Accounts ▸

Mapping ▸

Pay Scales

Pay Scale Approvals

Pay Scale Bands

Pay Scale Timelines

Performance Pay

School Job Roles

TLR Rates

SEN Payments

Superannuation

Divisor Data

Divisor Payband Data

Divisor Year Range

Contract

School Job Roles

We now have the option of assigning school job roles to an individual schools or an authority.

Job Role Details

Job Roles Pay Scale Authorities

Name Access to Learning (29-37)

Gross Ledger Codes 2630 Finance & Admin - Salaries

Super Annuation Ledger Codes 2640 Finance & Admin - Supn

National Insurance Ledger Codes 2635 Finance & Admin - NI

☒ Weeks Paid Applies ☐ FTE Factor

☐ Has Divisor

☐ TLR Apply ☐ SEN Funding

☐ MSA ☐ Quick Calculator

☐ Other Fixed Allowances

Increment Cycle Yearly April 1

Award Month April

FTE 36.50000 Hours

Type Non-Teaching Staff Pay Band ☐

WFC - Post Description

WFC - Role ID

Spot Salary % Increment 0.00%

Assign Jobrole ☒ Authority ☐ Schools

Save New

[Back To School Job Roles](#)

Funding

| Central Data ▾ | Future Data ▾ | Tools ▾ |
|---------------------|---------------|------------------------|
| Pay Elements ▶ | | |
| Funding ▶ | | Budget Sections |
| Chart of Accounts ▶ | | Funding Allocation |
| Mapping ▶ | | Funding Simple Entries |

COA

| Central Data ▾ | Future Data ▾ | Tools ▾ |
|---------------------|---------------|--------------|
| Pay Elements ▶ | | |
| Funding ▶ | | Central Data |
| Chart of Accounts ▶ | | Line Numbers |
| Mapping ▶ | | Ledger Codes |

Mapping

| Central Data ▾ | Future Data ▾ | Tools ▾ |
|---------------------|---------------|-----------------------------|
| Pay Elements ▶ | | |
| Funding ▶ | | Central Data |
| Chart of Accounts ▶ | | Payscale |
| Mapping ▶ | | Payroll Mapping Details |
| | | Budget Monitoring Details |
| | | Profile Details |
| | | Code Mapping |
| | | Budget Output File Mappings |
| | | Clusters |

Tools

