

Update School Details in IRIS Financial Planner

School details are recorded in IRIS Financial Planner for use within reports, and some details are for information purposes only. We recommend keeping this information up to date.

Updating Leadership Information

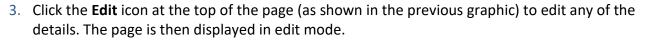
The **Leadership** tab is used to view/edit information about the key leaders involved in the reporting process. Some of the information entered on the **Leadership** tab (**School Details** page) is displayed in the **Leadership** panel on the dashboard.

2		Das	hboard	0								
Leadership	Updates	s & Nev	/s									
yourlogo	No news a	available										
St Mary and St Johns Trust (IRIS)	Monitor	ing										
Head Teacher	Payroll R	econcilia	ation (see	e more sch	ools)							
Name: Mrs M Smith	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Email: mrsmsmith@stmarystjohnexample.sch.uk	View	View	View	View	View	View	View	View	View	View	View	View
Tel: 01234 567890	Budget N	1onitor (see more s	chools)								
School Business Manager	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug
Name: Mr Brown	View	View	View	View	View	View	View	View	View	View	View	View
Email: mribrown@stmarystjohnexample.sch.uk Tel: 01234 567897												

- 1. To edit leadership information, select **Settings > School Details** from the sidebar menu to display the **School Details** page.
- 2. Select the **Leadership** tab. By default, the page is displayed in view mode. Any information in blue indicates that a link is available, such as an email or telephone number.

School	Details 🕐
Details Child Schools Lead	ership Report Settings Users
Head teacher	: Mrs M Smith
Head teacher email	mrsmsmith@stmarystjohnexample.sch.uk
School business manager	: Mr I Brown
School business manage email	
School business manage phone	





Q	Edit School Details ③	✓ >	ĸ
Details Leadership Report Settings			
Head teacher:	Mrs M Smith		
Head teacher email:	mrsmsmith@stmarystjohnexample.sch.uk		
School business manager:	Mr I Brown		
School business manager email:	mribrown@stmarystjohnexample.sch.uk		
School business manager phone:	01234 567891		

4. Add or edit any information as required, then click the **Save** (green tick) icon at the top of the page to save the information. A green message is displayed in the top right-hand corner indicating that the update has completed successfully.

School updated.	×

Updating Report Settings

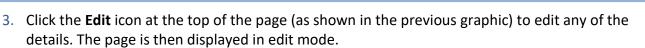
As its name would suggest, the **Report Settings** tab is used to apply settings for the reports and statements that can be produced in IRIS Financial Planner.

- 1. Select Settings > School Details from the sidebar menu to display the School Details page.
- 2. Select the **Report Settings** tab. By default, the page is displayed in view mode. If a signature has been uploaded, a copy of the signature is displayed at the bottom of the page.

	School D		¢	
Details	Child Schools Leader	ship Report Settings I	Jsers	
	Report signatory name:	Mrs M Smith, Head Teach	er	
	Report signatory group:	Board of Governors		
	Show address on salary statements:	On		
	Show cover page on PDF reports:	On		
5	Show minimal dashboard:	Off		
Sa	alary statement signature:	MSuide		

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Q	Edit School Details ③	 ×
Details Leadership Report Settings		
Report signatory name:	Mrs M Smith, Head Teacher	
Report signatory group:	Board of Governors	
Show address on salary statements:		
Show cover page on PDF reports:		
Show minimal dashboard:	CID	

4. The **Report signatory name** is usually the Head Teacher's name and should be written as you would like it to appear on reports. Enter who the signatory is representing in the **Report signatory group** field. In the previous example, the signature would appear Mrs M Smith, Head Teacher, on behalf of the Board of Governors.

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Note: If both signatory fields are left blank, the salary statement signatory line will either be blank or omitted from certain reports.

- 5. Turn the **Show address on salary statements** switch on, if you want the academy/MAT address to be displayed on salary statements (switched on by default). The address is populated from the address entered on the **Details** page and must be in the correct format (as described in the following section).
- 6. Turn the **Show cover page on PDF reports** switch on, if you want to produce a cover page containing your school, and some basic report details when you download certain reports (switched on by default).
- 7. Once the required settings have been applied, click the **Save** (green tick) icon at the top of the page to save the information. A green message is displayed in the top right-hand corner indicating that the update has completed successfully.



HOW TO





Updating the Address on Salary Statements

1. Select **Settings > School Details** from the sidebar menu. The **Details** tab is displayed by default with the school details displayed in view mode.

		School De	tails ⑦		2 6
Details	Child Schools	Leadership	Report Settings	Users	
	Name:	St Mary and St	St Johns		School Logo
	URL:	stmarystjohn iris.petesting			

2. Click the **Edit** icon at the top of the page (as shown in the previous graphic) to edit the details. The page is then displayed in edit mode.

Q	Edit School Details ⑦	✓ ×
Details Leadership Report Settings		
Name:	St Mary and St Johns Trust (IRIS)	
URL	http://stmarystjohn-iriscom	
Phone:	01234 567890	
Address:	1-16 Grove Terrace, High Street, Example Town, LONDON, W12 4AB.	
Website:	http://www.stmarystjohn-iris.org	
VAT number:		
Local Authority	Barking and Dagenham	
DfE/Establishment number:		

3. The following four fields can be edited:

FIELD	DESCRIPTION
Name	The school name entered in this field is used as the name for the Planner.
Phone	Enter your school phone number here (brackets and spaces are permitted if required)



FIELDDESCRIPTIONAddressThe address entered here is used for salary statements. It is therefore essential
that each line of the address is entered and on a separate line and separated
with a comma (excluding the last line). The following example, and previous
graphic show how the address should be entered.1-16 Grove Terrace,
High Street,
Example Town,
LONDON,
W12 4AB.WebsiteEnter the name of your school website if required.

4. Once you are happy with the changes, click the **Save** icon (green tick) at the top of the page. A green message is displayed indicating that the information has been successfully updated.



Updating/Uploading Your School Logo or Signatory

It is likely that a school logo will have been added as part of your installation/migration process. However, you can change the logo whenever required. Once uploaded, the logo will be visible onscreen and will also appear on salary statements and report cover pages.

In addition, you can upload a signature of the person who signs off salary statements and reports. The uploaded signature will then be displayed in applicable places when the statements/reports are produced. For more information, please see Uploading a signature on page 7.

Updating/Uploading the School Logo

 Select Settings > School Details from the sidebar menu. The Details tab is displayed by default with the school details displayed in view mode. If you want to change the existing logo, click the Manage Settings icon at the top of the page, then select Change Logo from the drop-down menu.

<i>L</i> 😳		0	chool Details	Sc	
Change Logo	_				
Change Signature	Users	Report Settings	Leadership	Child Schools	Details
School Logo			t Mary and St	Name: S	

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2. If no logo currently exists, click the **Upload Logo** button positioned where the logo would normally be displayed.

	So	hool Details	0		Ô.	¢
Details	Child Schools	Leadership	Report Settings	Users		
	Name: S J	t Mary and St ohns Trust (IRI	S)		School Logo Upload logo	
		tmarystjohn-	ulaway a c			-

3. The Upload School Logo page is displayed. Click the Browse button.

Q	Upload School Logo	1 × 🛍
	Upload Center	
	Image File: Browse	

4. From the **Open** dialog, navigate to the required school logo file and click the **Open** button.

🕆 🗖 > This P	C > Desktop		,	ତ Search D	asktop	۶
Organize 💌 New folder					- 11	
A Quick access	Name	Date modified	Туре	Size		
Documents	🏓 This PC	19/09/2018 13:04	Shortcut	1 KB		
Downloads #	TEST.RDP	11/09/2019 13:53	Remote Desktop C	3 KB		
Pictures #	🖻 School Logo.jpg	07/08/2019 10:09	JPG File	40 KB		
Graphics	RDP Manager.rdg	25/10/2019 09:43	RDG File	93 KB		
Graphics	PSF Shares (M)	19/09/2018 13:05	Shortcut	1 KB		
User Guides	💭 OneDrive - P S FINANCIALS LTD	19/09/2018 13:06	Shortcut	1 KB		
User Guides	NewGroup.CSV	02/09/2019 13:20	Microsoft Excel Co	10 KB		
	😼 Microsoft Teams	20/11/2019 20:40	Shortcut	3 KB		
OneDrive - IRIS So	🔁 Microsoft Edge	15/10/2019 20:10	Shortcut	2 KB		
📥 OneDrive - Person	SAAW05.RDP	14/02/2019 10:45	Remote Desktop C	3 KB		
🞐 This PC						
3D Objects						
Desktop						
Documents						
🕹 Downloads 🗸 🗸						
File name:	School Logo.jpg			 All files ((*)	

5. The file name is displayed in the **Image File** field. Click the **Upload** icon at the top of the page as shown in the following graphic:





6. A message is displayed in the top right-hand corner of the page indicating that the logo has been successfully uploaded.



7. The logo is then displayed on the **Details** page and will appear in applicable statements and reports when produced.

etails	Child Schools	Leadership	Report Settings	Users	
	Name:	St Mary and St Johns Trust (IRI	S)		School Logo
	URL:	stmarystjohn- iris.pstesting.co	.uk		
	Address:	1-16 Grove Terra High Street, Example Town, LONDON, W12 4		~~~~~	yourlogo

Uploading a Signature

You can upload a signature of the person who signs off salary statements and reports. The uploaded signature will then be displayed in applicable places when the statements/reports are produced.

- 1. Select **Settings > School Details** from the sidebar menu. The **Details** tab is displayed by default with the school details displayed in view mode.
- 2. If you want to change the existing signature, click the **Manage Settings** icon at the top of the page, then select **Change Signature** from the drop-down menu.

		0	chool Details	Sc	
Change Logo					
Change Signature	Users	Report Settings	Leadership	Child Schools	Details
School Logo			t Mary and St	Name: S	



3. If no signature currently exists, click the **Upload signature** button positioned where the signature would normally be displayed.

etails	Child Schools	s Leadership Report Settings Users	
	Name:	St Mary and St Johns Trust (IRIS)	School Logo
	URL:	stmarystjohn- iris.pstesting.co.uk	
	Address:	1-16 Grove Terrace, High Street, Example Town, LONDON, W12 4AB.	
	Phone:	01234 567890	Salary Statement Signature
	Website:	http://www.stmarystjohn- iris.org	Upload signature

4. The Upload Signature page is displayed. Click the Browse button.

Upload Center	
Image File: Browse	

5. From the **Open** dialog, navigate to the required school signature file then click the **Open** button.

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Organize 👻 New folder						111 -	?
Graphics ^	Name	Date modified	Туре	Size			
Graphics	PC This PC	19/09/2018 13:04	Shortcut		1 KB		
User Guides	TEST.RDP	11/09/2019 13:53	Remote Desktop C		3 KB		
OneDrive - IRIS So	School Logo.jpg	07/08/2019 10:09	JPG File		40 KB		
OneDrive - Person	RDP Manager.rdg	25/10/2019 09:43	RDG File		3 KB		
OlieDrive - Person	PSF Shares (M)	19/09/2018 13:05	Shortcut		1 KB		
🤰 This PC	OneDrive - P S FINANCIALS LTD	19/09/2018 13:06	Shortcut		1 KB		
3D Objects	NewGroup.CSV	02/09/2019 13:20	Microsoft Excel Co		10 KB		
📃 Desktop	📁 Microsoft Teams	20/11/2019 20:40	Shortcut		3 KB		
Documents	🔁 Microsoft Edge	15/10/2019 20:10	Shortcut		2 KB		
🕹 Downloads	AAW05.RDP	14/02/2019 10:45	Remote Desktop C		з кв		
👌 Music	m_smith_signature.jpg	28/11/2019 16:00	JPG File	94	42 KB		
Nictures							
Videos							
ຢ OS (C:)							
🗙 shares (\\psfinan							
* *							
File name	m_smith_signature.jpg			~	All files (*)		,
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6. The file name is then displayed in the **Image File** field. Click the **Upload** icon at the top of the page as shown in the following graphic:



7. A message is displayed in the top right-hand corner of the page, indicating that the signature has been successfully uploaded. The signature is then displayed on the **Details** page and will appear in applicable statements and reports when produced.

etails	Child Schools	s Leadership Report Settings Users	
	Name:	St Mary and St Johns Trust (IRIS)	School Logo
	URL:	stmarystjohn- iris.pstesting.co.uk	
	Address:	1-16 Grove Terrace, High Street, Example Town, LONDON, W12 4AB.	yourlogo
	Phone:	01234 567890	Salary Statement Signature
	Website:	http://www.stmarystjohn- iris.org	M.Suiter

Where to Get More Help and Information

Our currently available documentation can be found at the following address: https://psfinancials.zendesk.com/hc/en-us/categories/360000797219-User-Documentation

You can also utilise information on our Support Portal at the following address: <u>https://psfinancials.zendesk.com</u>

Providing Feedback on our Documentation

If you have any feedback, comments or suggestions regarding our documentation, please email:



documentation@psfinancials.com

1ENT REFERENCE	DESCRIP

TM-171219-USD-IFP-1.0 Initial release