

Schools**BPS**

User Manual

Version 9.0

Summer updates 2016



Orovia Software

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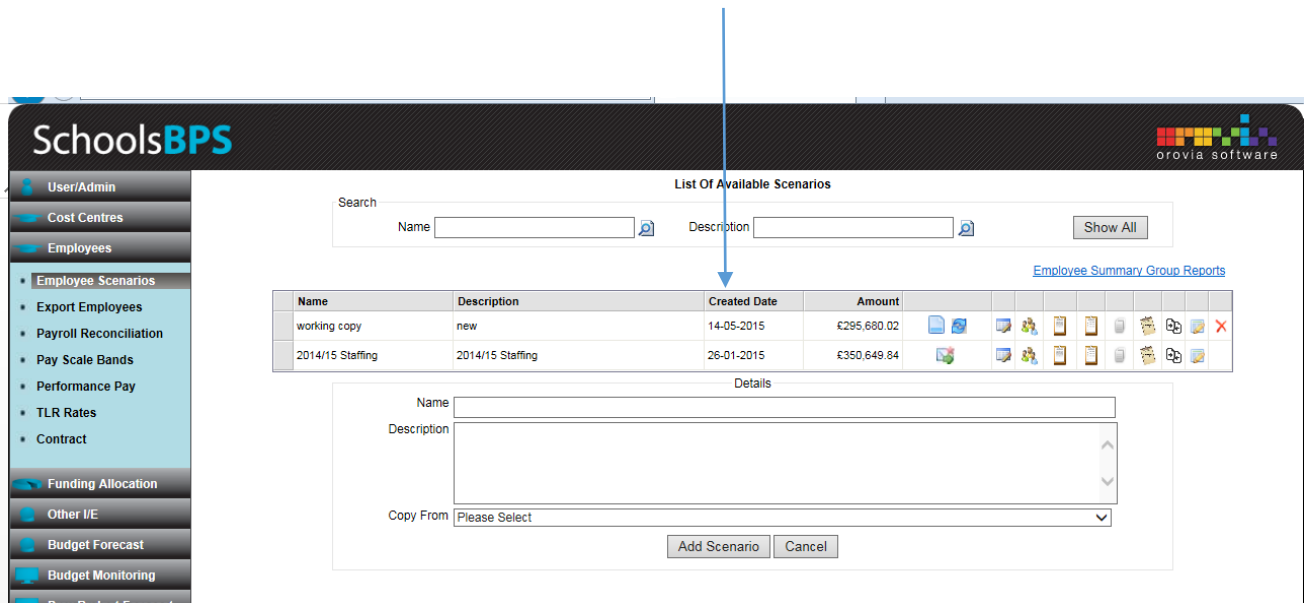
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Employees

Employees > Pay Scales. Moved from User/Admin into Employees.

Employees > Pay Scale Timelines – For information only

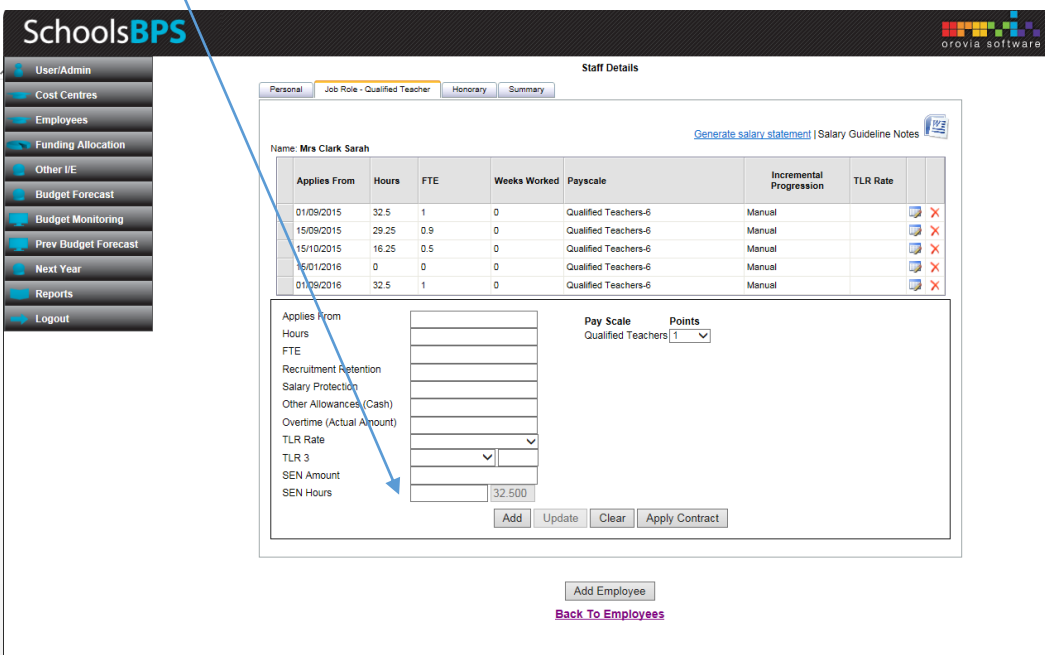
Employee Scenarios > List of scenarios. New field added for Created Date.



Employee Scenarios > SEN calculation changes.

On Teacher employees with an SEN responsibility, actual hours can be recorded on the Job role tab, in the SEN hours field. e.g. If a FT teacher is paid for PT hours on an SEN amount – the actual SEN hours can be recorded here and the SEN annual payment will be calculated on the Summary tab.

The SEN hours default to the contracted hours.



Employee Scenarios > Additional remarks can be added in on the Employees Personal tab.

New notepad will open – remember to click Save.

SchoolsBPS Staff Details

Personal | Job Role - Qualified Teacher | Honorary | Summary

Title: Mrs
Surname: Clark
First Name: Sarah
Post Description:
Notes: [Additional Remarks](#)

Pay Roll Number: 222555
Joining Date:
Created User: schmaster
Created Date: 14/05/2015 12:31:28

Job Roles	End Date	Auto Increment	Super Annuation	Spot Salary	Cost Centres	Job Pay Roll Number
Qualified Teacher		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		222555
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

Save

Employee Scenarios > Employees (support staff)

SchoolsBPS Staff Details

Personal | Job Role - Admin and Clerical staff - Grade 11 | Honorary | Summary

Name: admin test 1 [Generate salary statement](#) | [Salary Guideline Notes](#)

Applies From	Hours	FTE	Weeks Worked	Weeks Paid	Payscale	Incremental Progression	TLR Rate
01/04/2016	25	0.59427369	39	45.7353	Support Staff-38	Manual	
01/04/2017	25	0.59427369	39	45.7353	Support Staff-39	Auto	
01/04/2018	25	0.59427369	39	45.7353	Support Staff-40	Auto	
01/04/2019	25	0.59427369	39	45.7353	Support Staff-41	Auto	
01/04/2020	25	0	39	0	Support Staff-42	Auto	

Applies From: 01/04/2016
Hours: 25.00
FTE: 0.59427369
Recruitment Retention: 0.000
Salary Protection: 0.000
Other Allowances (Cash):
Overtime (Actual Amount): 0.000
Weeks Worked: 39.0000
Weeks Paid: 45.7353

Pay Scale: Support Staff [38] Points:

Update Auto Entry

Add Update Clear Apply Contract

Add Employee
[Back To Employees](#)

New fields added – now shows weeks worked and weeks paid.

Employees > Contract > Employee Maternity Contract. (Teachers Maternity Calculator)

The tables here are for information only – the same as Pay Scales.

Employees > Employee Scenarios > Open Employee > Add Maternity Contract

Go to Employee Scenarios> Choose Existing Employee > Go to Job Role tab – Click Apply Contract

SchoolsBPS Staff Details

Personal | Job Role - Qualified Teacher | Honorary | Summary

Name: Morris Natale

Applies From	Hours	FTE	Weeks Worked	Payscale	Incremental Progression	TLR Rate		
01/09/2015	32.5	1	0	Qualified Teachers-2	Manual			X
01/09/2016	32.5	1	0	Qualified Teachers-3	Auto			X
01/09/2017	32.5	1	0	Qualified Teachers-4	Auto			X
01/09/2018	32.5	1	0	Qualified Teachers-5	Auto			X
01/09/2019	32.5	1	0	Qualified Teachers-6	Auto			X

Generate salary statement | Salary Guideline Notes

Applies From:
Hours:
FTE:
Recruitment Retention:
Salary Protection:
Other Allowances (Cash):
Overtime (Actual Amount):
TLR Rate:
TLR 3:
SEN Amount:
SEN Hours:

Pay Scale: Points:

Add Update Clear Apply Contract

Add Employee
[Back To Employees](#)

New box appears

Maternity Contract

Start Date:
Contract: <--- Choose --->
Return Date:
Days Worked:

OK Cancel

Insert Start Date

Choose Contract type from dropdown list – Teachers Maternity


Insert Return Date

Days worked – will prepopulate



















OK – Message box appears – Click OK

The outcome of this contract change will be seen on the Employees Job Role timelines sheet and included in the Summary tab.

Personal | Job Role - Qualified Teacher | **Honorary** | Summary

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

Name: Morris Natalie

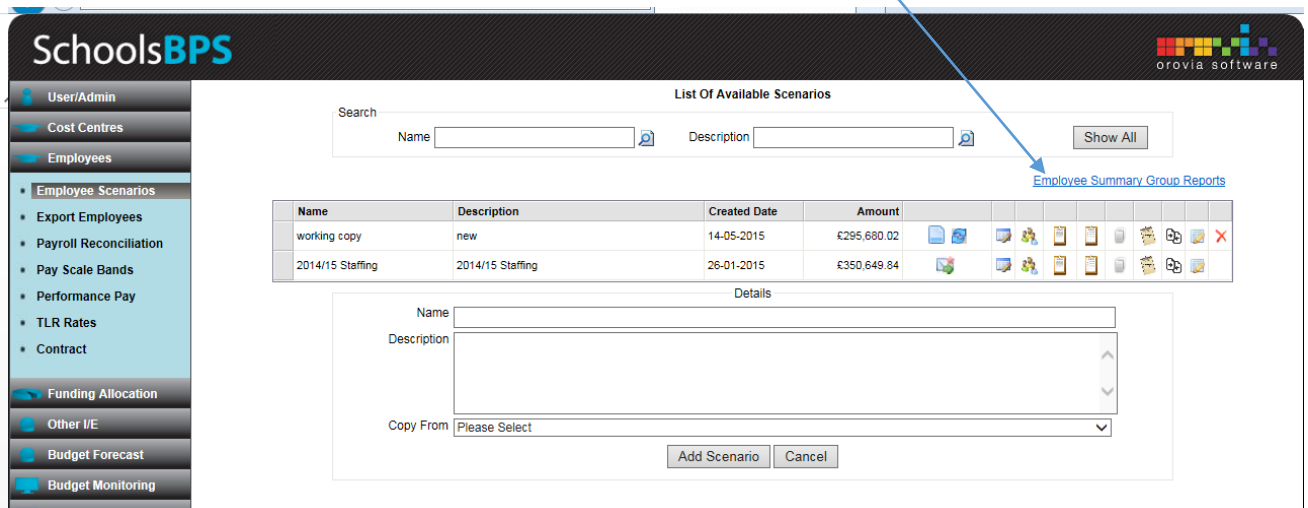
	Applies From	Hours	FTE	Weeks Worked	Payscale	Incremental Progression	TLR Rate		
	01/09/2015	32.5	1	0	Qualified Teachers-2	Manual			
	01/09/2016	32.5	1	0	Qualified Teachers-3	Auto			
	01/10/2016	32.5	1	0	Qualified Teachers-3	Contract (Teachers Maternity)			
	29/10/2016	29.25	0.9	0	Qualified Teachers-3	Contract (Teachers Maternity)			
	12/11/2016	16.25	0.5	0	Qualified Teachers-3	Contract (Teachers Maternity)			
	12/11/2016	32.5	1	0	SMP-1	Contract (Teachers Maternity)			
	04/02/2017	32.5	1	0	SMP-1	Contract (Teachers Maternity)			
	01/07/2017	0	0	0	Qualified Teachers-3	Contract (Teachers Maternity)			
	17/07/2017	32.5	1	0	Qualified Teachers-3	Auto			
	01/09/2017	32.5	1	0	Qualified Teachers-4	Auto			
	01/09/2018	32.5	1	0	Qualified Teachers-5	Auto			
	01/09/2019	32.5	1	0	Qualified Teachers-6	Auto			

Applies From

Employee Scenarios > Reports > Regenerating Employee Summary Group Reports.

Updated reports are now pre-calculated for staff alterations. **However if data is changed centrally e.g. updates to National Pay Scales, NI or Pensions – regeneration will still need to be actioned.**

To do this > Go to Employee scenarios > Click on Employee Summary Group Reports



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













User/Admin | Cost Centres | **Employees**

- Employee Scenarios
- Export Employees
- Payroll Reconciliation
- Pay Scale Bands
- Performance Pay
- TLR Rates
- Contract

Funding Allocation | Other I/E | Budget Forecast | Budget Monitoring

List Of Available Scenarios

Search: Name Description Show All

Name	Description	Created Date	Amount								
working copy	new	14-05-2015	£295,680.02								
2014/15 Staffing	2014/15 Staffing	26-01-2015	£350,649.84								

[Employee Summary Group Reports](#)

Details

Name

Description

Copy From

Add Scenario Cancel

Select the Reports you want to regenerate- apply Tick

Click > Generate Summary Reports.

This can take a couple of minutes, depending on the amount of data in the selection.

Delete Employee Scenarios – Users now have the option to delete employee scenarios which only have references in previous year budget forecasts.

Employee Scenarios –Reports > FTE with Full Summary.

Option to drill down on employee (underlined in blue) back to contract.

Option to see Summary salary details of employee from this screen by moving over to right and clicking on Summary report icon.

Other allowances (£)					Total Gross Pay (£)				
2016/17	2017/18	2018/19	2019/20	2020/21	2016/17	2017/18	2018/19	2019/20	2020/21
12.80	412.80	412.80	412.80	412.80	445839.61	446741.85	483714.16	493950.37	498466.80
412.80	412.80	412.80	412.80	412.80	14582.05	14948.27	15167.94	15485.70	15712.67
0.00	0.00	0.00	0.00	0.00	18066.31	22949.80	30599.74	30599.74	30599.74
0.00	0.00	0.00	0.00	0.00	31705.55	32833.08	32833.08	32833.08	32833.08

Employees > Payroll Reconciliation

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Payroll Reconciliation List

Search: Financial year: 2016 Scenario: Choose... Show

- User/Admin
- Cost Centres
- Employees
 - Employee Scenarios
 - Export Employees
 - Payroll Reconciliation**
 - Pay Scales
 - Pay Scale Timelines
 - TLR Rates
 - Contract

This screen has changed –

Search – Financial year and then Scenario. > Show

Other Income/Expenditure

Other Income/Expenditure has been moved to a discrete menu area named Other I/E.

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- User/Admin
- Cost Centres
- Employees
- Funding Allocation
- Other I/E**
 - Other Income/Expenditure**
- Budget Forecast

The Income, Expenditure and Balances on the Scenario browse screen – now relate to in year figures for **Revenue only**.

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Other Income & Expenditure Version Details

Search: Description: Version No: Show All

Version	Version Description	Date	Created User	Income	Expenditure	Balance			
2	2016-17 I & E July	12-07-2016	Margaret	€205,310.00	€339,575.00	€40,074.00			
1	2016-17 I & E	01-07-2016	Margaret	€205,310.00	€339,575.00	€40,074.00			

Add New (Ledger Codes) Add New (Cost Centres)

- User/Admin
- Cost Centres
- Employees
- Funding Allocation
- Other I/E
 - Other Income/Expenditure**
 - Budget Forecast
 - Budget Monitoring
 - Prev Budget Forecast
 - Reports
 - Logout

Budget Forecast

When creating a **new** budget forecast, by default the new option to “Check Salary Calculations” is selected

Upon calculating an updated budget forecast the system will check the payroll data and generate updated Employee reports.

If you are confident that all **Central payroll changes** have been incorporated whilst preparing payroll updates – this box can be Unticked, this reduces the time it takes the system to produce the Budget Forecast Report.

We recommend you leave this box ticked.

Re-populating a Current Budget Forecast

The screen has changed to show the impact of reposting – now showing tabs for the full five year period.

Details	Saved	Actual	Variance	Apply
Employees	£976,831.98	£969,284.98	£7,547.00	<input checked="" type="checkbox"/>
Funding	£1,118,401.40	£1,118,401.40	£0.00	<input checked="" type="checkbox"/>
Other Income	£205,310.00	£205,310.00	£0.00	<input checked="" type="checkbox"/>
Other Expenditure	£339,575.00	£339,575.00	£0.00	<input checked="" type="checkbox"/>
Balance	£7,304.42	£14,851.42	£7,547.00	<input checked="" type="checkbox"/>
Balance B/Fwd	£40,074.00	£40,074.00	£0.00	<input checked="" type="checkbox"/>
Balance C/Fwd	£47,378.42	£54,925.42	£7,547.00	<input checked="" type="checkbox"/>

Notes : Employee salary calculations last updated on 18-08-2016 @09:53:54 by Margaret Courtman

To see changes over the full 5 years – simply click onto the appropriate year tab.

At this stage you can again Re-check salary calculation for any Central changes. Not re-checking make this process quicker.

Budget Monitoring

Budget Monitoring > Budget Profile – Column Heading changes.

Old version

Code	Description	Submit Budget (£)	Actual To Date (£)	% Spent	Calculated Remaining From Budget Months (£)	Estimated Remaining (£)	Expected Out Turn (£)	Variance (£)	Comments
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Expected Out-Turn has been changed to Adjustments and Comments has been changed to a Note Pad

New version

Code	Description	Original Budget (Submit) (£)	Actual To Date (£)	% Spent/ Received	Calculated Remaining From Budget Months (£)	Adjustments (£)	Expected Out Turn (£)	Variance (£)	
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A new Comments box has been added to the Balances tabs.