ensemble

Ensemble User Guide

www.paritor.com

Preface

Paritor Ensemble *is a living product constantly being enhanced as a result of User feedback and comment. Every attempt is made to keep this document up to date at all times. If you discover any errors in this document please let us know by either raising a support ticket or sending an email to support@paritor.co.uk.*

Introduction

Ensemble is a software suite designed to help manage Music and Performing Arts Services, Private Performing Arts Schools and Colleges and Private Teachers.

The design of Ensemble has been developed over a number of years and incorporates many features to make the Users life easy. Special attention has been given to the User Interface, with careful use of colours and special controls such as drop down menus and lists. The result is a set of screens which are easy to follow.

It is distributed with a comprehensive set of documentation made available to the User via a help system and online videos. Users may also access the Paritor web site for the latest updates and information.

Data maintained by the system is stored in an SQL database and is therefore easily extracted, manipulated and analysed by any of the components of Microsoft Office such as Excel or any other product designed to integrate with SQL compliant databases.

The aim of this document is to provide a detailed reference to using the software. Its layout is such that it provides information on specific operations, explaining each individual function and its use. This document should be used in conjunction with the User Guide which explains how the software can be used to manage specific tasks.

Who is This Book For?

This book has been designed to be of use to any User or potential User of the Ensemble Software. The book covers general usage topics and specific areas including system setup and configuration; it should therefore be used by those responsible for managing all aspects of the business and in part by those responsible for managing specific areas of the business.

What is covered in This Book?

This book looks at how to set up and configure the software and how to do a number of tasks you will perform during the business year. Detailed explanations and screenshots of the software itself are provided throughout.

Style Conventions

The book makes use of a number of different styles of text and layout to help differentiate between the different kinds of information. Here are examples of the styles used and an explanation of what they mean.

- Advice, hints, and background information comes in this font.
- All features and functions in Ensemble will begin with a capital letter. E.g. Pupil Record.
- *Important Words are in Italics.*
- Keys that you press on the keyboard like *Ctrl* and *Enter* are in *italics.*
- Words that appear on the screen (such as buttons or in menus) like File or Help are like this.
- Instructions for reaching a window are in **bold.** For example:
  Ribbon Menu > Tools > Manage Database
- References to other sections and chapters are given in **bold.**
- Where a form is explained each field on the form is listed and an explanation is given next to it. The field name is in **bold**:

Pay Reference   Enter the Teachers' pay reference

Contents

Installing the Software

Download the setup file provided by the Paritor Support Team.

1. Running Ensemble for the first time

You can run Ensemble from the *desktop icon* or from the *start menu*. This icon is displayed below:

Double-click on the icon, and this screen will appear:

Connecting to a Database

When you first run Ensemble Enterprise, the system will run *the Paritor Database Connection Wizard* displayed below:
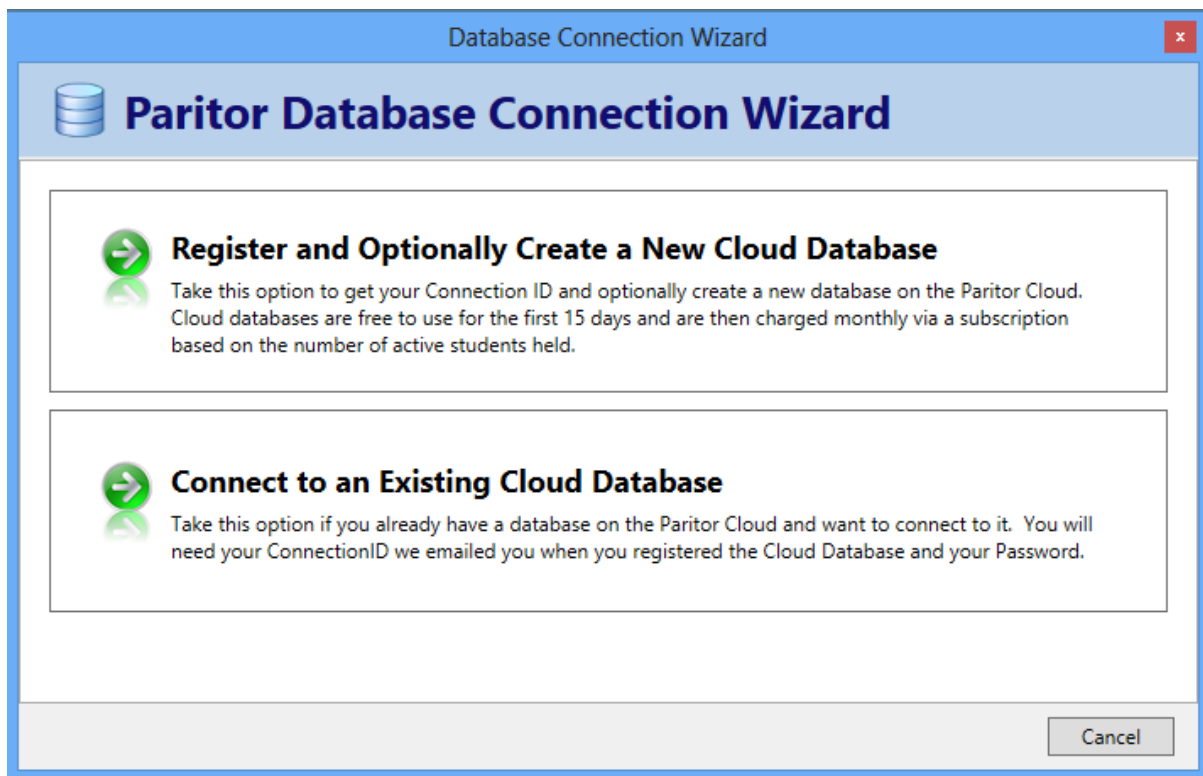
In this window you will have to register your software and enter your database connection information.

Alternatively you can create or connect to an existing *Cloud Database.*

Note: Your *Connection ID* and *Connection Password* are provided by Paritor Ltd; contact us if you have forgotten what they are.

Once you have successfully connected, a *Configuration file* is saved to your local disk (C Drive).

If you ever wish to add or connect to more databases go to:

Tools (Ribbon Menu) > Change Database
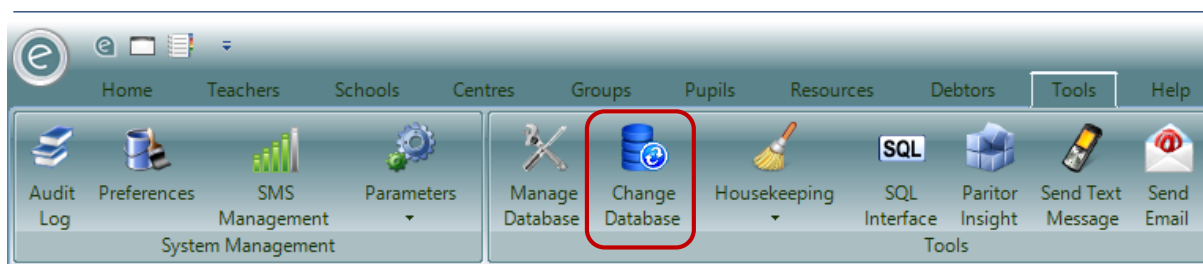
Configuring Ensemble

Ensemble has been designed to cover many of the functions you carry out in running your business, as well as the facility to manage other less common functions. This Chapter will cover the initial configuration of the system in order to get started.

1. Setting up Internet Connection

▶ [Watch the Video Tutorial here](#)

You now need to check the internet connection. *Right-click* the *Ensemble icon* found in the System Tray in the *bottom-right* of your screen and select **Current Connection Status**, displayed below:
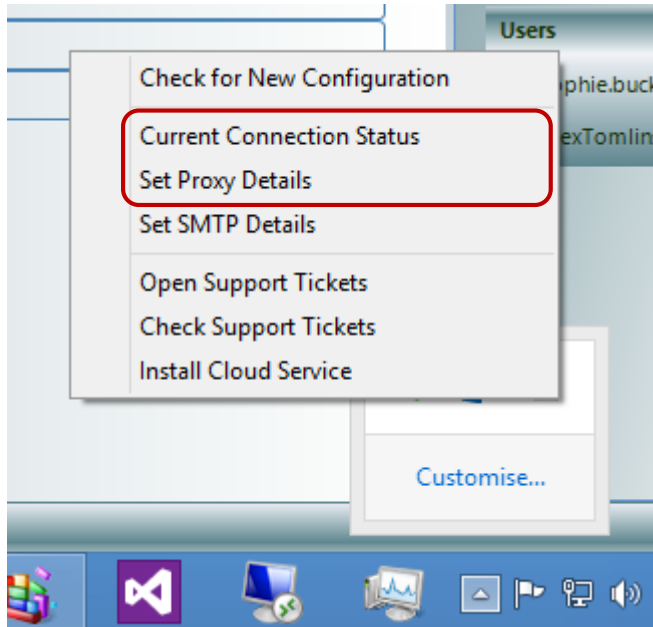
This will display your internet connection details.

If the status *does not show as connected* you may need to enter your *Proxy Server* details. To do this right-click the icon again and select **Set Proxy Details**. This will display a dialog window below:

Here you can enter your *Proxy Server* details. These can be obtained from your Network Manager.

2. Setting up Ensemble Mail

▶ [Watch the Video Tutorial here](#)

If you wish to *send emails directly from within the software* you will also need to enter your *SMTP Server details*.

Right-click on the *Ensemble icon* in the System Tray on the *bottom-right* of your screen and select **Set SMTP details**, as displayed below:
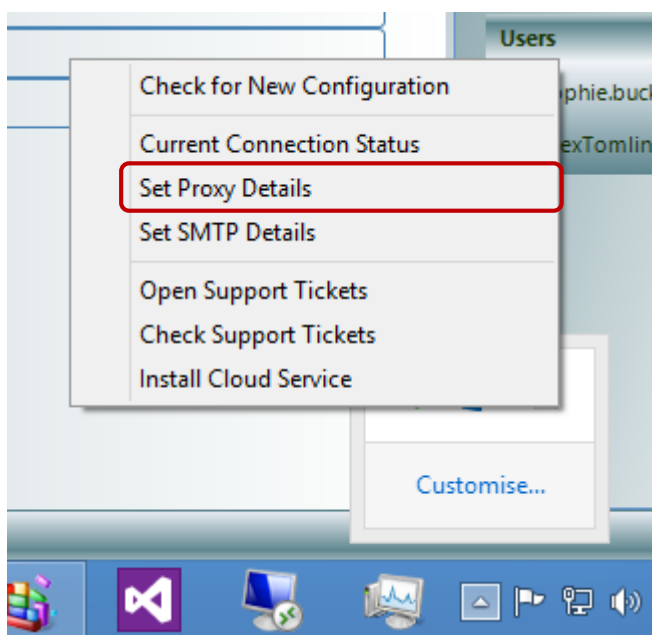
This will display a dialog window where you can enter your SMTP details:
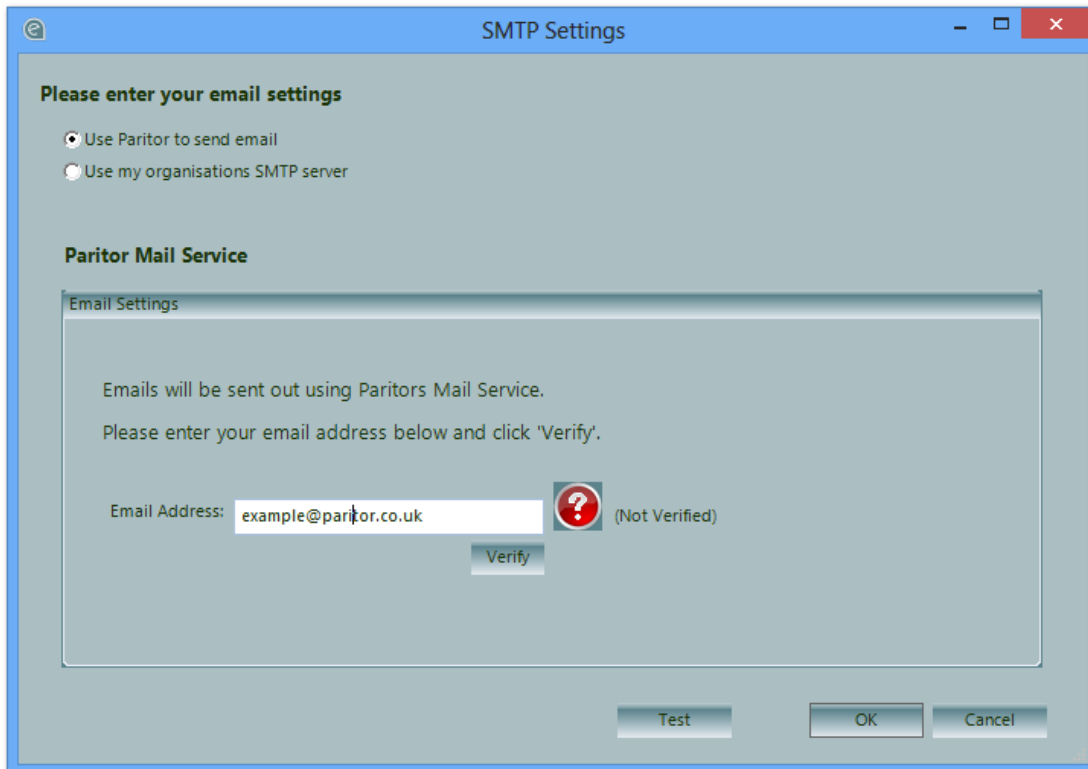
You can **use Paritor to send email** (as currently selected) and an email verification will need to be completed to establish a connection.

Alternatively you may **use your organisation's SMTP server**. Your server details will need to be obtained from your Network Manager.

Note: For either method you can either use your default windows login credentials or enter a set of credentials.

3. Re-configuring Ensemble

 [Watch the Video Tutorial here](#)

Ensemble is *re-configured automatically* to ensure that you are always up-to date and it will automatically install any new configurations that become available.

You may also check for configurations by *right-clicking* the *Ensemble icon* found in the System Tray in the *bottom-right* of your screen and select **Check for New Configuration**, displayed below:
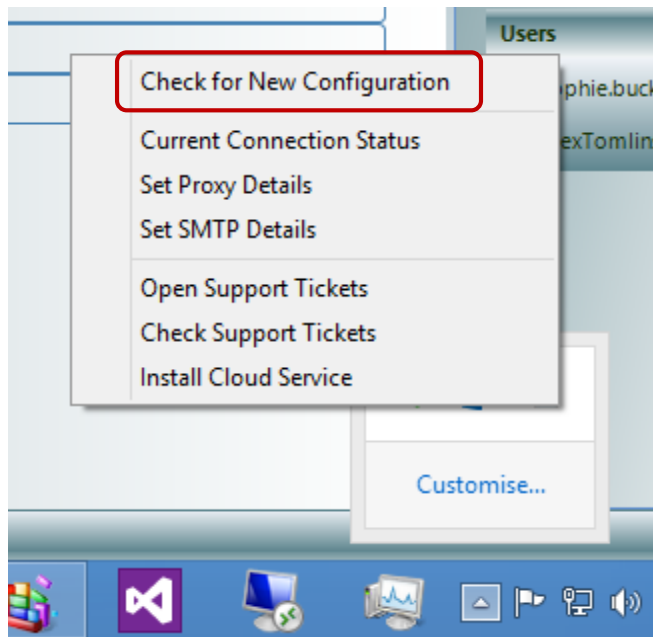
Getting Started and Basic Features

In this Chapter you will be guided through the basics of using the available features in Ensemble. This also explains some of the concepts that are referenced in the rest of the manual.

1. The Console

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Access to all operations and systems within Ensemble is via a *single Console Screen*. The main Console Screen is the first screen that appears when Ensemble is launched. This is displayed below:
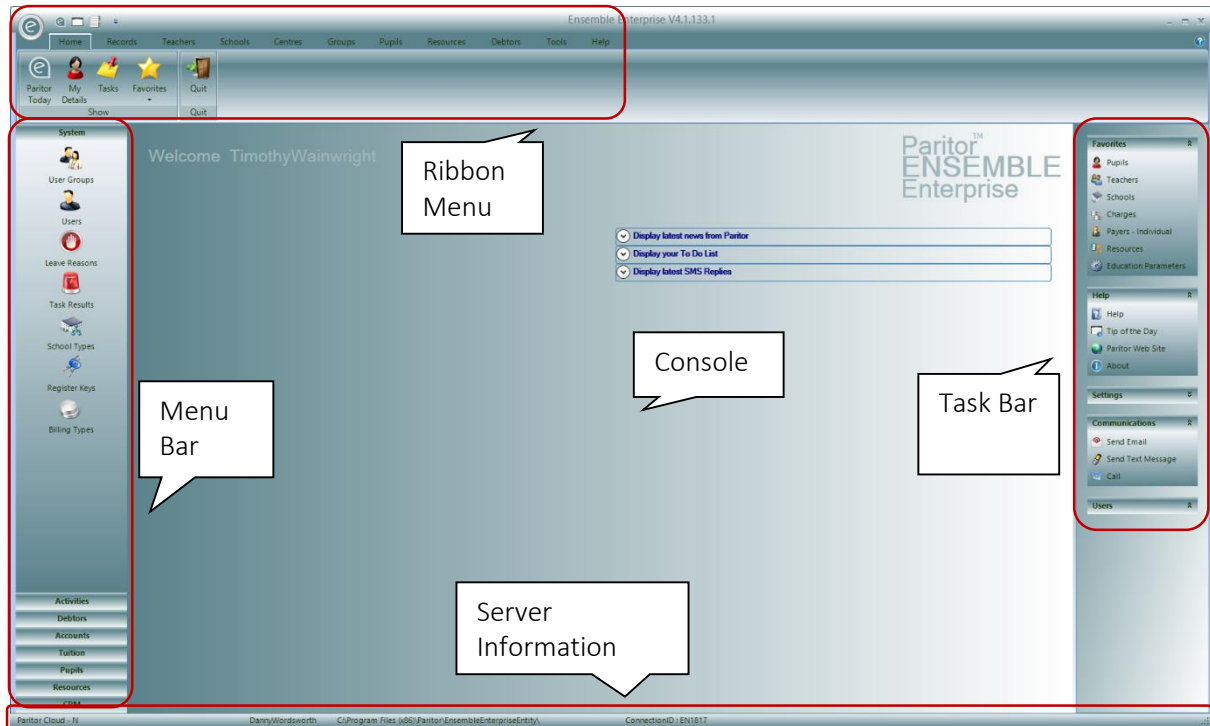
The main Ensemble interface comprises several discrete areas. They are dependent on the privileges you have as a User, and on the software modules you have installed. For example, if you don't have access to items on the Resources Menu, or you don't have the Resources Module installed, the Resources Menu will be blank.

2. Menu Bar

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Down the *left hand side* of the Console is a push-button menu containing many different sections. These provide access to different areas of the system. When you need *access to stored information such as records*, this is where you will find it.

3. Task Bar

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On the *right hand side* of the Ensemble interface is the Task Bar containing help and other links to resources. On the right hand panel above the Help Menu is a list of your Favourites. These are your

eight most frequently-used functions within the database. Clicking on one of these will access it's function. These are *frequently updated* as you use Ensemble.

4. Console

▶ [Watch the Video Tutorial here](#)

The *main body* of the Ensemble interface is known as the Console. It will contain either a web page or a list of information on a selected item. The initial web page that greets the User is called 'Paritor Today'.

5. Ribbon Menu

▶ [Watch the Video Tutorial here](#)

All Ensemble functions can be accessed from the Ribbon Menu and every window opened in Ensemble will contain one. They are *always located at the top of the window* and is the menu design used in the *Microsoft Office* family of products. The idea behind the Ribbon Menu is to display more functionality with as few clicks as possible.

The Ribbon Menu is organised with Tabs which cover the broad areas of the software. When you select a Tab, the options available in the Ribbon Menu relevant to that tab are displayed. The menu primarily used to *produce reports* from the records in the software and these options are contained within the different Tabs.

Navigation

This example demonstrates how the Console Ribbon Menu (available upon opening the program) works.

1. The *Tabs* are Home, Records, Teachers, Schools … highlighted by the red box.
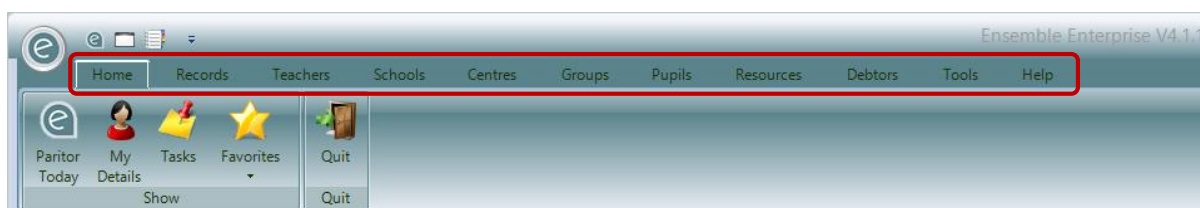
2. Here the *Home Tab* has been selected. The Ribbon Menu will allow the User to select from Paritor Today, My Details, Tasks, Favorites and Quit.
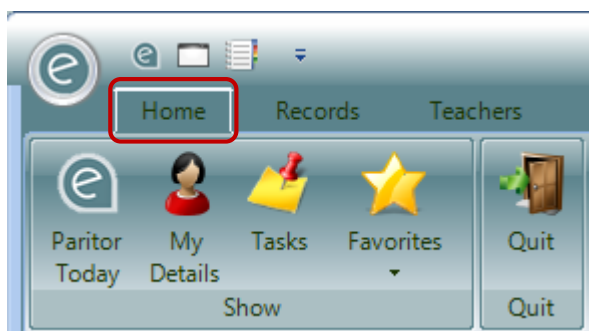
3. Now the *Records Tab* has been selected. The Ribbon Menu has changed to show options relevant to Records. These include **Paritor Today, New Charge, a dropdown menu to select defined lessons (known as Activities in Ensemble), List Items** etc.
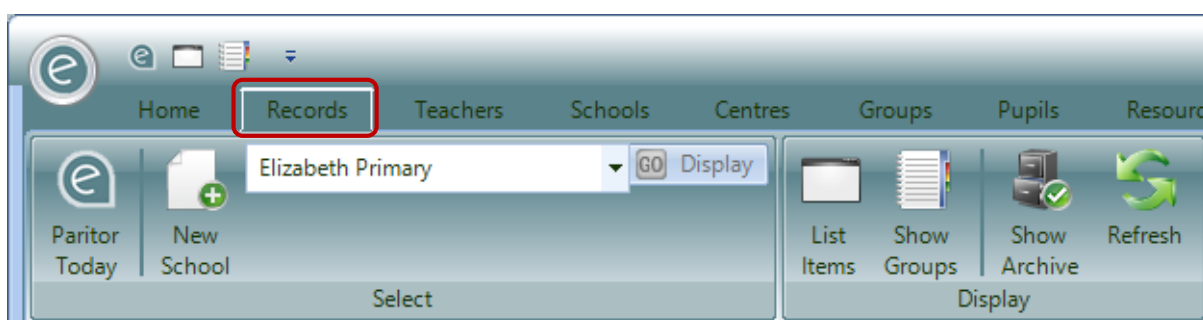
Therefore changing the selected Tab will show you different options *relevant to your selection*. The layout of the Ribbon Menu organises common functionality into groups and *varies the size* of the icons depending on their *importance* within that group.

Produce Reports

This example will briefly cover how to produce reports from the Ribbon Menu.
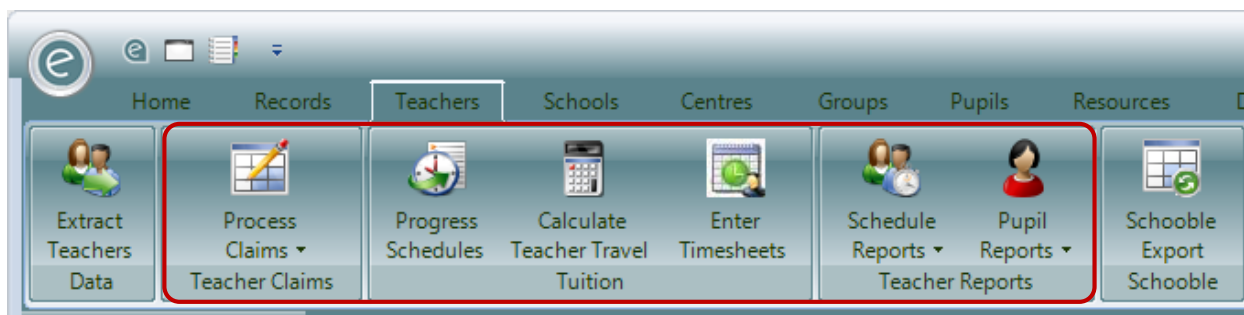
Here the *Teachers Tab* has been opened with our available functions. Inside the red box are various reports we can produce such as **Timesheets and Pupil Reports**.

Clicking other Tabs such as Schools, Centres and Groups will show reports available for each of these.

Extract Data

Data within the records in Ensemble can also be extracted to Paritor Insight by clicking the **Extract** button, when you want to performance further data analysis. This button is always *located on the left* within each Tab of the Ribbon Menu.
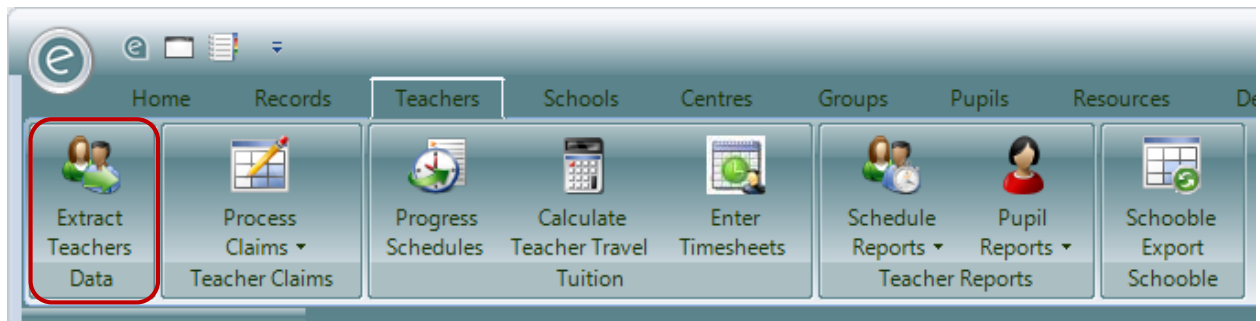
Here within the Teachers Tab, we can extract Teacher records by clicking **Extract Teachers** inside the **red box**.

6. Server Information

▶ [Watch the Video Tutorial here](#)

The *base of the Console* contains information about the current environment:
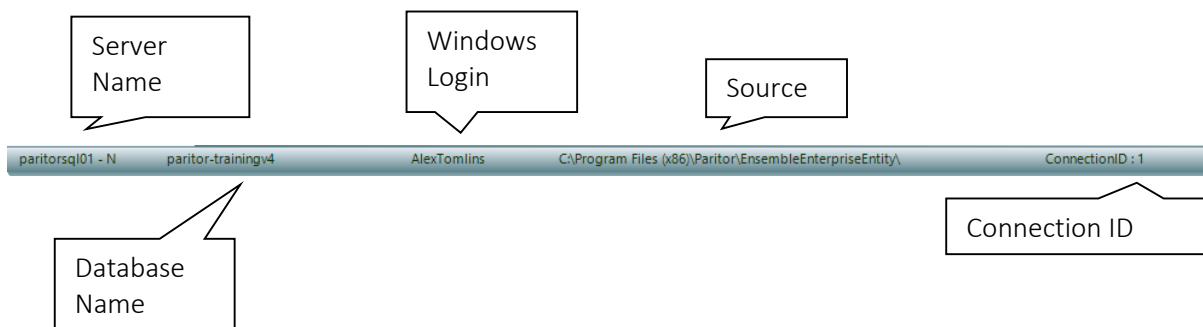
Common Tasks

This section will cover common tasks within Ensemble that Users will need to be able to perform such as creating and using records and data entry.

1. Finding/Searching Records

▶

A Record in Ensemble will contain all the information concerning a specific individuals and institutions such as Pupils, Teachers and Schools. Records are *accessed within the Menu Bar* on the left hand side of the Console Screen and are listed within the Console.

Once a Record is opened it will display a new window called the Record Card in which all the information concerning that particular Record can be viewed. For example a *Pupil Record Card* will display information such as *name, DOB, parents and tuition schedules*.

Example Search

In this example, we will look for a *Pupil Record*. Click:

Menu Bar > Pupils > Pupils

The console screen will be empty and there is a searching option at the top right which is displayed below:

(Eg; This is the Search for Pupils by Last Name)

Depending on the type of Record you are searching for there are *several different search options*, normally by Name or Postcode. When searching for Pupils by Name, it will perform a Surname search.

We are looking for a Pupil named *Lauren Abbot*. We therefore type *Abbot* into the search criteria displayed above). To run the search, click the Spyglass Icon in the red box. This will return a list of Pupil Records with last name of Abbot. Select the record by *double clicking*.

If the search criteria is left empty then *all available Records will be displayed in alphabetical order* upon beginning the search. This is displayed below:

Last Name	First Name	DOB	Address Line 1	Address Line 2	Town	County	Post Code	Tel Number	Current School
Abbot	Lauren	12/04/20	65 Teign Street,		Teignmouth,	Devon,	TQ14 7TA	01626771238	Teign School
Adams	Colin	16/02/20	65 Woodland Roa		Newton Abbot,	Devon,	TQ13 5RS	0162623132	Teign School
Ambler	Martin	06/02/19	12 Kangeroo Roa		Teignmouth,	Devon,	TQ14 6UD	01626778999	Abbotsbury School
Ambler	Martin	16/02/20							
Armstrong	Alan	17/01/20	7 Maudlin Drive,		Teignmouth,	Devon,	TQ14 6TA	01626123123	Hazeldown Primary School
Atkin	Victor	15/11/20	2 Deer Avenue,		Teignmouth,	Devon,	TQ15 4EE	01626828282	Hazeldown Primary School
Barber	Margaret	01/07/20	32 Ferndale Road,		Teignmouth,	Devon,	TQ14 8NQ	01626772534	Teign School
Bargette	Chloe	14/06/20	19 Bakers Road		Bakers Park	Newton Abbot	TQ12 7HA		Coombeshead Academy
Barrett	Darren	23/06/19	23 King Road,		Newton Abbot,	Devon,	TQ13 4UI	01626231888	Trinity School
Barton	Mikaela	23/06/19	12 Teignmouth R		Teignmouth		TQ14 3QL		Trinity School
Batley	Chris	16/08/19	73 Grange Drive,		Teignmouth,	Devon,	TQ14 6BB	01626770003	Teignmouth Community College
Beesley	Claire	12/06/19	21 Grange Street,		Newton Abbot,	Devon,	TQ13 7PP	01626637212	Coombeshead Academy
Bellamy	Dean	10/02/19	12 Kingteignton R		Kingsteignton		TQ12 9YA		Teign School
Bellamy	Sherrie	14/06/20	12 Kingteignton R		Kingsteignton		TQ12 9YA		Trinity School
Bird	Paul	10/04/19	83 Forde Street,		Teignmouth,	Devon,	TQ12 6FS	0162671231	Stover School
Black	Gregory	16/03/20	32 Telegraph Roa		Teignmouth,	Devon,	TQ14 7BN	01626779898	Teignmouth Community College
Blue	Ryan	19/08/19	643 Telegraph Ro		Teignmouth,	Devon,	TQ14 7UL	01626776621	Teignmouth Community College
Bowdler	Sarah	23/07/19	45 Oracle Way		Hamilton Dirve	Newton Abbot	TQ12 9OL		Trinity School
Bowdler	Tom	13/10/19	45 Oracle Way		Hamilton Dirve	Newton Abbot	TQ12 9OL		Trinity School
Bradley	Emily	06/03/19	92 Buckfast Road,		Teignmouth,	Devon,	TQ14 0PL	012674747329	Teignmouth Community College
Bradley	Laura	19/05/19	23 The Avenue		The Avenue	Newton Abbot	TQ12 3LP		Coombeshead Academy
Bradshaw	June	16/03/19	102 June Street,		Teignmouth,	Devon,	TQ14 0RR	01626775678	Teignmouth Community College
Brazier	Tom	10/05/20	14 Rancar Avenue		Torre	Torquay	TQ1 1ES		Trinity School
Brown	Clifford	25/09/20	23 Merry Street,		Teignmouth,	Devon,	TQ14 6LO	012667721321	Hazeldown Primary School
Browne	Michael	07/03/20	73 French Street,		Teignmouth,	Devon,	TQ14 7TT	012667721342	Hazeldown Primary School
Brownlow	John	11/02/20	73 Green Lane,		Teignmouth,	Devon,	TQ14 0UU	0162672731	Hazeldown Primary School
Burns	Harry	06/08/20	33 Sandford View		Exeter	Devon	EX1 3SE		
Camp	Bethany	05/07/20	12 Alla Break		Alla	Newton Abbot	TQ12 2EZ		Trinity School
Camp	Jamie	09/05/20	12 Alla Break		Alla	Newton Abbot	TQ12 2EZ		Trinity School
Carter	Andrew	10/07/20	62 Higher Close,		Teignmouth,	Devon,	TQ14 7JA	0162631342	Hazeldown Primary School
Clark	Luke	19/07/19	74 Woodland Ave		Teignmouth,	Devon,	TQ14 7TQ	0162677000	Teignmouth Community College
Clarke	Kieran	22/10/19	58 Bourneville Clo		Weston Super Ma		RH24 8AN		Teign School
Clarke	Robert	24/06/19	58 Bourneville Clo		Weston Super Ma		RH24 8AN		Teign School
Clausen	Karl	09/11/19							
Clement	Jason	15/02/20	7 James Drive,		Newton Abbot,	Devon,	TQ13 6PO	0162673212	Coombeshead Academy

Search Shortcuts

Ensemble has built in shortcuts to make searching for Records easy.

By placing a * in the query you can search by:

Starting with _____* (Enter text before the *)

Contains *_____* (Enter text inside both *)

Ends with *_____ (Enter text after *)

For example to search for a Pupil's postcode containing 'EX', type *EX* into the search box as displayed below:

Filtering

 [Watch the Video Tutorial here](#)

Within your search criteria, you will also be able to *filter* the data in terms of a specific field. This can be done by clicking the appropriate Filter icon for the column heading. This is displayed below:

This is an example of the location of the filter icons in the column headings:
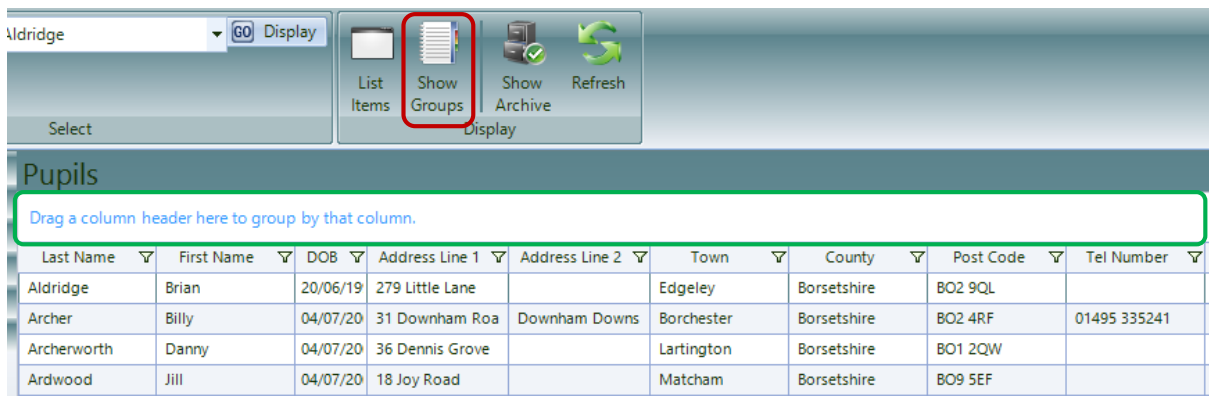
Grouping

After you have completed a search for records, in addition to filtering, you can also *group* the data by a specific field. When data is grouped, it is split into sections assigned by the group and ordered by this.

For example a useful grouping for a Pupil Record Card search is by School. This will firstly order the search by the Schools and then within each *grouping* for the School will be an alphabetical list of pupils in that School. Therefore if you wanted to easily view the Pupils with respect to their School, then grouping the data is a powerful tool to do this.

To allow the data to be grouped, click:

Records (Ribbon Menu) > Show Groups

This will open a *white space* above the column headers as displayed below:

Now to group the data by a column header, *click and drag* it into the white space. The data will now be grouped:

Pupils

Last Name	First Name	DOB	Address Line 1	Address Line 2	Town	County	Post Code
Current School : (3 items)							
Daniels	Adam	19/09/19	82 Cheddar Grove		Little Coxley	Borsetshire	BO8 3QM
Sally	Jane	27/02/19	90 Jack Road		Faircastle	Borsetshire	BO7 3DS
Wilson	Matt	01/06/20					
Current School : Ambridge Grammar School (13 items)							
Curfew	Jessica	20/07/20	13 Dairy Lane		Waterley Cross	Borsetshire	BO8 3TY
Fisher	Lawrence	30/03/20	999 Help Road		Churcham	Borsetshire	BO5 4ZH
Forest	Zoe	06/02/19	111 Charlie Street		Copeley	Borsetshire	BO4 7RE
Gibson	Katie	07/07/20	189 Blagdon Lane		Herrick	Borsetshire	BO3 8IE
Green	Wendy	20/10/20	69 Happy Lane		Hazelhust	Borsetshire	BO4 1QS
Jarvis	Phillip	07/02/20	6 Mile Road,		Tenbury,	Borsetshire,	BO3 7GS
Nigels	Tony	05/05/20	35 Downing Lane		Lower Pendon	Borsetshire	BO6 2GF
Pope	Jonathan	04/06/20	123 Amazing Roa		Faircastle	Borsetshire	BO8 9KL
Ranger	Christian	13/02/19	20 Holy Road		Upper Croft	Borsetshire	BO5 2AZ
Shen	Suzy	13/07/19	15 Star Lane		Netherbourne	Borsetshire	BO2 9QW
Sky	Victoria	04/07/20	7 Jazz Road		Lower Hinton	Borsetshire	BO9 4RT
Tailor	Henry	12/06/19	10001 Galaxy Roa		Comberley	Borsetshire	BO1 9PE
Wilson	Matt	06/01/20	26 Upper Cross St		Herrick	Borsetshire	BO10 6EK
Current School : Copeley Academy (6 items)							
Archerworth	Danny	04/07/20	36 Dennis Grove		Lartington	Borsetshire	BO1 2QW
Barham	Leigh	17/03/20	64 High Grove		Westbury	Borsetshire	BO8 3ER
King	Alice	14/05/19	190 Sidwell Lane		Comberley	Borsetshire	BO3 7LZ
Lloyd	Azealia	25/10/20	12 Brick Street		Atherton	Borsetshire	BO3 6FG
Makepeace	Rosa	05/11/20	90 Wooders Close		St Johns Parva	Borsetshire	BO1 9QZ
Pocket	Timmy	31/12/19	35 Firewood Lane		Matcham	Borsetshire	BO2 6AS

As can be seen, the data is now grouped by the *Current School* of the Pupils. You may group the data again, by dragging another column into the white space.

To *ungroup* the data click:

Records (Ribbon Menu) > List Items
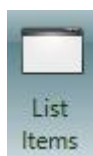
2. Creating and Updating Record Cards

▶ [Watch the Video Tutorial here](#)

When clicking on specific Tabs in the Menu Bar, another Tab in the Ribbon Menu will automatically appear relating to Records called the **Records Tab.** This Tab contains functions such as **New, Search and Archiving.**
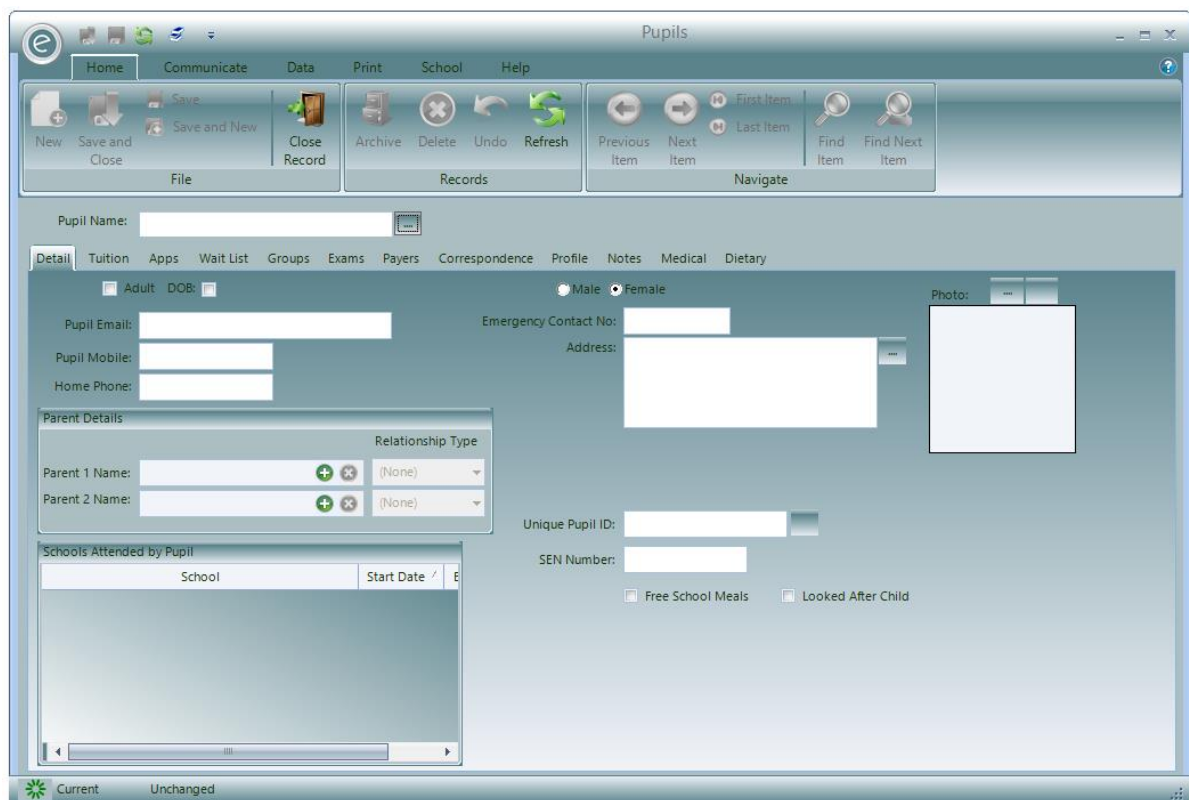
Note: Remember the Records Tab in the Ribbon Menu will display options relating specifically to the records currently viewed from the Menu Bar.

To create a *Pupil Record Card*, click:

Pupils (Menu Bar) > Pupils > New Pupil
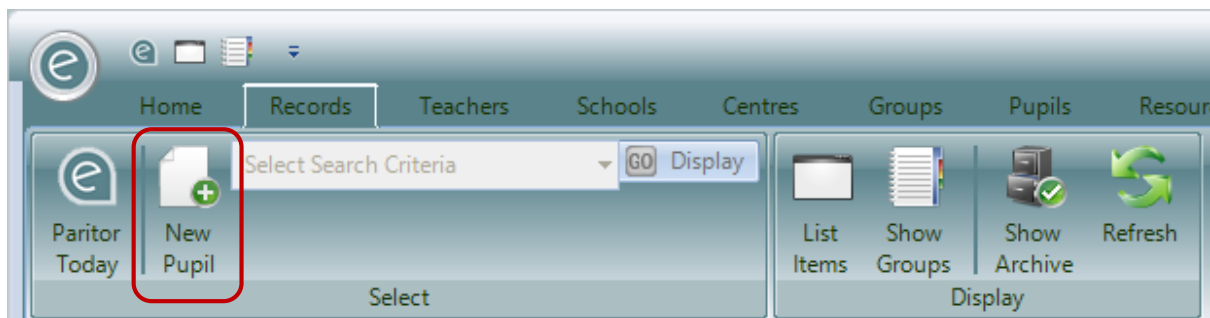
This will bring up a *blank Record Card* as demonstrated below.

From this view you can then fill in the information shown.

To save, you will need to select **Save and Close/and New.** These functions are currently greyed since nothing has been entered.

Once saved, the **Refresh** button will update the list details with any new information.

Updating a Record Card

Let's update a Teacher's Record Card. To access:

Menu Bar > Tuition > Teachers > {Select a Teacher}

The window will look like this:

The **Home Tab** is automatically selected and will allow the User to update the Record Card. The Home Tab contains these functions in the Ribbon Menu.

Adds a new Record Card.

Saves and Closes the Record Card.

Saves the Record Card, or saves and opens a new Record Card.

Closes the Record Card.

Archives the Record Card.

For more information please refer to the **Archiving Records** section of the Help Guide.

Deletes the Record Card forever.

Undoes the last action on the Record Card.

Moves you to the **Previous** or **Next** Record Card in your list from the Console .
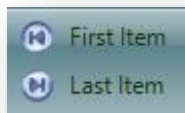
Moves you the **First** or **Last** Record Card in your list from from the Console.

Record Card Navigation

 [Watch the Video Tutorial here](#)

Record Cards are *divided into Tabs* in a very similar style to the Ribbon Menus. Clicking on a specific Tab will display the information related to it, while information related to others is hidden. This helps to organise the information within the Record Card and make it easier to find. Though every Record type will display different Tabs, the format is the same throughout.

This is the Record Card for Lauren Abbot:

The red box is highlighting all the different Tabs available to view for a *Pupil Record Card.* Upon opening a Pupil Record Card, the Detail tab is automatically selected which contains information such as age, gender, contact information, parent and School details.

The window below shows how the Record Card is displayed when the Tuition tab next to Detail is clicked:
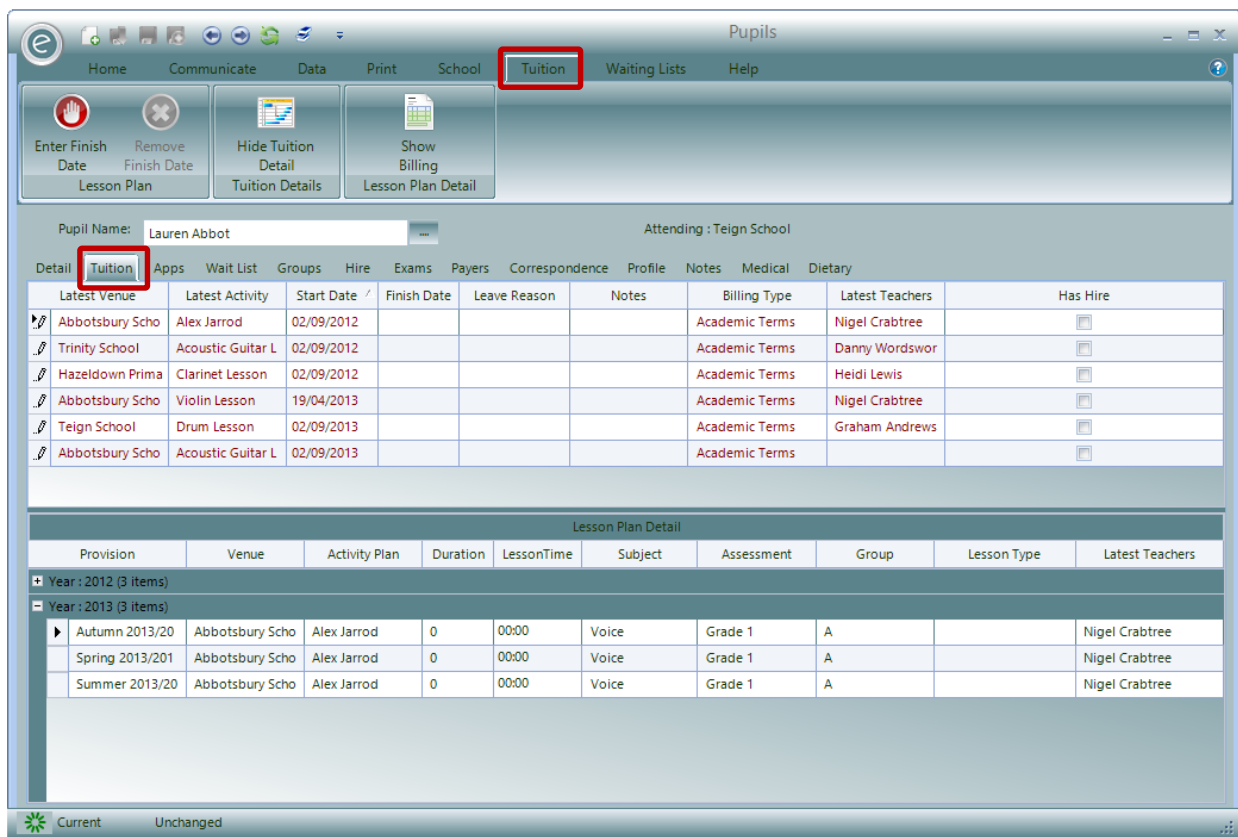
The Record Card now displays Tuition related information such as the *lessons attended, where they are attended and the Teacher*.

There is also now a Tuition Tab in the Ribbon Menu with specific functions related to Tuition. This will occur every time a different tab is selected in the Record Card

3. Contacts

All Records created in Ensemble with contactable information are all based on a *Contact*. This Contact will then be used a base and can be assigned *roles* such as Pupil, Payer, Parent or Teacher. For example a contact known as Mr John Smith may exist as a Pupil and a Payer in the Ensemble database if they pay for their tuition.

A Contact is created if you were to create them for the first time as a Teacher or Pupil.

You can also create a Contacts by clicking:

CRM (Menu Bar) > Contacts > New Contact

This will display the window below:

In this Record Card you will be able to enter their basic information such as **Name**, **Address**, **Email** and **Telephone Number**.

You can also assign them a **Role.** These include:

- **Pupil**
- **Creditor**
- **Debtor**
- **Employee**
- **Teacher**
- **User**

If a Contact is given a Role they will also appear as that Record in Ensemble, for example if you make them a Pupil, a corresponding Pupil Record will appear.

A Contact can be assigned additional Roles by clicking **Add Role**.

To save the Contact click **Save and Close**.

4. Finding an Item/Record

 [Watch the Video Tutorial here](#)

Within a Record Card, if you need to search for a new Record you can either use the **Find Next Item** icon or the **Find Item** icon which are displayed below:

Clicking **Find Item** will take you into the **Find Screen**, shown below. Remember to save the record you had previously been in.

Here we can define a new search criteria which can identify a single Record or another set of Records.

Type your search criteria into the **Find What:** field and select where to use the search in the **In What:** field.

The type of searches that can be done are:

Start of Field	Ensemble will only look at the beginning of the record name for your search criteria.
Containing	Ensemble will look for any part of the record name for your search criteria
Match Whole Field	Your search criteria must match the record name for it to be found

Then click **Find** / **Find Next** to search for the Record.

Note: This is very useful when you need to manually scroll through a collection of Records that are different to the previous search from the Console screen!

5. Creating Custom User Fields

 [Watch the Video Tutorial here](#)

In a Record Card you can *add User definable tabs and fields* by clicking on **User Fields.** To access click:

Data Tab > User Fields

This is displayed below:

Clicking this icon will show the following screen:

You will see the *all the Tabs in the Record Card listed* down the left hand side; by selecting one of these tabs and clicking the New Field icon you will add a new Field with default information *within that tab*. You will need to edit the Field Name, Label, Position and Characteristics to your requirements.

The label displayed at the bottom called *(MainForm)* is the area above the tabs in a record card. This is highlighted in the screenshot below for a Teacher's Record Card:
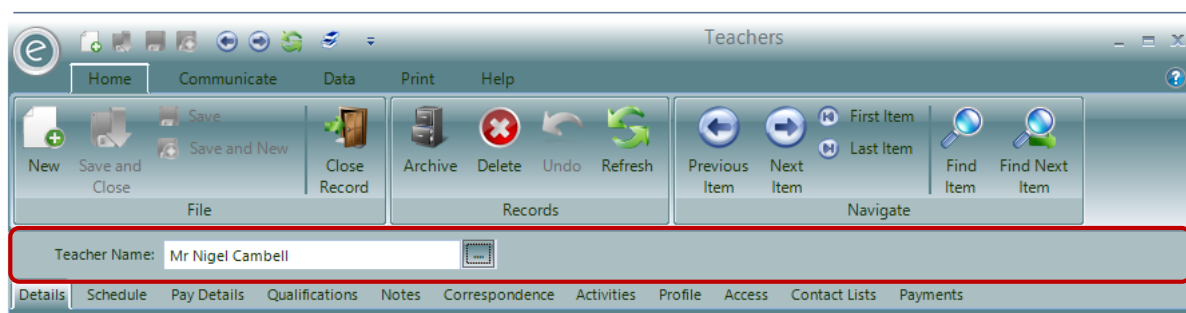
Therefore if you create a User Field within this, it will *always be displayed* since it is above the tabs below.

Create a New Field

Clicking New Field will open the window below:

You can define the Type of field and the available options are:

Text	Straightforward text field is created
DateTime	A date field is created
Numeric	A field is created in which only *integers* (whole numbers) can be written. You can also specify a minimum and maximum value
Currency	Identical to the Numeric field but with a £ included
Yes/No	Creates a tick-box
Decimal	Similar to the Numeric field but numbers up to 2 decimal places can be written. Also can specify minimum and maximum values
List	Create a customised *dropdown menu*. You can specify each of the available options

Important: Once a Field has been created, its type *can't be changed*.

You can also define the:

Name	Give it a name
Top	How many pixels this is displayed from the top of the Tab
Left	How many pixels this is displayed from the left of the Tab
Width	The width pixel length

Height	The height pixel length
Multiline	Ticking will allow multiple lines
Max Length	The maximum amount of characters that can be entered. If left as 0, then the maximum will be infinite.

When your Field has the correct criteria click **Apply Changes**. To view your changes you will need to exit the Record Card and re-enter. This Field will be *available on all Record Cards of that type*.

Note: If you use these Fields to hold standard data rather than the fields already provided in Ensemble they will not be populated on Standard forms.

If you wish to edit the Field then select it and click **Edit Field**.

Locked Tabs

All the factory-built tabs in the record cards such as Details and Schedule will have a **Lock symbol** next to them to indicate that they *can't be deleted*. This is displayed below:

Important: No fields that are *created within them* can be deleted either. This prevents data being accidently wiped and lost throughout all these records. If a customised data field is no longer required then it can be archived. This allows it to be restored if a mistake is made or if it is required again.

Create a New Tab

In the same manner you can add a **New Tab** to the Record Card by clicking the icon displayed in the **red box** below:
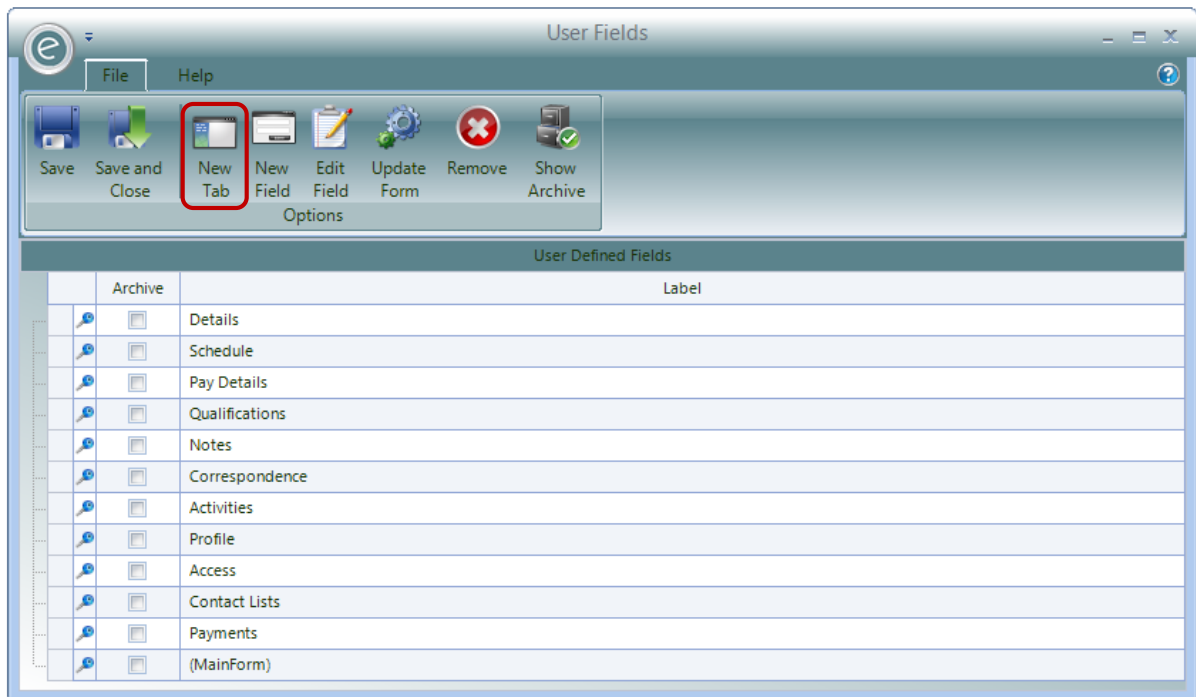
6. Data Entry

Record Cards *contain all the data* entered into the system. The User is simply required to enter data, select a value from a drop-down list, or click on a tick-box or radio button. Other fields are managed by more complex controls.

To create a new Record from a Record Card, click the New button at the top left of the screen. This is displayed below:

Name Validation

One of the first pieces of information in a Record Card is the Name. Below we have named this Pupil *Alex Tomlins*:

Whenever a person's name is entered, the *system automatically splits it up into its constituent parts*. These are displayed in a separate window consisting of 3 fields which are:

- First Name
- Middle Name
- Last Name
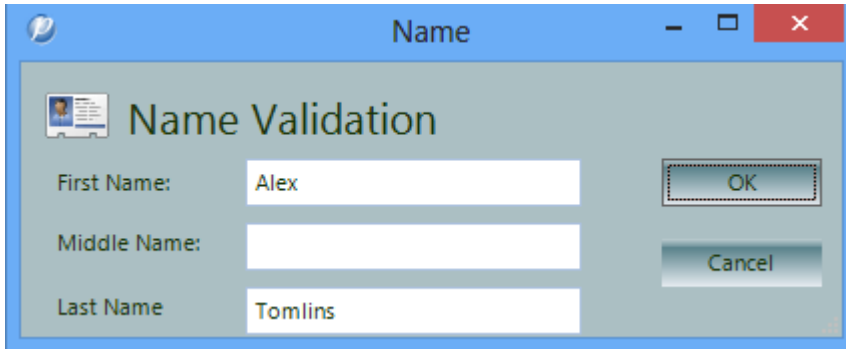
As each section is extracted from a person's name, the text is checked and converted into an Initial Capital followed by lower-case letters. Each part of the name is stored in the database as a *separate item* and is reconstructed when displayed by the system. This allows Users to select the desired parts of a name when extracting data from the database.

E.g. If you're creating a mail-merged document, you might want to address your letters by recipient's titles and surnames, thus not including their first or middle names.

A Name Validation control consists of an area where the name is displayed and modified with a button to its right, which is highlighted in the red box below:

Clicking on this button will bring up the Name Validation window below:

The Name Validation window is automatically displayed when any amendment is made to the name and the User leaves the control to move to another field.

Address Validation

Address Validation is very similar to Name Validation. As with names, addresses are split into fields and displayed in a separate window for validation. The fields of an address are:
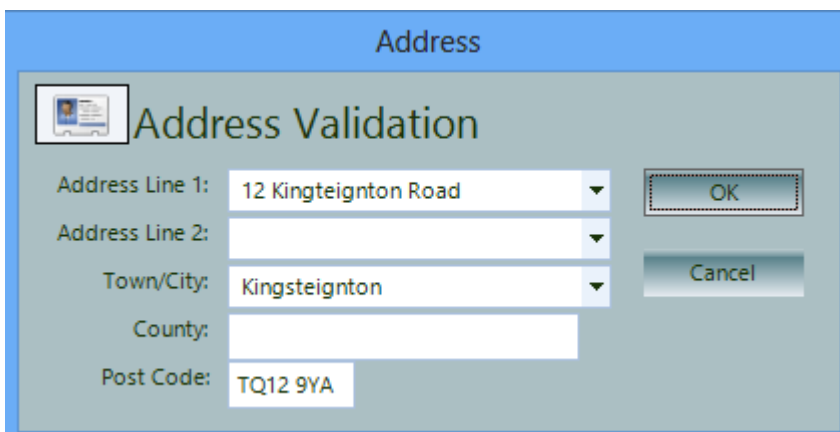
- Address Line 1
- Address Line 2
- Town/City
- County
- Post Code

An Address Validation control consists of an area where the address is displayed and modified with a button to its right, which is highlighted in the red box.

Clicking on this button will bring up the Address Validation window displayed below:

The Address Validation window is automatically displayed when an amendment is made to the address and the User leaves the control to move to another field.

Linked Contacts

If the address details or the telephone details (*Landline 1*) are changed in a contact record that is linked to at least one other contact record (i.e. a Pupil and a Parent) then Ensemble will allow you to copy those changes across to the other contact records.

This is displayed in the window below:

All the linked contacts will be displayed here.

The column highlighted in the red box will allow you to specify which records to update with the changes. Tick a row if you would like to update their details.

The column highlighted in the green box indicates the relation of these contacts to the original contact i.e. Payer, Pupil, Parent.

The columns highlighted in the blue box display the name of the contacts, their current address information and their primary telephone number.

Once you have chosen which records to update, click **Save and Close**.

7. Record History

▶ [Watch the Video Tutorial here](#)

You can view the history of which users have viewed and edited data for a Record by clicking on *Record History* button.

This can be accessed by:

Opening a Record Card (Menu Bar) > Data tab > Record History

This is displayed below for a Pupil Record Card:
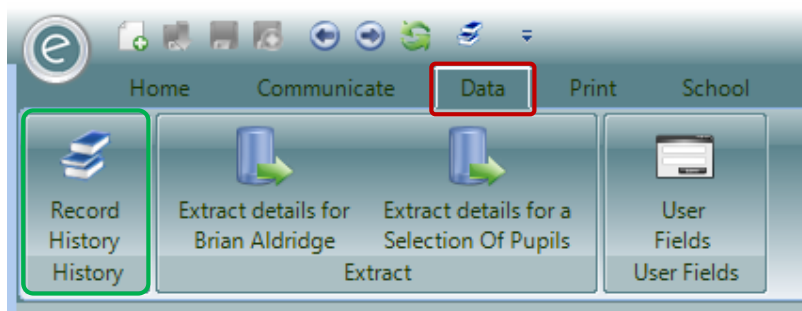
Once clicked this will display the window below:

You will be able to specify the **date range** for the log and a **User**.

When the *Type* column header indicates that the Record was *Updated* or *Created* then you can click on the **+** on the left of the row to expand the row and see more information.

8. Capturing information via Screenshot

This function will allow you to *capture a screenshot of the screen* you are in and either **Email, Print or Save** the information. The system will default to say you'd like to email your screenshot to Support at Paritor.

These options are displayed below and can be accessed by clicking on the **Help Tab** in the Ribbon Menu of the Record Card (Moreover they can be accessed from *any* Ribbon Menu):

Below is an example illustrating how to email a screenshot from Ensemble after clicking **Capture and Email**:
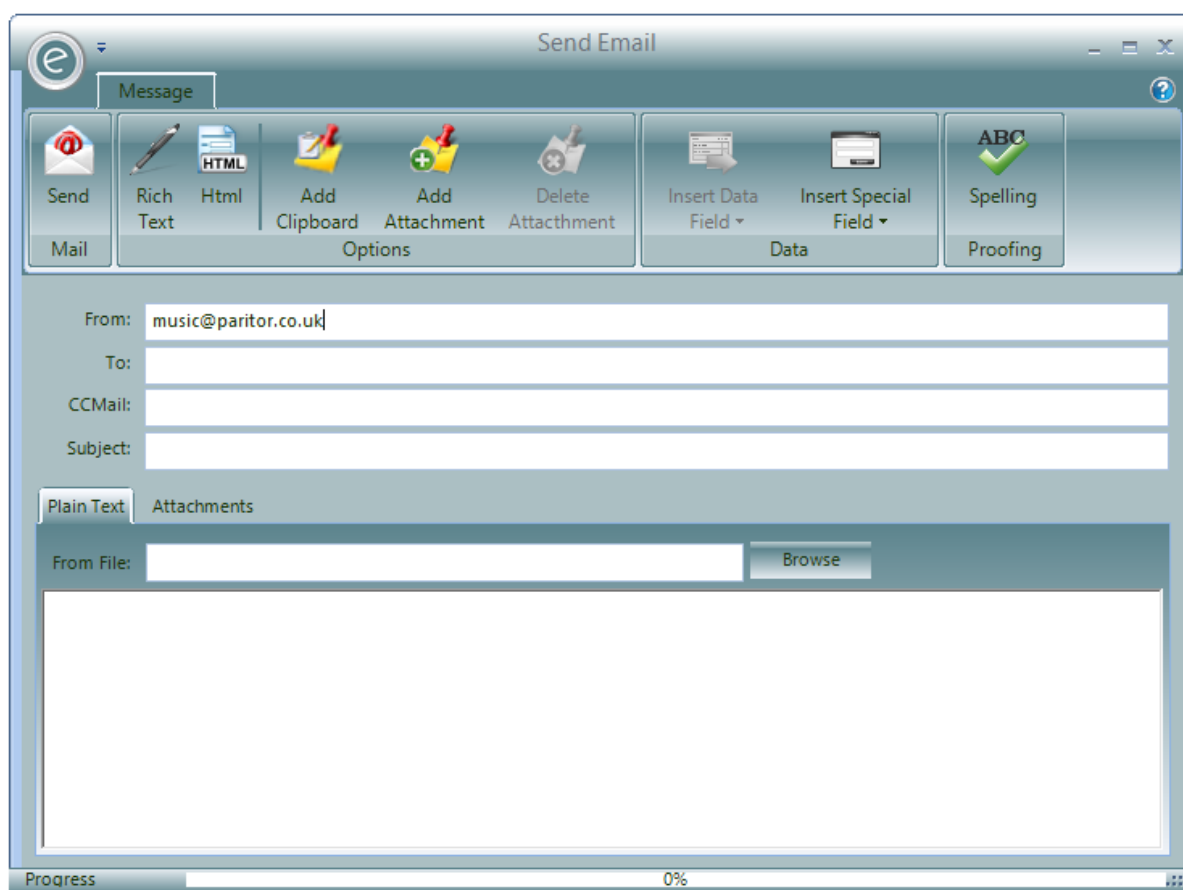
9. Archiving Records

▶ [Watch the Video Tutorial here](#)

Records within Ensemble can be archived when they are *no longer required*.

This is *preferable to deleting them*, because deleted items will leave holes in the history of your data. Ensemble keeps a full history of everything you do, year on year, so it is *important that information is retained*.

Archiving is useful for Resources that have been written off, Schools that have closed and Teachers whom you no longer employ. By default, archived Records do not appear in any Record list.

Show Archive

▶ [Watch the Video Tutorial here](#)

To display archived items when searched go to:

Records (Ribbon Menu) > Show Archive

The **Show Archive** button is displayed below:

Now the search results will contain both current Records and archived Records.

Note: Clicking **Show Archive** will *not automatically display archived Records*. It merely allows them to appear in a search.

You can hide the archived Records again from the search by clicking **Hide Archive** displayed below:

Archive and Restore a Record

 [Watch the Video Tutorial here](#)

To archive a Record, open its Record Card and click on the **Archive** button:

Ensemble will check that you really want to archive the item.   This is to stop items being archived by mistake. Items that have dependencies in the database *should not* be archived, as this will cause gaps to appear in your data.
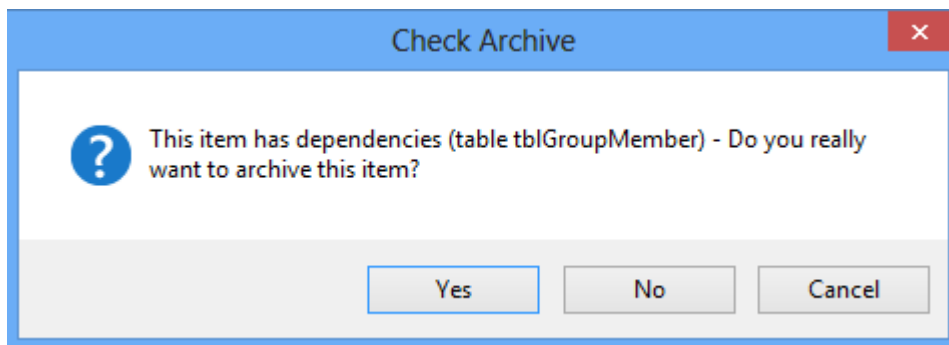
To restore an archived item, open its Record Card and click on the **Restore** button:

10. Specify How Contacts Receive Reports

As a default setting, all of your contacts in Ensemble such as Pupils, Teachers and Payers will receive *published Reports* by email. These documents may be Invoices, Registers or any Report that is available in the software For example, if you were to produce a Register for the term all your Teachers will receive this report via email. However this setting can be changed so that this Report is printed as a default. This is known as the *User Profile.*

You will be able to edit this setting for each type of Report that a contact may receive. It can be done on a system wide basis or individually via their Record Cards.

Note: Changes made on individual Records will *override* any system wide settings.

Note: For more information regarding how to publish documents please search for **Publishing and Printing Reports**.

User Profiles - System Wide

To set the system wide default User Profiles click:

Tools (Ribbon Menu) > Housekeeping > User Profile Defaults

This will display the window below:

All available Document Types are listed in the **Available Document Types** section, highlighted by the **red box**. Select the Document Type and click **Add >** to transfer to the **Allocated Document Types** section, highlighted by the **green box**.

Publish Method   Select the preferred distribution method for this document e.g. email or print

Text Notification   Select if you want to notify the contact by text as confirm

Click **Add All >>** to select all. To remove a selected Document Type click **< Remove** to transfer back. Click **<< Remove All** to remove all.

Defaults User Profiles can be constructed for

- Teachers
- Schools
- Payers
- Pupils
- Parents

There is a tab for each one.

Click **Save and Close** when finished.

User Profile - Individual

The User Profiles for the available Records above can all be viewed and edited in the individual Record Card. This is all done within a tab called Profile.

For example in a *Teacher Record Card*:

Tuition (Menu Bar) > Teachers > Open a Teacher Card > Profile tab

This will display the window below:
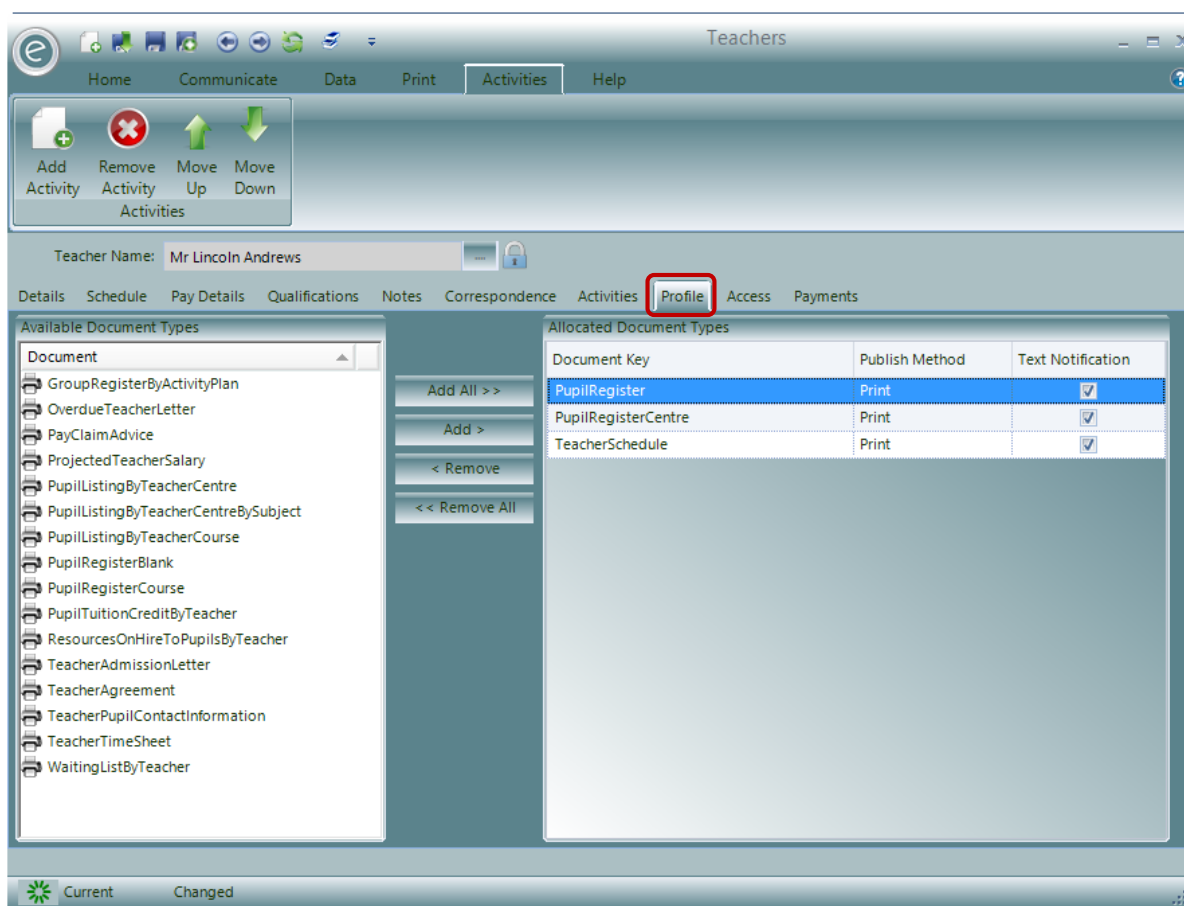
The options in the tab are identical to those within Housekeeping.

When you have finished making changes for this Record click Save and Close.

11.   Parameters

▶ Watch the Video Tutorial here

In order to customise the system so that it best suits the way you operate, a set of *Parameters* are available. By carefully selecting the correct options for each of these parameters you can tailor the system to the way you work.

Parameters are found in:

Tools (Ribbon Menu) > Parameters

The Parameters are divided up into four areas, these are:

Configuration Settings These parameters hold details of your business and system configuration details.

Education Parameters Information on what functions with the system you wish to use, variable field names, options on Teachers' pay and connection details for links to external database systems.

Finance Parameters Various options on how you calculate billing and manage your debt.

Online Portal Parameters Various options for altering online parameters.

Click on the above links for more details on each Parameter. The options in the Parameters will be extensively covered throughout this manual.

Allocating a Shared Location Folder

A shared folder can be allocated to use for or exporting data to or saving customised Reports. This is done in the *Configuration Settings,* by clicking:

Tools (Ribbon Menu) > Parameters > Configuration Settings > Settings tab

This will display the window below:
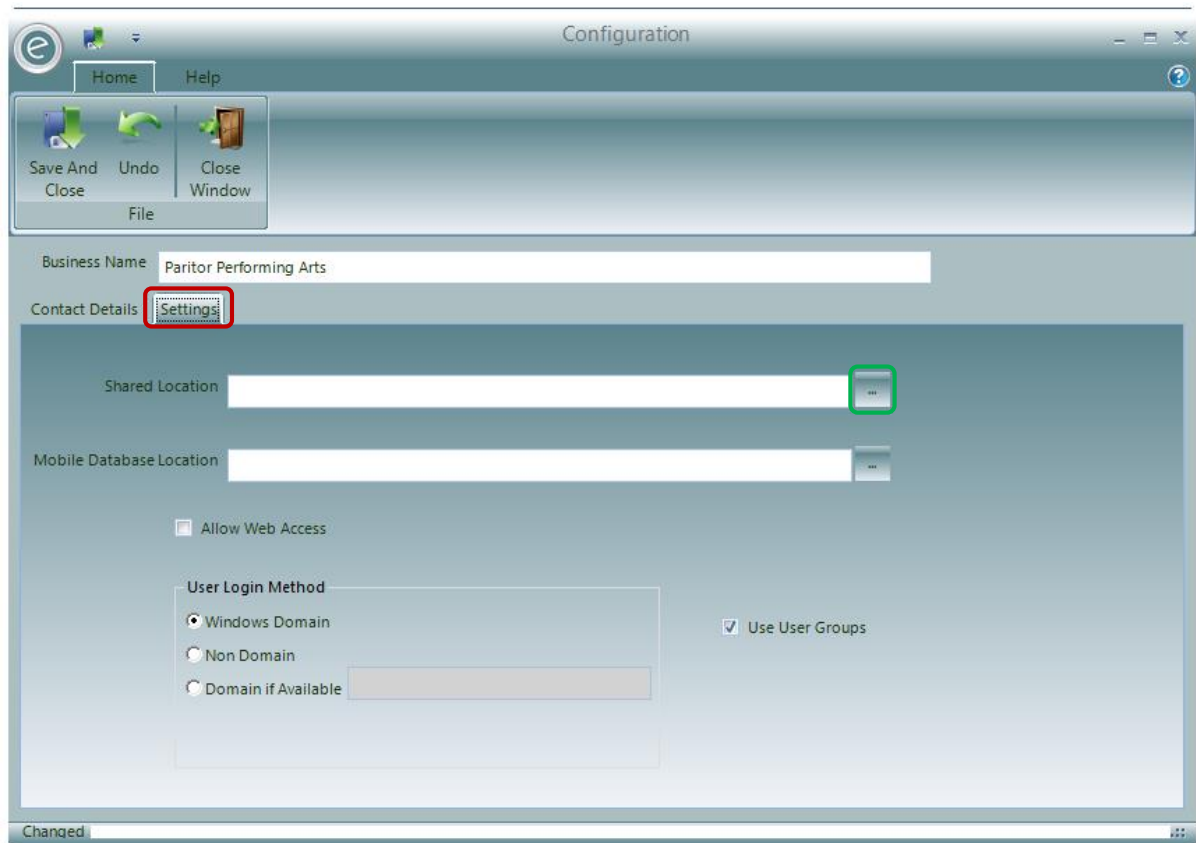
You will then be able to browse for a folder by clicking the **Browse Icon** next to **Shared Location**. This is highlighted in the **green box**.

Click **Save and Close** once a folder has been chosen.

Use Country in Address Information

As a default, Ensemble will not display the country in the address of a contactable Record. If you want this to be visible, it can be enabled in the *Configuration Settings*. To do this click:

Tools (Ribbon Menu) > Parameters > Configuration Settings

This will display the window below:

You will need to tick **Use Country In Address** as highlighted by the **red box**.

You can then enter a default country to be used in an address in the **Country** field.

Click **Save and Close** to save.

12.   Getting Help

Ensemble provides many sources of help. These include:

- **Paritor Ensemble Help**
- **Paritor Website**
- **About Paritor Ensemble**
- **Paritor Blogs**
- **Support Tickets**

To display all the options for getting help on Paritor Ensemble software you can click:

Ribbon Menu > Help

Paritor Ensemble Help

By clicking on the **Display Help** icon (above) you will be able to see the complete help pages displayed below:
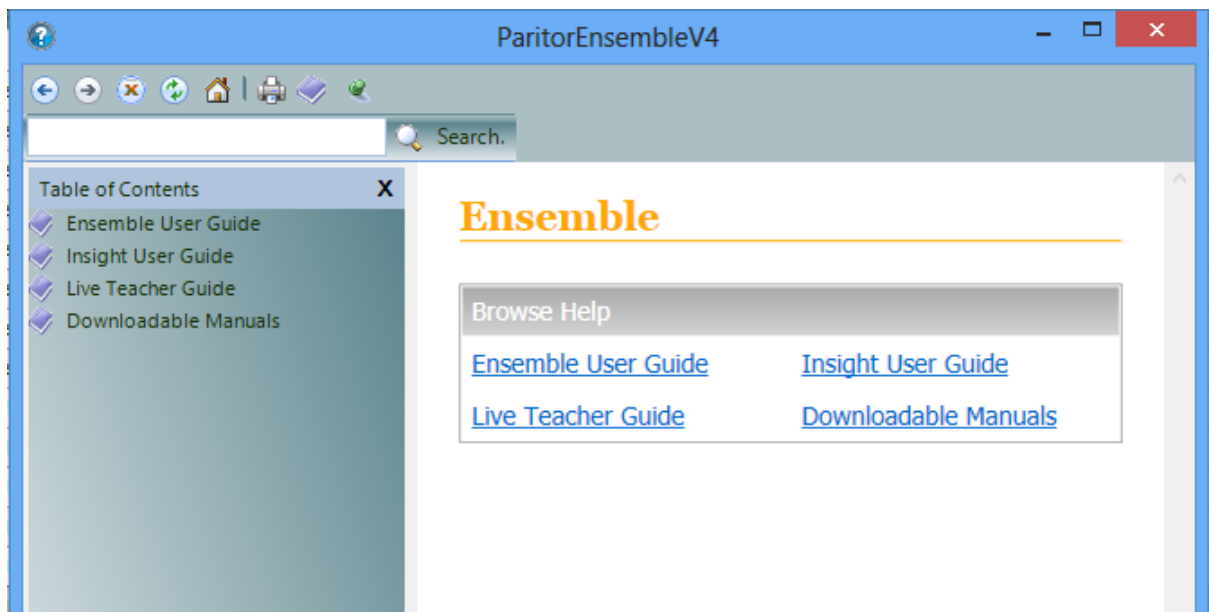
Software Information and Updates
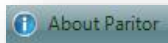
By clicking on the About Paritor icon (above) you will be able to see:

- Company information

- Information about the software and information about your specific licence such as Connection ID and Password.

- Log of updates and changes to the software – under the Change Log tab

There are also hyperlinks to our support email address and the Paritor website.
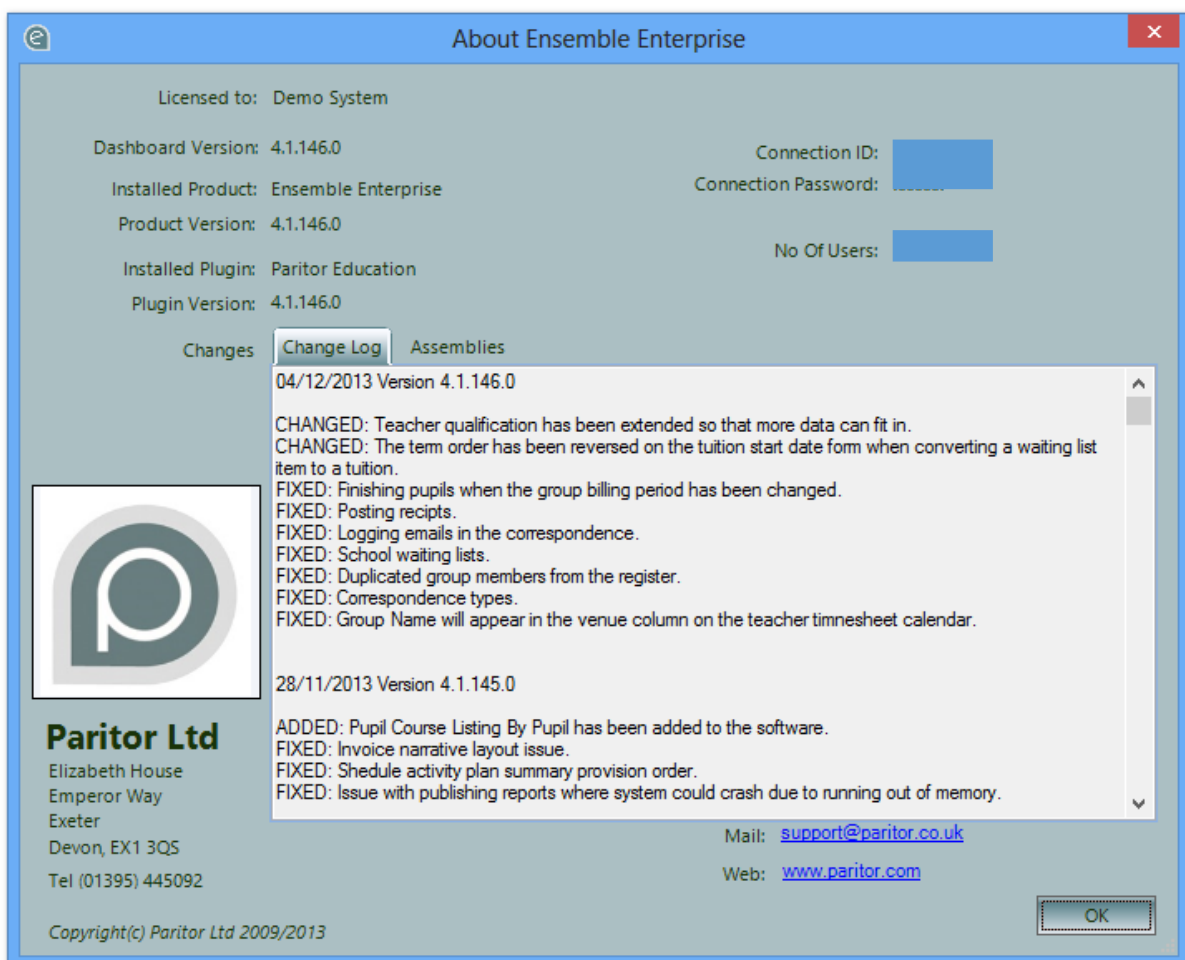
Support Tickets

Overview

To get help with using the system from one of our support team or to raise an issue regarding the software, you can use the built in support ticketing facility. This manages queries from beginning to end, alerting you when changes are made to a ticket and provides a history of how the question was answered or the issue resolved.

The Support Ticket Manager

Support Tickets are created and viewed via the *Support Ticket Manager*. This can be opened by:

Console Ribbon Menu > Help > Support Tickets

Or

Right click on the system tray icon (bottom right of computer screen) to display the following menu from which you can select **Open Support Tickets**.
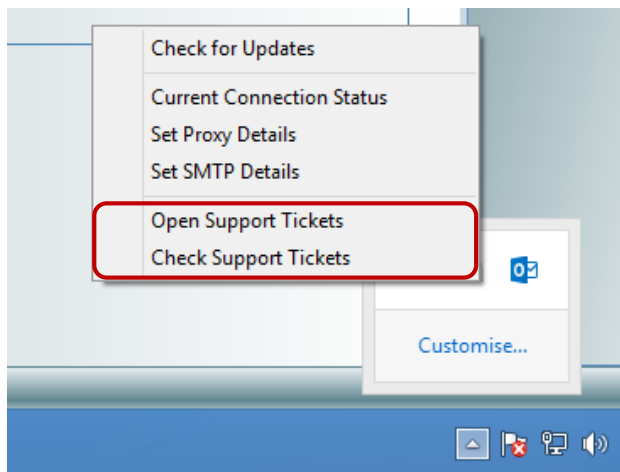
The window below displays the Support Ticket Manager:
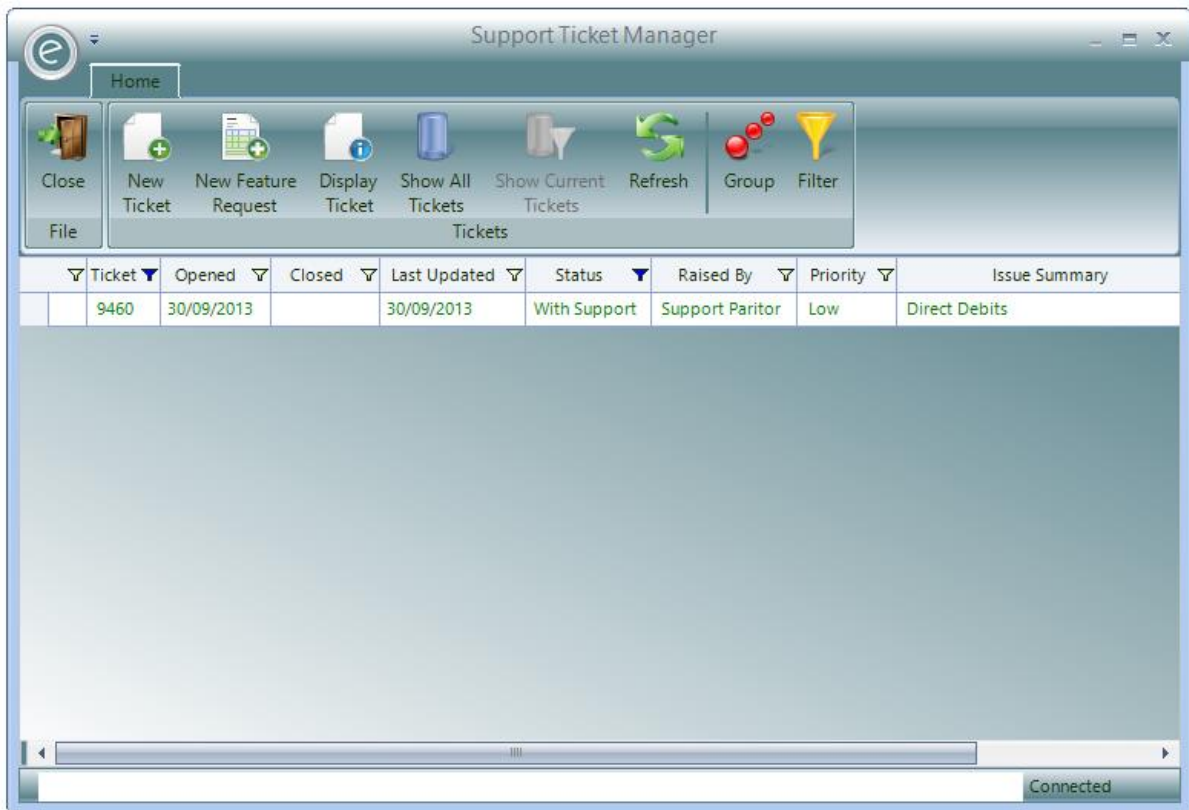
This form displays all open tickets raised by Users at your organisation.

Note: It is possible for more than one User to contribute to a ticket.

You can organise the list using the **Group** and **Filter** buttons or by sorting it into different orders simply by clicking on a column heading.

The **Group** button displays a grouping area at the top of the list. You can *drag columns* into this area and in doing so the list will be grouped by that column. As an example, you can group tickets by the User who initially raised the ticket by dragging the **Raised By** column into the grouping area.

Clicking on the **Filter** icon allows you to filter your tickets by specific traits. With Filtering on you can click on a columns filter and select the filter value to apply. For example using filter you can choose to only view tickets raised by a particular User.

Support Ticket Status

There are several different states a Support Ticket can be in, these are also colour coded.

With Support

Tickets that require action by Paritor Support (i.e tickets that have last been updated by you) team are displayed in Green.

With User

Tickets that required action by the User are displayed in Red

In Progress

Tickets that are being solved by the Paritor Support Team are displayed in Purple

Awaiting Release

Tickets that have been solved and the solution will be included in the next software update appear in Blue

Ticket Closed

Once a ticket has been resolved you can close it. This will remove it from the list of Current Tickets. To see a history of all tickets, current and closed, click on Show All Tickets button.

Create New Support Ticket

To begin a new Support Ticket, click the New Ticket button. This will start up a new Ticket and display the following form:

The form is automatically populated with your User name and your email address. Type in an issue summary and add a detailed explanation. Where possible add additional information such as a screen shot to the ticket as an attachment by clicking Add Attachments.

Note: A Ticket should be about a *single issue*; if you have more than one question or issue then raise separate tickets. If you have further comments about an issue then add an event to the initial ticket rather than creating a new Ticket.

Attachments

You can add files or screenshots using the Add Attachments icon. This opens the window below:
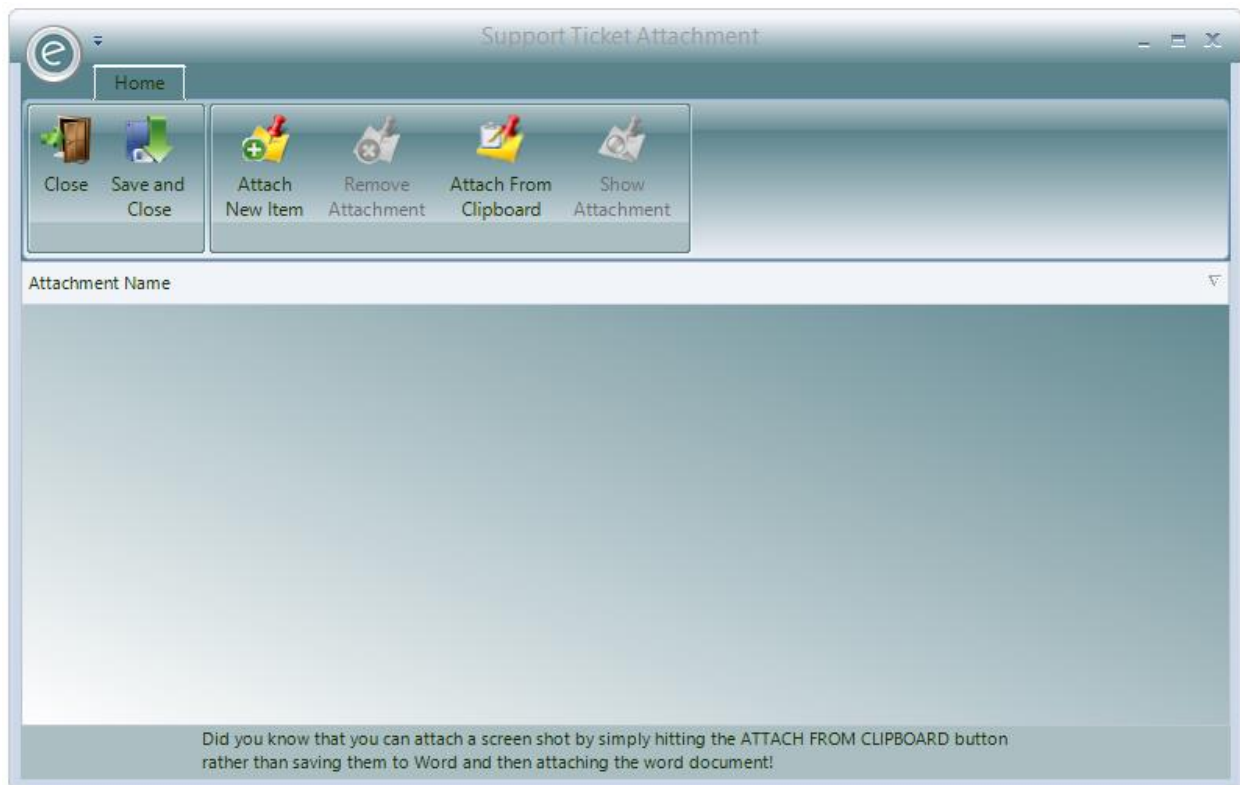
You can attach information held in your clipboard as an attachment by simply clicking on the Attach From Clipboard button. Therefore the simplest way to attach a screen shot is to click on your keyboards *print screen button* and then click on the Attach From Clipboard.

You can attach documents, such as *Word* documents, *SQL Scripts* or spreadsheets using the Attach New Item option

You can add multiple attachments; provided each attachment is no larger than 2 megabytes and the total size of the attachments combined is no larger than 3 megabytes.

Priorities

Each ticket is assigned a *Priority* which states the urgency of your issue.

By default all new tickets are allocated a priority of *Low*. You can change this by selecting an alternative priority which are highlighted in the red box above. Priority is measured on a 3-tier scale; *High, Medium and Low:*

High   *Critical problems* that prevent the use of the software under normal operating conditions.

Medium   Problems that affect the way the service functions, causing the software not to function as specified but does not prevent the software from being used.

Low   Problems which do not affect the operation of the software.

Feature Request   You can also add Feature Requests, any thoughts you might have on how the system could be improved to benefit all both yourself and other Users. This can be created either by selecting the Feature Request option alongside the priorities or by opening the New Feature Request icon found on the Support Ticket Manager, displayed below in the red box:
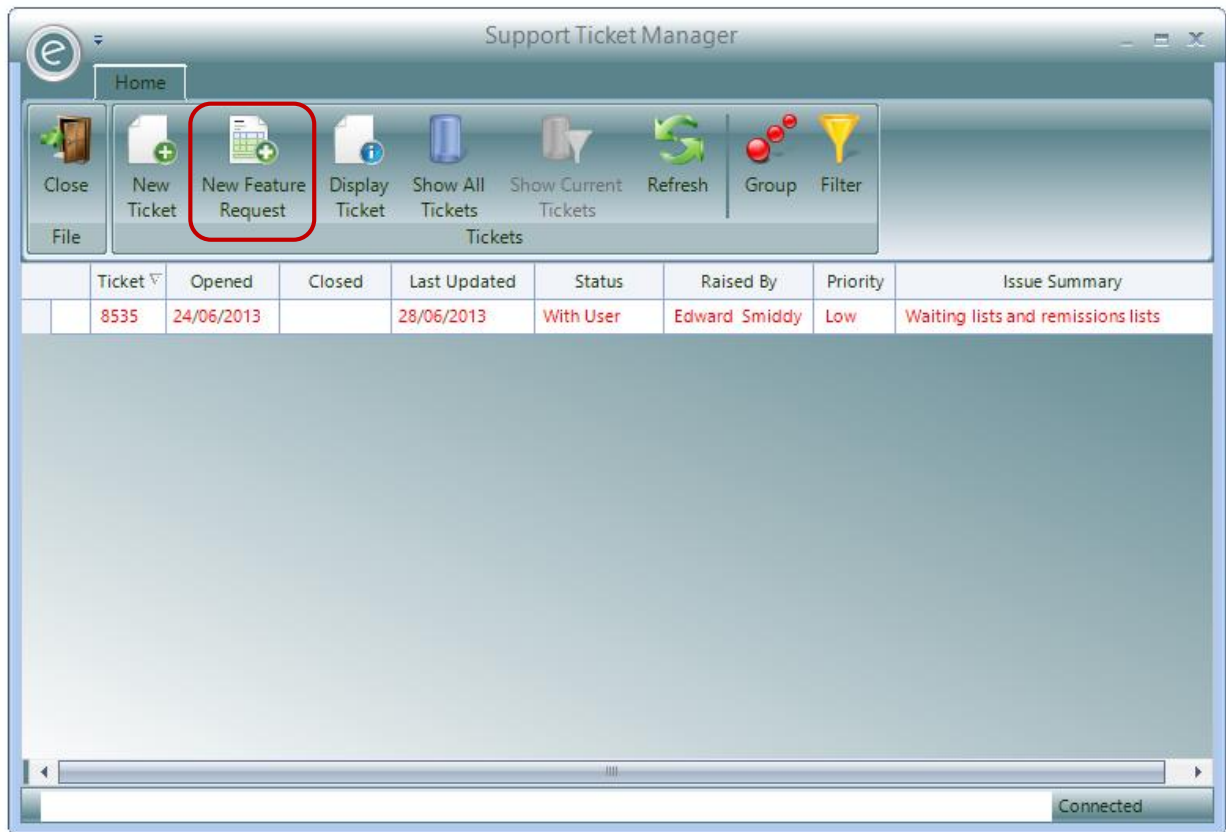
Please prioritise tickets accurately, as tickets with incorrect priorities will be amended by the support team.
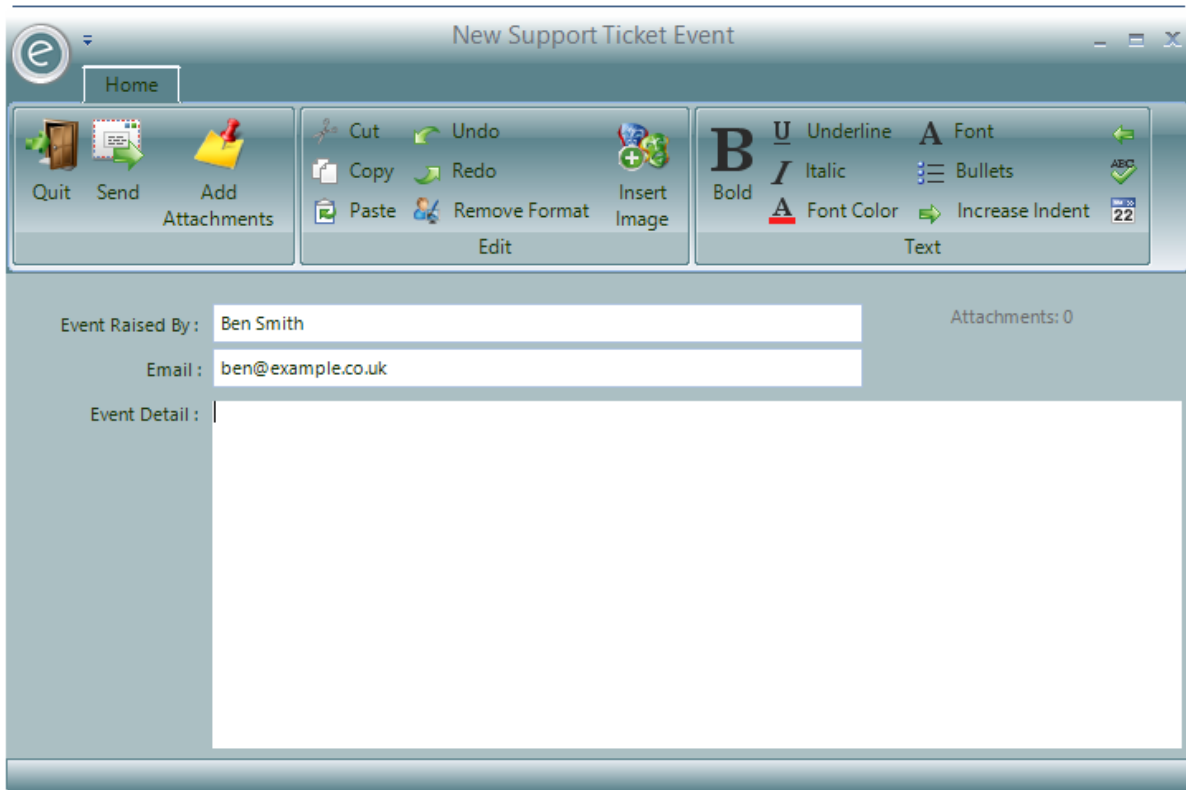
Adding a New Event

An Event in a Ticket is a recorded response between the User and the support team. This enables both parties to track the progress of an issue raised in a Ticket. When you first create a Ticket the initial Event is automatically added. As the issue is discussed and addressed new Events are added by Users and Paritor's support team adding new information regarding the issue.

To *add new Events* to a ticket go to:

Support Ticket Manager > {Select Ticket} > New Event.

This will open the following form.

Enter the Ticket Event Detail and if required add any attachments in the same way as you entered attachments when first creating the support ticket. Refer to **Attachments** in this section if you are unsure.

Reviewing a Support Ticket

You can review a Ticket, change its status or add new events by *double clicking* on the Support Ticket in the *Support Ticket Manager.* This will open up the Ticket and display the *View Support Ticket* form displayed below. To access from the Console click:

Help (Ribbon Menu) > Support Tickets > Double-click on Ticket

This form displays the Ticket *reference information* as well as a list of all the events that have been raised regarding the ticket which are shown on the left.

If an attachment has been associated with an event you can view the attachment by clicking on the **View Attachment** button. Attachments such as plain text and pictures are displayed in a viewer. Other types of attachments have to be saved to your system and opened manually.

The menu includes a **Print** button to print the history of the Support Ticket. This will print a set of formatted pages containing all the issue data including any printable attachments, i.e. simple text or pictures.

Once the issue raised on the Ticket has been resolved click the **Close Ticket** button to close the ticket. This removes it from the list of current tickets. If necessary you can use the **Re-Open Ticket** button to re-open a closed ticket.

Note: You can still view closed tickets from the Support Ticket Manager.

Support Ticket Alerts

The Support Ticketing system will email you and alert you when there has been an update to a Ticket you are associated with. You are associated with a Ticket if you created it or you have added an Event to the Ticket. Alerts will appear in the *bottom right hand corner* of your screen. They look like the window displayed below:
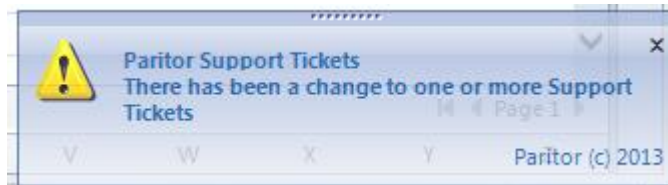
The Support Ticket system checks for changes as you are working. When an update alert is displayed you can click on it to open up the Ticket. If a change remains un-viewed (by the User), the system will display a new alert for all Users involved in the Ticket every 15 minutes, until one of these Users has viewed the Ticket.

You can also check for Support Ticket changes by *right clicking* on the Paritor icon in the *System Tray Notification Area*, and choosing Check Support Tickets.

Core Records

This section will briefly introduce core records that users should create to use Ensemble effectively. The manual shall frequently return to them in later sections.

1. Tuition Records

All of the Records that *contain tuition Schedules* are created from the **Tuition** section of the Menu Bar. These Records are:

- Teachers
- Schools
- Centres
- Groups

Within this section an additional Record for ongoing subscriptions to your services can created called a *Subscription*.

Create a Teacher

[Watch the Video Tutorial here](#)

All of the tuition by your service will be delivered by Teachers. Therefore to create a Teacher, click:

Tuition (Menu Bar) > Teachers > New Teacher

This will display the window below:

To create this Teacher, only the Teacher's name in the **Teacher Name** field *is required*.

Details

The Details tab opens by default and contains further basic information which can be entered. Fields in the red box include:

Male / Female	Specify the Teacher's gender
Known As	Specify their nickname
Job Title	Specify their Job Title
Address	Specify their address which can be used for sending out correspondence such as letters
Home Tel No	Specify their address which can be used for correspondence

If there is an existing hierarchical structure for Teachers in your organisation this can be defined within Ensemble by selecting Line Manager in the green box. A dropdown menu will appear allowing you to select another Teacher which is this current Teacher's Line Manager.

Pictures of the Teacher can be imported and deleted by clicking Elipse and Delete buttons respectively by Photo in the green box.

Finally if the Teacher is part of a professional membership, these can be included in the available textboxes in the Memberships section highlighted in the blue box.

Qualifications

You can also enter the known Qualifications that a Teacher has. These are used only as reference within the Record Card.

To do this click on the Qualifications tab, highlighted in the red box to display the window below:
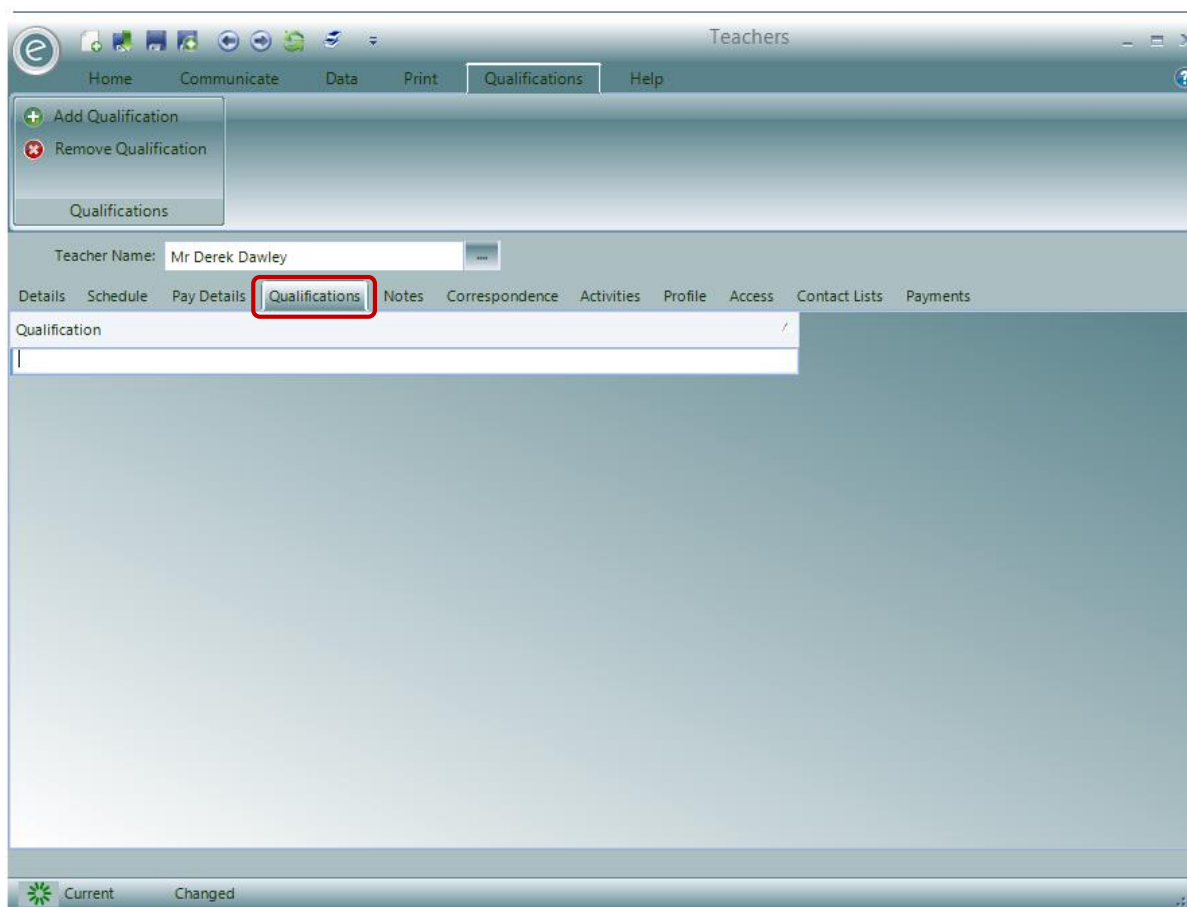
Simply click **Add Qualification** to add the Qualification and then enter the details in the row.

Click **Remove Qualification** to delete one.

Access to Ensemble and Live Teacher

Use the **Access** tab to control access that a Teacher can have to Ensemble and Live Teacher:
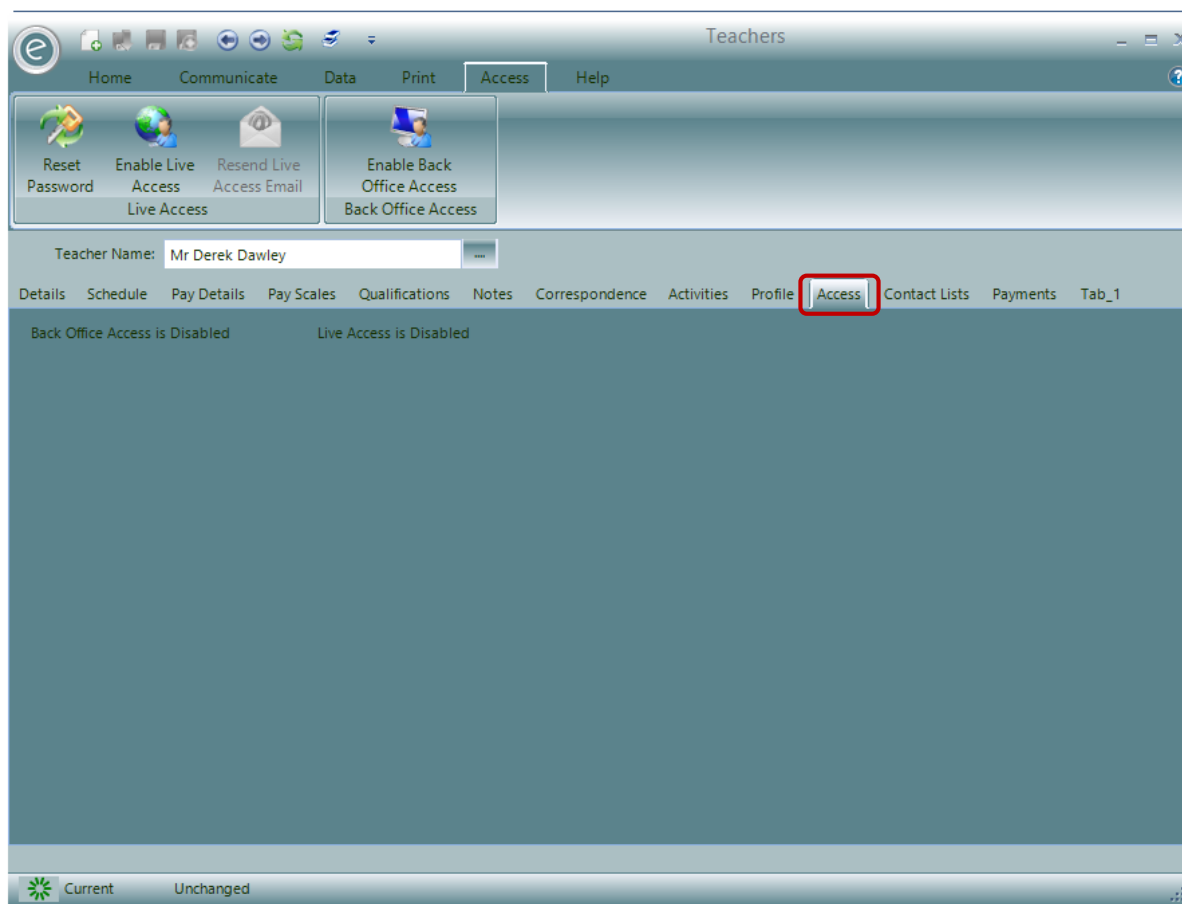
Within this tab you will be able to see if the Teacher has *Back Office Access* (rights to use Ensemble) and/or *Live Access* (right to use Live Teacher).

You will need to click **Enable Back Office Access** to allow the Teacher to use Ensemble. This will also create a Record called a *User* for them.

Click **Enable Live Access** to allow the Teacher to use Live Teacher.

For more information regarding access control please refer to the **User Management** Chapter.

Additional Notes

There is also an additional tab for entering miscellaneous information called **Notes**:

The white space is all available for typing into. Options in the Ribbon Menu include:

Insert Image Launches an Image Capture window. The screenshot will be displayed on the textline

Reduce Size Select an image and the size will reduce

Increase Size Select an image and the size will increase

Insert Date Inserts the current date into the text

Print Print the Notes

Click **Save and Close** to create the Teacher.

Create a School

  [Watch the Video Tutorial here](#)

Schools will accommodate a lot of the tuition delivered by your service. To create a School, click:

Tuition (Menu Bar) > Schools > New School

This will display the window below:

To create this School, only the School's name in the School Name field *is required*.

Details

The Details tab contains further basic information which can be entered. Fields in the red box include:

Address	Specify the address which can be used for sending out correspondence such as letters
Tel No	Specify the telephone number which can be used for correspondence
School Email	Specify the school email which can be used for correspondence
School Type	Define the School Type from the dropdown list
Default Provision Type	Define the default Provision Type to use when creating Activity Plans in the Schedule

Furthermore, you can enter the contact details for a Head Teacher, a member of Admin and a Third Contact highlighted in the green box. These individuals are saved as *Contact Records* in Ensemble. Their information will also be extracted in relevant school reports and they can also be communicated with via Ensemble.

Note: Any other individual in Ensemble is also a Contact, such as Teachers, Pupils and Parents.

Edit the Contact Names

One of your main contacts for a School may not be a member of 'Admin' or you may have an official title for who the 'Third Contact' is. For example, you may want one of your three main contacts to be the 'Head of Music'. In such a case, you will be able to edit these titles in the *Education Parameters*. To do this, click:

Tools (Ribbon Menu) > Parameters > Education Parameters

This will display the window below:

In the area highlighted you can edit the descriptions for the contacts.

Note: This will also edit the field names for their data such as mobile number, name and address if this needs to be extracted into *Paritor Insight*. For more information regarding data extraction please refer to the **Data Extraction** Chapter.

Once you have finished making these changes click **Save and Close**.

School Contacts
You will be able to enter additional Contacts for the School in the **Other Contacts** tab:
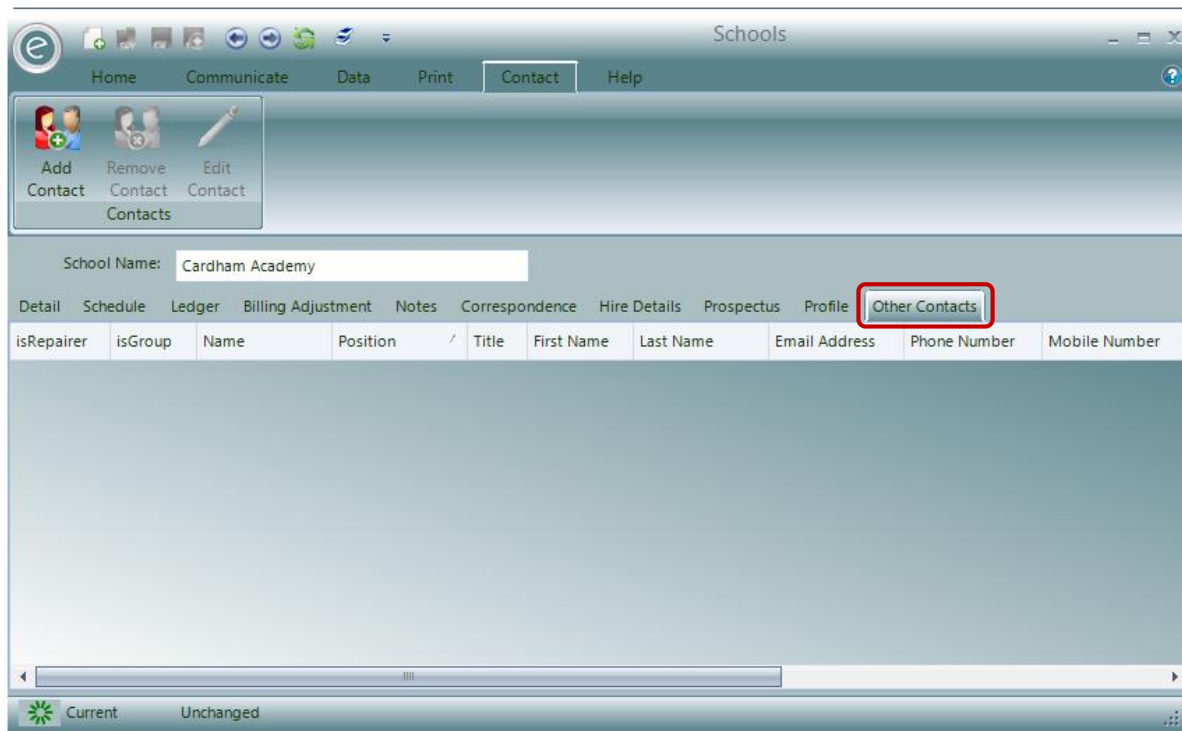
To add a new Contact click **Add Contact**. A window will appear in which you can search for an existing Contact or create a new one.

To edit a Contact click **Edit Contact**.

To remove a Contact from the list click **Remove Contact**.

Additional Notes

There is also an additional tab for entering miscellaneous information called **Notes**:

The white space is all available for typing into. Options in the Ribbon Menu include:

Insert Image   Launches an Image Capture window. The screenshot will be displayed on the textline

Reduce Size   Select an image and the size will reduce

Increase Size   Select an image and the size will increase

Insert Date   Inserts the current date into the text

Print   Print the Notes

Click **Save and Close** to create the School.

Create a Music Centre

 Watch the Video Tutorial here

Tuition may also take place within Centres for your service such as Music Centres. To create them click:

Tuition (Menu Bar) > Centres > New Centre

This will display the window below:

To create this Centre, only the Centre's name in the **Centre Name** field *is required*.

Details

The **Details** tab contains further basic information which can be entered. These are:

Manager Name	Create a Contact for the Centre Manager
Manager Email	Enter an Email for the Centre Manager
Default Billing Type	Select a Default Billing Type
Address	Specify the address which can be used for sending out correspondence such as letters
Tel No	Specify the telephone number which can be used for correspondence
Fax No	Specify the fax number which can be used for correspondence

Centre Contacts

You will be able to enter additional Contacts for the Centre in the **Other Contacts** tab:
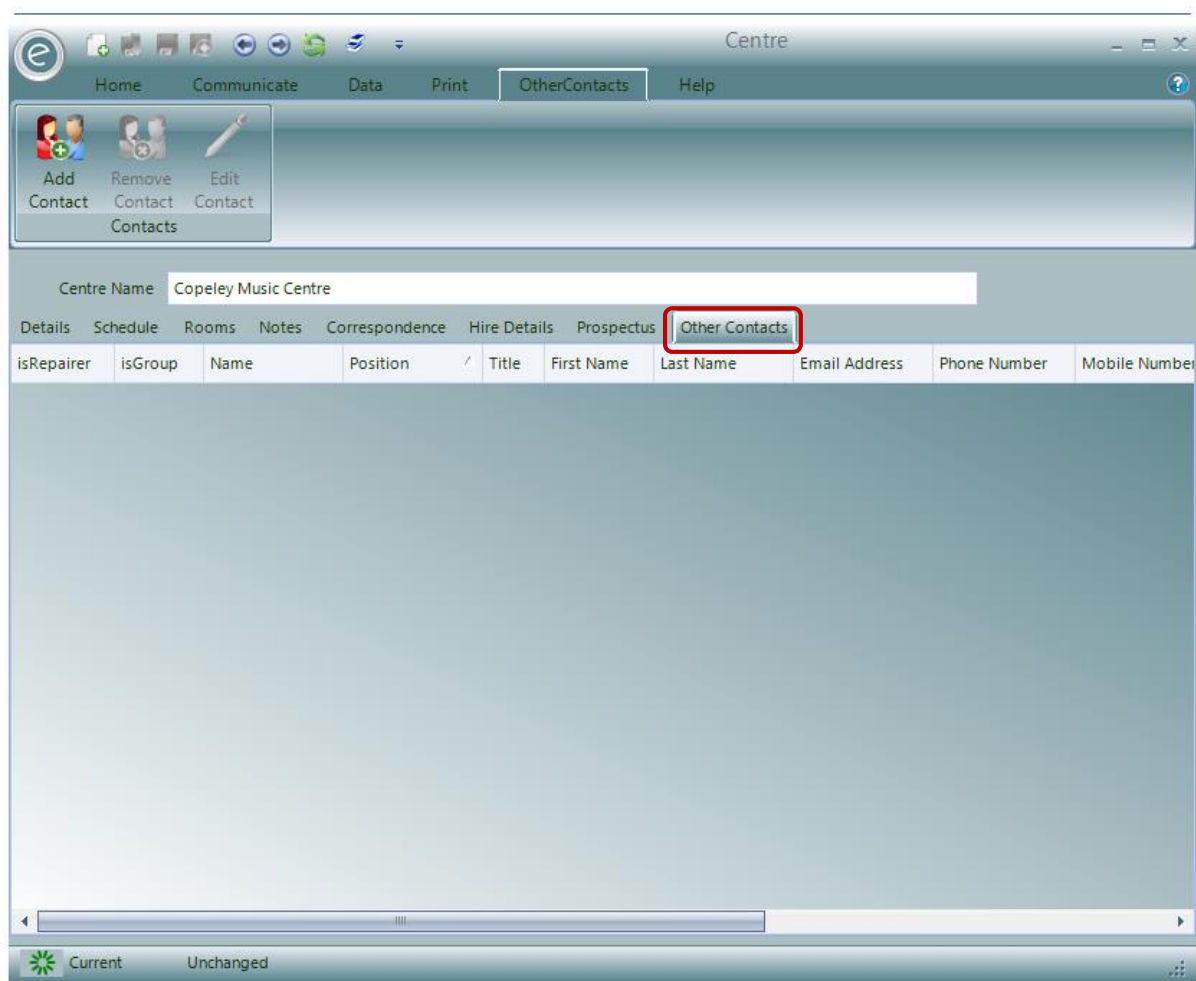
To add a new Contact click **Add Contact**. A window will appear in which you can search for an existing Contact or create a new one.

To edit a Contact click **Edit Contact**.

To remove a Contact from the list click **Remove Contact**.

Classrooms

In the **Rooms** tab you will also be able to specify the classrooms in the Centre in which tuition will take place:
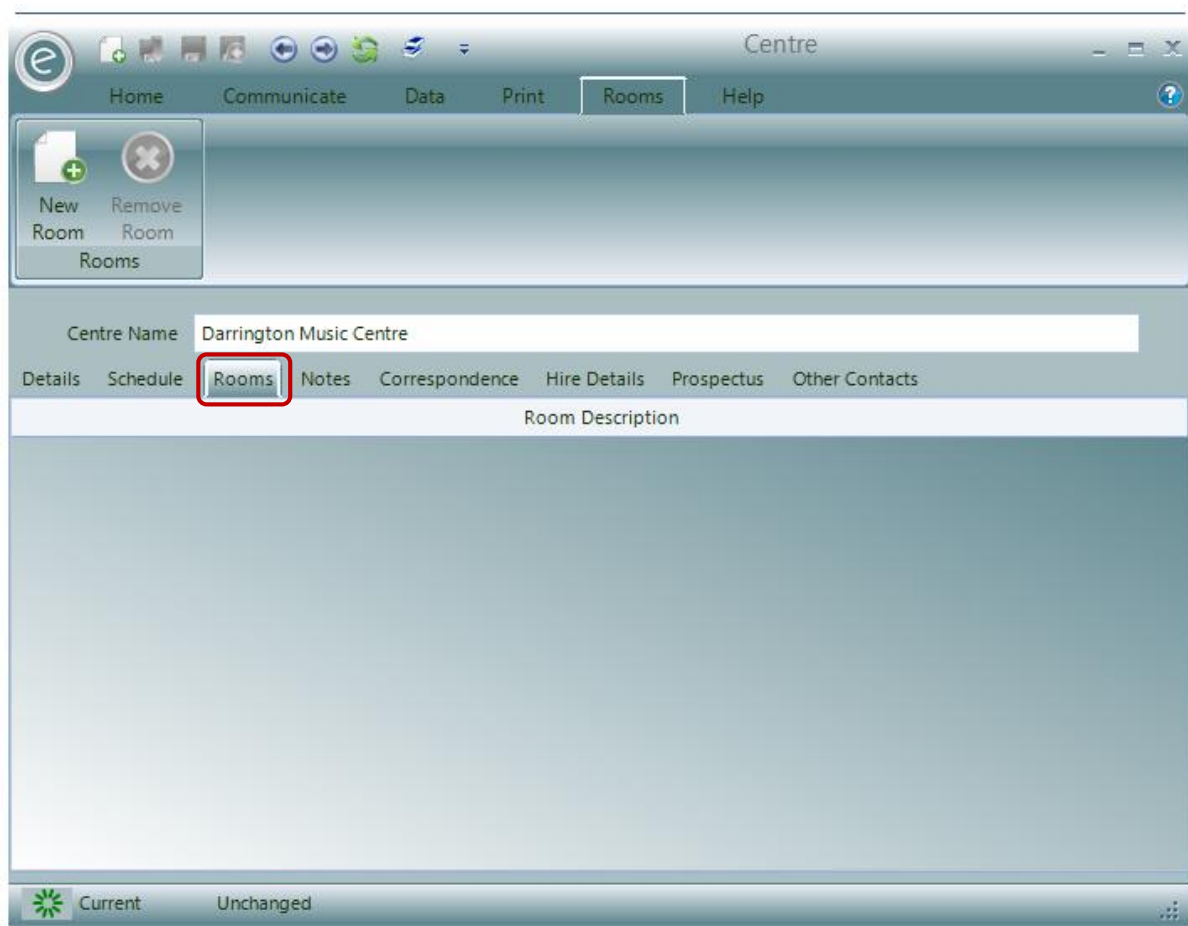
This tab will contain the list of classrooms for this Centre. To create a new Room click **New Room** and new row will appear.

You can then specify the name.

If you wish to delete a Room, click **Remove Room**.

Additional Notes

There is also an additional tab for entering miscellaneous information called **Notes**:

The white space is all available for typing into. Options in the Ribbon Menu include:

Insert Image   Launches an Image Capture window. The screenshot will be displayed on the textline

Reduce Size   Select an image and the size will reduce

Increase Size   Select an image and the size will increase

Insert Date   Inserts the current date into the text

Print   Print the Notes

Click **Save and Close** to create the Centre.

Create a Group

▶ [Watch the Video Tutorial here](#)

Groups that have tuition together such as Orchestras and Choirs can be saved in Ensemble as *Groups*.

Tuition (Menu Bar) > Groups > New Group

This will display the window below:

To create this Group, only the Group's name in the Group Name field *is required*.

Details

The Details tab contains further basic information which can be entered. These are:

Address	Enter the address that this Group use here
Tel No	Enter the telephone number
Teacher	Assign a Teacher from a dropdown list to this Group
Billing Type	Specify the Billing Type which will be used when calculating membership charges
Chargeable Membership	Tick if membership is charged
Gift Aid Enabled	Tick is Gift Aid is used

Additional Notes

There is also an additional tab for entering miscellaneous information called Notes:

The white space is all available for typing into. Options in the Ribbon Menu include:

Insert Image Launches an Image Capture window. The screenshot will be displayed on the textline

Reduce Size Select an image and the size will reduce

Increase Size Select an image and the size will increase

Insert Date Inserts the current date into the text

Print Print the Notes

Click **Save and Close** to create the Group.

Create a Subscription

    Watch the Video Tutorial here

Subscriptions allow Pupils to have access to all lessons from Centres or Groups. To create a Subscription click:

Tuition (Menu Bar) > Subscriptions > New Subscription

This will display the window below:
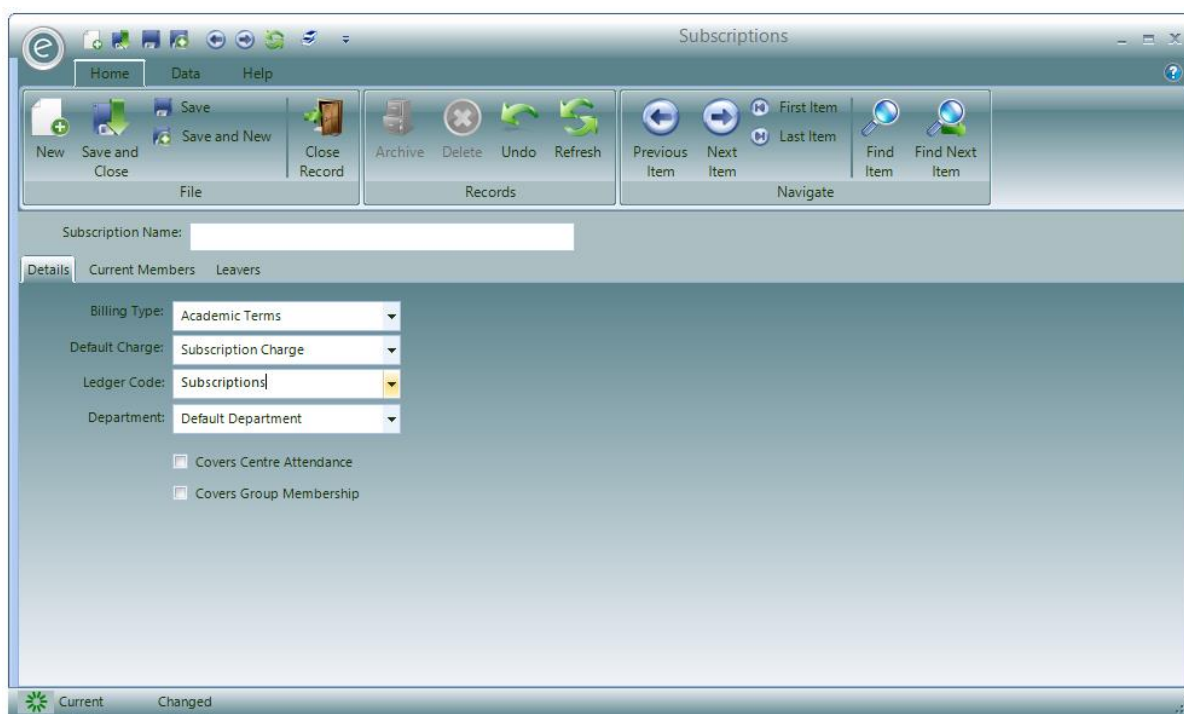
To create this Subscription, only the Subscription's name in the **Subscription Name** field *is required*.

The **Details** tab contains further basic information which can be entered. These are:

Billing Type	Specify the Billing Type which will be used when calculating membership charges
Default Charge	Select the Charge to be applied for using this Subscription
Ledger Code	Enter a pre-defined Ledger Code
Covers Centre Attendance	Tick if this Subscription is for Centre attendance
Covers Group Membership	Tick if this Subscription is Group membership

In the **Finance in Ensemble** Chapter, for more information on:

- Billing Types, refer to **Billing Types and Billing Periods**
- Ledger Codes, refer to **Ledger Codes**

Click **Save and Close** to create the Subscription.

2. Parents and Pupils

Parents and Pupils are created from the **Pupils** section in the Menu Bar. Pupils are individuals that will receive tuition and/or join Groups. Parents are individuals that are responsible for the Pupils and their Records will just contain contact information.

Note: It is common that Parents will pay for Pupils tuition, however Ensemble only recognises individuals (or organisations) that pay for tuition as *Payers.* Therefore a parent will need to be introduced into Ensemble again as a Payer Record to pay for tuition. The Parent Record is merely for contact purposes only.
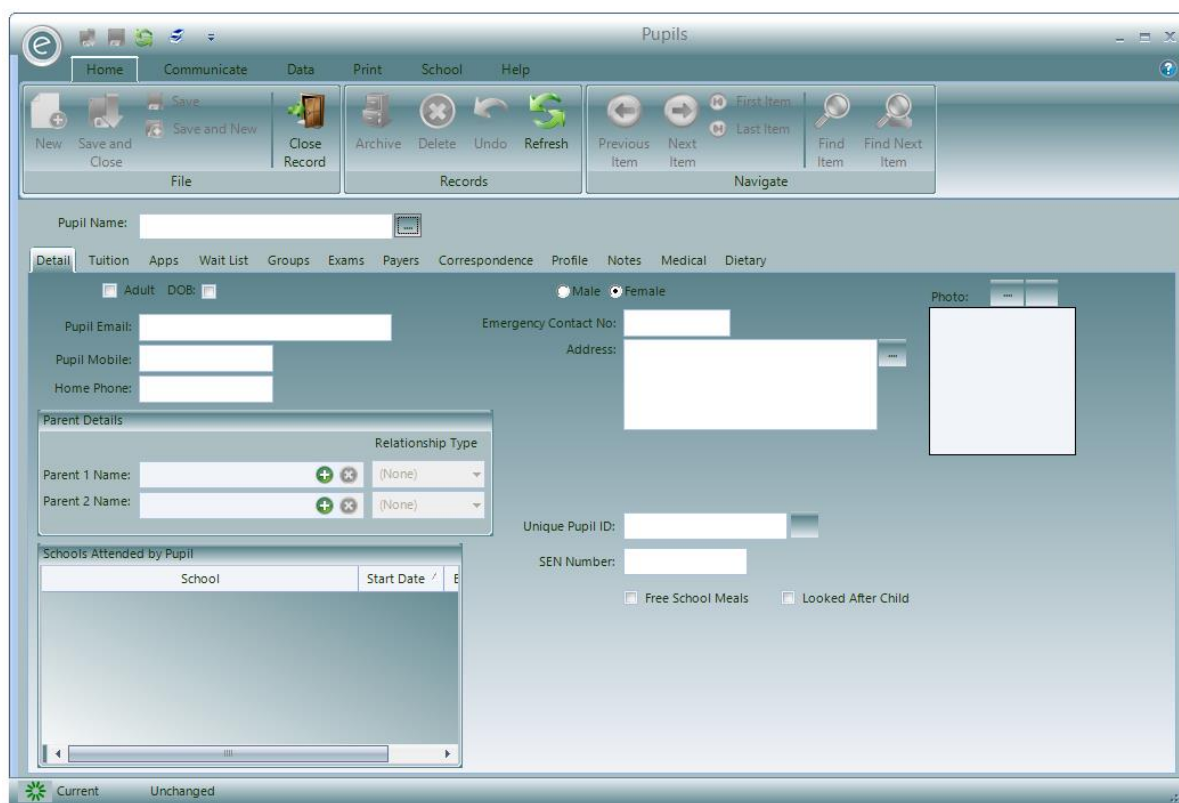
Create a Pupil

[Watch the Video Tutorial here](#)

To create a Pupil, click:

Pupils (Menu Bar) > Pupils > New Pupil

This will display the window below:

The only required field to enter is the **Pupil Name** for this Record to be created. From this, you can then fill in the other information shown.

Schools Attended

You will also be able to record the School that the Pupil currently attends and the Schools previously attended. This is done from *within the Pupil Record Card* by clicking:

School (Ribbon Menu) > New School

This is displayed below:

A new row will appear in the Schools Attended by Pupil section of the Pupil Record Card.

You will be able to select the School, Start Date and Finish Date.

Additional Notes and Medical or Dietary Information

There are also additional tabs for entering Medical Notes, Dietary Notes and miscellaneous Notes called Medical, Dietary and Notes respectively.

Each tab has identical format, this is an example of the *Notes* tab:

The white space is all available for typing into. Options in the Ribbon Menu include:

Insert Image	Launches an Image Capture window. The screenshot will be displayed on the textline
Reduce Size	Select an image and the size will reduce
Increase Size	Select an image and the size will increase
Insert Date	Inserts the current date into the text
Print	Print the Notes

To save, you will need to select Save.

Create a Parent

▶ Watch the Video Tutorial here

To create a Parent, click:

Pupils (Menu Bar) > Parents > New Parent

This will display the window below:

Fill in the basic information shown and click **Save and Close** to create the Parent.

Note: You can also create a Parent from a Pupil Record Card. This is shown below:

3. Activities

 [Watch the Video Tutorial here](#)

One of your major services is to provide tuition; this may be directly to Pupils or to Schools, but you may also organise summer Schools, events and trips. These are all known as *Activities* and need to be defined within Ensemble as such.

To create an Activity click:

Activities (Menu Bar) > Activities > New Activity

This will display the window below:
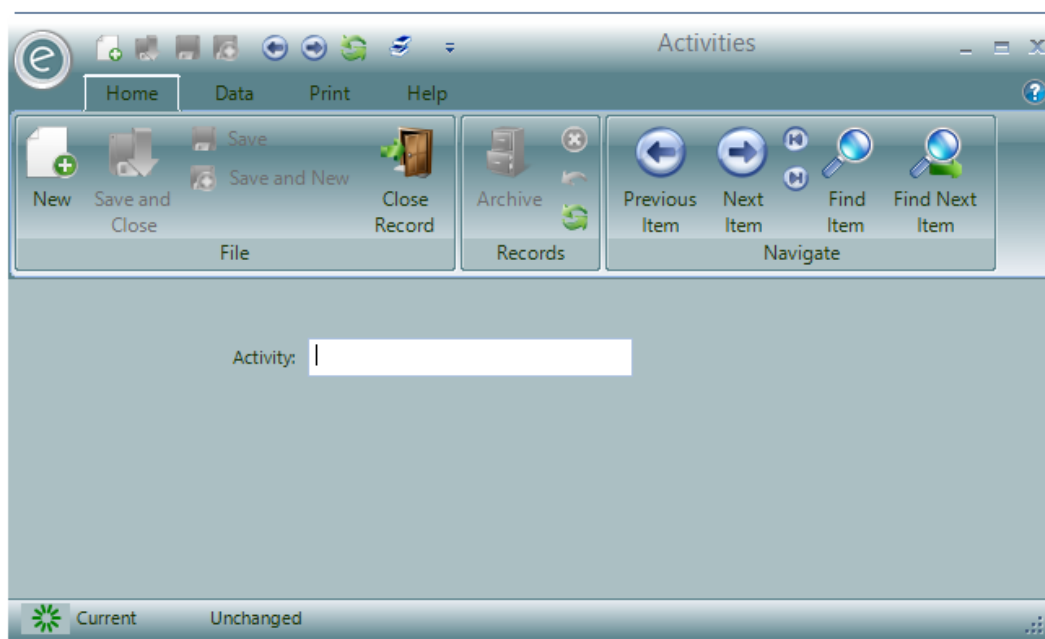
Simply enter the name of the Activity in the Activity field and press and Save and Close.

Activity List in a Teacher Record

Once you have created Activities you can create an Activity List within a Teacher Record Card. This lists the Activities that a Teacher is capable of conducting. This will become useful when you begin managing schedules as you can refer to this list for arranging cover/makeup lessons if a Teacher can't teach a lesson.

Note: This list will not constrain actual scheduling Activities to Teachers, it is merely for reference purposes.

To make this click:

Tuition (Menu Bar) > Teachers > Open a Teacher Record Card > Activities tab

This is highlighted in the window below:
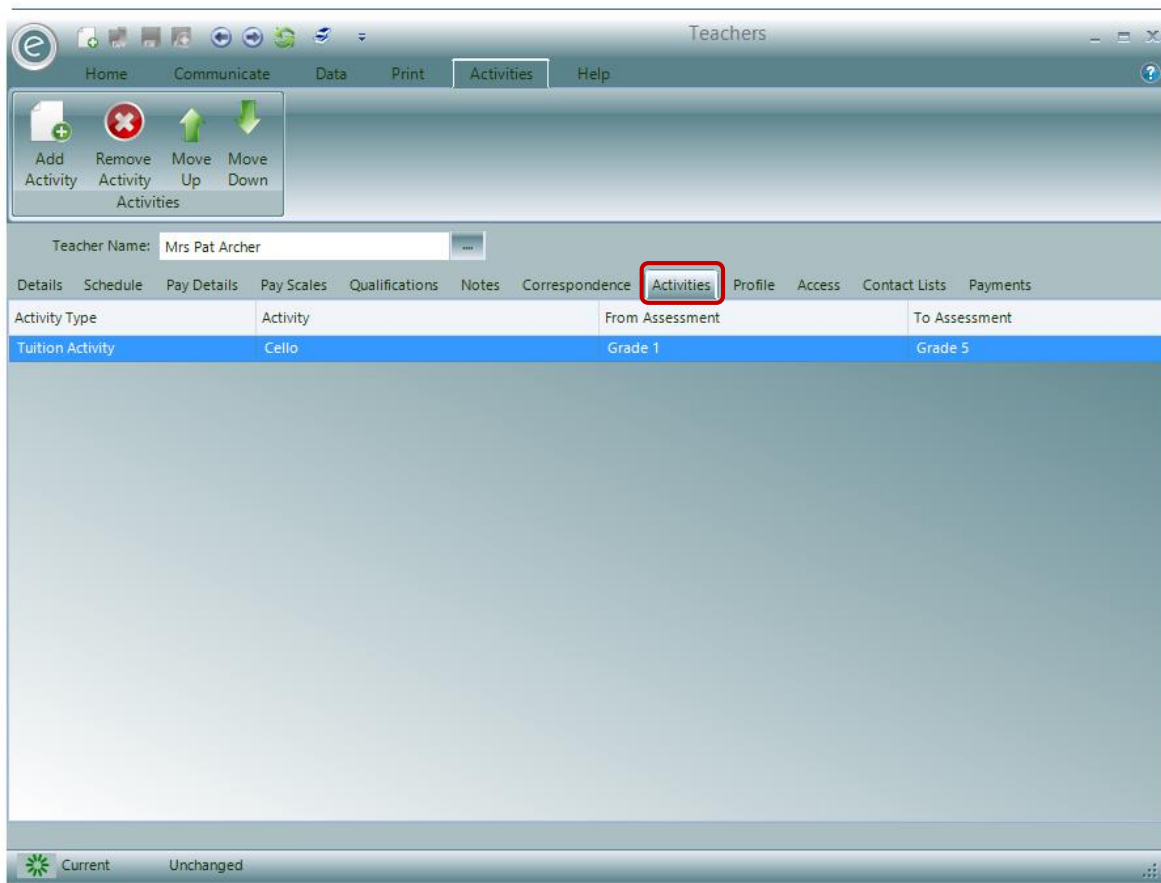
To add an Activity to this list click **Add Activity** in the Ribbon Menu.

They will then appear as a row in the grid.

You can change the order of the Activity List by clicking **Move Up** or **Move Down** and you can delete an Activity from this list by clicking **Remove Activity**.

Click **Save and Close** when finished.

4. Provision Types

▶ [Watch the Video Tutorial here](#)

Within the software the term *Provision* refers to the *supply of a service for a period of time*; for example:

- When a set of tuition runs within an academic term, then the *term of lessons* would be classed as a Provision.
- If a Summer School is organised for a single week, then the *week of lessons* would be classed as its Provision.

We use a *Provision Type* to lay down *rules* as to how individual Provisions can be defined.

There are *three* different basic Provision Types:

1. Term Based
2. Annual
3. Ad-Hoc

Enable Provision Types in the Education Parameters

By default, Ensemble will only use a Provision Type called *Academic Terms* which is term based using three terms for Autumn, Spring and Summer. This also will also be the *only Provision Type available* to use unless the *Use Provision Types* option is selected in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Provision Types' > Save and Close

This is displayed in the window below, with **Use Provision Types** highlighted in the **red box**:
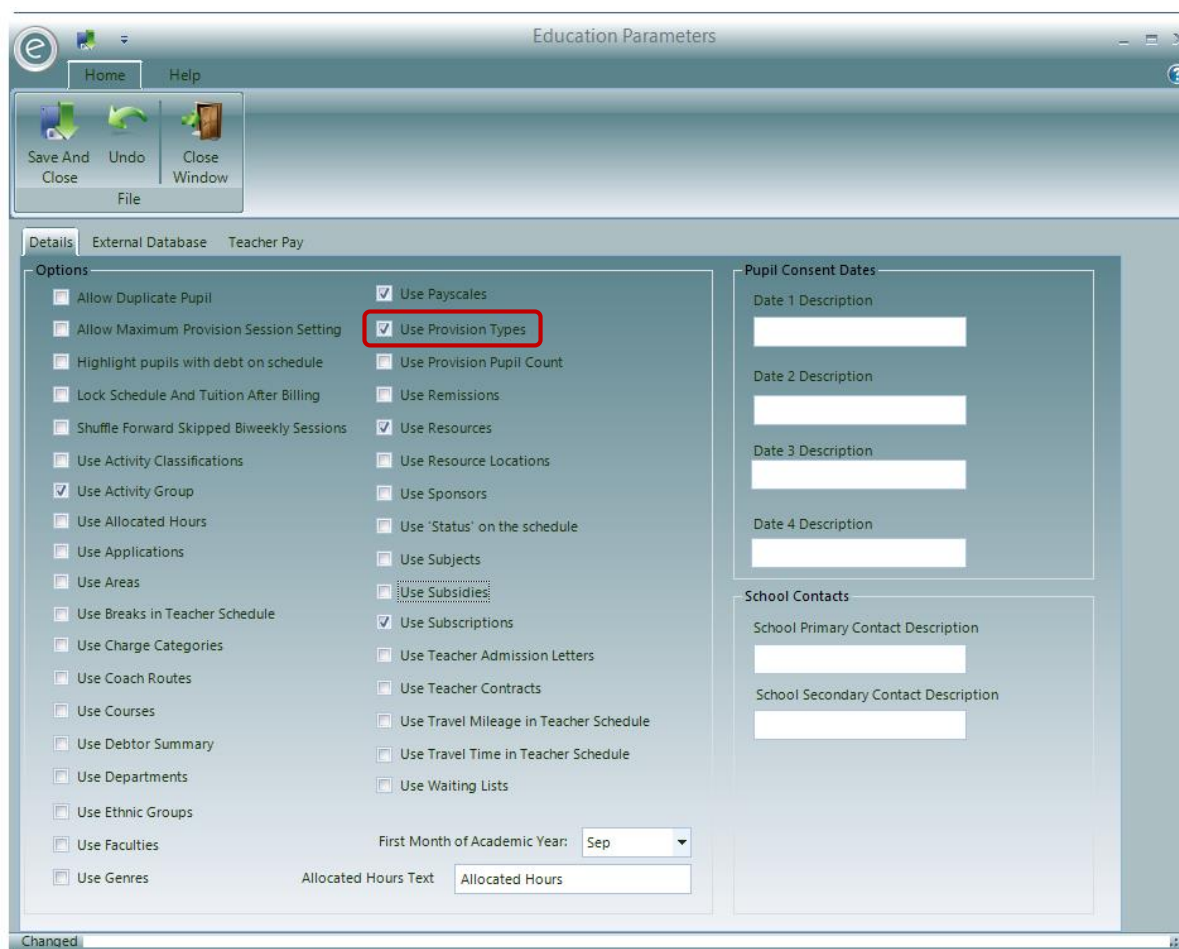
Click **Save and Close** and now Provision Types will be available to use in Ensemble.

Create a Provision Type

▶ **Watch the Video Tutorial here**

To define your Provision Types, go to:

System (Menu Bar) > Provision Types > New Provision Type

This will display the window below:

The *Provision Types* are highlighted in the red box and *Term Based* will be focused on for now.

Term Based

These are Provisions that are repeated throughout a year and follow *academic terms*. This is very useful for lessons that are cyclical and repeat. When defining a Term Based Provision Type you also define a *set of terms* for each year. This is the *default Provision Type* selected when you create a Provision Type.

This is displayed in the window below:
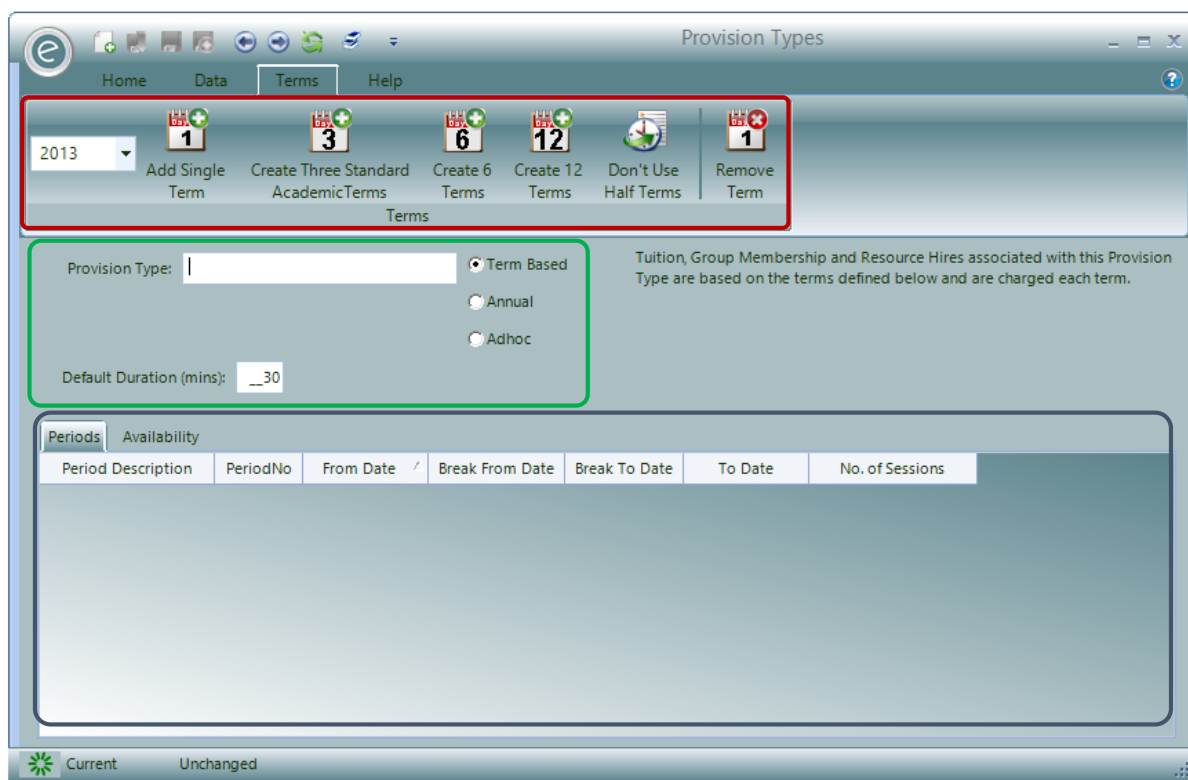
The *Provision Types* are highlighted in the green box, here *Term Based* is selected. In here you will also need to write the name for this Provision Type in the Provision Type field and define the Default Duration (mins) for an Activity Plan created within this Provision Type.

Note: Refer to **Activity Plans** in the **Schedule Management** Chapter for more information on Activity Plans.

The blue box highlights the area where the terms are displayed, known as *Provision Periods*. These define how the year is divided. Each term will appear as a row, within this area. The Availability tab also allows you to define dates when activities *cannot take place* by switching to a *Calendar view*.

The red box highlights the Ribbon Menu whereby you can *define the year* for this Provision Type to run for in the dropdown menu and *add or remove terms* by clicking:

Add Single Term	Creates a single Provision Period (1 row)
Create Three Standard Academic Terms	Creates 3 Provision Periods automatically defined as Autumn, Spring and Spring. Typical term layout (3 rows)
Create 6 Terms	Creates 6 Provision Periods (6 rows)
Create 12 Terms	Creates 12 Provision Periods (12 rows)
Don't Use Half Terms/Use Half Terms	Remove or use Half Terms
Remove Term	Delete a Provision Period (row) from the table

For example, selecting Create Three Standard Academic Terms will display this below:

This table holds information regarding the:

Period Description	Name of the term
PeriodNo	The number of the specific Provision Period
From Date / To Date	Date range of the whole term
Break From Date / Break To Date	Date range of the half term break
	Note: Clicking Don't Use Half Terms will remove these columns
No. of Sessions	Default number of sessions, i.e. the number of lessons provided in a term

Information in the cells can be edited and as many Provision Periods can be created as you wish.

5. Charges

 Watch the Video Tutorial here

Before defining any service you provide, you must first define the *Charge* to apply to that service. The Charge will set down the value of the service and how that service should be applied. For example if a Charge is to be applied to the supply of a teacher into a school, what is the *charge*?

- Is it a total charge for providing the service or is it a charge per visit or per hour?
- Does the charge decrease according to the amount of time purchased?

All these sort of things are defined within the Charge.

Overview

To create a new Charge click:

Debtors (Menu Bar) > Charges > New Charge > New Charge Amount

This will display the window below:

Inside the blue box, there is a row for you specify the Effective Date from which the Charge is implemented and the amount charged. New rows can be added by clicking New Charge Amount again, you will typically do this when a charge has expired and needs updating.

Note: If your Charges change, you do not have to enter new Charges which would then have to be associated with each Pupil. All that is required is to update the Charges that you already have by clicking New Charge Amount.

Charge For

The red box illustrates *six different categories* of Charge. Together they cover the various types of services offered. Each one of these is *specialised to the type of Activity it is classified for*. For example when defining Groups, only the 'Group Membership' Charges will be available. They are listed below:

Teacher(s) Attending Schools	Used when supplying teachers to Schools and charging for their time.
Each Pupil Attending	Charge relates to a Pupil receiving tuition
Group Membership	Fee for joining a Group such as an Orchestra
Resource Hire	Charges for hiring Resources such as instruments
Subscription	Charge for a Subscription
Coach Fees	Fee for using a coach service

Depending on the Charge method you are defining you can specify various ways as to *how* the Charge is applied. These options are discussed below.

Regardless of the method, each charge detail contains a set of prices with an *effective date* for each one. It is therefore possible to set up prices in advance by specifying the date the new price becomes effective.

Charge Type

Applicable for these *Charge For* types:

- Teacher(s) Attending (Schools)
- Each Pupil Attending

Here the red box shows the Charge Type. This defines the relationship between the price and what is being delivered. There are three available Charge Types:

Hour	The price you specify is a price for each hour the service is provided.
Session/Week	The price is for each session or week the service is provided regardless of the duration of visit.
Provision/Term	The price is for the duration of the Provision. This includes the academic term, or if the charge is for a course or an event then it's the total price of that course or event.

Banding Type

Applicable to all *Charge For* types.

You have the option to apply a Banding Type to the charge, which is highlighted in the red box. A Banding Type allows you to set up a *discounted price structure* that sets a different price depending on some sort of *quantity.* For example, the more hours purchased the lower the price.

You can elect *not to use* banding, or select one of the four available banding options. These are:

Provision/Term No	You specify a *different price for each Provision*. For example you may offer a price structure whereby the first term is free the second is at half price and the third and following terms are at full price.
Session No	You specify a *different price for each session*. For example you offer a two day course where the first day is at full price but the second is at half price.
Session Duration	The session duration banding type provides method for charging a *different price based of the duration in minutes of each session*. This is often used to offer a lower price when a longer session is purchased.
Provision/Term Duration	The type allows you to offer a different price depending on the total amount of time purchased for the *Provision in hours*. For

example the more time purchased in a term the lower the price.

Coach Stop No This only applies when the Charge is for a Coach Fee. The banding applies a different price to the Stop on the route.

Depending of the Banding Type you select, the *pricing grid* (where you enter the prices) will change to allow you to enter the *band value and the price for the band*.

For example if you select the Session Duration Banding Type, the grid will change to display a set of *dual columns* where you can enter pairs of the *number of minutes and the charge*, as shown below:

Effective Date ▽	Minutes 1	Charge 1	Minutes 2	Charge 2	Minutes 3	Charge 3	Minutes 4	Charge 4	Minutes 5	Charge 5	Minutes
23 09 2013	0	£0.00	0	£0.00	0	£0.00	0	£0.00	0	£0.00	0

You can enter up to nine pairs although you do not need to enter all nine. The system will take the last value you enter and apply it for any Banding Values over and above the last one.

 For example if you wanted to offer a price of £25 per hour for the first 60 minutes, £20 for the next 60 minutes and £15 there after you would enter the following:

Effective Date ▽	Minutes 1	Charge 1	Minutes 2	Charge 2	Minutes 3	Charge 3
23 09 2013	60	£25.00	60	£20.00	0	£15.00

Banding Option

Applicable for these *Charge For* types:

- Teacher(s) Attending (Schools)
- Each Pupil Attending

If you have used a Session Duration Banding Type then you can use the Banding Option to specify how the Banding Values are used. This is highlighted in the red box above. There are two Banding Options:

Standard	Each Banding represents the *next* Band of values. For example a banding such as the one below will be treated as follows. For example if anything between 0 and 100 minutes are purchased they will be billed at £25, between 100 and 150 minutes will be billed at £23 and anything above that will be as £20.
Cumulative	Each banding is *added to the previous* one to get the banding value. For example a banding such as the one below will be treated as follows. If anything up to 100 minutes are purchased they will be billed at £25, up to 250 minutes will be billed at £23 and anything above that will be as £20.

Multi Discount

Applicable for these *Charge For* types:

- Teacher(s) Attending (Schools)

- Each Pupil Attending

The red box highlights the Multi Discount option which provides a method for you to offer a discount where *more than one* service is taken up at the *same* Charge rate. If you offer this then you can enter either a:

| Percent Discount | Selecting the option will produce a box for you to enter the percentage |
| Value Discount | A box will also appear here in which you can enter a flat discount in British Pounds |

This is then applied to all second and subsequent services provided they use the same Charge Rate and are of the same Provision Type.

Lesson Type

Applicable for these *Charge For* types:

- Teacher(s) Attending (Schools)
- Each Pupil Attending
- Coach Fee

The red box highlights the Lesson Type option. This allows you to specify if the lesson is for an:

Individual	A one-to-one lesson between the pupil and teacher
Group	Lesson for a group of pupils
Shared	Lesson for two pupils
Other	A lesson for any other specification of pupils

Default Pupil Detail

Applicable for these *Charge For* types:

- Teacher(s) Attending (Schools)
- Each Pupil Attending

Default Pupil Detail outlines the *length of time that Pupils or groups of Pupils have for their lesson* and hence the length of time that they are charged for. Enter the duration for Pupils and groups in **Duration Per Pupil** and **Duration Per Group** respectively.

Schedule/Diary

Applicable for these *Charge For* types:

- Teacher(s) Attending (Schools)
- Each Pupil Attending

Schedule/Diary outlines how the teacher calculates the bill for the delivery of lessons and is highlighted in the red box. The options are:

Bill by Schedule	The teacher will be *paid in advance* of lessons being delivered according to their schedule
Bill by Delivery	The teacher will have to record the delivery of lessons in their diary and receive payment through a *claims process*

Overrides

The Charge also allows you to select a number of *Override* options, as highlighted in the red box. The number of Overrides available will change depending on which Charge For category you have defined your Charge to. The Overrides are:

Suppress All Discounts	Disables any other defined discounts e.g. Sibling Discounts.
Suppress any Payer Remission	Disables any Remissions which have been defined on the Payer.
Suppresss any Enrolment Fee	Disables any Enrolment Fees defined for the Charge.
Apply to Tuition Credits*	The Charge will create Tuition Credits, which payers use to purchase lessons.

*This override is only applicable to Charges defined as Each Pupil Attending.

6. Debtors

▶ [Watch the Video Tutorial here](#)

In Ensemble, *Debtors* are defined as:

Schools	These are bodies that purchase tuition or related services from you and pay you either for the Teacher's time or for the service you provide. For example they may pay for each Pupil you teach, or perhaps for each resource they hire.
Payers (Individual)	These are individuals that pay for Pupils to receive tuition, hire resources, join groups In most cases these are parents but may be Pupils themselves or other in individuals that agree to pay for the Pupil i.e. a grandparent.
Payers (Organisation)	These are very similar to an Individual Payer but they are an Organisation, for example a charity or a business.

Additionally, a single Payer may be paying for *several* Pupils. In fact a Pupil may have a number of different associated Payers. For example a Pupil may be taking some form of school based tuition paid for by their parent and could also be a member of an orchestra with the membership fee paid for by a grandparent.

Note: Be careful not to confuse Debtors and Payers as they *are not the same*. Debtors *encompass all individuals/organisations* owing debt, whereas a Payer is just a *type of Debtor* as shown above.

Create an Individual Payer

[Watch the Video Tutorial here](#)

Payers are managed within the *Debtors* tab of the Menu Bar. Therefore to create a Payer that is an *individual* such as a parent, click:

Debtors (Menu Bar) > Payers – Individual > New Payer

This will display the window below:

110

To create this Payer, only the Payer's name in the **Payer** field is required.

Details

The **Details** tab contains further basic information such as the fields highlighted in the **red box** which include:

- **Address**
- **Email**
- **Home Tel No**
- **Mob Tel No**
- **Fax No**

Additional Notes

There is also an additional tab for entering miscellaneous information called **Notes**:

The white space is all available for typing into. Options in the Ribbon Menu include:

Insert Image   Launches an Image Capture window. The screenshot will be displayed on the textline

Reduce Size   Select an image and the size will reduce

Increase Size   Select an image and the size will increase

Insert Date   Inserts the current date into the text

Print   Print the Notes

Click **Save and Close** to create the Payer.

Create a Payer Organisation

      [Watch the Video Tutorial here](#)

To create a Payer that is an *organisation* such as a charity, click:

Debtors (Menu Bar) > Payers – Organisation > New Payer

This will display the window below:

Again, to create this Payer, only the Payer's name in the Payer field is required.

Details

The Details tab contains further basic information such as the fields highlighted in the red box which include:

- Address
- Email
- Home Tel No
- Mob Tel No
- Fax No

Additional Notes

There is also an additional tab for entering miscellaneous information called Notes:

The white space is all available for typing into. Options in the Ribbon Menu include:

Insert Image   Launches an Image Capture window. The screenshot will be displayed on the textline

Reduce Size   Select an image and the size will reduce

Increase Size   Select an image and the size will increase

Insert Date   Inserts the current date into the text

Print   Print the Notes

Click **Save and Close** to create the Payer.

7. Resources

▶   Watch the Video Tutorial here

You can create Resources either individually or as a batch. Each Resource must be allocated its own *unique reference number*. This can be its serial number but as many Resources do not have a serial number it is recommended that you use your own sequence of reference numbers. In addition to this reference you can hold the Resources serial number where one exists.

Resource Types

▶   Watch the Video Tutorial here

Before Resources are created, it is useful to define *Resource Types* in Ensemble. Resource Types are used to specify what a Resource is. For example a Resource Type can be: Piano Grand, Piano Upright, Clarinet in A.

To define a Resource Type, click:

Resources (Menu Bar) > Resource Types > New Resource Type

This will display the window below:
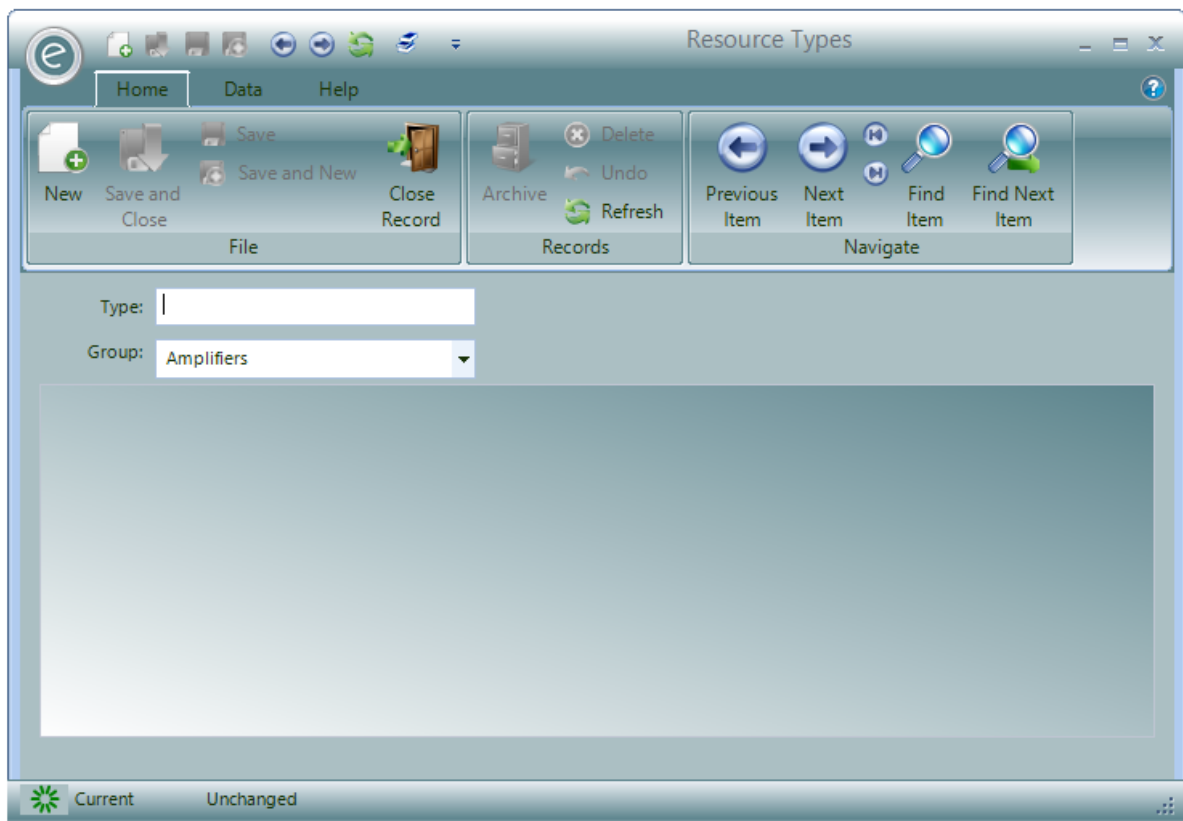
Simply name the Resource Type, assign it to a Resource Group and click **Save and Close**.

Create an Individual Resource

▶ [Watch the Video Tutorial here](#)

To create an individual Resource click:

Resources (Menu Bar) > Resources > New Resource

This will display the window below:

You will need to specify a **Ref ID** and/or **Serial No** to create the Resource.

Additionally you can select the **Resource Type** from the drop down and fill in the rest of the information.

The **Current Status** of the Resource is displayed next to Serial No. This will tell you if the Resource is available, on hire/loan or in repair.

Additional Notes

There is also an additional tab for entering miscellaneous information called **Notes**:

The white space is all available for typing into. Options in the Ribbon Menu include:

Insert Image   Launches an Image Capture window. The screenshot will be displayed on the textline

Reduce Size   Select an image and the size will reduce

Increase Size   Select an image and the size will increase

Insert Date   Inserts the current date into the text

Print   Print the Notes

Click **Save and Close** to create the Resource.

Enable Resource Location in Education Parameters

If you store Resources in *more than one physical location* you can select to use *Resource Locations.* This is an option you will find within *Education Parameters*. With this option turned on you can set up a list of physical Resource stores or locations. When adding a new Resource you can specify the location at which the Resource is stored.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Resource Locations' > Save and Close

This is displayed in the window below, with **Use Resource Locations** highlighted in the **red box**:

Click **Save and Close** and now Resources are available to use in Ensemble.

Optional Descriptive Records

This chapter will introduce Records in Ensemble that have optional use. When services are large and have a complex structure these Records help with organisation, especially when aiding Reports. They are merely descriptive and don't change how Ensemble operates.

1. Areas

 [Watch the Video Tutorial here](#)

Areas are used to help identify the location of a School, Centre, Teacher or Group.

For example, services in London would find it useful to define Areas such as Peckham, Hackney and Westminster. Of course Areas can be as broad or narrow as you wish.

Enable Availability in Education Parameters

When you first setup your database, it *will not show* the Areas option. You will therefore need to switch these on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Areas' > Save and Close

This is displayed in the window below, with **Use Areas** highlighted in the **red box**:
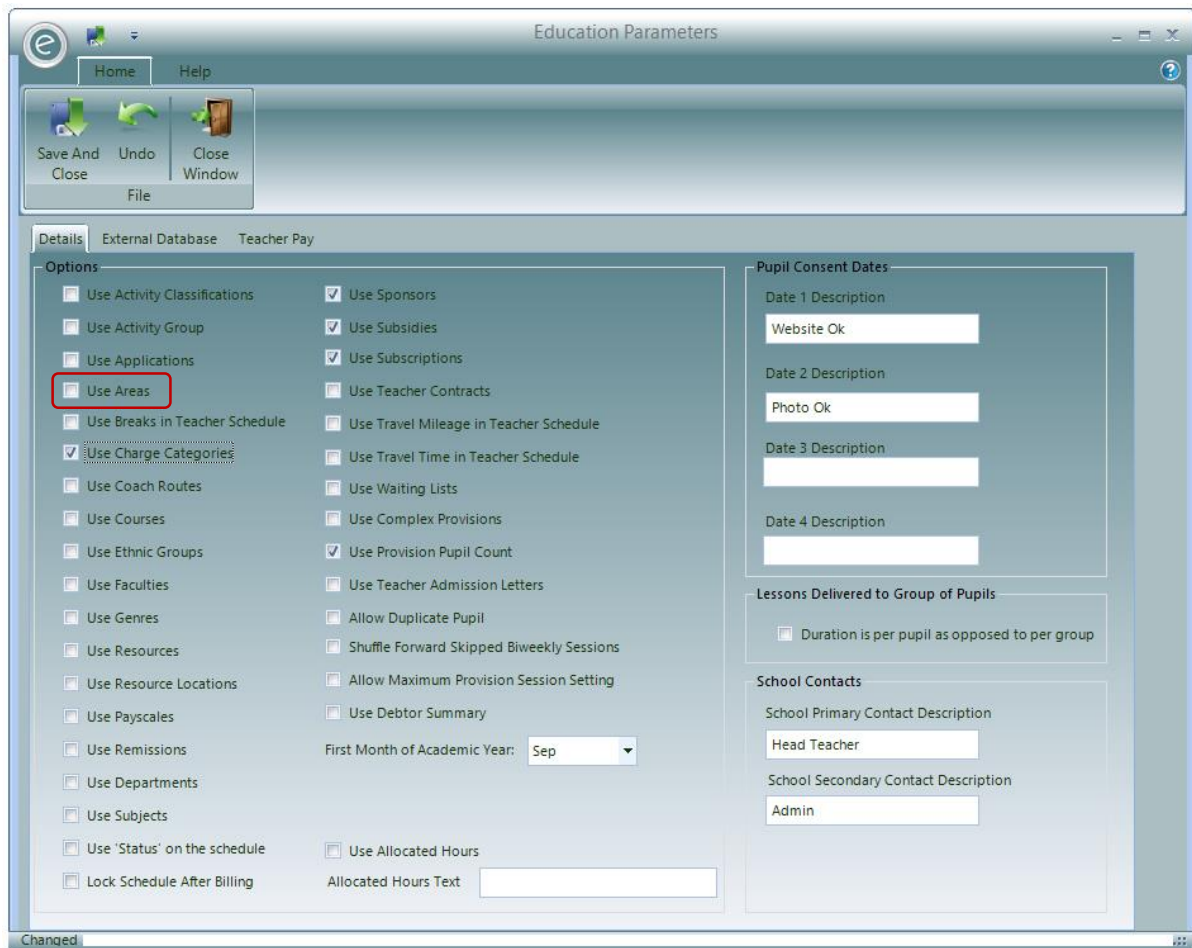
This will add the Area option to the **System** tab in the Menu Bar.

Create an Area

To create an Area click:

System (Menu Bar) > Area > New Area

This will display the window below:

Type in the name of the area in Area.

Click Save and Close to create the Area.

Applying an Area

Defined Areas are applied on School/Centre/Teacher/Group Record Card under the *Details* tab.

For example, to apply to a School Record Card, click:

Tuition (Menu Bar) > Schools > Open/Create a School Record Card > Details tab > Select Area

This is displayed in the window below:

Click **Save and Close** to save the Area for the Record.

2. Ethnic Groups

▶ [Watch the Video Tutorial here](#)

Ethnic Groups are administrative Records that describe the ethnic background of Pupils.

Enable Availability in Education Parameters

When you first setup your database, it *will not show* the Ethnic Groups option. You will therefore need to switch these on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Ethnic Groups' > Save and Close

This is displayed in the window below, with **Use Ethnic Groups** highlighted in the **red box**:
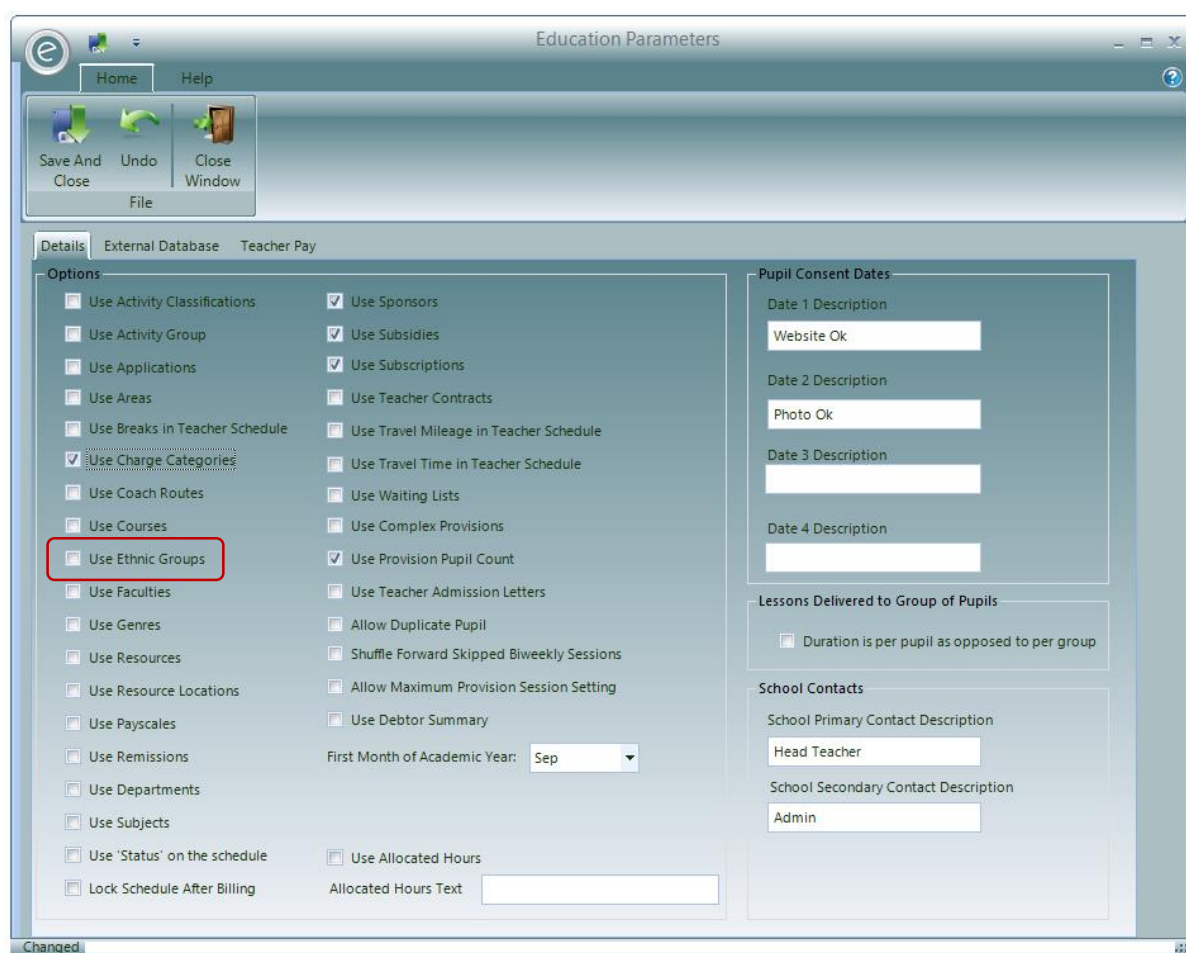
This will add the Ethnic Group option to the **System** tab in the Menu Bar.

Create an Ethnic Group

To create an Ethnic Group click:

System (Menu Bar) > Ethnic Group > New Ethnic Group

This will display the window below:
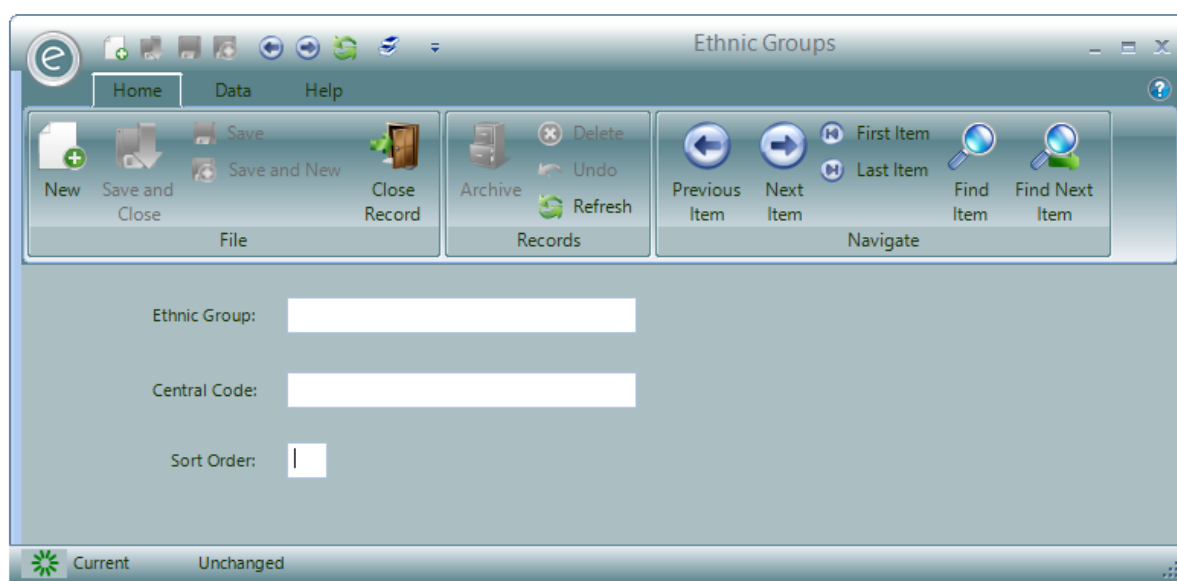
Type in the name of the ethnic group in Ethnic Group. Since the categories of ethnic groups can be very specific and hence long worded, an abbreviation can be defined in the Central Code field. This is useful for search purposes. For example; for an Ethnic Group called White – British, an appropriate Central Code may be W-BRIT.

By default Ethnic Groups are listed alphabetically in a dropdown menu, however this order can be changed by entering a number into Sort Order.

Note: If there is an Ethnic Group that you want to appear as a default, then type in 1 into the Sort Order field.

Click Save and Close to create the Ethnic Group.

Applying an Ethnic Group

Defined Ethnic Groups are applied on Pupil Record Card. Therefore click:

Pupils (Menu Bar) > Pupils > Open/Create Pupil Record Card > Details tab > Tick 'Ethnic Groups'

This is displayed in the window below:

 After ticking **Ethnic Group** you will be able to select one from the dropdown menu.

There is also a **Search** button next to the dropdown menu on the right allowing you to search by the *Central Code*.

Note: Ethnic Groups can altered as many time as you wish.

Click **Save and Close** to save the Ethnic Group for the Pupil Record.

3. Faculties

▶ [Watch the Video Tutorial here](#)

Faculties are used to identity a Faculty that a Teacher belongs to. For a music service, this may be Percussion, Keys or Guitar.

Enable Availability in Education Parameters

When you first setup your database, it *will not show* the Faculty option. You will therefore need to switch these on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Faculties' > Save and Close

This is displayed in the window below, with **Use Faculties** highlighted in the **red box**:
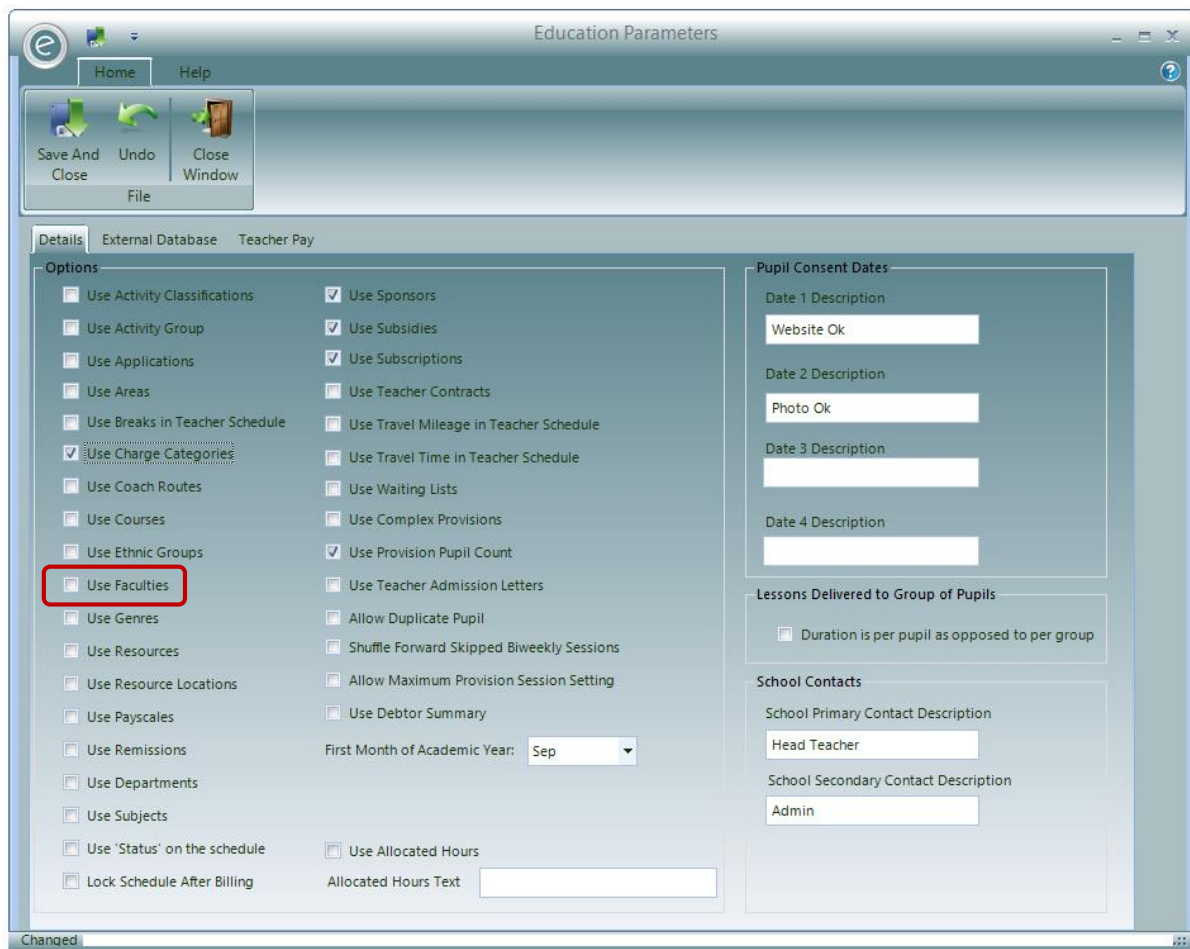
This will add the Faculty option to the **System** tab in the Menu Bar.

Create a Faculty

To create a Faculty click:

System (Menu Bar) > Faculty > New Faculty

This will display the window below:
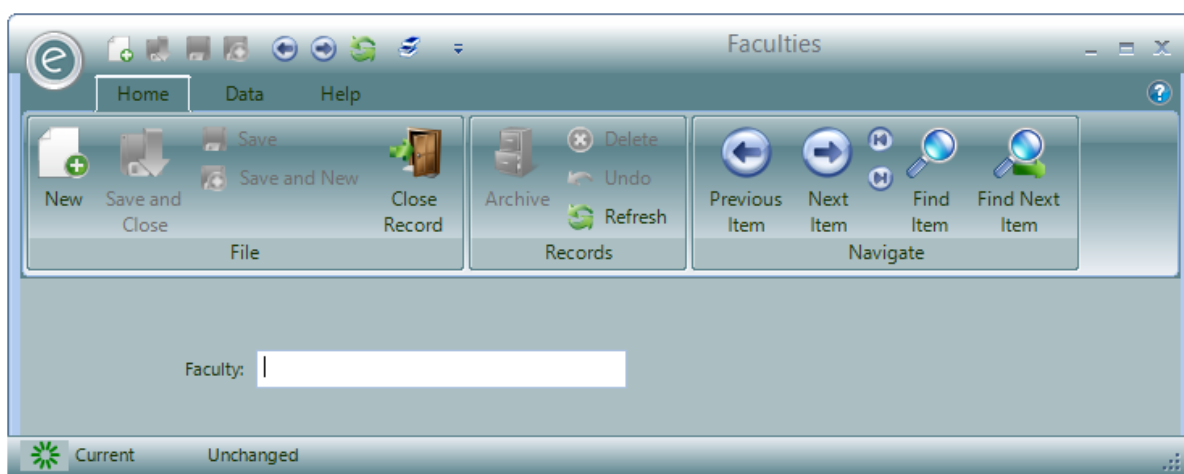
Type in the name of the Faculty in **Faculty**.

Click **Save and Close** to create the Faculty.

Applying a Faculty

Defined Faculties are applied on a Teacher Record Card. Therefore click:

Tuition (Menu Bar) > Teachers > Open/Create a Teacher Record Card > Details tab **>** Select a Faculty

This is displayed in the window below:

After choosing the Faculty, click Save and Close.

4. Departments

 Watch the Video Tutorial here

Departments are used in School, Centre, Teacher and Group Record Cards.

They are similar to Faculties however they are normally used for financial purposes e.g. Invoicing.

Enable Availability in Education Parameters

Departments are activated in the *Education Parameters.* This can be done by clicking:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick Use Departments **> Save and Close**

This is displayed in the window below:
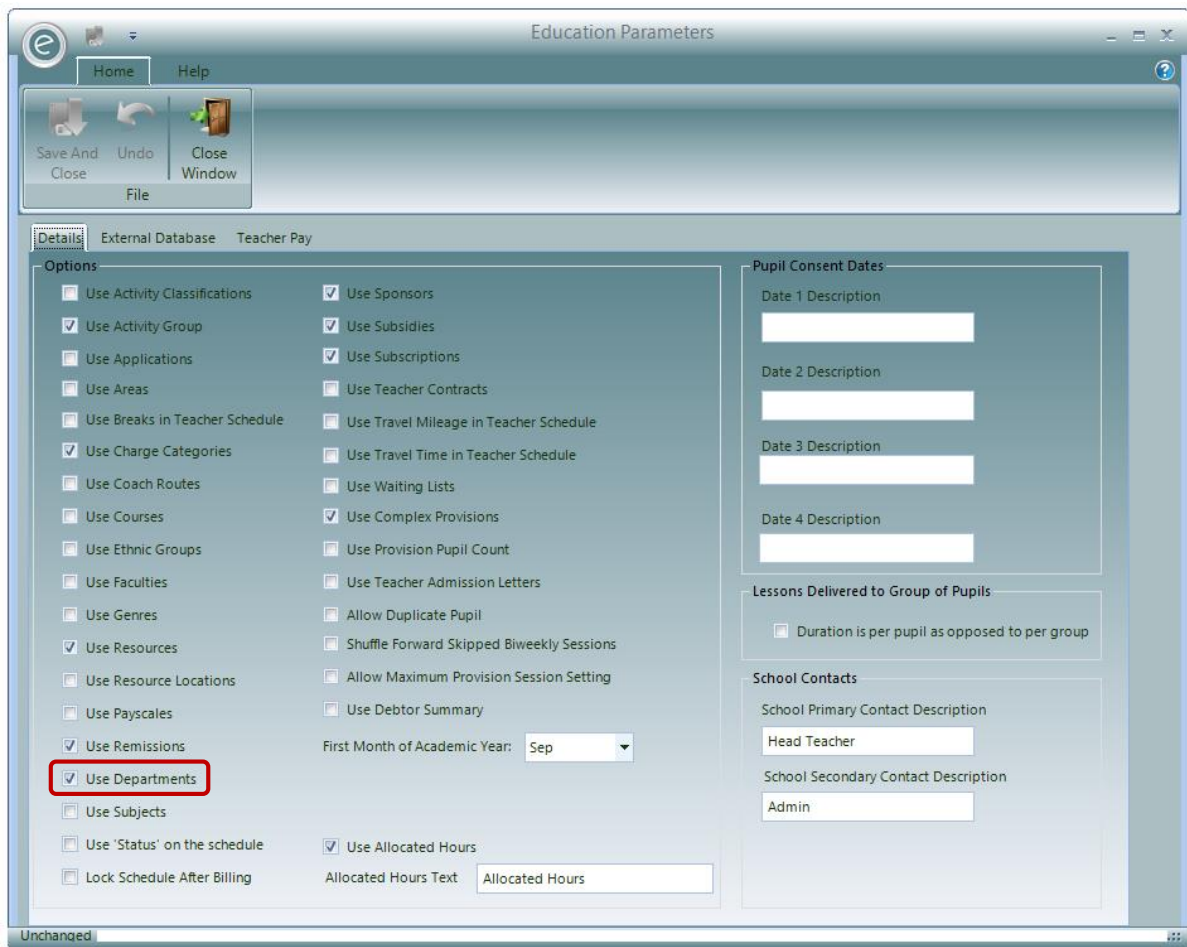
This will add the Department option to the **System** tab in the Menu Bar.

Create a Department

To create a Department, click:

System (Menu Bar) > Department > New Department

This will display the window below:
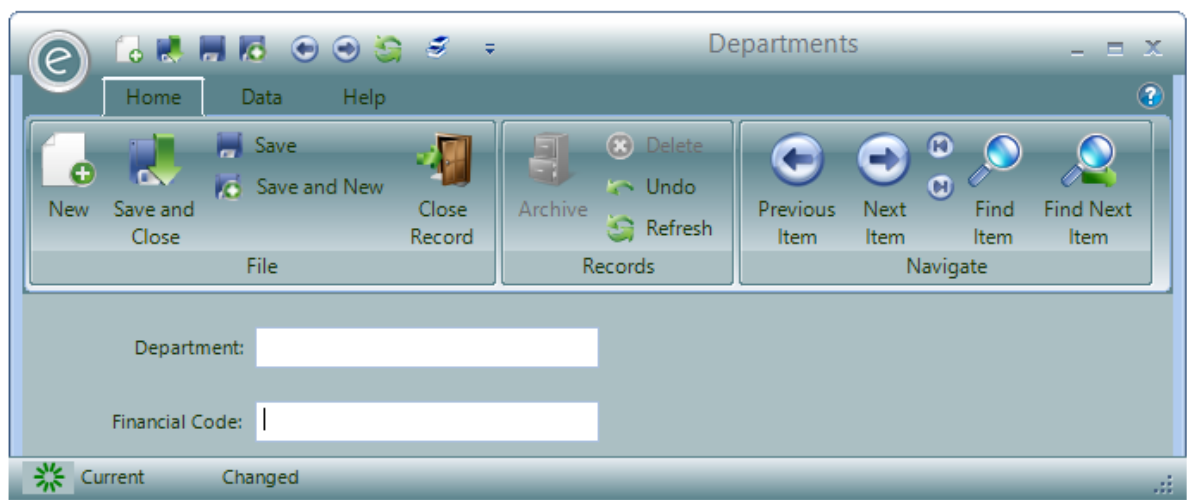
Simply name the **Department** then click **Save and Close**.

Apply a Department

Defined Departments are applied on School/Centre/Teacher/Group Record Card under the *Details* tab.

For example, to apply to a School Record Card, click:

Tuition (Menu Bar) > Schools > Open/Create a School Record Card > Details tab > Select Department

This is displayed in the window below:

Click **Save and Close** to save the Department for the Record.

5. Genres

▶ [Watch the Video Tutorial here](#)

Genre Records are used to describe genres. They are applied to Groups.

Enable Availability in Education Parameters

When you first setup your database, it *will not show* the Genres option. You will therefore need to switch these on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Genres' > Save and Close

This is displayed in the window below, with **Use Genres** highlighted in the **red box**:
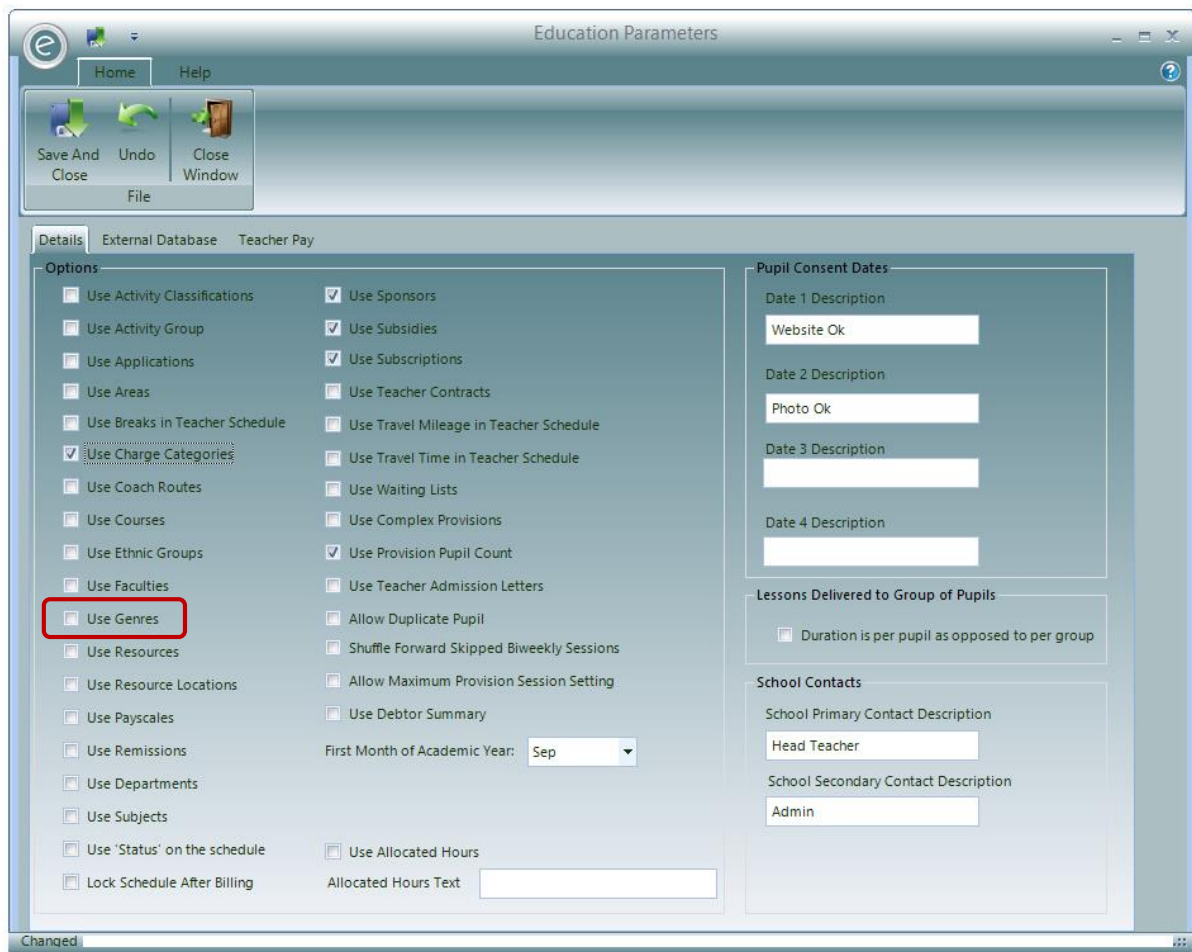
This will add the Genres option to the **System** tab in the Menu Bar.

Create a Genre

To create a Genre click:

System (Menu Bar) > Genres > New Genre

This will display the window below:
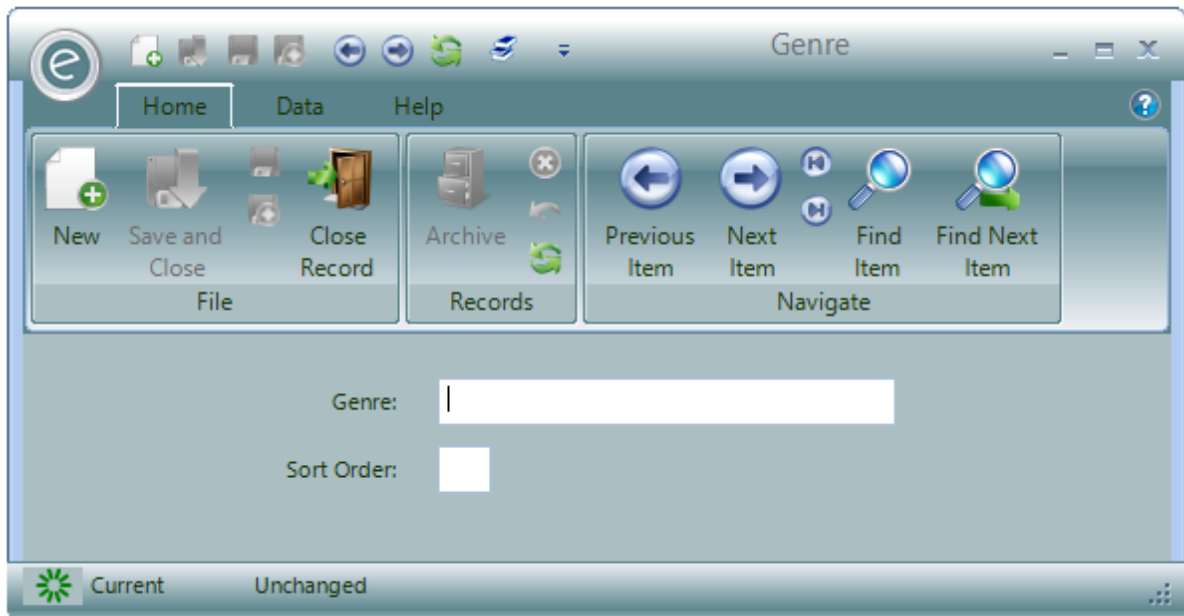
Type in the name of the Genre in Genre.

By default Genres are listed alphabetically in a dropdown menu, however this order can be changed by entering a number into Sort Order.

Note: If there is a Genre that you want to *appear as a default*, then type in 1 into the Sort Order field.

Click Save and Close to create the Genre.

Applying a Genre

Defined Genres are applied on a Group Record Card. Therefore click:

Tuition (Menu Bar) > Groups > Open/Create a Group Record Card > Details tab **>** Select a Genre

This is displayed in the window below:

After choosing the Genre, click Save and Close.

6. Prospectuses

Your service can create a *Prospectus* Record in Ensemble which will outline the various Activities you offer to particular Schools or Centres.

Create a Prospectus

To create a Prospectus click:

Activities (Menu Bar) > Prospectus > New Prospectus

This will display the window below:
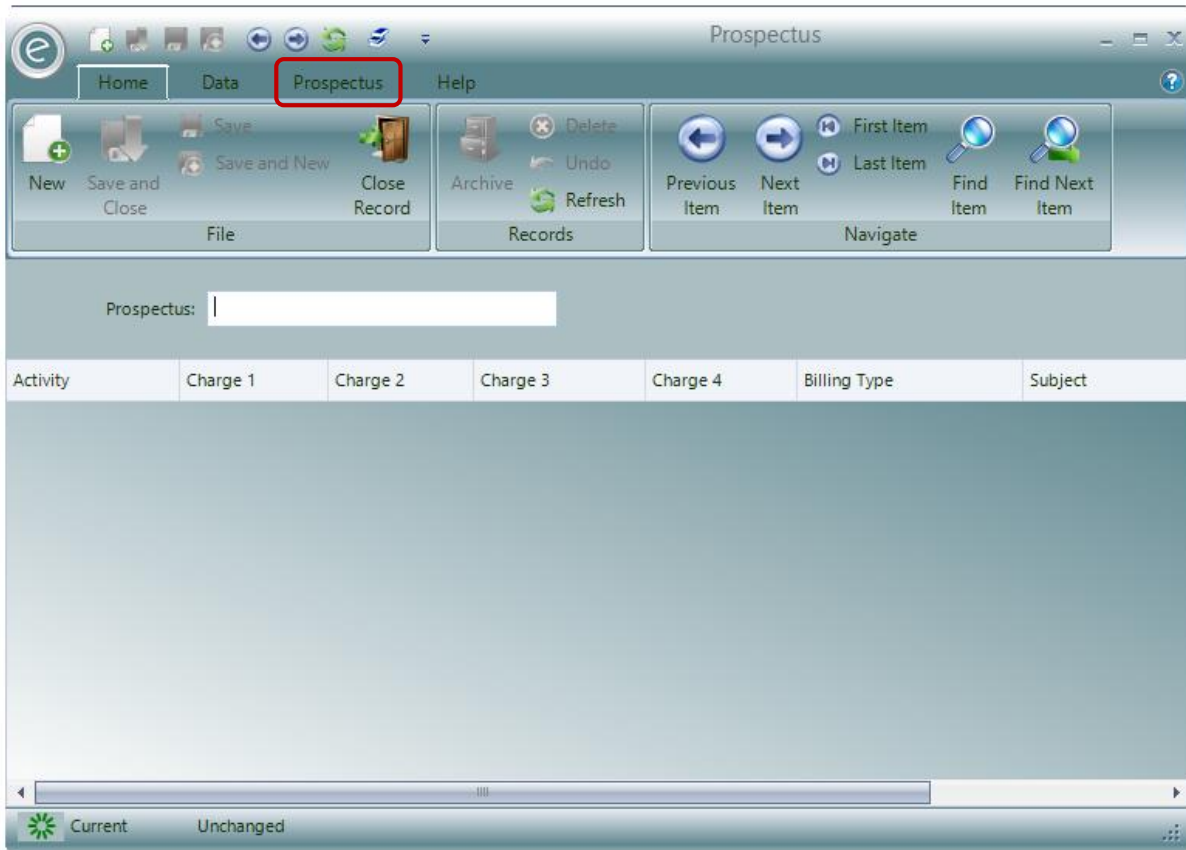
You can name the Prospectus in the **Prospectus** field.

The grid below will contain the **Activities** offered, the **Charge** options, the **Billing Type** which the Activities are in and a **Subject** if specified.

To add Activities to the Prospectus click the **Prospectus** tab highlighted by the red box. This will display the options below:
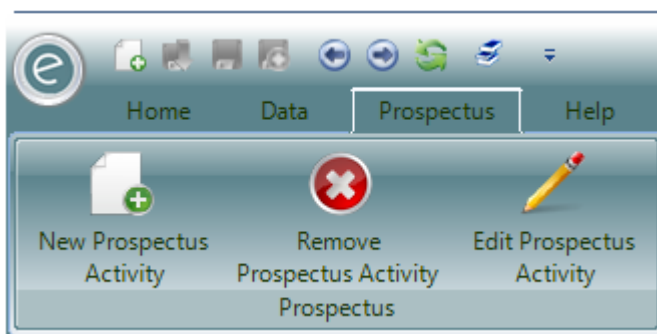
Click **New Prospectus Activity** to add a new Activity, this will open the window below:

You will be able to select the **Activity**, the **Billing Type** and *up to four* **Charges**.

If you service has a *Live Parent* license, tick **Active** and the Prospectus will appear on your Live Parent website.

Once you have specified the Activity to appear in the Prospectus click **Save and Close**.

In the Prospectus Record you can then amend an Activity offered by clicking **Edit Prospectus Activity** or delete one by clicking **Remove Prospectus Activity**.

When you have finished creating your Prospectus click **Save and Close** to save the Record.

Apply a Prospectus to a School or Centre

To apply a Prospectus to a School or Centre click:

Tuition (Menu Bar) > Open School or Centre Record Card > Details tab

For a School, this will display the window below:

The **Prospectus** field is highlighted by the **green box**. Tick this and you will be able to select a Prospectus for the School (or Centre in a Centre Record Card).

Click **Save and Close** to save.

7. Relationship Types

 [Watch the Video Tutorial here](#)

Relationship Type records describe the relation between Pupils and Parents. There are already default Relationship Type Records in Ensemble such as Mother, Father and Carer.

Create a Relationship Type

To create a Relationship Type click:

Pupils (Menu Bar) > Relationship Types > New Relationship Type

This will display the window below:
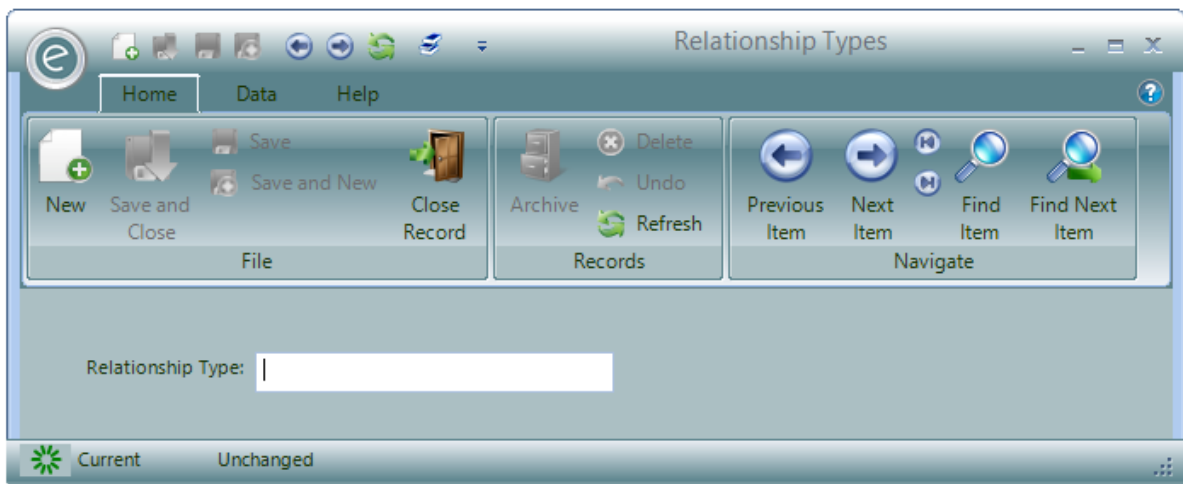
Simply specify the name in **Relationship Type**.

Click **Save and Close** to create the Relationship Type.

Applying a Relationship Type
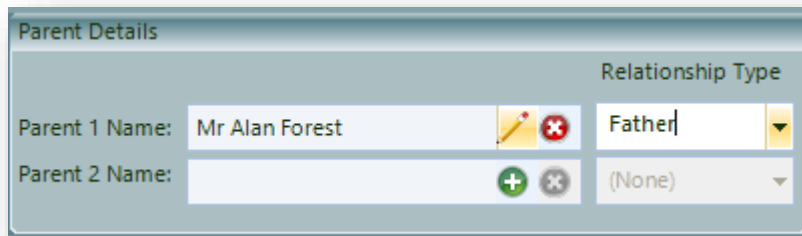
Defined Relationship Types are applied on the associated Parents on a Pupil Record Card. Therefore click:

Pupils (Menu Bar) > Pupils > Open/Create Pupil Record Card > Details tab **>** Enter a Parent

This is displayed in the window below:

After entering a Parent into the Parent 1 Name or Parent 2 Name field, the Relationship Type dropdown menu will become available. Enter the Relationship Type from this as displayed below:

Click **Save and Close** to save.

8. School Types

 [Watch the Video Tutorial here](#)
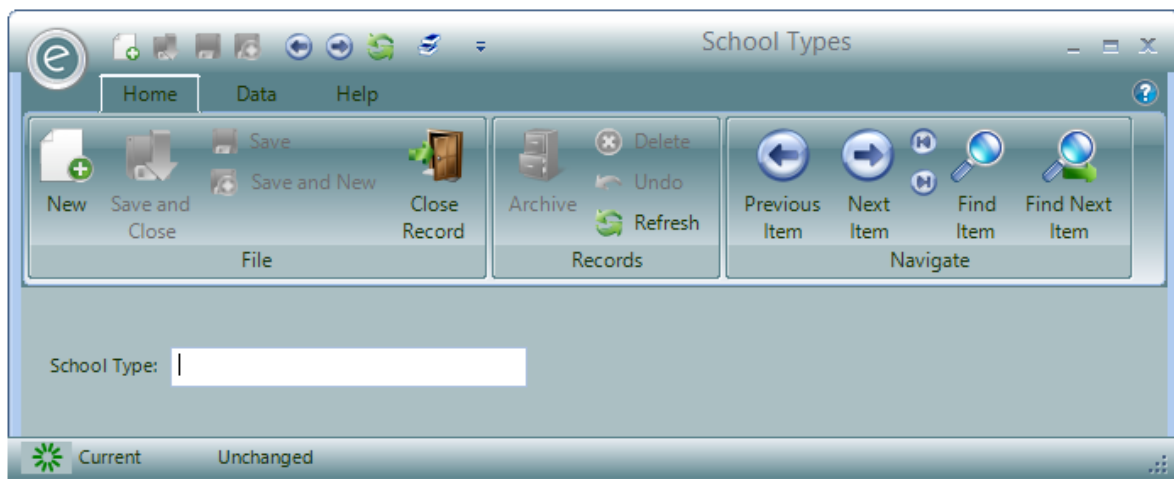
School Types define the type of School. E.g. Secondary, Primary. These Records are already pre-defined in Ensemble, however additional School Types can be created.

Create a School Type

To create a School Type click:

System (Menu Bar) > School Types > New School Type

This will display the window below:

Type in the name of the School Type in **School Type**.

Click **Save and Close** to create the School Type.

Apply a School Type

The School Type is applied on the School Record Card.

Therefore click:

Tuition (Menu Bar) > Schools > Open/Create a School Record Card > Details tab > Select a School Type

This is displayed in the window below:

The School Type can be altered as many time as you wish. Once happy, click **Save and Close** to save.

9. Pupil Consent Dates

▶ [Watch the Video Tutorial here](#)

Pupil Consent Dates are used to record particular dates that a parent has consented for their child to begin tuition. Four can be named in the Education Parameters and the date of consent can then be entered for the Pupil in their Pupil Record Card. They are primarily used in the *Pupil List by Consent Date Report.*

Enable Availability in Education Parameters

Pupil Consent Dates are activated in the *Education Parameters.* This can be done by clicking:

Tools (Ribbon Menu) > Parameters > Education Parameters

This is displayed in the window below:

There are four available Consent Dates to define.

Once finished, click Save and Close.

Apply a Pupil Consent Date

When at least one Pupil Consent Date has been defined in the Education Parameters you will be able to apply it on a Pupil's Record Card. To do this click:

Pupils (Menu Bar) > Pupils > Open/Create a Pupil Record Card > Details tab

This will display the window below:

There will be a section called **Consent** now available to use in the Record Card, highlighted by the red box. Select the Pupil Consent Date to use and enter the date that this was made.

Click **Save and Close** once complete.

User Management

This section contains information on how to control the people who can access your data and what they are allowed to change or view.

1. Overview

Access to the software and the functions within it are controlled by a User. Each User requiring access must be defined within the database and the functions they wish to perform must be allocated to them via a set of User Group Memberships.

When run, the software examines the operating system to discover the User's windows login name and checks that it has an entry in the database. If there is no entry present the User is denied access. If the entry is found then the system looks at the User Groups that the User is a member of and constructs the menus to contain the functions listed for each User Group.

Each function listed in a User Group includes an indicator as to whether the User can *just read* or *read and modify* data using the function. It is therefore possible to control who has access to the software, what functions they may use and how they can affect the data.

When the software is first used no Users will exist in the database. While it is in this state all Users that try and access the software are given temporary membership of the Administration Group allowing access to all areas of the system. This allows the first User to define actual Users.

Note: As soon as a User has been added to the database the system will start to control access. It is therefore important that this *first User created should be an administrator* and have the administration group added to it so that this User can manage the creation and modification of all other Users.

2. User Groups

This software includes one default User Group, the *Administrator Group*. Users with the necessary rights can create as many other User Groups as required. User Groups tend to be designed around User's job functions and therefore include all the functions Users would need to perform their tasks. Each User can then have the User Group designed for their job function assigned to them.

Note: Users can and often have more than one job function and so *more than one* User Group can be assigned to a User.

Defining a User Group

[Watch the Video Tutorial here](#)

To create User Groups, go to:

System (Menu Bar) > User Groups > New User Group

Clicking **New User Group** will open the window below:
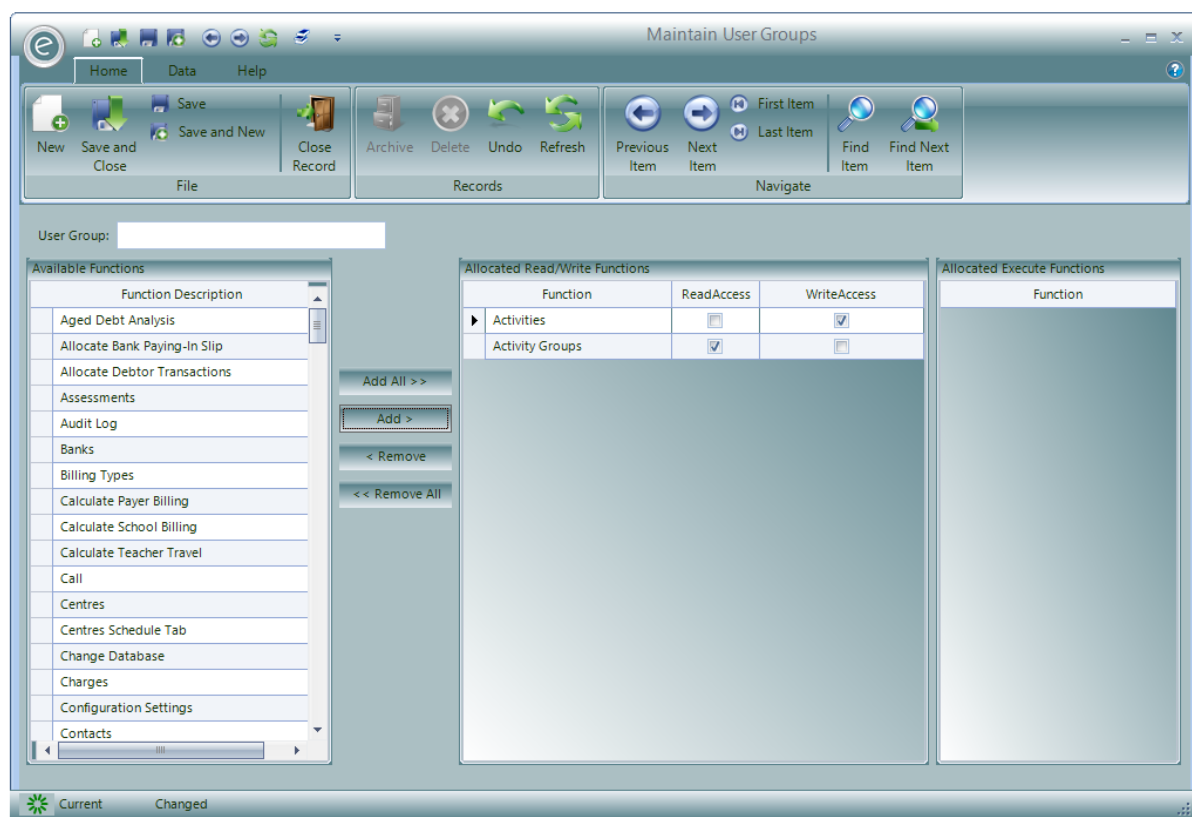
Type in a name for the User Group in the **User Group** field.

To allocate a function to this User Group, select a function from the **Available Functions** list on the left, then click on the **Add** button to add them to one of the **Allocated Functions** lists.

If the function relates to some process whereby you can *create or amend a data record* then it is added to the **Allocated Read/Write Functions** list. If the function is *a process that is executable* such as a report or calculation, it is added to the **Allocated Execute Functions** list.

Items added to the Allocated Read/Write Functions list may have their access properties set. Tick *Read Access* to allow to read data and *Write Access* to allow to edit the data.

Activation in Configuration Parameters

As a default, User Groups will be switched on in the Parameters but they may be switched off. This will make every User a member of the default Administration User Group, giving them full access to Ensemble.

To do this click:

Tools (Ribbon Menu) > Parameters > Configuration Parameters > Settings tab

This will display the window below:
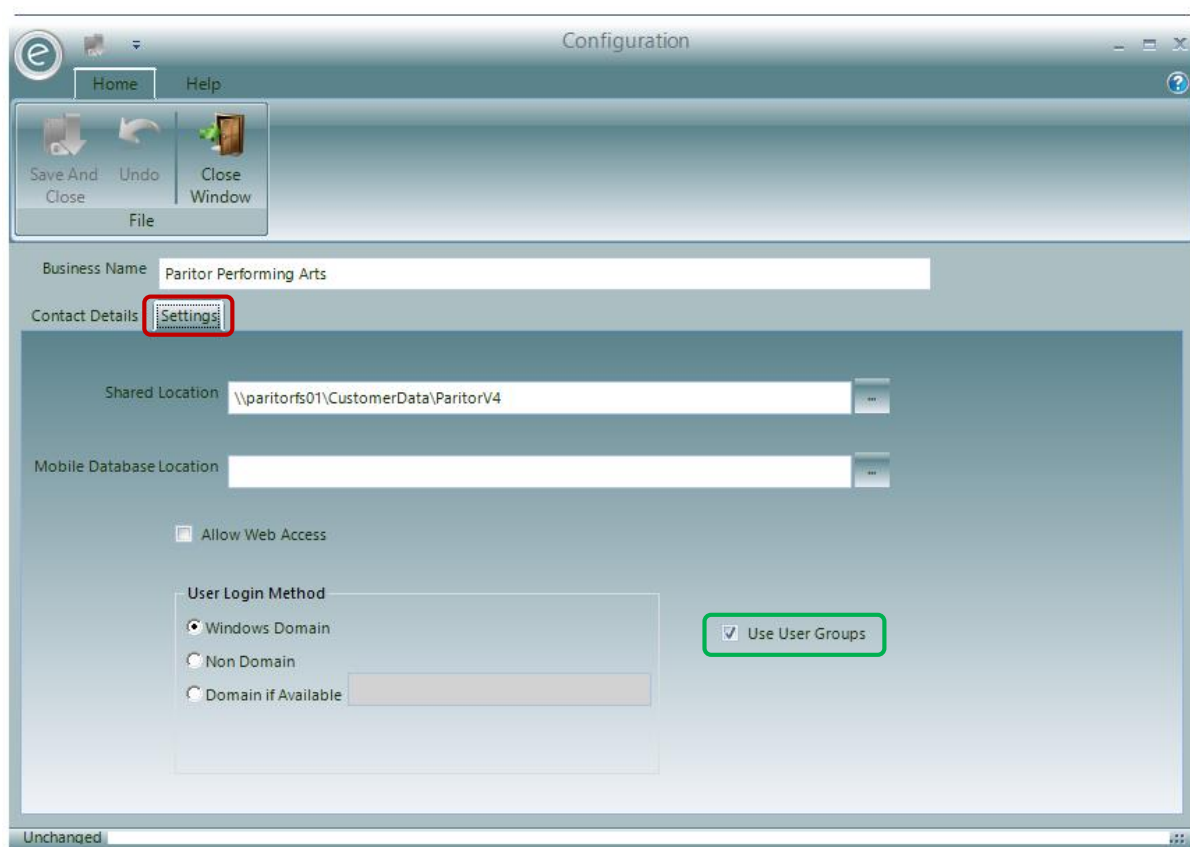
You can then *tick* Use User Groups (as highlighted by the green box) to *activate* them or *un-tick* to *deactivate*.

Then click Save and Close to save the changes.

3. Users

All Users requiring access to the system need to be defined within the system database. This is done by creating a User Record and assigning a set of *User Groups.*
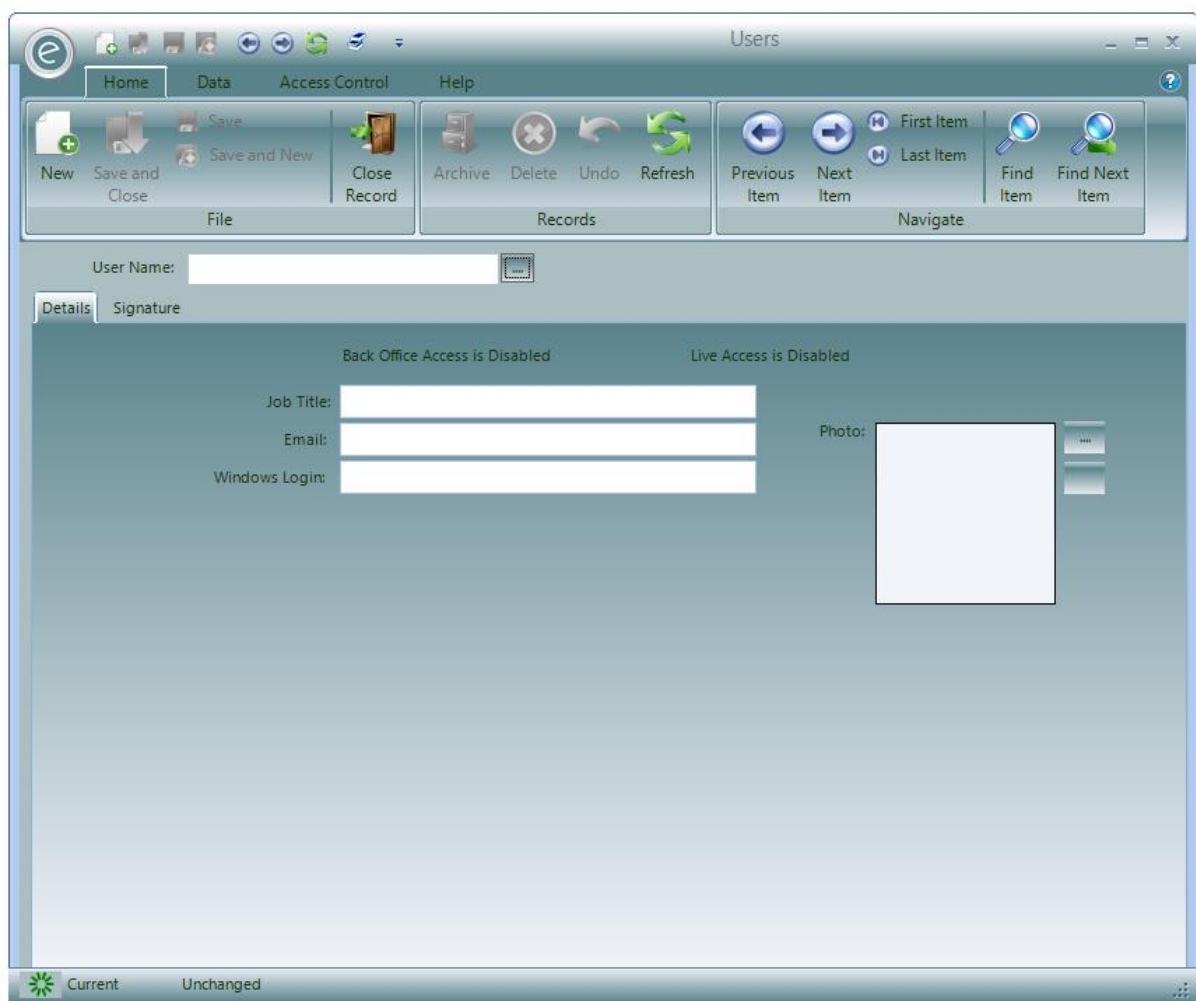
Create a User

▶ [Watch the Video Tutorial here](#)

To create a new User go to:

System (Menu Bar) > Users > New User

This will display the window below:

You need to enter the **User Name** to save the User.

Furthermore you can specify their **Job Title**, **Email** and **Windows Login** as well as including a **Photo**.

Above the Job Title field are *read-only fields* that disclose if the User has **Back Office Access** and/or **Live Access**. Currently in this example, they are disabled.

Clicking the **Signature** tab will allow you to import a copy of their signature which may be used for reporting purposes.

This is displayed below:
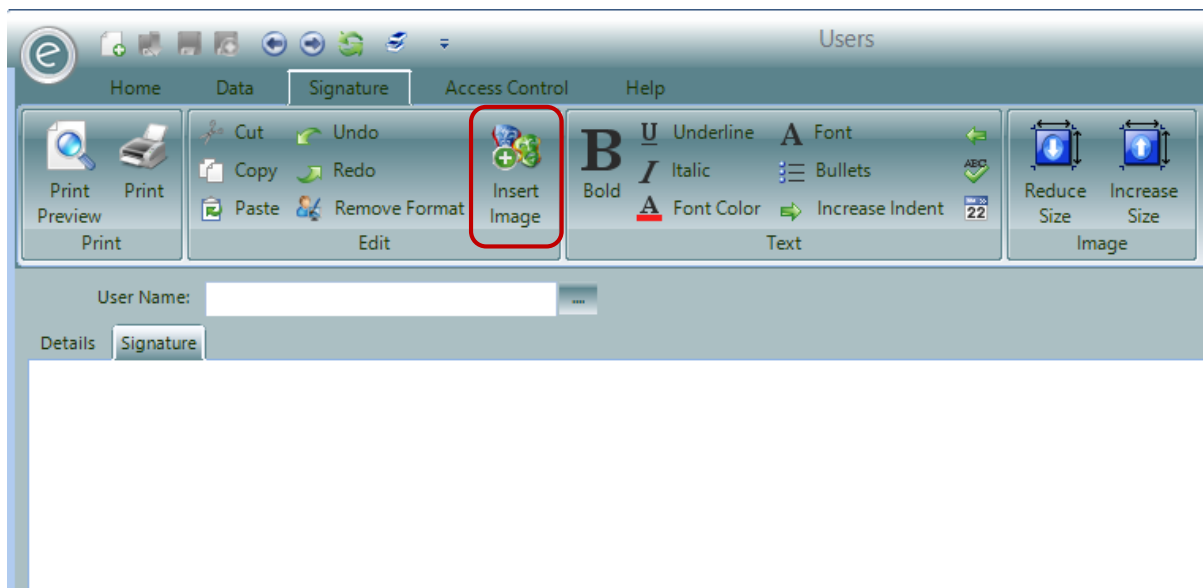
Click **Insert Image** to input the signature.

When happy, click **Save and Close** to create the User.

Control Users Access

While creating a User or after the User has been created, you'll need to select what the User can access in Ensemble.

This is done on the **Access Control** tab of a User's Record Card as displayed below:
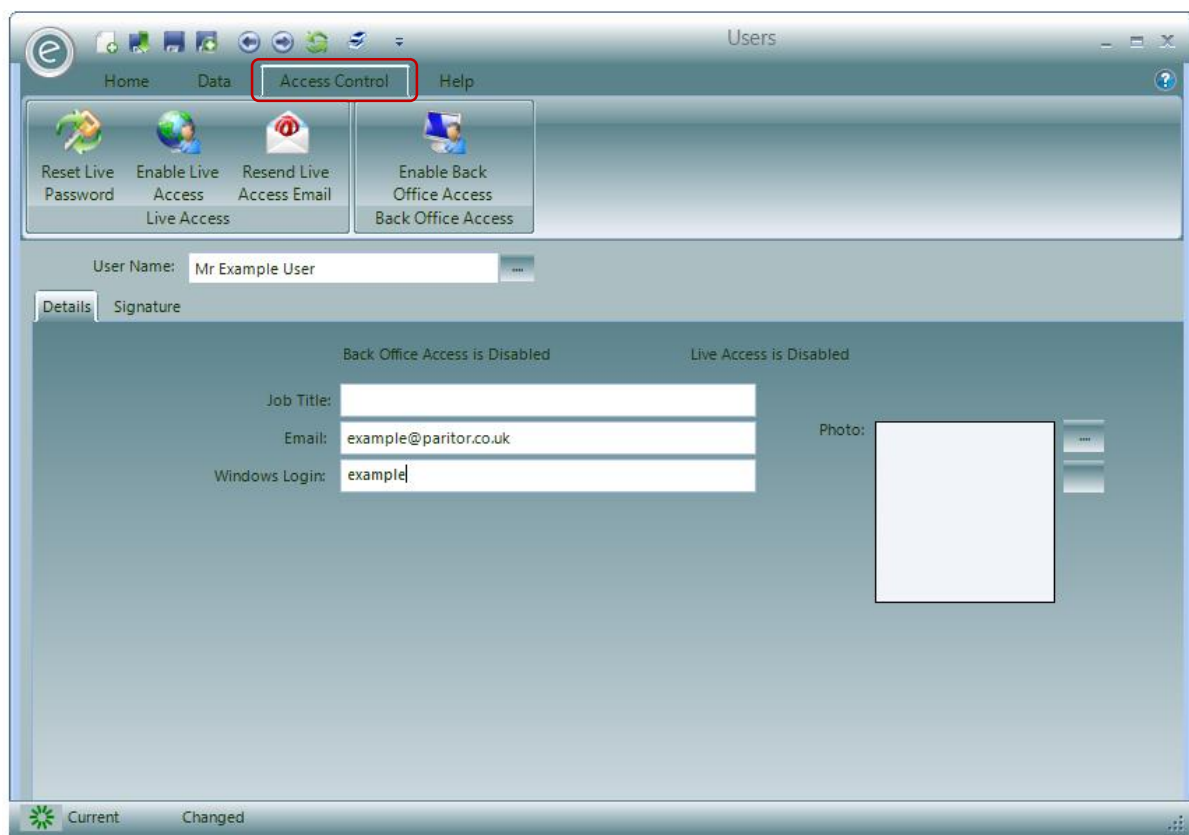
You now have options to:

Enable Back Office Access	All User's such as administration staff that require use of Ensemble Enterprise/Lite facilities must have this activated in order to log in.
Enable Live Access	All User's such as Teachers and Head Teachers who require use of the Ensemble Live facilities will need this to be activated
Reset Live Password	If a Live User forgets there password, it can be reset here. The user will be sent an email containing the new temporary password and another email to change it.
Resend Live Email	If the emails sent from Reset Live Password are not received, they can be sent again here

If the User has Live Access activated, *new read-only fields will appear* on the Details tab of the User Record Card. These are displayed below:

Allocating User Groups to a User

Once a User has been given Back Office Access they can be assigned to the User Groups that define what areas of Ensemble Enterprise/Lite they can use. A *table will be visible* from the Details tab of the User Record Card that will allow you to do this. It is displayed below:

All the defined User Groups are displayed under Available Groups and those that are allocated to the User are under Allocated Groups.

To allocate a User Group, simply select one from Available Groups and click Add to move it to Allocated Groups. The reverse applied to remove one, by pressing Remove.

Alternatively all User Groups can be allocated or removed by clicking Add All or Remove All.

In the example above, this User has the *Read Only* User Group allocated to them.

Click **Save and Close** to save the Record Card.

View Users Currently Using the System

A list of all current Users is displayed in the *Task Bar* of the Console. You can email any other User by simply *double clicking* on the User's name.

This is highlighted below by the **red box**:

Schedule Management

This chapter will discuss how to:

- Set up the working calendar
- Set up schedules with lessons
- Set up cover lessons and record why original lessons did not take place
- Make variations to the Schedules
- Produce reports such as Schedules

1. Provision Types and Calendars

Overview

▶ Watch the Video Tutorial here

In order to schedule work and organise work into distinct entities, the system uses a combination of *Provision Types and Calendars* that define when an entity such as a Teacher or Resource is available.

All work defined within the system is assigned a *Provision Type*. All work of a similar type would have the same Provision Type. For example a Provision Type will define how the academic year is divided. Typically it would be split into Autumn, Spring and Summer terms but this can be divided differently such as 2 terms.

Provision Types

▶ **Watch the Video Tutorial here**

Within the software the term *Provision* refers to the *supply of a service for a period of time*; for example:

- When a set of tuition runs within an academic term, then the *term of lessons* would be classed as a Provision.
- If a Summer School is organised for a single week, then the *week of lessons* would be classed as its Provision.

We use a *Provision Type* to lay down *rules* as to how individual Provisions can be defined.

There are *three* different basic Provision Types:

1. Term Based
2. Annual
3. Ad-Hoc

These are discussed in the topic **Create a New Provision Type**.

Enable Provision Types in the Education Parameters

By default, Ensemble will only use a Provision Type called *Academic Terms* which is term based using three terms for Autumn, Spring and Summer. This also will also be the *only Provision Type available* to use unless the *Use Provision Types* option is selected in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Provision Types' > Save and Close

This is displayed in the window below, with Use Provision Types highlighted in the red box:
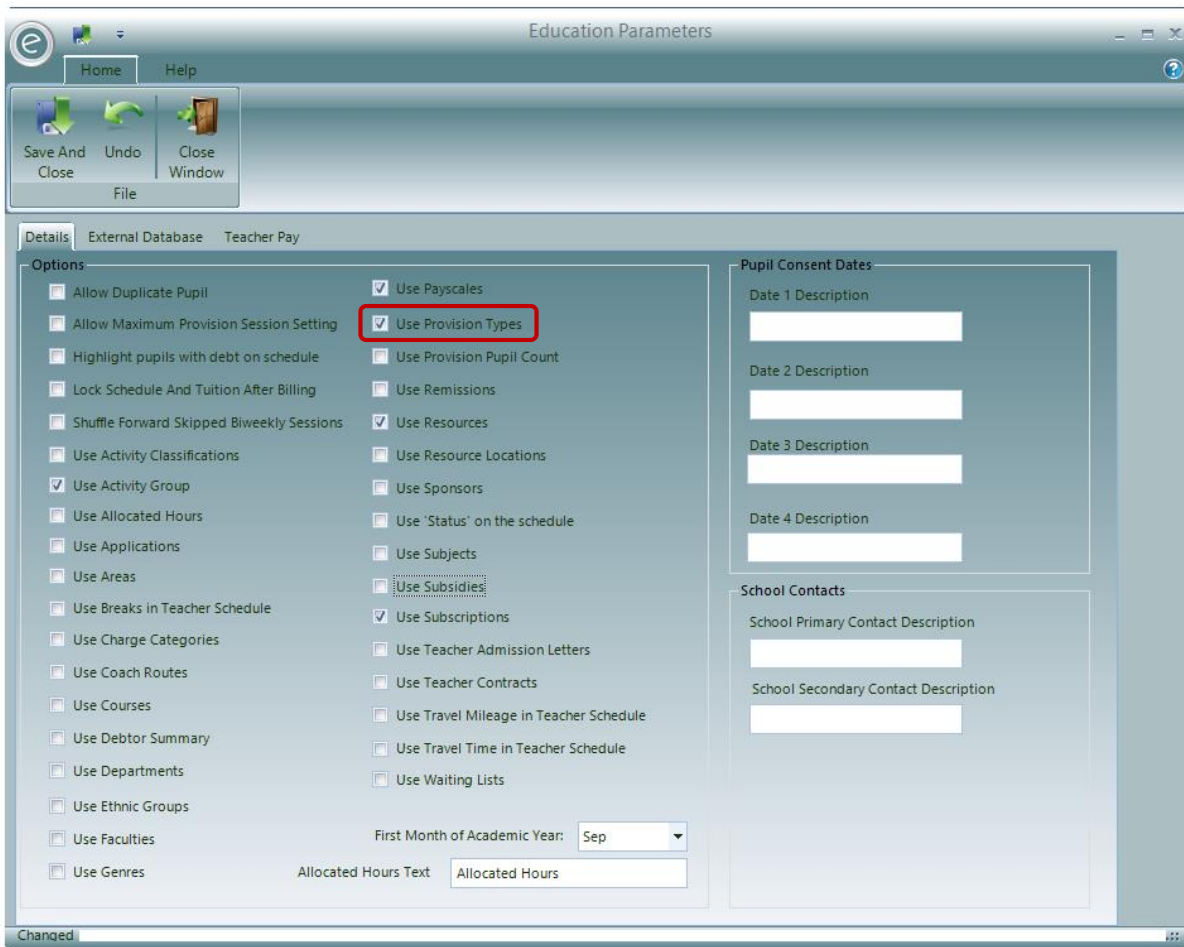
Click **Save and Close** and now Provision Types will be available to use in Ensemble.

Create a New Provision Type

To define your Provision Types, go to:

System (Menu Bar) > Provision Types > New Provision Type

This will display the window below:
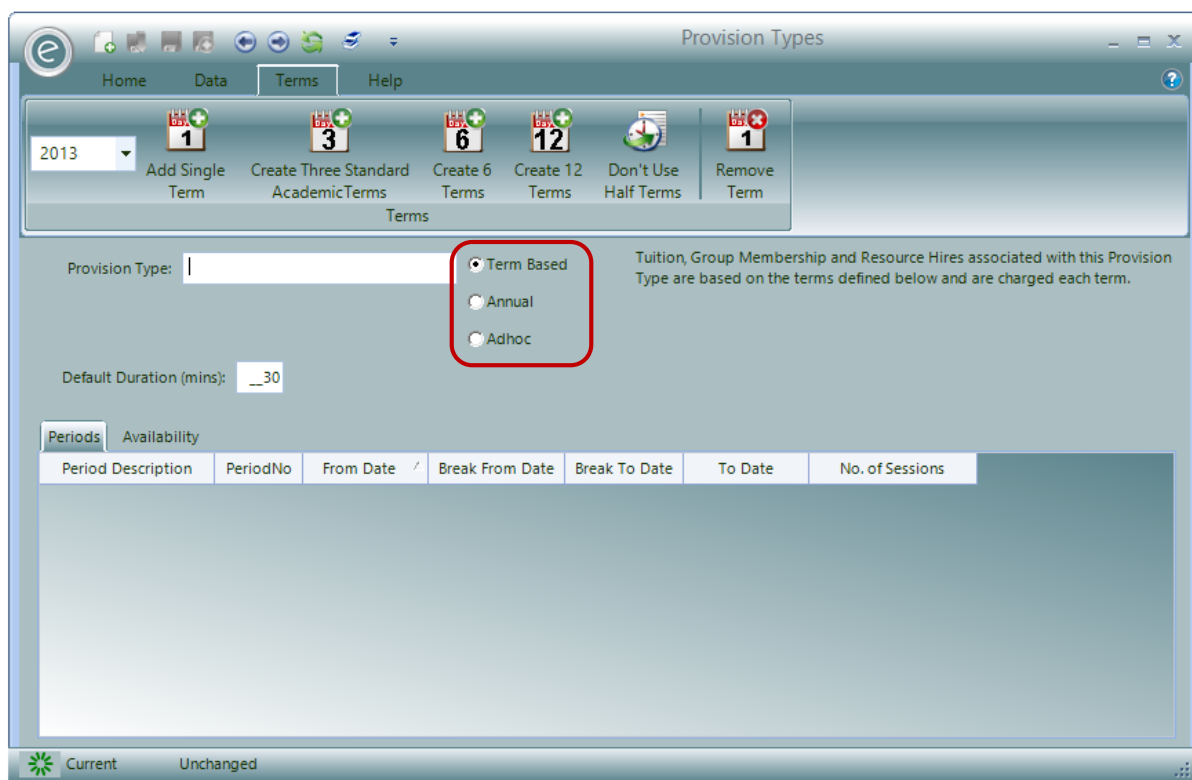
The *Provision Types* are highlighted in the red box and each will be explained below.

Term Based

These are Provisions that are repeated throughout a year and follow *academic terms*. This is very useful for lessons that are cyclical and repeat. When defining a Term Based Provision Type you also define a *set of terms* for each year. This is the *default Provision Type* selected when you create a Provision Type.

This is displayed in the window below:
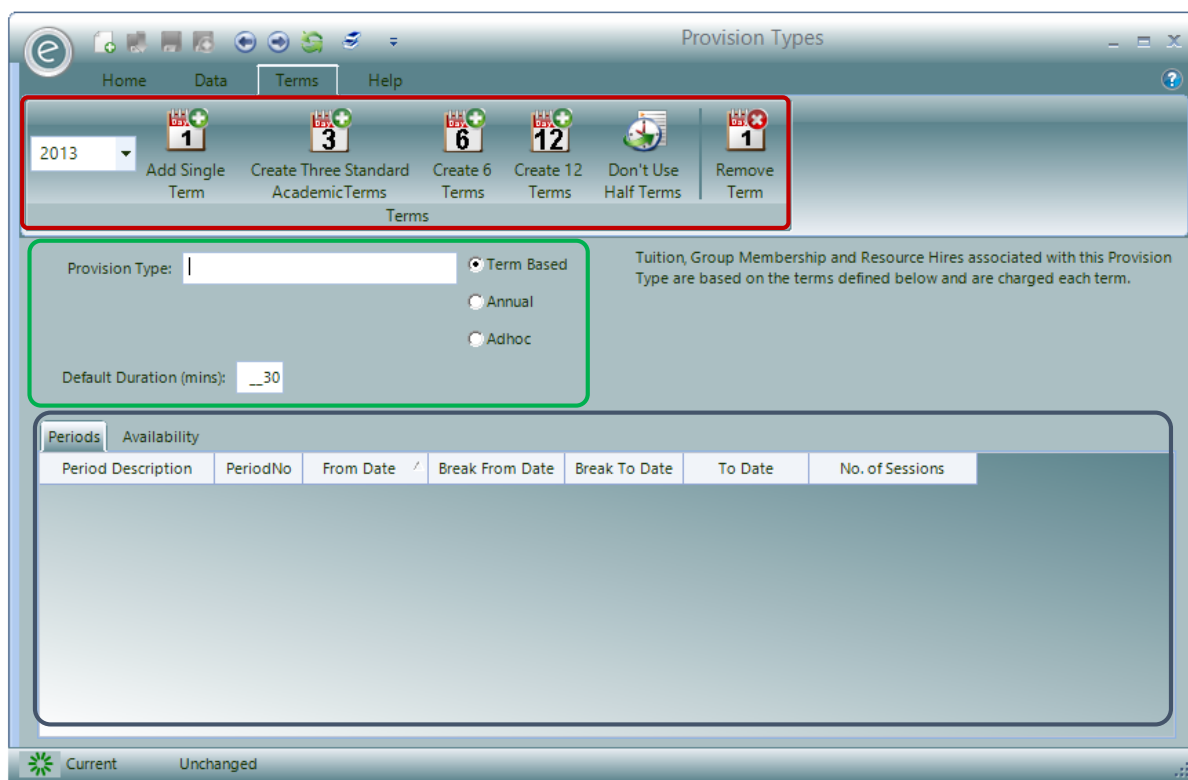
The *Provision Types* are highlighted in the green box, here *Term Based* is selected. In here you will also need to write the name for this Provision Type in the **Provision Type** field and define the **Default Duration (mins)** for an Activity Plan created within this Provision Type.

The blue box highlights the area where the terms are displayed, known as *Provision Periods*. These define how the year is divided. Each term will appear as a row, within this area. The **Availability** tab also allows you to define dates when activities *cannot take place* by switching to a *Calendar view*.

The red box highlights the Ribbon Menu whereby you can *define the year* for this Provision Type to run for in the dropdown menu and *add or remove terms* by clicking:

Add Single Term	Creates a single Provision Period (1 row)
Create Three Standard Academic Terms	Creates 3 Provision Periods automatically defined as Autumn, Spring and Spring. Typical term layout (3 rows)
Create 6 Terms	Creates 6 Provision Periods (6 rows)
Create 12 Terms	Creates 12 Provision Periods (12 rows)
Don't Use Half Terms/Use Half Terms	Remove or use Half Terms
Remove Term	Delete a Provision Period (row) from the table

For example, selecting **Create Three Standard Academic Terms** will display this below:

This table holds information regarding the:

Period Description	Name of the term
PeriodNo	The number of the specific Provision Period
From Date / To Date	Date range of the whole term
Break From Date / Break To Date	Date range of the half term break
	Note: Clicking Don't Use Half Terms will remove these columns
No. of Sessions	Default number of sessions, i.e. the number of lessons provided in a term

Information in the cells can be edited and as many Provision Periods can be created as you wish.

Important: Be careful that no one terms' set of dates overlap another terms.

Furthermore clicking the Availability tab will allow you to specify *Non-Working Time* on a Calendar. These dates are unavailable for activities, for example because of school holidays. Simply *click on a date* to make it unavailable. This is displayed below:

Here Saturday 12th October and Sunday 13th October are unavailable as they have been highlighted in red.

Note: When you define your lessons later, if a lesson is scheduled to run on a date defined as Non-Working Time, it will automatically be re-scheduled to the next available date.

Annual

An Annual Provision Type covers a *whole year*. To create this Provision Type, select Annual. The window will change to the view below:
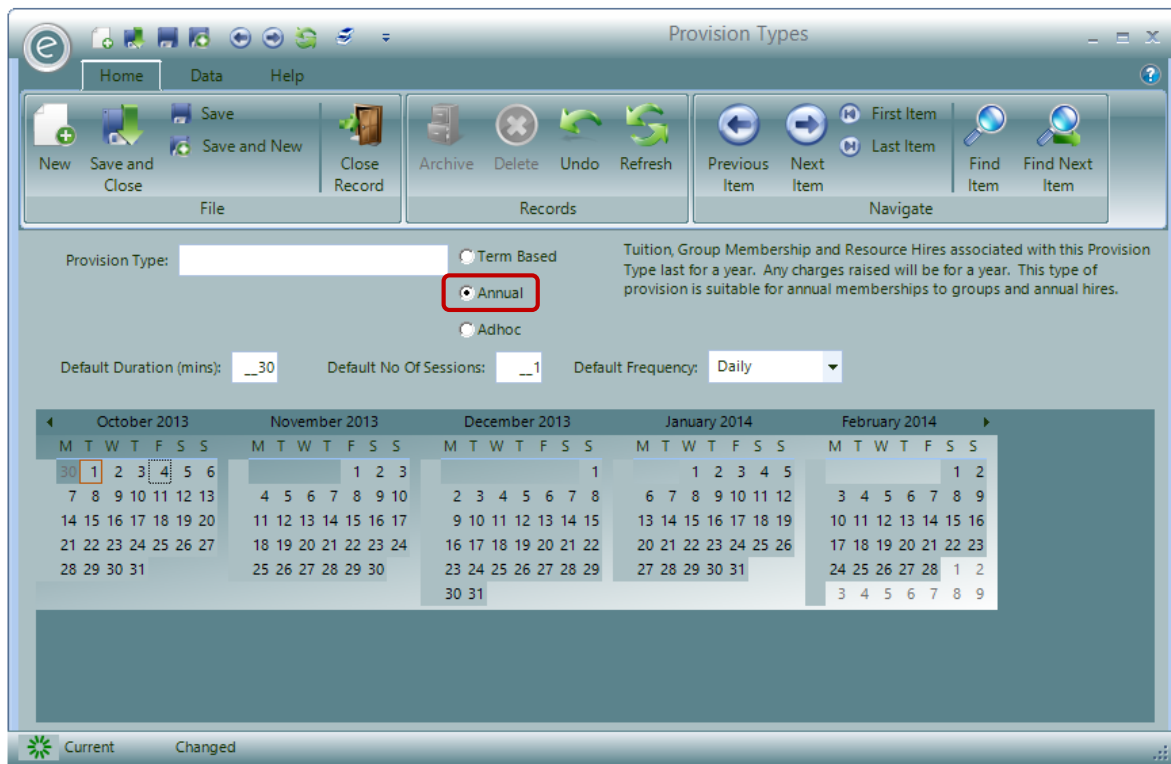
It contains no date information but covers a period of twelve months. You will need to define the:

Provision Type Define a name for the Provision Type

Default Duration (mins) Default length of the sessions in minutes

Default No Of Sessions Default number of sessions to use in the year

Default Frequency Default frequency they will run for

The Calendar will allow you to specify *Non-Working Time.*

First Month of Academic Year

Finally the *First Month of the Academic Year* will need to be defined within the *Education Parameters.* This is the month from which the year will start and is applied across the whole system. To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters

This will display the window below:

The **First Month of Academic Year** is highlighted in the **red box**. Simply select the month in the dropdown menu and click **Save and Close**.

As with Term Based Provision Types any type of activity including scheduled tuition, Group Membership and Resource Hire can be associated with this Provision Type. You can set default lesson duration and default number of sessions should you wish.

Ad-Hoc

Ad-Hoc Provision Types cover the Provision of activities that *do not relate to a fixed repeating period* of time such as a term. It is therefore used when defining *one off events* such as summer schools or trips. To create this Provision Type, select **Adhoc.** The window will change to the view below:
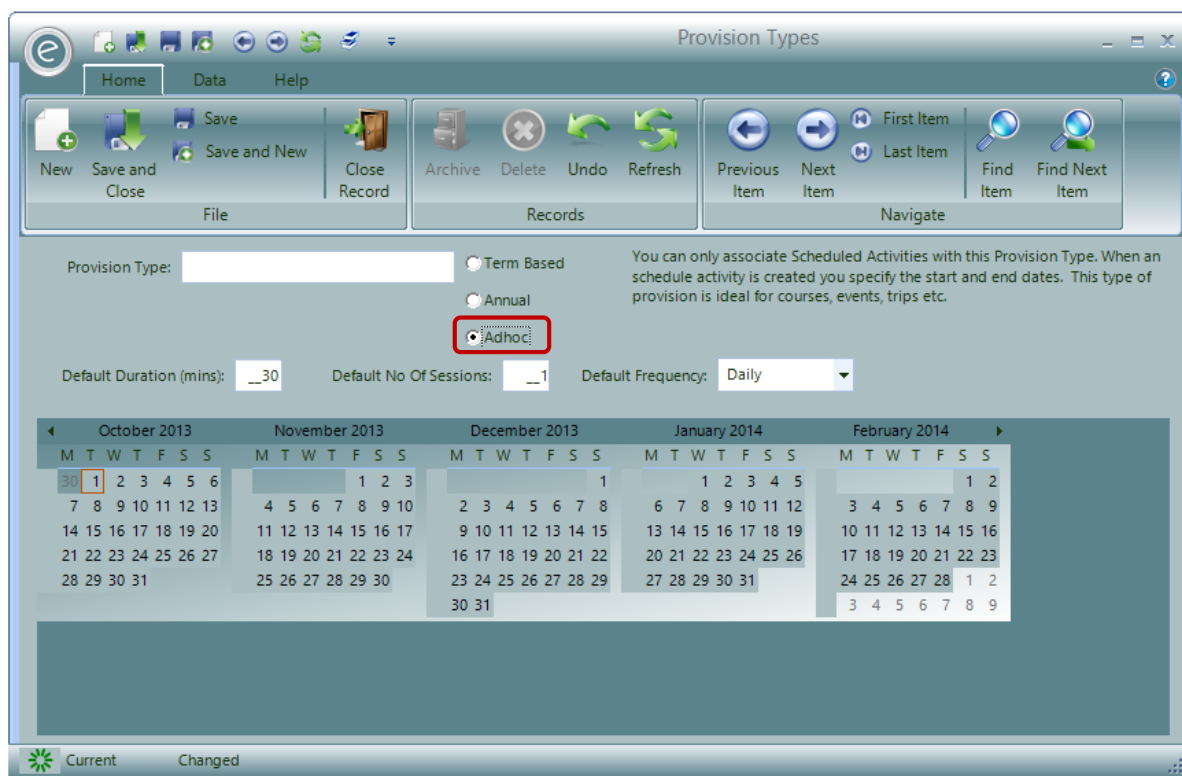
Similarly to Annual Provision Types, you will need to define the:

Provision Type	Define a name for the Provision Type
Default Duration (mins)	Default length of the sessions in minutes
Default No Of Sessions	Default number of sessions to use in the year
Default Frequency	Default frequency they will run for

The Calendar will allow you to specify *Non-Working Time.*

Availability and Non-Working Time

▶ [Watch the Video Tutorial here](#)

When planning the Provision of tuition a number of factors have to be taken into account, not least the availability of each resource that is involved in the tuition. For example, is a Teacher available on a specific date or is the date a bank holiday? The system maintains a set of calendars that hold details of availability. Therefore dates known as *Non-Working Time* can be defined which will make that date unavailable for activities to occur.

System Wide

This holds dates where no activity can take place across the *whole of your service*. The system wide calendar can be found in:

Tools (Ribbon Menu) > Housekeeping > Non-Working Time

This will display the window below:

Select the dates you wish to define as unavailable by simply *clicking* on the calendar or for *multiple dates* you can *drag across*. They will appear as *red squares*.

When finished, click Save and Close.

Important: If you have already set up your lesson Schedule you will need to run the *re-diarise* procedure for these changes to be made effective. Otherwise your changes will not appear in the Diary Entries. Therefore we advise that this is inputted before an Academic Year begins.

Note: For more information regarding the re-diarise process please search for **Reset Schedule Diary**.

Specific Records

These are the *individual Records* that can have Non-Working Time defined:

| Provision Types | Clicking on the Availability tab for Term Based Provision Types and the Calendar is already visible for Annual and Ad-Hoc Provision Types. |

Teachers	Each Teacher has their own calendar defining when their available. The calendar can be viewed by opening a Teacher's Record Card and clicking on **Non-Working Time** within the **Schedule** tab.
Schools / Centres	This includes Schools and Centres and as with Teachers, these also have their own calendar to define availability. The calendar can be viewed by opening a School's Record Card and clicking on **Non-Working Time** within the **Schedule** tab. This is particularly useful for defining days when the School is closed.
Groups	Viewed by opening a Group's Record Card and clicking on **Non-Working Time** within the **Schedule** tab. The Groups calendar can be used to define dates when no activity involving the Group can take place.

Note: When building a diary of activities from a Schedule, the system looks at all the above calendars in order to plan dates.

3. Activity Plans

A fundamental principle behind the way the software works is the creation and maintenance of *Activity Plans*. An Activity Plan is an Activity, such as a lesson, *scheduled* to take place at a Venue such as a School.

You can create five basic types of Activity Plan. These are:

School Activity Plan A tuition Activity that takes place within a School

Centre Activity Plan A tuition Activity that takes place within a Music Centre that you run and organise tuition for

Group Activity Plan An Activity undertaken by Teachers that relates to a Group where a Group is a choir, band or dance group

Allowance Activity Plan* An Activity performed by a Teacher that is part of their scheduled time but is *not a tuition or group activity*, e.g. a regular meeting

Module Activity Plan* A tuition Activity that is a Module of a Course

*Note: For more information on *Modules and Courses*, refer to **Courses and Modules** in the **Advanced Schedule Management** chapter.

All Activity Plans are contained within a *Schedule*; these are maintained from a Teacher, School, Centre or Group Record.

4. Schedules

To view a Schedule open up one of the above records and select the Schedule tab. Therefore to view the Schedule for a School, click:

Tuition (Menu Bar) > Schools > Open a School Record Card > Schedule tab

This is displayed in the window below:
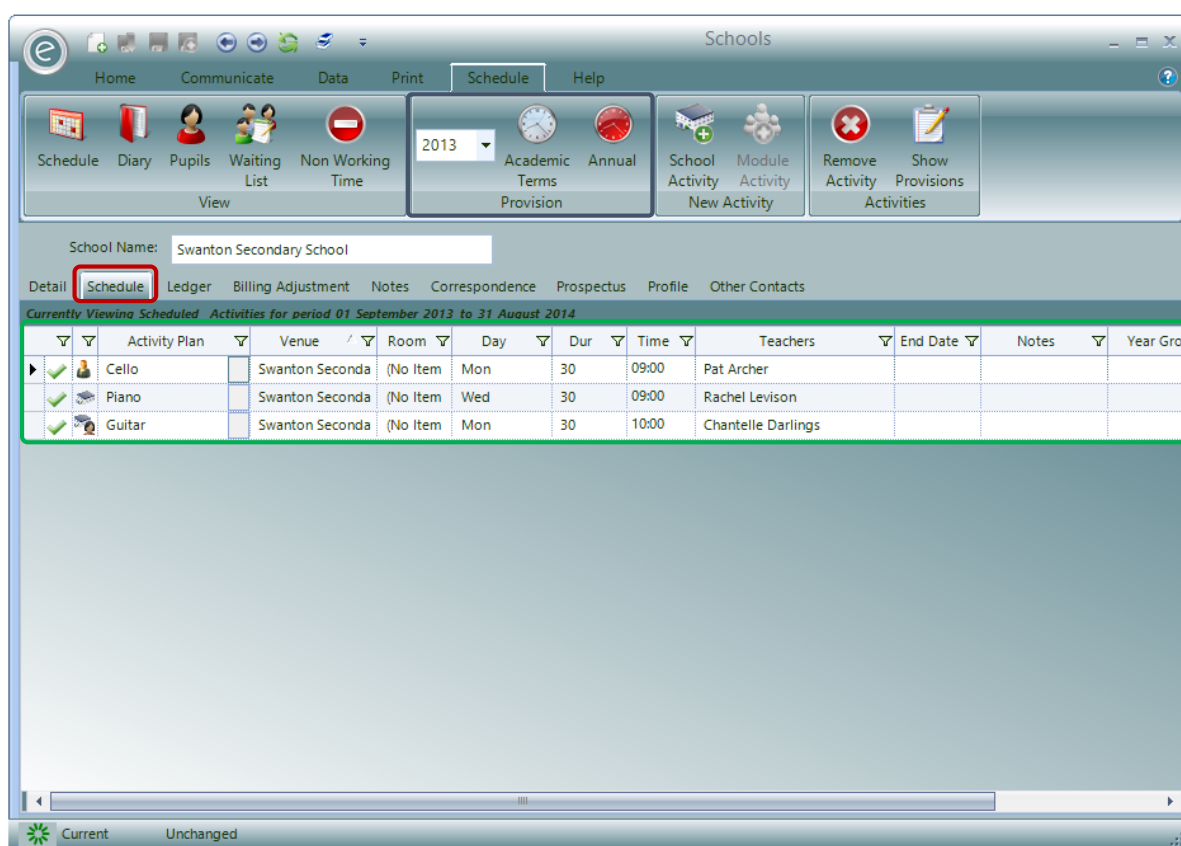
The Schedule tab will initially *summarise all the current Activity Plans* associated with the Record Card, giving you an overview of the scheduled items. The Activity Plans are displayed individually as rows highlighted in the green box.

Here Swanton Secondary School has three Activity Plans. These are Cello, Piano and Guitar.

Upon opening the Schedule tab, the year will default to the *current academic year*, though you can change this via the Academic Year dropdown menu on the Ribbon Menu, highlighted in the blue box. You can also select which Provision Type to view and this will display Activity Plans which have been made for that Provision Type.

For example, here we have defined Academic Terms and Annual as Provision Types.

The information columns in the grid displaying the Activity Plans are:

Activity Plan Status

The first column contains an icon that *notifies you if there is any issue* with each activity. For example, it may be that the planned number of sessions cannot be fitted between the start and end date of a Provision. The icons displayed are:

✔   All is OK

⚠   Requires attention

Activity Plan Type

The second column also contains icons and these indicate the type of activity plan and who is to be charged for the activity. The icons displayed are:

 Teacher Allowance

 School activity charged to School by time.

 School activity charged to School per Pupil.

 School activity charged to Pupil payer.

 Centre activity

 Group activity

Remaining Columns

These are the remaining columns in the Schedule.

Activity Plan	Name of the Activity*
Venue	Name of the Venue. This isn't necessarily the School as will been seen when creating Activity Plans*
Room	Specify a Room in which the Activity takes place*
Day	Day of the week for the Activity to take place*
Duration	Duration of the Activity*
Time	Starting time of the Activity*
Teachers	The Teacher conducting the Activity*
End Date	When an Activity permanently finishes an End Date should be recorded here
Notes	Notes can be written here
Year Group	Year Group of the Pupils to be taught
Summary	This will summarise the Provision information

*These will already be filled in after an Activity Plan has been created.

5. How to Create an Activity Plan

▶ [Watch the Video Tutorial here](#)

Activity Plans are maintained from the Teacher, School, Centre or Group Record Cards. To create an Activity Plan open up one of these Records and select the *Schedule* tab. For example, to access this for a School, click:

Tuition (Menu Bar) > Schools > Open a School Record Card > Schedule tab

There will be section the in *Ribbon Menu* called **New Activity** that will contain the available Activity Plans to create. This is highlighted within the **green box** in the window below:
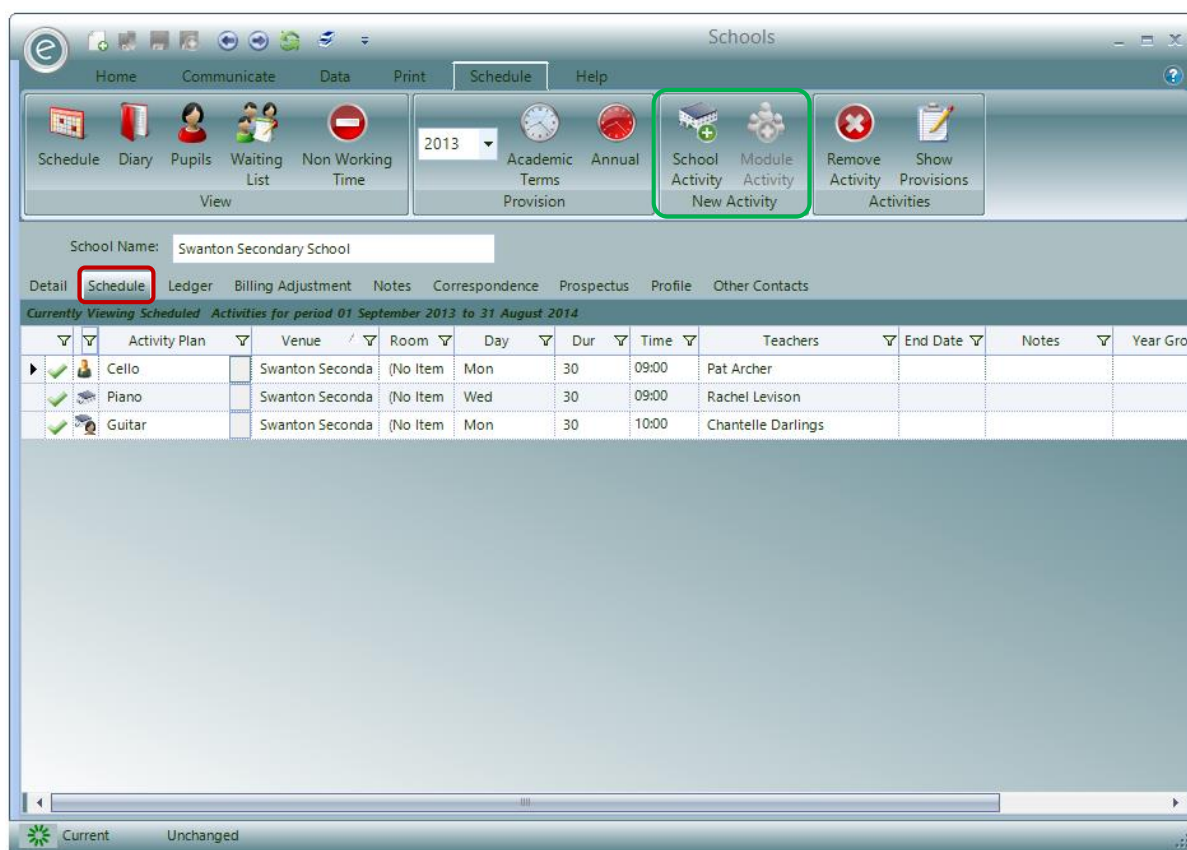
There are different Activity Plans available to create within different Record Cards.

When using a *Teacher Record Card*, all the different Activity Plans will be available to create from the New Activity section since all the Activity Plans *require a Teacher*. This is displayed below:

When creating Activity Plans from a *School or Centre Record Record* the New Activity section contains an option to create the *related Activity Plan and the Module Activity Plan*. This is displayed below:
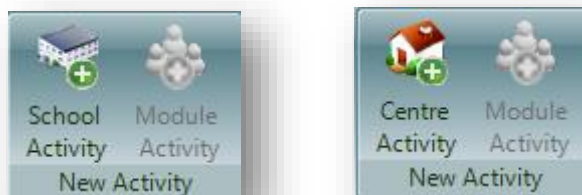
When creating Activity Plans from a *Group Record*, the New Activity section *only contains* an option to create a Group Activity Plan. This is displayed below:

Note: To illustrate how to create all the Activity Plans, they will all be created from a *Teacher Record Card.* This is because New Activity Plan windows *differ slightly* depending on which Record is opened, however one won't contain more or less than another.

Note: *Allowance Activity Plans* and *Module Activity Plans* are discussed in **Allowances** and **Course and Modules** respectively in the **Advanced Schedule Management** chapter.

Create a School Activity Plan

Watch the Video Tutorial here

To create a School Activity Plan, click:

Tuition (Menu Bar) > Teachers/Schools > Open Record Card > Schedule tab > School Activity

This will display the window below:

There are several fields to be filled in order to create the Activity Plan.

The red box highlights:

School   If you are creating the Activity Plan from a *Teacher Record Card* then you will
                      need to select the School at which the Pupils *actually attend*. Select from the
                      dropdown list.

                      Note: This may *not necessarily be where the Activity is to take place.*

Activity   Select the *Activity* from the dropdown list. The list will contain all the
                      Activities you have defined.

Description   The description will be populated with the Activity description. This can then
                      be modified to better describe the Activity Plan.

Billing Type   Select the Billing Type from the dropdown list. You will have previously
                      defined your Provision Types and this will indicate the *structure that the
                      Activity Plan will follow* (it may be based on terms). The lower half of the
                      form contains a grid of information about the Provisions.

The **black box** highlights the Auto Diarise button. When this is ticked, the *Diary Entries will be
automatically created* given the date constraints of the Provisions selected and the defined Frequency
of the sessions. This ticked as a default. If it is un-ticked, the Diary Entries for the lessons will need to
be created manually.

The blue box highlights the *Provision Period layout for the Activity Plan*. Each row is an individual
Provision Period and the columns indicate how the Activity Plan is scheduled.

Where more than one Provision is displayed, altering any value will also change the value of the
following Provisions. For example if you have three Provisions altering the number of sessions in the
second will also change the number of sessions in the third but not the first.

The Provisions will *initially be set up according to the selected Provision Type*. Where the Provision Type is Term Based the Description, From Date, To Date and Sessions will be copied from the Provision Type. These values along with the other values displayed in the grid and can *all be changed*.

Provisions can also be added and removed by clicking Add Single Provision and Delete Provision respectively.

The Provision information grid contains values for the following:

Provision/Term	This is a description of the Provision. This will typically be a term such as Autumn, Spring and Summer
From Date	Select the date the first activity is to occur within the Provision.
	Note: If the Frequency is Daily then this must be the *actual first date*. Otherwise this can be the *week start date*.
To Date	Select the last possible date for the Provision. No diary entries will be made after this date.
Sessions*	This is the *number of sessions* the Activity is to be supplied within the Provision.
Duration*	This is the duration in *minutes* of a single Activity.
Total Duration*	This value will be *automatically calculated* after you enter Sessions and Duration. It is the total number of minutes that the Activity Plan will have for the Provision.
Day*	If you know the Day on which the Activity is to be provided then it can be entered here.
Time*	If you know the Time at which the Activity is to be delivered it can be entered here.
Teacher	If you *aren't creating a School Activity Plan on a Teacher Record Card* then you can optionally select a Teacher from the drop down list.

*Auto-Diarise will allow these fields to be automatically populated. This is *ticked as a default*.

Total Duration Calculator

On some occasions you may know the:

- Total Duration and the number of Sessions and wish to work out the Session Duration
- Total Duration and individual Session Duration but wish to know how many Sessions are required to fulfil this

This can be done by using the *Total Duration Calculator*. At the right hand side of the *Total Duration* there is a white square button which when clicked will display the Calculator. The button is highlighted below:

Provision/Term	From Date ∧	To Date	Sessions	Duration	Total Duration	Day	Time
Autumn	02/09/2013	18/12/2013	10	30	300		
Spring	04/01/2014	01/04/2014	10	30	300		
Summer	19/04/2014	22/07/2014	10	30	300		

The Calculator window is displayed below:

The calculator takes two values and calculates a third. You can select the two values to enter from the following.

- Sessions & Duration
- Sessions & Total
- Duration & Total

Click Apply Changes when you are finished here.

The purple box highlights how Charges are made for the tuition. These are:

Charge a Pupil Payer for each Pupil	Charge will be applied to the Payers associated with the Pupil
Charge School for each Pupil	School will pay for the tuition
Charge School for Teachers(s) at a rate of	Applies for Teachers paid by claims. Associated Charges will appear

Make sure that the *Effective From* date in Charge Record Card is *on or before* the starting date for the Activity Plan.
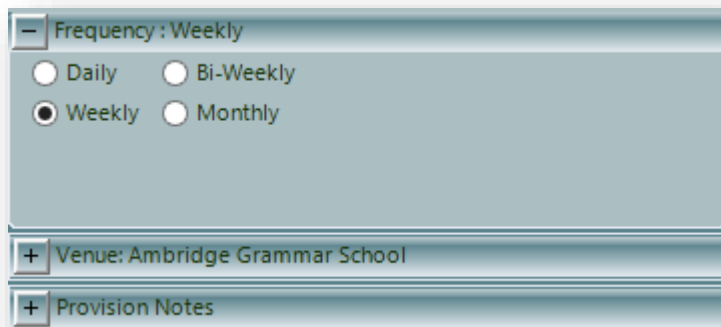
Note: For more detail on defining Charges refer to **Charges** in the manual.

The orange box highlights:

Agreed By	Select the User from the dropdown list who has *agreed to provide this Activity to the School*. This may be the person entering the Activity Plan details or any other User defined in you Users list.
Customer Ref	Enter any reference provided by the School for this Activity Plan for example the School's order number. This reference can be printed on any Invoice produced.

The green box highlights the *frequency the of the Actitity, the Venue and Notes*. These can be expanded and collapses by clicking **+** or **-**

Frequency

The *Frequency* defines how often the Activity will occur. These are: **Daily, Weekly, Bi-Weekly** and **Monthly**. If it's set to Weekly then the entries in the **blue box** are placed in the diary each week, if Daily then they are placed in each day.

By default the Frequency is set to:

- Weekly when the Billing Type is Term Based or Annual

- Daily if it is Ad-Hoc

Venue

The *Venue* is where the Activity will *actually take place.* In most cases this will be the School but you do have the flexibility to set this elsewhere.

For example, a Primary School may request you to organise music tuition for a set of its students, for which it *will be paying*, but asks for the tuition *to take place* at the local High School. In this case the Primary School is the Debtor but the *High School is the Venue*.

To do this, click on the expander button and select a **School** or **Centre** from the dropdown list.

Important: This can't be changed once the Activity Plan is saved.

Provision Notes

Here you can enter any notes you want recorded against each Provision.

Click **Create and Save** or **Create and New** to create the School Activity Plan.
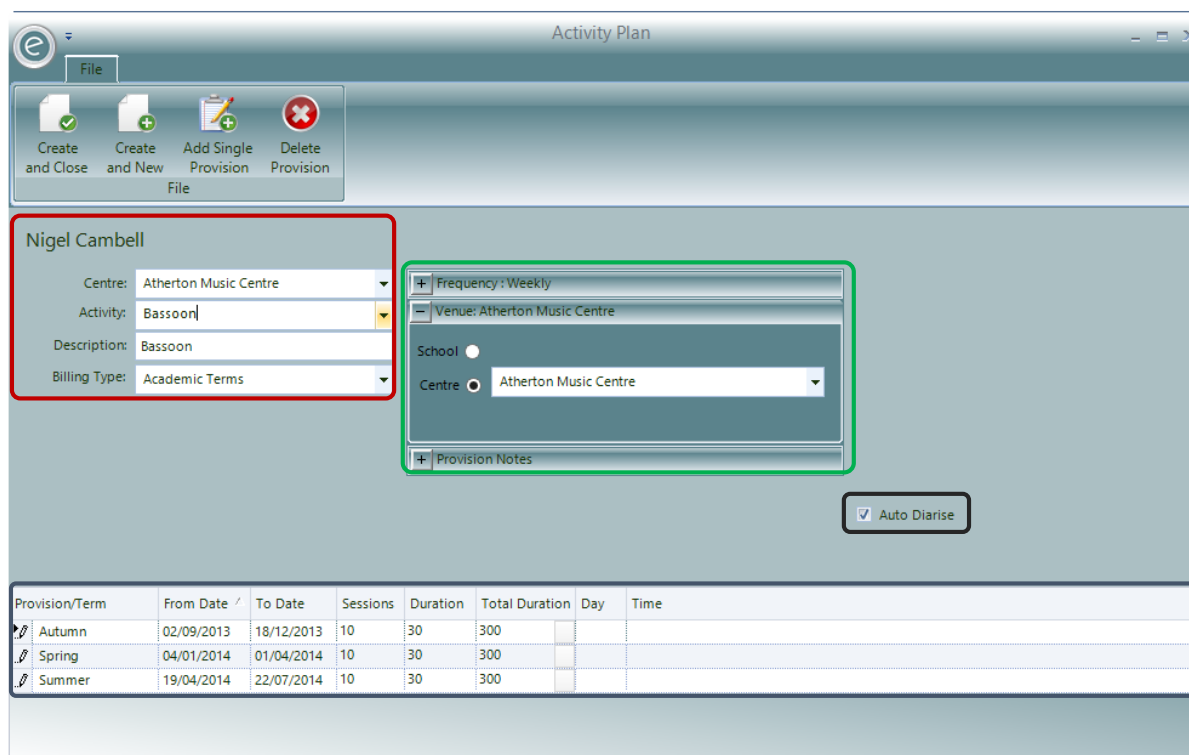
Create a Centre Activity Plan

 [Watch the Video Tutorial here](#)

To create a Centre Activity Plan, click:

Tuition (Menu Bar) > Teachers/Centres > Open Record Card > Schedule tab > Centre Activity

This will display the window below:

The process of creating a Centre Activity Plan is very similar to creating a School Activity Plan.

There are several fields to be filled in order to create the Activity Plan.

The **red box** highlights:

Centre	If you are creating the Activity Plan from a *Teacher Record Card* then you will need to select the Centre at which the Pupils *actually attend*. Select from the dropdown list.
	Note: This may *not necessary be where the Activity is to take place.*
Activity	Select the *Activity* from the dropdown list. The list will contain all the Activities you have defined.
Description	The description will be populated with the Activity description. This can then be modified to better describe the Activity Plan.
Billing Type	Select the Billing Type from the dropdown list. You will have previously defined your Provision Types and this will indicate the *structure that the Activity Plan will follow* (it may be based on terms). The lower half of the form contains a grid of information about the Provisions.

The **black box** highlights the Auto Diarise button. When this is ticked, the *Diary Entries will be automatically created* given the date constraints of the Provisions selected and the defined Frequency

of the sessions. This ticked as a default. If it is un-ticked, the Diary Entries for the lessons will need to be created manually.

The blue box highlights the *Provision Period layout for the Activity Plan*. Each row is an individual Provision Period and the columns indicate how Activity Plan is scheduled.

Where more than one Provision is displayed, altering any value will also change the value of the following Provisions. For example if you have three Provisions altering the number of sessions in the second will also change the number of sessions in the third but not the first.

The Provisions will *initially be set up according to the selected Provision Type*. Where the Provision Type is Term Based the Description, From Date, To Date and Sessions will be copied from the Provision Type. These values along with the other values displayed in the grid and can *all be changed*.

Provisions can also be added and removed by clicking Add Single Provision and Delete Provision respectively.

The Provision information grid contains values for the following:

Provision/Term	This is a description of the Provision. This will typically be a term such as Autumn, Spring and Summer
From Date	Select the date the first activity is to occur within the Provision.
	Note: If the Frequency is Daily then this must be the *actual first date*. Otherwise this can be the *week start date*.
To Date	Select the last possible date for the Provision. No diary entries will be made after this date.
Sessions*	This is the *number of sessions* the Activity is to be supplied within the Provision.
Duration*	This is the duration in *minutes* of a single Activity.
Total Duration*	This value will be *automatically calculated* after you enter Sessions and Duration. It is the total number of minutes that the Activity Plan will have for the Provision.
Day*	If you know the Day on which the Activity is to be provided then it can be entered here.
Time*	If you know the Time at which the Activity is to be delivered it can be entered here.
Teacher	If you *aren't creating a Centre Activity Plan on a Teacher Record Card* then you can optionally select a Teacher from the drop down list.

*Auto-Diarise will allow these field to be automatically populated. This is *ticked as a default*.

Total Duration Calculator

On some occasions you may know the:

- Total Duration and the number of Sessions and wish to work out the Session Duration
- Total Duration and individual Session Duration but wish to know how many Sessions are required to fulfil this

This can be done by using the *Total Duration Calculator*. At the right hand side of the *Total Duration* there is a white square button which when clicked will display the Calculator. The button is highlighted below:

The Calculator window is displayed below:

The calculator takes two values and calculates a third. You can select the two values to enter from the following.

- Sessions & Duration
- Sessions & Total
- Duration & Total

Click **Apply Changes** when you are finished here.

The green box highlights the *frequency the of the Actitity, the Venue and Notes*. These can be expanded and collapses by clicking **+** or **-**

Frequency

The *Frequency* defines how often the Activity will occur. These are: Daily, Weekly, Bi-Weekly and Monthly. If it's set to Weekly then the entries in the blue box are placed in the diary each week, if Daily then they are placed in each day.

By default the Frequency is set to:

- Weekly when the Billing Type is Term Based or Annual

- Daily if it is Ad-Hoc

Venue

The *Venue* is where the Activity will *actually take place.* In most cases this will be the Centre but you do have the flexibility to set this elsewhere.

To do this, click on the expander button and select a School or Centre from the dropdown list.

Note: If you have created *Rooms* for the Centre, you will also be able to specify the Room that the Activity will take place in. You will be able to create a Room in the Rooms tab of a Centre Record Card.

Important: This can't be changed once the Activity Plan is saved.

Provision Notes

Here you can enter any notes you want recorded against each Provision.

Click **Create and Save** or **Create and New** to create the Centre Activity Plan.
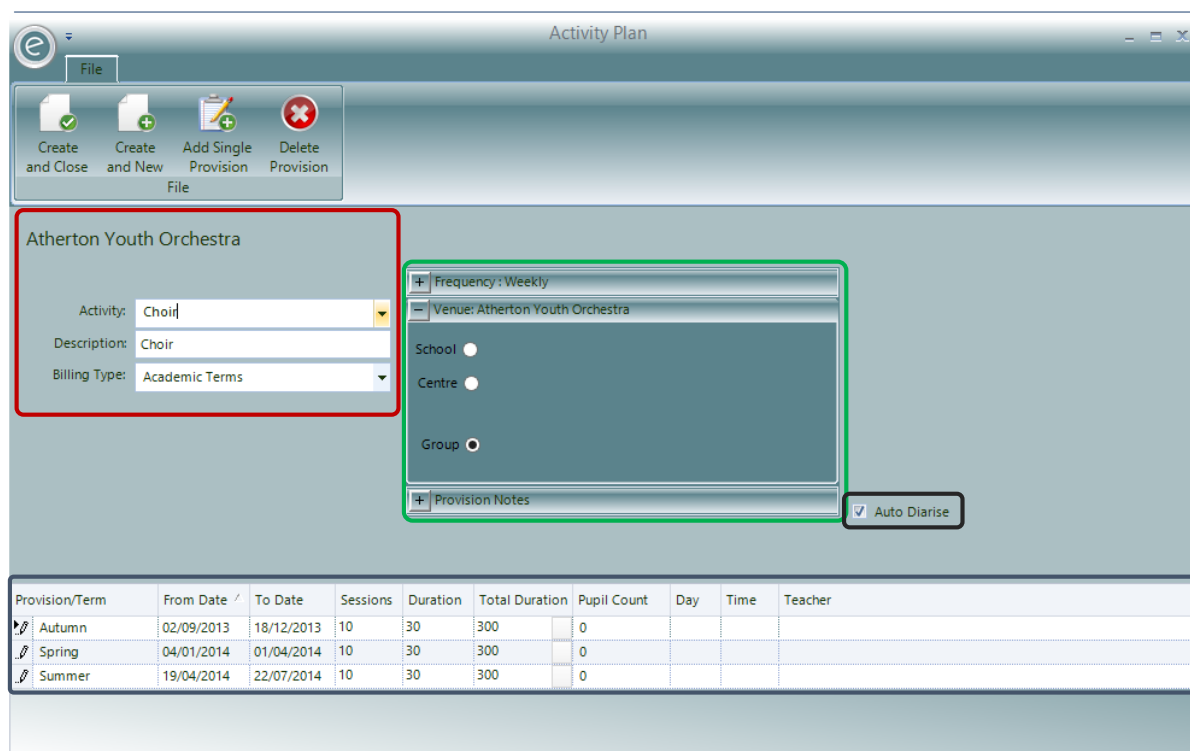
Create a Group Activity Plan

▶ [Watch the Video Tutorial here](#)

To create a Group Activity Plan, click:

Tuition (Menu Bar) > Teachers/Groups > Open Record Card > Schedule tab > Group Activity

This will display the window below:

There are several fields to be filled in order to create the Activity Plan.

The **red box** highlights:

Activity	Select the *Activity* from the dropdown list. The list will contain all the *Group Membership* Activities you have defined.
Description	The description will be populated with the Activity description. This can then be modified to better describe the Activity Plan.
Billing Type	Select the Billing Type from the dropdown list. You will have previously defined your Provision Types and this will indicate the *structure that the Activity Plan will follow* (it may be based on terms). The lower half of the form contains a grid of information about the Provisions.

The **black box** highlights the Auto Diarise button. When this is ticked, the *Diary Entries will be automatically created* given the date constraints of the Provisions selected and the defined Frequency of the sessions. This ticked as a default. If it is un-ticked, the Diary Entries for the lessons will need to be created manually.

The **blue box** highlights the *Provision Period layout for the Activity Plan*. Each row is an individual Provision Period and the columns indicate how Activity Plan is scheduled.

Where more than one Provision is displayed, altering any value will also change the value of the following Provisions. For example if you have three Provisions altering the number of sessions in the second will also change the number of sessions in the third but not the first.

The Provisions will *initially be set up according to the selected Provision Type*. Where the Provision Type is Term Based the Description, From Date, To Date and Sessions will be copied from the Provision Type. These values along with the other values displayed in the grid and can *all be changed*.

Provisions can also be added and removed by clicking Add Single Provision and Delete Provision respectively.

The Provision information grid contains values for the following:

Provision/Term	This is a description of the Provision. This will typically be a term such as Autumn, Spring and Summer
From Date	Select the date the first activity is to occur within the Provision. **Note:** If the Frequency is Daily then this must be the *actual first date*. Otherwise this can be the *week start date*.
To Date	Select the last possible date for the Provision. No diary entries will be made after this date.
Sessions*	This is the *number of sessions* the Activity is to be supplied within the Provision.
Duration*	This is the duration in *minutes* of a single Activity.
Total Duration*	This value will be *automatically calculated* after you enter Sessions and Duration. It is the total number of minutes that the Activity Plan will have for the Provision.
Day*	If you know the Day on which the Activity is to be provided then it can be entered here.
Time*	If you know the Time at which the Activity is to be delivered it can be entered here.
Teacher	If you *aren't creating a Group Activity Plan on a Teacher Record Card* then you can optionally select a Teacher from the drop down list.

*Auto-Diarise will allow these field to be automatically populated. This is *ticked as a default*.

Total Duration Calculator

On some occasions you may know the:

- Total Duration and the number of Sessions and wish to work out the Session Duration
- Total Duration and individual Session Duration but wish to know how many Sessions are required to fulfil this

This can be done by using the *Total Duration Calculator*. At the right hand side of the *Total Duration* there is a white square button which when clicked will display the Calculator. The button is highlighted below:

Provision/Term	From Date	To Date	Sessions	Duration	Total Duration	Day	Time
Autumn	02/09/2013	18/12/2013	10	30	300		
Spring	04/01/2014	01/04/2014	10	30	300		
Summer	19/04/2014	22/07/2014	10	30	300		

The Calculator window is displayed below:

The calculator takes two values and calculates a third. You can select the two values to enter from the following.

- **Sessions & Duration**
- **Sessions & Total**
- **Duration & Total**

Click **Apply Changes** when you are finished here.

The **green box** highlights the *frequency the of the Activity, the Venue and Notes*. These can be expanded and collapses by clicking **+** or **-**

Frequency

The *Frequency* defines how often the Activity will occur. These are: **Daily, Weekly, Bi-Weekly** and **Monthly**. If it's set to Weekly then the entries in the **blue box** are placed in the diary each week, if Daily then they are placed in each day.

By default the Frequency is set to:

- Weekly when the Billing Type is Term Based or Annual

- Daily if it is Ad-Hoc

Venue

The *Venue* is where the Activity will *actually take place.* In most cases this will be the Centre but you do have the flexibility to set this elsewhere. **Group** is selected as a default which will leave the Venue blank

To do this, click on the expander button and select a **School** or **Centre** from the dropdown list.

Note: If you have created *Rooms* for the Centre, you will also be able to specify the Room that the Activity will take place in. You will be able to create a Room in the 'Rooms' tab of a Centre Record Card.

Important: This can't be changed once the Activity Plan is saved.

Provision Notes

Here you can enter any notes you want recorded against each Provision.

Click **Create and Save** or **Create and New** to create the Group Activity Plan.

6. Edit an Activity Plan

If you want to change information about the Activity Plan once it has been created it can be edited. This is done by clicking the **white square** next to the name of the Activity Plan.

This is highlighted below:

		Activity Plan		Venue	Room	Day	Dur	Time	Teachers
✓		Cello		Swanton Seconda	(No Item	Mon	30	09:00	Pat Archer
✓		Piano		Swanton Seconda	(No Item	Wed	30	09:00	Rachel Levison

Clicking this will display the window below:

You be able to edit the:

- **Activity Plan Description**
- **Activity**
- **Provision Type**
- **Option to Auto-diarise**
- **Charge Method**

Click **Apply Changes** to save.

7. Finishing Activity Plans

 [Watch the Video Tutorial here](#)

Activity Plans may finish early during a term and this can be recorded with an *End Date*. This will end all further Schedules for subsequent Provision Periods and dates within the current one. A record of

the Activity Plan will remain in system and charges for pupils associated with the lesson until the End Date will still apply.

To enter an End Date:

Open a Teacher/School/Centre Record Card > Schedule > Enter 'End Date'

This is displayed below:

Once an Activity Plan has finished it will remain in the Schedule but it will be *crossed out* as displayed below:

8. Deleting Activity Plans

 Watch the Video Tutorial here

You can delete an Activity Plan from any Teacher, School, Centre or Group Record Card by clicking on the Remove Activity button found on the Ribbon Menu. To do this:

Open the Record Card > Schedule tab > Select Activity Plan > Remove Activity

This is displayed below:
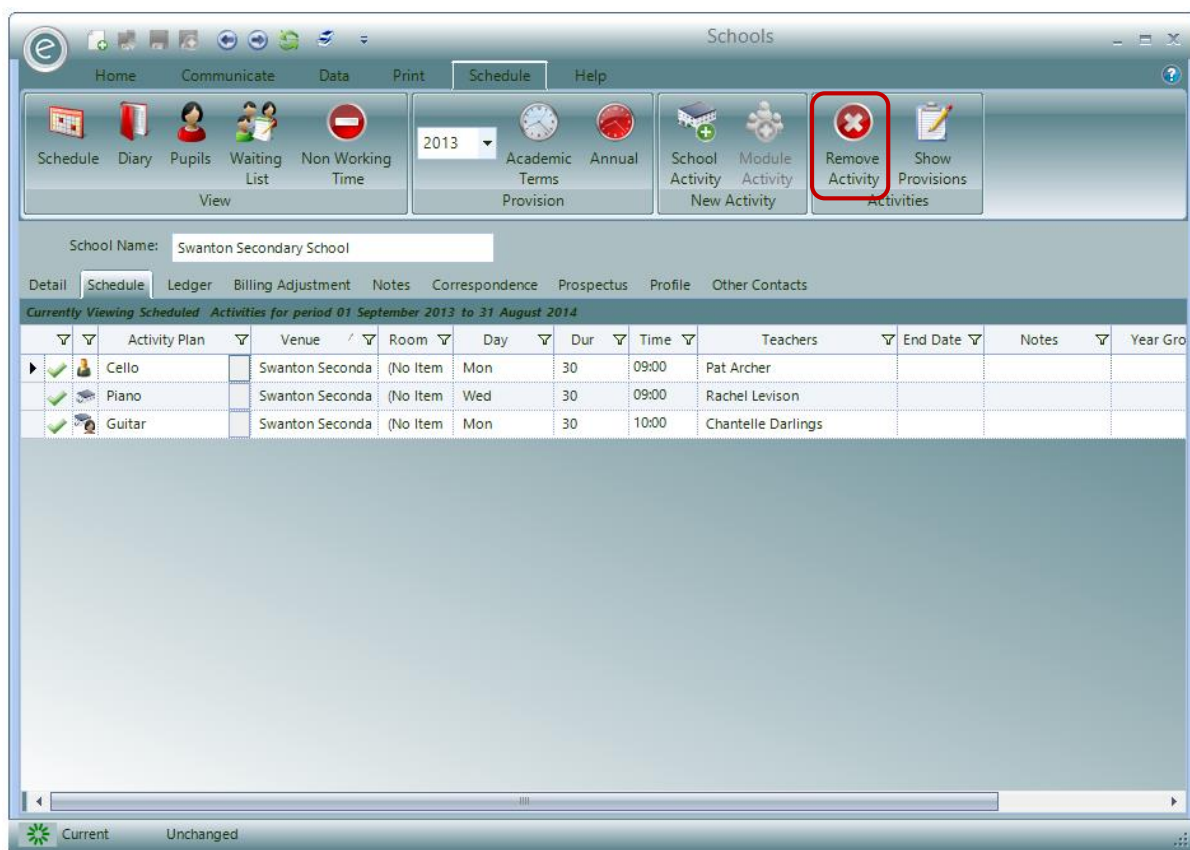
This will remove the Activity Plan, all its Provisions and associated Schedule Requirements, Teacher Lines, Diary Entries and any attached Pupil Tuition details.

9. Viewing Schedules in Activity Plans

▶ [Watch the Video Tutorial here](#)

To view an Activity Plan's Schedule, click on either the

- **Show Provisions** button in the Ribbon Menu
- Or *double click* on the Activity Plan line

The Show Provisions button is displayed in the **red box** below:
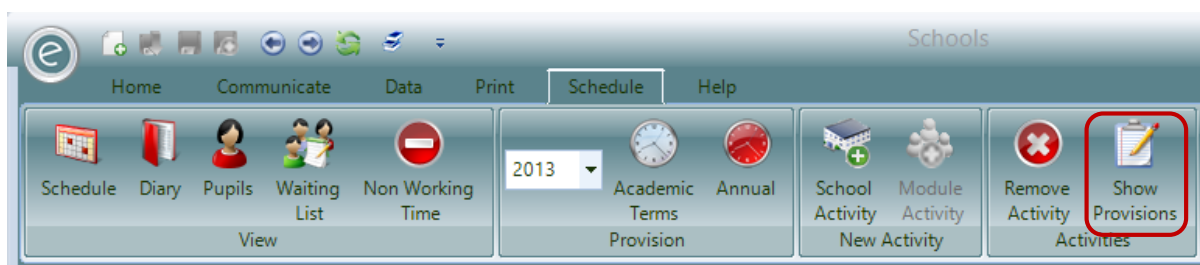
This action will *expand the window* so that *Activity Plan Provisions* are also displayed. This is shown below:
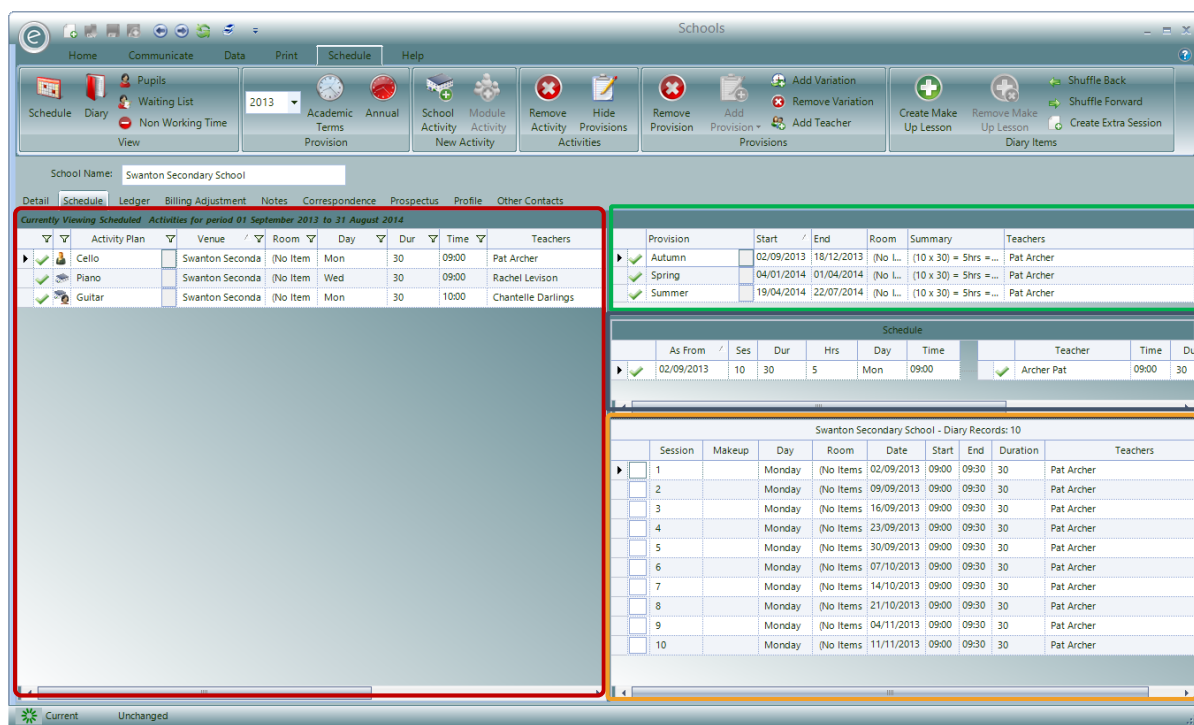
The red box displays the Activity Plans. The other three sections will show expanded information on one of the selected Activity Plans.

Provision Periods

The green box displays the Provision Periods for this Activity Plan. An enlarged screen shot is shown below:

As can be seen this is very similar to previous windows showing the Provision Periods. The columns are:

Provision	Name of the Provision Period
Start	Start date of the Provision Period
End	End date of the Provision Period
Room	Room name/number that the Activity takes place in
Summary	Summarises total number of hours and minutes for the Activity Plan
Teachers	Indicates the Teacher

| Cost | (Only School Billed Activity Plans) This row displays the total cost of the Activity Plan for each Provision Period to the School |

Additional the first column in the *Provision Period and Teacher sections* include icons indicating their *state*. The icons displayed are:

| | All is OK |
| | The number of diary items does not match the required number. |

Note: If you hover the mouse over the icon, an explanation of the actual issue is displayed.

Viewed in a Teacher Record Card

The screenshot below, displays the Provision Periods when viewed in a Teacher's Record Card.

		Provision	Start	End	Room	Summary	Teachers
▶		Autumn	02/09/2013	18/12/2013	(No Items)	(11 x 30) = 5.5hrs = 5 hrs 30 mins	Chantelle Darlings
		Spring	04/01/2014	01/04/2014	(No Items)	(11 x 30) = 5.5hrs = 5 hrs 30 mins	Chantelle Darlings
		Summer	19/04/2014	22/07/2014	(No Items)	(11 x 30) = 5.5hrs = 5 hrs 30 mins	Chantelle Darlings

There is a second column of icons which provides an indication of the involvement of the Teacher in the Activity Plan. The icons are:

	Involved for all of the Provision
	Part Involved for all of the Provision. For example if viewing a Teacher's Schedule and the Teacher *took over the activity half way through* a Provision then this Icon would be displayed.
	Not involved for all of the Provision. For example if viewing a Teacher's schedule and the Teacher took over the activity half way through a year, then any Provision *prior to that date* would have this icon displayed.

Status

A further column of icons may be displayed in the *Provision Periods* section. These can be activated in the *Education Parameters*. This parameter is called Use 'Status' on the schedule.

The icons displayed on the Provision Periods section are:

Provisional	The Activity Plan is Provisional State
Pending	The Activity Plan is in a Pending State
Draft	The Activity Plan is in a Draft State
Contract Sent	The contract has been sent to the customer
Confirmed	The contract has been confirmed by the customer

The Icons displayed on the Teacher's section are:

| Provisional | The Teacher is Provisionally Allocated |

Pending   The Allocated Teacher is Pending Confirmation

Draft   The Teacher allocation is in a Draft State

Contract Sent   A contract has been to the Teacher

Confirmed   The Teacher has confirmed the work can be done.

They are displayed in the screenshot below:

Schedule Requirements

The blue box summarises the Schedule Requirement *for the selected Provision Period above.* An enlarged screen shot is shown below:

As can be seen, the Provision Period of Autumn 2013 has been selected for Pat Archer. The columns are:

As From	Beginning date of the selected Provision Period
Session	Number of sessions
Duration	Duration of each session
Hours	Total number of hours and minutes for the Activity Plan
Day	Day that each session
Time	Time that Activity begins

The other grid in the Schedule Requirement shows the Schedule Requirement for the Teacher. An enlarged screenshot is shown below:

This shows the information for:

Teacher   Select the Teacher you want to allocate to the Schedule Requirement.

Note: you can change the Teacher even when viewing the schedule from a Teacher's record.

Time   By default the Teacher involved with the Activity has the same time as the Schedule Requirement.

Where more than one Teacher is added it may well be that the second Teacher starts some time later than the first Teacher, maybe just joining for the second half.

Note: You *cannot enter a time that is later* than the Schedule Requirement's Time plus duration. If the Requirement has a start time of 9am and a duration of 60 minutes then the Teacher's time must be between 9am and 10am. If you change the time on a Schedule Requirement all the associated Teacher times will change by the same amount.

Duration   As with the time it is assumed the Teacher duration will be the same as the Schedule Requirement.

You can enter any duration, even one greater than the Schedule Requirement; where this is the case the Schedule Requirement's duration is *extended* to cover the Teacher duration.

Note: Reducing the Teacher duration it does not reduce the Schedule Requirement duration.

Payment   This value determines if the work is part of the Teacher's contract or if it is outside of the contract and therefore subject to a claim. Select the value one the following;

- **Contract** – Work is part of Teachers contracted hours.
- **Payscale** – The work is outside of the Teacher's contract and is subject to the remuneration as specified in the Teachers Pay Scales. Selecting this option will add two additional columns to the Teacher line from which you can adjust the Pay Scale and the Point on the Pay Scale in order to get the pay rate.
- **Ad-Hoc** – The work is outside of the Teacher's contract and is subject to a specified hourly remuneration rate. When this option is selected extra column is added to the Teacher line in which you can enter the hourly rate.

Note: For more information concerning Teacher Pay refer to the **Teacher Pay** Chapter.

Schedule Diary

The orange box highlights the Schedule Diary which displays *Diary Entries* for each Activity in *the selected Provision Period above.* An enlarged screen shot is shown below:

Swanton Secondary School - Diary Records: 10

	Session	Makeup	Day	Room	Date	Start	End	Duration	Teachers
▶	1		Monday	(No Items	02/09/2013	09:00	09:30	30	Pat Archer
	2		Monday	(No Items	09/09/2013	09:00	09:30	30	Pat Archer
	3		Monday	(No Items	16/09/2013	09:00	09:30	30	Pat Archer
	4		Monday	(No Items	23/09/2013	09:00	09:30	30	Pat Archer
	5		Monday	(No Items	30/09/2013	09:00	09:30	30	Pat Archer
	6		Monday	(No Items	07/10/2013	09:00	09:30	30	Pat Archer
	7		Monday	(No Items	14/10/2013	09:00	09:30	30	Pat Archer
	8		Monday	(No Items	21/10/2013	09:00	09:30	30	Pat Archer
	9		Monday	(No Items	04/11/2013	09:00	09:30	30	Pat Archer
	10		Monday	(No Items	11/11/2013	09:00	09:30	30	Pat Archer

There are 10 planned Activities for the Activity Plan and they are shown here by the rows. The columns are:

Session	The session number of the Activity. They are in ascending order.
Makeup	If a *Cover Teacher* is required, then this can be recorded in this column.
Day	The day that the Activity takes place
Room	Room that the Activity takes place in
Date	The date that the Activity takes place.
	Note: The date of the first Activity is *not necessarily the Start Date of the Provision Period*.
Start	Start time
End	End time
Duration	Duration of the Activity in minutes
Teachers	Teacher providing tuition

The *white squares* in the first column are *Task Results*.

Note: These are discussed further in **Task Results**

10. Diary Entries

▶ [Watch the Video Tutorial here](#)

As Activity Plans are created and modified the system maintains a set of *Diary Entries* for both the *Venues and the Teachers*.

As seen in the previous section **Schedule Diary**, Diary Entries will detail each Activity in the Activity Plan with information such as Day, Date, Start and End Time.

When you select a Schedule Requirement line the associated Venue's Diary entries are displayed, selecting a Teacher line will display the associated Teacher Diary entries.

Venue Diary Entries

	As From	/	Ses	Dur	Hrs	Day	Time			Teacher	Time	Dur	Payment
▶ ✔	02/09/2013		10	30	5	Mon	09:00		✔	Archer Pat	09:00	30	

Swanton Secondary School - Diary Records: 10

	Session	Makeup	Day	Room	Date	Start	End	Duration	Teachers
▶	1		Monday	(No Items	02/09/2013	09:00	09:30	30	Pat Archer
	2		Monday	(No Items	09/09/2013	09:00	09:30	30	Pat Archer
	3		Monday	(No Items	16/09/2013	09:00	09:30	30	Pat Archer
	4		Monday	(No Items	23/09/2013	09:00	09:30	30	Pat Archer
	5		Monday	(No Items	30/09/2013	09:00	09:30	30	Pat Archer
	6		Monday	(No Items	07/10/2013	09:00	09:30	30	Pat Archer
	7		Monday	(No Items	14/10/2013	09:00	09:30	30	Pat Archer
	8		Monday	(No Items	21/10/2013	09:00	09:30	30	Pat Archer
	9		Monday	(No Items	04/11/2013	09:00	09:30	30	Pat Archer
	10		Monday	(No Items	11/11/2013	09:00	09:30	30	Pat Archer

The **red box** highlights the Schedule Requirement line as selected.

Note: Lines are selected when the arrow in the first column is displayed.

The Schedule Diary in the **green box** thus displays Diary Entries for the Venue. Notice the header now reads **Swanton Secondary School – Diary Records: 10**

Teacher Diary Entries

	As From	/	Ses	Dur	Hrs	Day	Time			Teacher	Time	Dur	Payment
✔	02/09/2013		10	30	5	Mon	09:00		▶ ✔	Archer Pat	09:00	30	

Pat Archer - Diary Records: 10

	Session	Makeup	Room	Day	Date	Start	End	Duration	Delivery Confirmed
▶	1			Monday	02/09/2013	09:00	09:30	30	
	2			Monday	09/09/2013	09:00	09:30	30	
	3			Monday	16/09/2013	09:00	09:30	30	
	4			Monday	23/09/2013	09:00	09:30	30	
	5			Monday	30/09/2013	09:00	09:30	30	
	6			Monday	07/10/2013	09:00	09:30	30	
	7			Monday	14/10/2013	09:00	09:30	30	
	8			Monday	21/10/2013	09:00	09:30	30	
	9			Monday	04/11/2013	09:00	09:30	30	
	10			Monday	11/11/2013	09:00	09:30	30	

The **red box** highlights the Teacher line as selected.

The Schedule Diary in the **green box** thus displays Diary Entries for the Teacher. Notice the header now reads **Pat Archer – Diary Records: 10**

The information displayed for each Teacher Diary Entry is as follows:

Session	This is the same as the Venue Diary Entry.
Makeup	Same as the Venue Diary Entry
Room	Room that the session takes place in
Day	Day of the session
Date	Date of the session
Start	The start time
End	The end time
Duration	Session duration in in minutes
Delivery Confirmation	Dropdown calendar to confirm date the session was delivered

11. Diary View

 [Watch the Video Tutorial here](#)

You can also see an alternative view of the *current diary* by clicking on the Diary button found in the View section in the Ribbon Menu. If you are viewing a Teacher's details you will see the *Teacher's Diary*. When viewing a Centre you will see the *Centre's Diary* and so on. The Diary button is highlighted in the **red box** below:
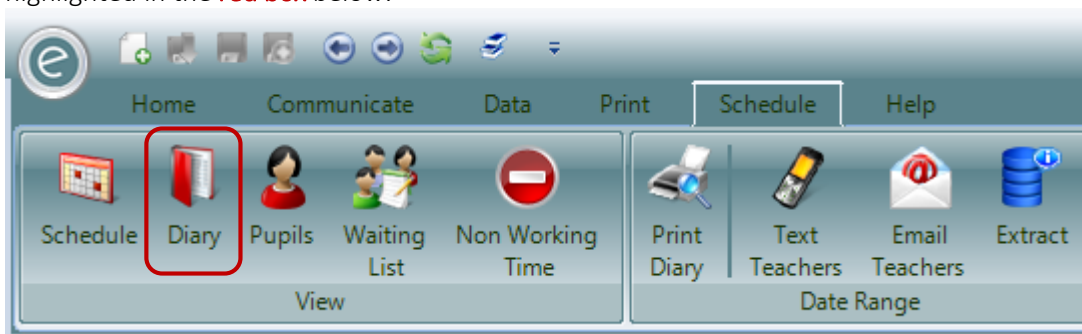
Clicking on this will now change the display in the Schedule tab to the window below:
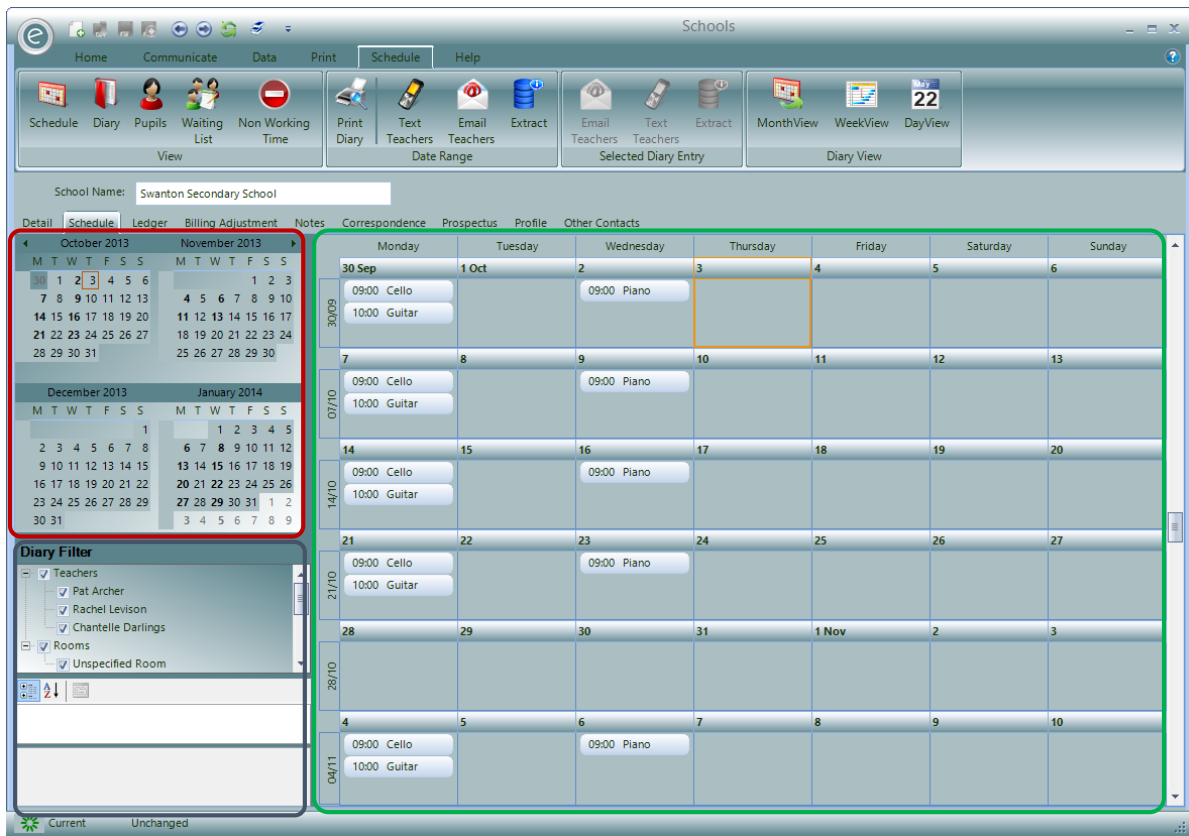
The **red box** in the top left contains a *Calendar* from which you can select the dates to view. **Note:** Bolded dates will contain Dairy Entries.

The **green box** in the right of the form contains a *diary display.* This will display all the Diary Entries within the current view.

You can also amend date and time values of any Diary Entry by clicking on an Entry and *dragging it to a new time* on the diary view. Any Diary Entry with *modified date or time* can be identified by the *bold text*.

There are three different views; **Month View, Week View** and **Day View**. You can change the view by clicking on the appropriate button in the Ribbon Menu. These are displayed below:
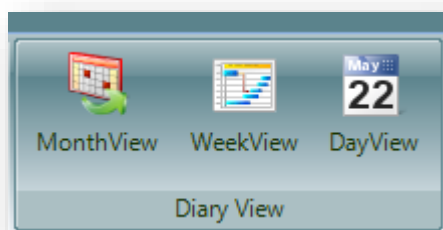
If you are looking at the *Day View* of the Diary you can also change the duration of a session by selecting the Entry and *dragging the anchor points at the top or bottom* of the displayed time block.

The **blue box** in the bottom left shows the *detail for any diary entry you click on*. This is expanded below:

At the top, this will allow you to **Filter** the Diary view by Teachers and Rooms.

The middle section shows the *details for the currently selected Diary* Entry such as **Description, Duration** and **Start Time**

The bottom section will describe any of the selected row details in the middle section.

You can return the original *Schedule* view by clicking on the **Schedule** button found in the **View** section of the Ribbon Menu. This is displayed below:
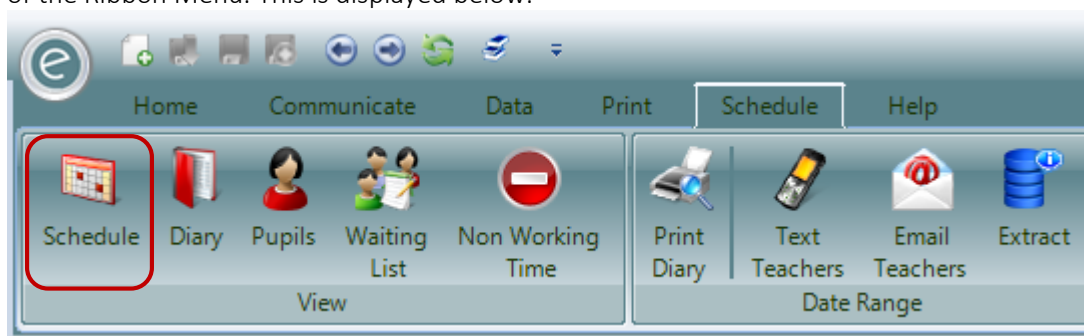
Edit a Diary Entry

▶ [Watch the Video Tutorial here](#)

To amend any Diary Entry, *double click* on it to display the *Diary Appointment* form. This displayed below:

This will allow you to change **Date, Start Time** and **End Time** and set **Task Results**.

Note: For more information on Task Results, refer to **Task Results**.

You can also specific Teacher information such as Teacher travel time and manage the Pupils for this Diary Entry.

Click **Apply Changes** to save.

Additional Diary Entries

If a day in the calendar has Diary Entries that are *hidden from view* this is indicated by the highlighted **arrow button** below:

Note: Clicking this won't expand the list. To view more entries for that day click on the **Day View** button in the Ribbon Menu.

12.   Schedule Reports

▶ [Watch the Video Tutorial here](#)

You can print Schedules detailing all the Activity Plans taking place during a *specified Provision Period or for a specified date*. You will be able to print a:

- Teacher Schedule Report
- School Schedule Report
- Centre Schedule Report
- Group Schedule Report

The Report will list the Diary Entries for each plan in chronological order. It is therefore ideal for showing what work is to take place at any given Venue or by any Teacher. The Report is sectioned by School if it is a School schedule, Teacher if a Teacher schedule and so on. If changes are made to the Schedule, then the new Schedule Reports will reflect this. It can be published via email to each School, Teacher, or body of staff.

Note: For more information on publishing documents, refer to **Publishing and Printing Reports** in the **Communication** chapter.

Teacher Schedule Report

To print a Teacher Schedule Report from the Console Home Screen, click:

Teachers (Ribbon Menu) > Schedule Reports > Print Teacher Schedules

Alternatively, you can *print the Report for a specific Teacher* directly from their Record Card by:

Opening Teacher Record Card > Print tab > Print Teacher Schedules

Either option will display the window below:

You can select any of the following date range options:

Select Schedules during a specified Period	Select a **Provision Type**, **Academic Year** and a **Provision Period**. The Report will include all the Diary Entries between the start and finish of the Provision
Select Schedules during a specified Date Range	Enter a **From** and **To date**. The Report will include all the Diary Entries between the two dates
Select Schedules on a Specific Date	Enter a specific date in **As At Date**. The Report will include any Diary Entries for the entered date
Select Schedules during a specific week	Select an **Academic Year** and a **Week Start Date**. The Report will include any Diary Entries for the specified week

In the **Report Type** section can you select **Detail** to view a Schedule Report with each individual Pupil listed. A **Summary** will just summarise the Report.

If you wish to print a Schedule for a specific Teacher, you can tick **Teacher** and select one.

Click **Preview** to view the Report.

An example is displayed below:

Teacher Schedules for Autumn 2013/2014

Nigel Cambell
20 Well Road
Ambridge
Borchester
Borsetshire
BO1 3TY

Week beginning   01-Sep-13

Day	Venue	Lesson	Task Result	Start Time	Duration	Finish	Freq
Monday	Elizabeth Primary	Bassoon		09:00	00:30	09:30	W
Monday	Ambridge Grammar School	Cello		11:00	00:30	11:30	W
Monday	Loxton Community College	Guitar		13:00	00:30	13:30	W
Monday	Loxton Community College	Guitar		14:00	00:30	14:30	W
Monday	Loxton Community College	Bassoon		15:00	00:30	15:30	W
Tuesday	Elizabeth Primary	Flute	Teacher Holiday	-	00:30	-	W
Tuesday	Tenbury High School	French Horn		10:00	00:30	10:30	W
Tuesday	Loxton Community College	Bassoon		11:00	00:30	11:30	W
Tuesday	Loxton Community College	Voice		12:00	00:30	12:30	W
Tuesday	St Marys Academy	Voice		12:00	00:30	12:30	W
Tuesday	Tenbury High School	Viola		15:00	00:30	15:30	W
Wednesday	Loxton Community College	Viola		10:00	00:30	10:30	W

School Schedule Report

To print a School Schedule Report, click:

Schools (Ribbon Menu) > Print School Schedules

Alternatively, you can *print the Report for a specific School* directly from the Record Card by:

Opening School Record Card > Print tab > Print School Schedules

Either of these options will display the window below:

Similarly, you can select any of the following date range options:

Select Schedules during a specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The Report will include all the Diary Entries between the start and finish of the Provision
Select Schedules during a specified Date Range	Enter a **From** and **To date**. The Report will include all the Diary Entries between the two dates
Select Schedules on a Specific Date	Enter a specific date in **As At Date**. The Report will include any Diary Entries for the entered date
Select Schedules during a specific week	Select an **Academic Year** and a **Week Start Date**. The Report will include any Diary Entries for the specified week

If you wish to print a Schedule for a specific Teacher or School, you can tick **Teacher** or **School** and select one.

Click **Preview** to view the Report.

School Schedules for Autumn 2013/2014

Ambridge Grammar School
Flepersham House
Felpersham
Ambridge
Borsetshire
BO1 5ER

Week beginning 01/09/2013

Day	Start	Duration	End	Activity	Teacher
Monday	09:00	00:30	09:30	Bassoon	Michael Birchfield
Monday	11:00	00:30	11:30	Cello	Nigel Cambell
Monday	13:00	00:30	13:30	Clarinet	Chantelle Darlings
Monday	15:00	00:30	15:30	Drums	Rachel Levison
Monday	17:00	00:30	17:30	Flute	Jenny Smith
Tuesday	10:00	00:30	10:30	Drums	Michael Birchfield
Tuesday	15:00	00:30	15:30	Flute	Jenny Smith
Wednesday	09:00	00:30	09:30	Piano	Michael Birchfield
Wednesday	13:00	00:30	13:30	Saxophone	Chantelle Darlings
Wednesday	16:00	00:30	16:30	Violin	Rachel Levison
Thursday	11:30	00:30	12:00	Voice	Rachel Levison
Thursday	13:30	00:30	14:00	Viola	Chantelle Darlings
Thursday	17:00	00:30	17:30	Triangle	Rachel Levison
Thursday	19:00	00:30	19:30	Orchestra	Chantelle Darlings
Friday	09:00	00:30	09:30	French Horn	Michael Birchfield
Friday	11:00	00:30	11:30	Guitar	Nigel Cambell
		08:00			

Centre Schedule Report

To print a Centre Schedule Report, click:

Centres (Ribbon Menu) > Print Centre Schedules

Alternatively, you can *print the Report for a specific Centre* directly from the Record Card by:

Opening Centre Record Card > Print tab > Print Centre Schedules

Either of these options will display the window below:

Similarly, you can select any of the following date range options:

Select Schedules during a specified Period	Select a **Provision Type, Academic Year** and a **Provision Period.** The Report will include all the Diary Entries between the start and finish of the Provision
Select Schedules during a specified Date Range	Enter a **From** and **To date.** The Report will include all the Diary Entries between the two dates
Select Schedules on a Specific Date	Enter a specific date in **As At Date.** The Report will include any Diary Entries for the entered date
Select Schedules during a specific week	Select an **Academic Year** and a **Week Start Date.** The Report will include any Diary Entries for the specified week

If you wish to print a Schedule for a specific Teacher or Centre, you can tick **Teacher** or **Centre** and select one.

Click **Preview** to view the Report.

03-Oct-13   Borsetshire Performing Arts Service

Centre Schedules for Autumn 2013/2014

Bochester Music Centre
1 Edgerly Road
Hossett Hills Avenue
Hosset Hills
Borsetshire
BO8 5TQ

Week beginning 01/09/2013

Day	Start	Duration	End	Activity	Teacher
Saturday	10:00	00:30	10:30	Drums	Rachel Levison
Saturday	14:00	00:30	14:30	Orchestra	Chantelle Darlings
		01:00			

Week beginning 08/09/2013

Day	Start	Duration	End	Activity	Teacher
-		00:30	-	Bassoon	Chantelle Darlings
Saturday	10:00	00:30	10:30	Drums	Rachel Levison
Saturday	14:00	00:30	14:30	Orchestra	Chantelle Darlings
		01:30			

Group Schedule Report

To print a Group Schedule Report, click:

Groups (Ribbon Menu) > Print Group Schedules

Alternatively, you can *print the Report for a specific Group* directly from their Record Card by:

Opening Group Record Card > Print tab > Print Group Schedules

Either of these options will display the window below:

Similarly, you can select any of the following date range options:

Select Group schedules during a specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The Report will include all the Diary Entries between the start and finish of the Provision
Select Group schedules during a specified Date Range	Enter a **From** and **To date**. The Report will include all the Diary Entries between the two dates
Select Group schedules on a Specific Date	Enter a specific date in **As At Date**. The Report will include any Diary Entries for the entered date

If you wish to print a Schedule for a specific Teacher or Group, you can tick **Teacher** or **Group** and select one.

Click **Preview** to view the Report.

Group Schedules for Autumn 2013/2014

Borchester Music Ensemble

Week beginning 01/09/2013

Day	Start	Duration	End	Activity	Teacher
Saturday	10:00	00:30	10:30	Drums	Rachel Levison
Saturday	11:00	00:30	11:30	Chior	Jenny Smith
Saturday	14:00	00:30	14:30	Orchestra	Nigel Cambell
Saturday	17:30	00:30	18:00	Drums	Michael Birchfield
		02:00			

Week beginning 08/09/2013

Day	Start	Duration	End	Activity	Teacher
Saturday	10:00	00:30	10:30	Drums	Rachel Levison
Saturday	11:00	00:30	11:30	Chior	Jenny Smith
Saturday	14:00	00:30	14:30	Orchestra	Nigel Cambell
Saturday	17:30	00:30	18:00	Drums	Michael Birchfield
		02:00			

Unallocated Lessons

If an Activity Plan doesn't have a Teacher allocated (i.e. no-one to conduct the lessons!) then this can be identified in the *Unallocated Lessons Report*.

To print this, click:

Teachers (Ribbon Menu) > Schedule Reports > Print Unallocated Lessons

This will display the window below:
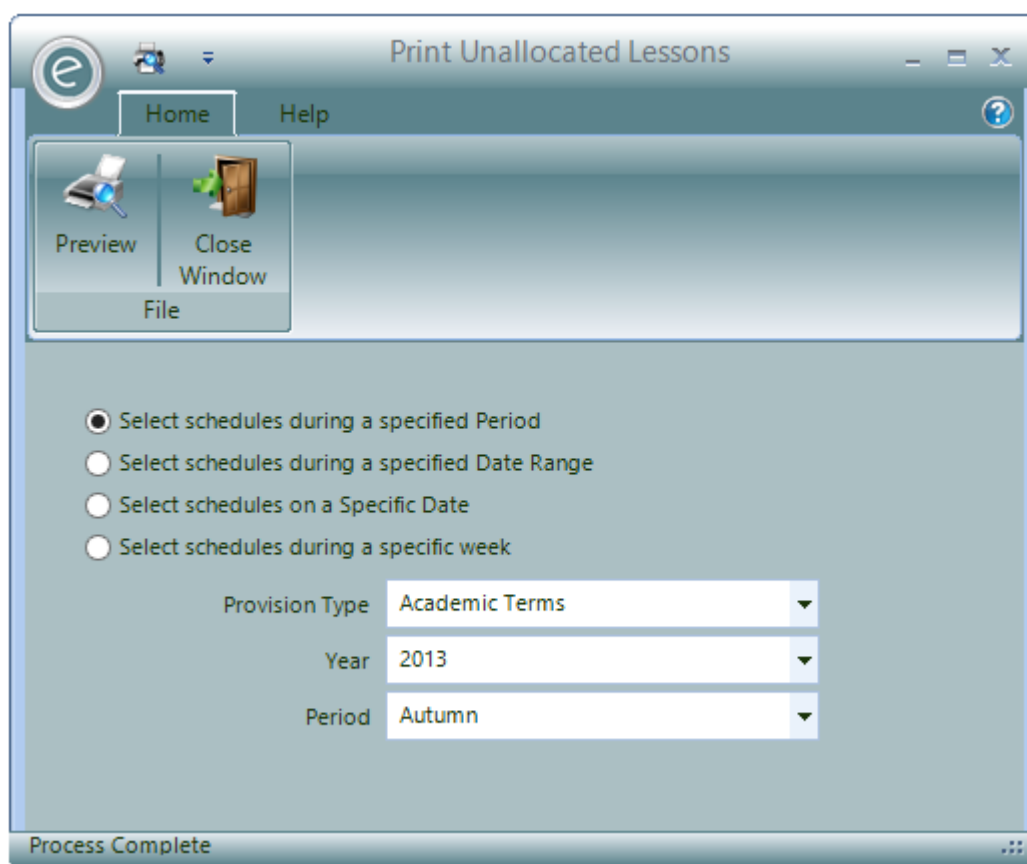
You can select any of the following date range options:

Select Schedules during a specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The Report will include all the Activity Plans between the start and finish of the Provision Period
Select Schedules during a specified Date Range	Enter a **From** and **To date**. The Report will include all the Activity Plans between the two dates
Select Schedules on a Specific Date	Enter a specific date in **As At Date**. The Report will include any Activity Plans for the entered date
Select Schedules during a specific week	Select an **Academic Year** and a **Week Start Date**. The Report will include any Activity Plans for the specified week

Click **Preview** to view the Report.

An example is displayed below:

Unallocated Lessons for Autumn 2013/2014

Venue	Provision	Activity Plan	As From	Sessions	Day	Duration
School						
Elizabeth Primary	Autumn	Piano	02-Sep-13	10	Wednesday	30
Elizabeth Primary	Autumn	Clarinet	02-Sep-13	10		30
Elizabeth Primary	Autumn	Drums	02-Sep-13	10		30
Elizabeth Primary	Autumn	French Horn	02-Sep-13	10		30
Elizabeth Primary	Autumn	Triangle	02-Sep-13	10		30
Elizabeth Primary	Autumn	Guitar	02-Sep-13	10		30
Elizabeth Primary	Autumn	Guitar	02-Sep-13	10	Tuesday	30
Loxton Community College	Autumn	Guitar	02-Sep-13	10	Thursday	30
Loxton Community College	Autumn	Cello	02-Sep-13	10		30
Loxton Community College	Autumn	Viola	02-Sep-13	10		30
Loxton Community College	Autumn	French Horn	02-Sep-13	10	Thursday	30
Loxton Community College	Autumn	Guitar	02-Sep-13	10		30

Teacher Timesheets

You can print a Teacher's Timesheet & Claim Form for any specified Provision Period. To print this, click:

Teachers (Ribbon Menu) > Schedule Reports > Print Timesheets/Claims

Alternatively, you can *print the Report for a specific Teacher* directly from their Record Card by:

Opening Teacher Record Card > Print tab > Print Teacher Timesheet

Either of these options will display the window below:

This will allow you to choose how to list the Timesheet, either by Chronological List or Calendar and choose a date range using the From Date / To fields.

Select the Return Date to be displayed on the document which indicates when it needs to be completed and returned by.

Furthermore, you can produce a Timesheet for one Teacher by ticking Teacher and selecting one.

Click Preview to view the Timesheet Report.

Borsetshire Performing Arts Service
Teacher Timesheet & Claim Form

DATE: 04-Oct-13

Michael Birchfield
1 Dover Close
Edgeley
Borsetshire
BO1 6ER

Payroll Ref:

Verified By:

Absence Codes
S - Teacher absence on sickness grounds
A - Teacher absence on other grounds
N - Teacher not required and required notice given
B - Teacher not required and required notice not given

If address is incorrect please alter

Tick the 'S' column below next to any permanent changes. Please record all additional information on any temporary changes and the reasons for those changes below

W/B & Day	Venue	Activity	Schedule Time	Scheduled Hours	Actual Time & Duration	S	A
01-Sep-13							
Monday	Loxton Community College	Bassoon	09:00 AM	00:30			
Monday	Ambridge Grammar School	Bassoon	09:00 AM	00:30			
Monday	Tenbury High School	Cello	12:00 PM	00:30			
Monday	Tenbury High School	Cello	03:00 PM	00:30			
Tuesday	Loxton Community College	Voice	09:00 AM	00:30			
Tuesday	Ambridge Grammar School	Drums	10:00 AM	00:30			
Wednesday	St Marys Academy	Voice	09:00 AM	00:30			
Wednesday	Ambridge Grammar School	Piano	09:00 AM	00:30			
Wednesday	Loxton Community College	Voice	12:00 PM	00:30			
Wednesday	Tenbury High School	Piano	03:00 PM	00:30			
Thursday	Loxton Community College	Drums	09:00 AM	00:30			

This Report details a Teacher's Diary Entries which provides an opportunity for the Teacher to mark items on the form as delivered or otherwise.

13.   Adding Provisions to an Activity Plan

If your Activity Plan is using a Provision Type that is based on either an Annual or Ad-Hoc basis then you can add Provisions by simply clicking on the Add Provision button on the Ribbon Menu. This is displayed below:

This will add a new line to the Provision grid.

14. Removing Provisions from an Activity Plan

If you need to remove a Provision, for example you are creating an Activity Plan based on Academic Terms but the Activity is *not to start until the second term* then you would need to *remove the first Provision*, then simply:

Select the Provision > **Click Remove Provision**

This is displayed below:
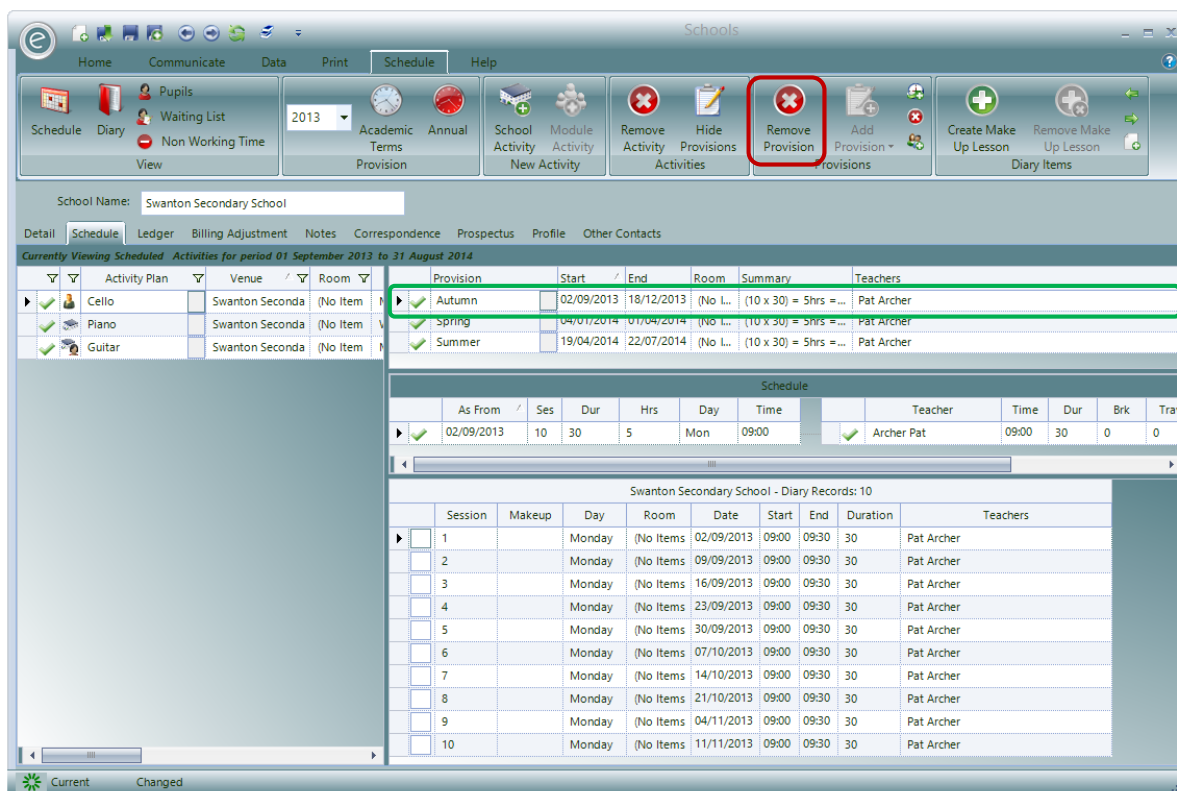
Here the Autumn term, highlighted in the green box, has been selected to be deleted.

15. Variations to Provisions

Adding a Schedule Requirement

▶   [Watch the Video Tutorial here](#)

If a value changes during a Provision you need to *add a Variation* to the Schedule Requirements. For example, the session duration may change. This creates a *new Schedule Requirement* that will allow you to change the Schedule to include this new session duration and continue as normal. To do this click Add Variation in the Ribbon Menu.

This is displayed below:
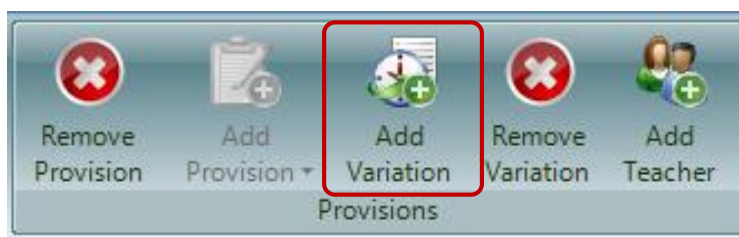
This will add a *new line to the Schedule Requirements*. This is displayed below:

Note: As a default, the line is added with an **As From** date set to the week *following the last session* and with its *number of sessions set to zero*.

The **red box** has highlighted the Provision Periods. Autumn is the Provision Period for which the Variation was added.

The **green box** has highlighted the Schedule Requirements. The *Variation is viewed here* and is the second line selected. You can see it begins after the last week of the Provision and has zero sessions.

In this example, the original Schedule Requirement has duration of 30 minutes and the new Schedule Requirement now has 20 minute sessions.

The **blue box** highlights the Schedule Diary and is currently empty since no sessions have been created.

You can now *do one of two things* in order to apply the Variation as at the required date.

Change the number of sessions on the original Schedule Requirement
Continuing from the example above:

If you know how many sessions you should have in the original Schedule Requirement (30 minute sessions), you can change the original Schedule Requirement to this. You have decided there should

be 5 sessions. This is displayed below:

	As From	Ses	Dur	Hrs	Day	Time
✔	02/09/2013	5	30	2.5	Mon	09:00
✔	06/10/2013	5	20	1.67	Mon	09:00

Doing so will automatically change the number of sessions in the new Schedule Requirement (20 minute sessions) so that the *total number of sessions in both Schedule Requirements* is equal the *total of number sessions specified for the Provision*. Since the Provision is defined for 10 sessions, 5 sessions are now entered in the new Schedule Requirement.

It has also updated the Hours and As From date for each Schedule Requirement.

There will now be 5 Diary Entries for each Schedule Requirement in the Schedule Diary. This is highlighted in the red box below:

	As From	Ses	Dur	Hrs	Day	Time			Teacher	Time	Dur	Payment
✔	02/09/2013	5	30	2.5	Mon	09:00	✔		Archer Pat	09:00	30	
✔	06/10/2013	5	30	2.5	Mon	09:00		✔	Archer Pat	09:00	20	

Swanton Secondary School - Diary Records: 5

	Session	Makeup	Day	Room	Date	Start	End	Duration	Teachers
	6		Monday	(No Items	07/10/2013	09:00	09:30	30	Pat Archer
	7		Monday	(No Items	14/10/2013	09:00	09:30	30	Pat Archer
	8		Monday	(No Items	21/10/2013	09:00	09:30	30	Pat Archer
	9		Monday	(No Items	04/11/2013	09:00	09:30	30	Pat Archer
	10		Monday	(No Items	11/11/2013	09:00	09:30	30	Pat Archer

Change the "As From" date
Alternatively, using the example above:

If you know the date that the change should take place change the As From date on the *new Schedule Requirement*. For example, you want the new Schedule Requirement to begin on 24th October. This is displayed below:

	As From	Ses	Dur	Hrs	Day	Time
✔	02/09/2013	8	30	4	Mon	09:00
✔	24/10/2013	2	20	0.67	Mon	09:00

This action will result in the number of sessions in both the original and the new Schedule Requirement being changed to the correct number. Since the total number of sessions in the Provision is 10, there are now 8 sessions in the original Schedule Requirement and 2 sessions in the new Schedule Requirement.

Removing a Schedule Requirement

You can remove a Schedule Requirement by simply selecting it and then clicking on the Remove Variation button found on the Ribbon Menu. This is displayed below:
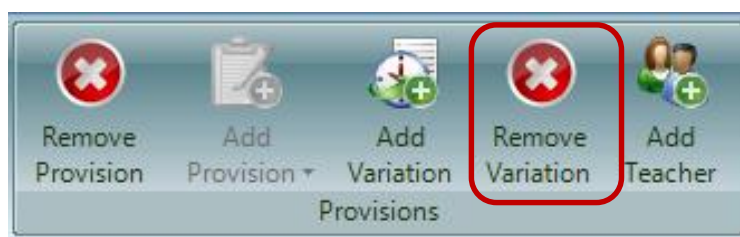
When you remove a Variation the Provision will be short on schedule for the sessions you have removed. You must therefore *amend the previous Schedule Requirement* and increase its number of sessions.

16.   Allocating Teachers

Each Activity Plan can have *one or more Teachers allocated* to it. You may want to change the Teacher or Teachers throughout the life of an Activity Plan.

Teachers are attached to a Schedule Requirement, therefore to add a Teacher:

Select the appropriate Schedule Requirement > Add Teacher

When you click on this button a new Teacher line is added to the Schedule Requirement as shown above in the green box. The new Teacher Line can be edited as required.

Note: In this example we now have two Teachers involved with the Activity at the *same time*.

When you do this you will see that the *Flag Icon* showed on the effected Provision lines change to show that the original Teacher has *little or no involvement in the Provision*. Currently they have changed to *yellow* (some involvement) as highlighted by the blue box.

Moreover if the Teacher is no longer involved (red flag), the summary Activity Plan line will also have a *line drawn through* it to indicate that once the current date has past the last date of their involvement.

Note: Do not use this feature unless you are setting a *long term change* in the Schedule. If you want to alter a small number of sessions then you should use the *Make Up Lesson* tool. These are discussed later in this Chapter.

When a new Teacher is added, or any of the Teacher line values changes, this will be felt *throughout the next Provision Periods*.

For example, if you have three Provisions specified and you add a new Teacher in the second Provision, then it will also be added to the third. Likewise if you changed the Teacher duration in the second Provision then this change will be applied to the third. This is displayed below:

		Provision	Start	End	Room	Pupils	Summary	Teachers
		Autumn	02/09/2013	18/12/2013	(No l...	0	(10 x 30) = 5hrs	Chantelle Darlings
▶		Spring	04/01/2014	01/04/2014	(No l...	0	(10 x 30) = 5hrs	Daisy Freeman
		Summer	19/04/2014	22/07/2014	(No l...	0	(10 x 30) = 5hrs	Daisy Freeman

Daisy Freeman was allocated in Spring and has been automatically added to Summer.

Alternatively, if you are:

1. **Creating Activity Plans from a Teacher's Record Card**, then the Teacher will automatically be attached to any Schedule Requirement.
2. **If you are creating Activity Plans from elsewhere such as a School Record Card**, then you can select a Teacher while in the Create Activity Plan form and this Teacher will automatically be added.

Note: If you want to *add additional Teachers* to a Schedule Requirement you will need to use the *Add Teacher* option.

Removing a Teacher

To remove a Teacher simply click on the Teacher line and click on the Remove Teacher icon found on the Ribbon Menu. This is displayed below:

Note: When you remove a Teacher from a Provision attached to the last Schedule Requirement the removal will be propagated to following Provisions.

17. Shuffle Diary Entries Forwards and Backwards

You can move the Dairy Entries forwards and backwards in the Schedule using the Shuffle Back and Shuffle Forward buttons in the Ribbon Menu. These are displayed below:
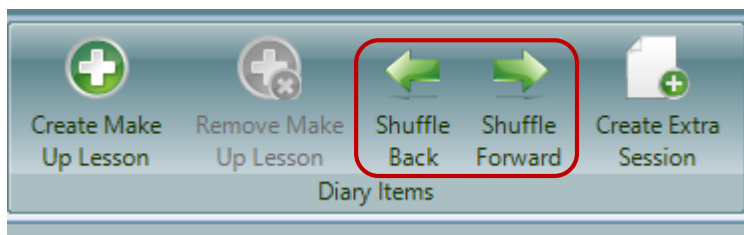
Example

You will need to open the Schedule for a Teacher/School/Centre Record Card and view the Schedule Diary. Select a Diary Entry to Shuffle Back or Forward from:

We have selected Session 4 on 23/09/2013.

Click **Shuffle Forward**, to bring all the Diary Entries, including and after this one, *up the Schedule*. This has the effect of moving all the Diary Entries a *week back* from this date:

Alternatively clicking **Shuffle Back**, will bring all the Diary Entries, including and before this one, *down the Schedule.* This has the effect of moving all the Diary Entries a *week forward* before this date.

18.   Recording Lesson Delivery with Task Results

Overview

 [Watch the Video Tutorial here](#)

If an Activity in a Diary Entry does not take place then it should be marked with a *Task Result*. This records the fact that the session has not taken place and whether the Teacher should be paid and the Pupils billed.

For example if the Teacher was ill they will still be credited with the work? i.e. they can claim for it if they are a Teacher or it is taken as part of their contracted hours if they are on a contract. If on the other hand if they just simply did not turn up then you may not want to credit them with the work.

By setting up various Task Results and applying the appropriate one you can apply the rules as required.

They can be viewed in the *Schedule Diary* of an Activity Plan.

To access the Schedule Diary:

Tuition (Menu Bar) > Open a Record Card > Schedule tab > View Provisions

The Schedule Diary is on the *bottom right of the screen* and is displayed below:

The **red box** highlights the Task Results for these Diary Entries. It is displayed as a *coloured square* to indicate its status. Currently, the Task Result hasn't been set and is displayed as *white.*

Create a Task Result

 [Watch the Video Tutorial here](#)

To create a Task Result, click:

Systems (Menu Bar) > Task Results > New Task Result

This will display the window below:

The fields to complete are:

Task Result   Enter the name of the Task Result

Makeup Required   Specify if a Make Up Lesson must be allocated

Pay Teacher   Specify if the Teacher still receives pay for the lesson

Charge Customer   Specify if the customer is still charged

Display Colour   Select a colour for this Task Result

Example Task Results are displayed below:

How to Apply a Task Result

 [Watch the Video Tutorial here](#)

To apply a Task Result, you will need to access the Schedule Diary:

Tuition (Menu Bar) > Open a Record Card > Schedule tab > View Provisions

The Schedule Diary is on the *bottom right of the screen* and is displayed below:

	Session	Makeup	Day	Room	Date	Start	End	Duration	Teachers
▶	1		Monday	(No Items	02/09/2013	09:00	09:30	30	Pat Archer
	2		Monday	(No Items	09/09/2013	09:00	09:30	30	Pat Archer
	3		Monday	(No Items	16/09/2013	09:00	09:30	30	Pat Archer
	4		Monday	(No Items	23/09/2013	09:00	09:30	30	Pat Archer
	5		Monday	(No Items	30/09/2013	09:00	09:30	30	Pat Archer
	6		Monday	(No Items	07/10/2013	09:00	09:30	30	Pat Archer
	7		Monday	(No Items	14/10/2013	09:00	09:30	30	Pat Archer
	8		Monday	(No Items	21/10/2013	09:00	09:30	30	Pat Archer
	9		Monday	(No Items	04/11/2013	09:00	09:30	30	Pat Archer
	10		Monday	(No Items	11/11/2013	09:00	09:30	30	Pat Archer

Swanton Secondary School - Diary Records: 10

By *right-clicking* a session you can then apply a Task Result. This will display a menu made up from all your defined Task Results. Select the required Task Result from the list. This is displayed below:

	Session	Makeup	Day	Room	Date	Start	End	Duration	Teachers
▶			Monday	(No Items	02/09/2013	09:00	09:30	30	Pat Archer
			Monday	(No Items	09/09/2013	09:00	09:30	30	Pat Archer
			Monday	(No Items	16/09/2013	09:00	09:30	30	Pat Archer
			Monday	(No Items	23/09/2013	09:00	09:30	30	Pat Archer
			Monday	(No Items	30/09/2013	09:00	09:30	30	Pat Archer
	6		Monday	(No Items	07/10/2013	09:00	09:30	30	Pat Archer
	7		Monday	(No Items	14/10/2013	09:00	09:30	30	Pat Archer
	8		Monday	(No Items	21/10/2013	09:00	09:30	30	Pat Archer
	9		Monday	(No Items	04/11/2013	09:00	09:30	30	Pat Archer
	10		Monday	(No Items	11/11/2013	09:00	09:30	30	Pat Archer

Swanton Secondary School - Diary Records: 10

Menu:
- Clear
- School Cancelled
- Teacher Holiday
- Teacher Illness

If the School was cancelled on this day then we select School Cancelled. This will apply the Task Result and is displayed below:

	Session	Makeup	Day	Room	Date	Start	End	Duration	Teachers
▶	1		Monday	(No Items	02/09/2013	09:00	09:30	30	Pat Archer
	2		Monday	(No Items	09/09/2013	09:00	09:30	30	Pat Archer
	3		Monday	(No Items	16/09/2013	09:00	09:30	30	Pat Archer
	4		Monday	(No Items	23/09/2013	09:00	09:30	30	Pat Archer
	5		Monday	(No Items	30/09/2013	09:00	09:30	30	Pat Archer
	6		Monday	(No Items	07/10/2013	09:00	09:30	30	Pat Archer
	7		Monday	(No Items	14/10/2013	09:00	09:30	30	Pat Archer
	8		Monday	(No Items	21/10/2013	09:00	09:30	30	Pat Archer
	9		Monday	(No Items	04/11/2013	09:00	09:30	30	Pat Archer
	10		Monday	(No Items	11/11/2013	09:00	09:30	30	Pat Archer

Swanton Secondary School - Diary Records: 10

If you are viewing *Venue Diary Entries*, setting a Task Result will also set the same Task Result on the related *Teacher Diary Entries*.

Alternatively, if you are applying the Task Result on the *Teacher Diary Entry* then it will only set the Task Result on the associated *Venue Diary Entry* if there is *only one Teacher* assigned to the Activity.

If you have more than one Teacher and you want to apply the Task Result to all the Diary Entries for one session you need to set each Teachers Diary Entry and the Venue Diary Entry.

Note: When the Invoices are raised, only the Task Results recorded *by this date* are taken into account when calculating the Billing Report. Therefore it is recommended to perform an invoice run once a term has finished. Alternatively, Billing Adjustments will need be to be made to take the un-chargeable Task Results into account. For more information regarding this please refer to the **Automatic Generation of Invoices** and **Debtor Billing Adjustments** sections of the **Finance in Ensemble** Chapter.

Activities with more than one Teacher

An alternative method of setting the Task Result which is especially *useful when there is more than one Teacher* involved is to display the *Diary Appointment Dialog*.

To display this:

Double-click on a Diary Entry

This provides two alternative methods to set the Task Result:

1. You can set the **Lesson Task Result** in the **red box** which will *change all* the related Diary Entries
2. Set the Task Result *individually* for each Teacher, highlighted in the **green box**.

Note: While in the Diary Appointment form you can also change the Date of the Activity and the Start Time and End Time of the each Diary Entry.

Teacher Absence Report

 [Watch the Video Tutorial here](#)

This Report lists all Task Results set against a Teacher, allowing you to run an analysis on the attendance of each member of staff.
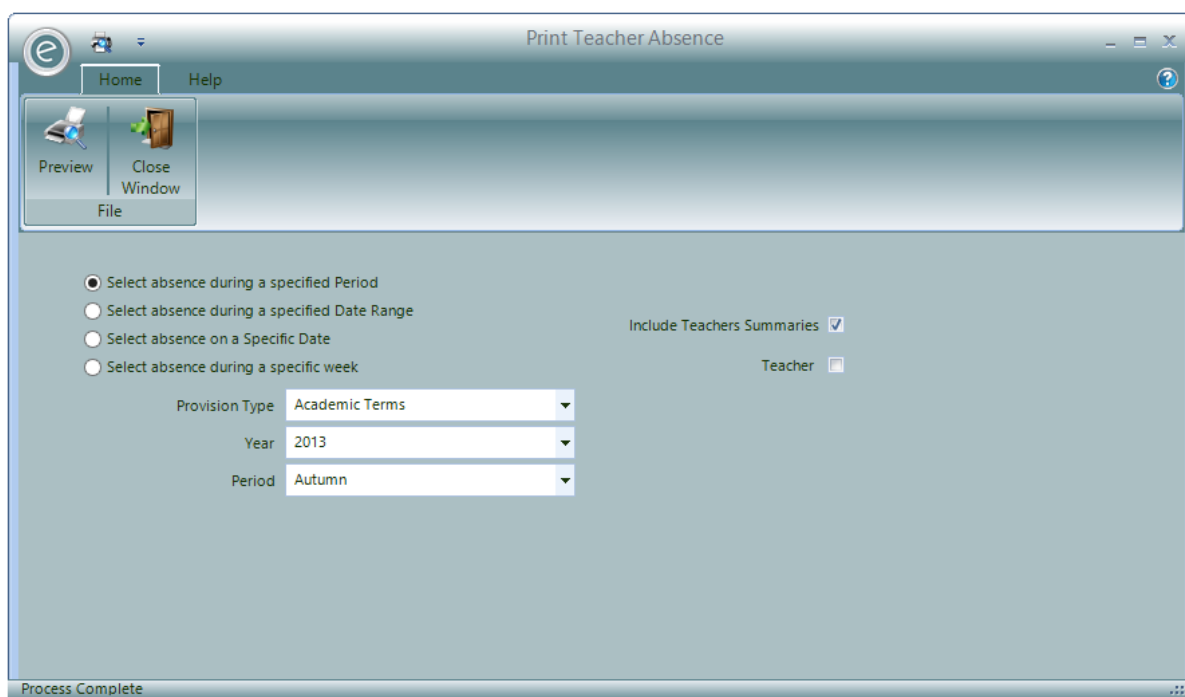
You can print a *Teacher's Absence Report* for any specified Provision Period. To print this, click:

Teachers (Ribbon Menu) > Schedule Reports > Print Teacher Absence

Alternatively, you can *print the Report for a specific Teacher* directly from their Record Card by:

Opening Teacher Record Card > Print tab > Print Teacher Absence

Either of these options will display the window below:

You can select any of the following date range options:

Select absence during a specified Period	Select a Provision Type, Academic Year and a Provision Period. The Report will include all the absences between the start and finish of the Provision Period
Select absence during a specified Date Range	Enter a From and To date. The Report will include all the absences between the two dates
Select absence on a Specific Date	Enter a specific date in As At Date. The Report will include any absences for the entered date
Select absence during a specific week	Select an Academic Year and a Week Start Date. The Report will include any absences for the specified week
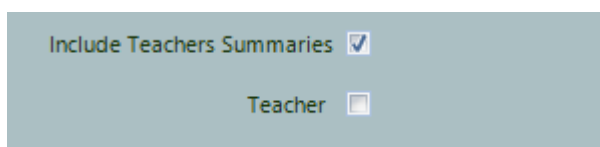
Summary Report

You can then tick to Include Teacher Summaries to keep the data brief and tick Teacher to view absences for a specific Teacher:

Click Preview to view the Report.

An example is displayed below:

12-Nov-13   Paritor Performing Arts

Teacher Absence for Autumn 2013/2014

	No Of Sessions	Total Time	Days Affected
Nigel Cambell			
School Cancelled	3	01:30	3
	3	01:30	3
Teacher Holiday	2	01:00	2
	2	01:00	2
Teacher Illness	3	01:30	3
	3	01:30	3
Nigel Cambell	8	04:00	8
Grand Total	8	04:00	8

Detailed Report

Un-tick **Include Teacher Summaries** and then select **Include Teachers Detailed** to expand the Report to show more information per Teacher such as date, start time of lessons and the specific Venue affected by the absence. Tick **Teacher** to view absences for a specific Teacher:

Click **Preview** to view the Report.

An example is displayed below:

10 February 2014   Dudley Performing Arts

Teacher Absence for Autumn 2013/2014

Mr Lincoln Andrews

Date	Start Time	Duration	Venue	Task Result	Make up required?
02-Sep-13	09:00	30	Atherton Music Centre	School Cancelled	False

19.   Make Up Lessons

If an Activity in a Diary Entry cannot be or has not been delivered you can enter a *Make Up Lesson* (a replacement Diary Entry).

Create a Make Up Lesson

▶   [Watch the Video Tutorial here](#)

To create a Make Up Lesson:

Select the Venue Diary Entry that has not taken place > Click Create Make up Entry

Note: It *has to be* a School or Centre Diary Entry and *not a Teacher Diary Entry.*

These are highlighted below:

Moreover, the Diary Entry you select cannot be an entry for which you have *already created a Make Up Lesson.* The Task Result does not need to be specified either. When you click on the button the following form is displayed:

The form is split into two sections:

1. *Original Session Details* in the **red box** displays the original Diary Entry. If you haven't previously done so, you can update the original entry with the Task Result explaining why it was not delivered. You also have the option to enter a *cover Teacher*. To do this select the cover Teacher from the list.

2. *Makeup Session Details* in the **green box** displays the new Makeup Session. Here you can enter a new date, time and duration for the Makeup Session.

To save this, click **Apply Changes.**

In the Schedule Diary, the original Activity will be updated with the Task Result and below it will be the new Make Up Lesson. These are displayed below within the **red box**:

Removing Make Up Lessons

 [Watch the Video Tutorial here](#)

You can remove a Make Up Lesson by selecting it and clicking on the **Remove Make Up Lession** button. This is displayed below:

Note: *It has to be a Venue Diary Entry for a Make Up Lesson* not a Teacher Diary Entry for a Make Up Lesson. This will remove both the Venue and Teacher Makeup Diary Entry.

20. Extra Sessions

Create an Extra Session

You can also create additional Diary Entries on top of those planned in the Schedule. These are different to normal Make Up Lessons since a Task Result is *not required* for them to be made. For example you may have space left in the Schedule for an additional session for revision.

To create an extra Session:

Open a Teacher/School/Centre Record Card > Schedule tab > Select Activity Plan > Create Extra Session

This will open the window displayed below:

You will be able to select the Date, Time, Duration and Teacher. The default Teacher selected will be the one conducting the Activity Plan.

You will also be able to add an additional Teacher by clicking Add Teacher or remove a Teacher by clicking Remove Teacher.

Click Apply Changes to create the extra Session.

Diary Entries for extra Sessions created will appear *bolded* in the Schedule Diary as below:

Remove an Extra Session

You can remove an Extra Session by simply selecting it and then clicking on the **Remove Extra Session** button found on the Ribbon Menu. This is displayed below:

21.   Print Activity Plans

You can print out the Activity Plans themselves on the *Activity Plan Report.* This can be used to *check throughout the term that lessons delivered are matching the requirement of the schedule*. This is done using *Task Results*. If this isn't happening then necessary adjustments to areas such as billing can be made.

To view the Report, click:

Schools/Centres/Groups (Ribbon Menu) > Print Activity Plans

Alternatively, you can *view the Report for a specific School*/Centre/Group directly from the Record Card by:

Opening a School/Centre/Group Record Card > Print tab > Print Activity Plan

Either of these options will display the window below:
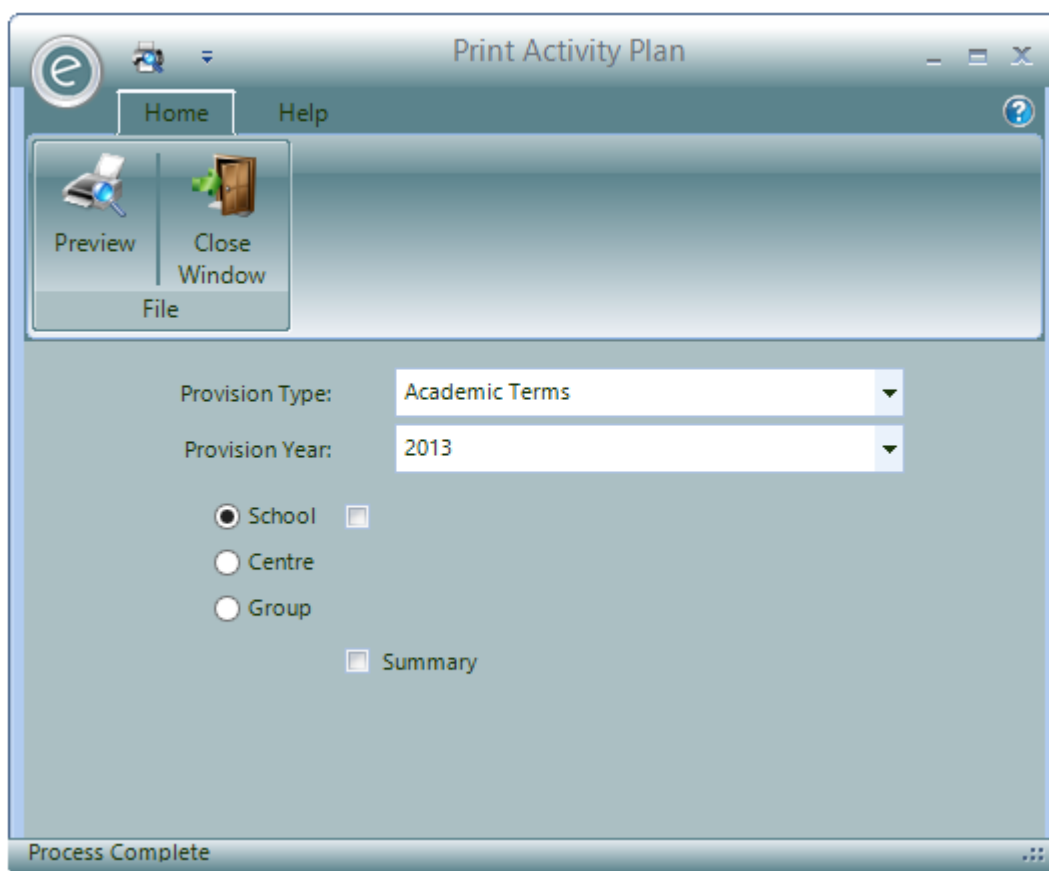
You will need to select the **Provision Type** and **Provision Year** to run the Report for.

You will also need to choice to run it for a **School**, **Centre** or **Group** and you can specific Record from these.

Click **Summary** to just view collapsed summary information.

Click **Preview** to view the Report.

An example is displayed below:

The Report is read from left to right. The *Requirement* section shows the given Activity Plan and the scheduled tuition. From this the *Venue Diary* section confirms the schedule. *Planned Teaching* shows the Teachers conducting the tuition and the variations to the schedule. Finally the *Teaching Diary* shows confirmation of the lessons delivered. If the Diary doesn't match the scheduled requirements then an X will appear.

22.   Print Unscheduled Requirements

There is a Report which will show Activity Plans which haven't adhered to the Schedule Requirements. This may be due to a lack a Make Up Lesson after a Task Result was recorded or a Teacher hasn't been allocated.

To view an *Unscheduled Requirements Report*, click:

Schools/Centres/Groups (Ribbon Menu) > Print Unscheduled Requirements

Alternatively, you can *view the Report for a specific School*/Centre/Group directly from the Record Card by:

Opening a School/Centre/Group Record Card > Print tab > Print Unscheduled Requirements

Either of these options will display the window below:
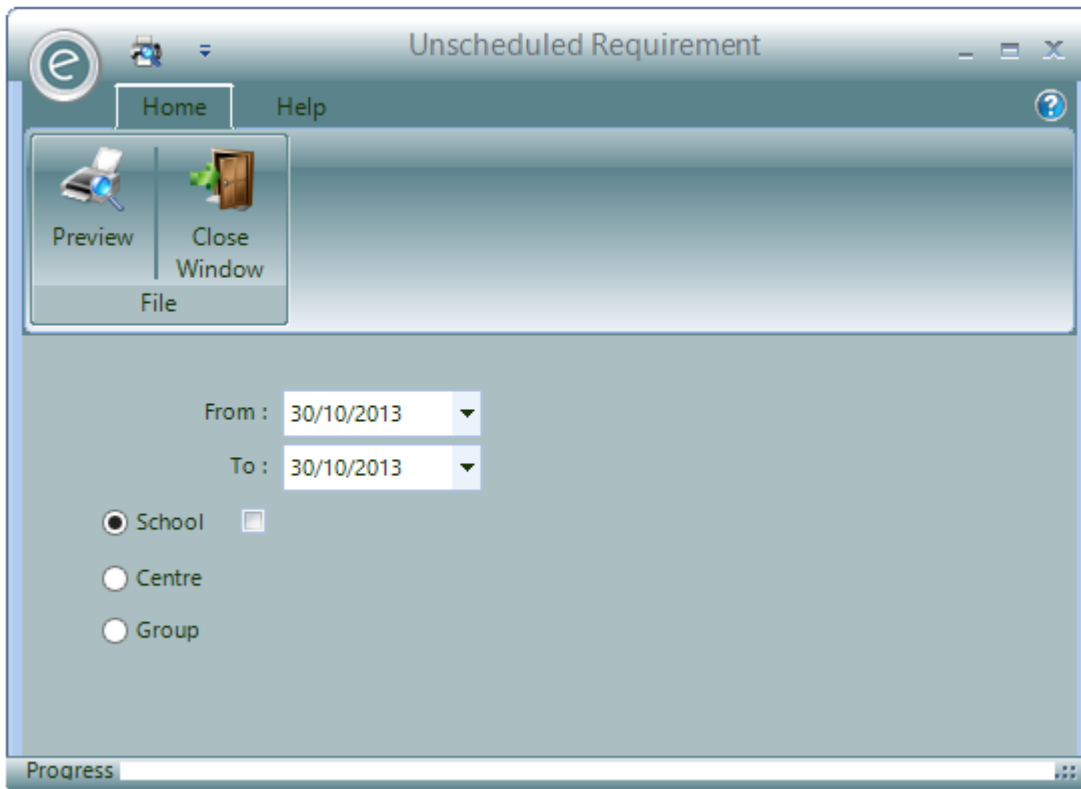
You will need to select the *date range* (as can be seen both dates can match) and whether to run the Report for a **School**, **Centre** or **Group**. You will also be able to select a specific Record from this.

Click **Preview** to view the Report.

An example is displayed below:

23. Activity Analysis

You can produce an Analysis of the scheduled Activities for Schools, Centres and Groups.

There are two Reports that can be produced:

1. One will analyse the scheduled hours within the associated Charges and the Activity Group*
2. Another will produce an year-on-year comparison of the hours bought for the Activities and their value

*Note: For more information on Activity Groups refer to **Activity Groups** in **Advanced Schedule Management**.

To view an Activity Analysis, click:

Schools/Centres/Groups (Ribbon Menu) > Print Activity Analysis

Alternatively, you can *view the Report for a specific School*/Centre/Group directly from the Record Card by:

Opening a School/Centre/Group Record Card > Print tab > Print Activity Analysis

Either of these options will display the window below:

There are *two different Analyses that can be produced* from this window which are highlighted by the green box:

Analysis of Scheduled Activity hours	Default selection. This report will analyse the Activity hours by the Charge and Activity Type
Comparison of Schedule Hours	This report produces a table showing the hours and the value of the hours year by year, which makes the services in growth or decline more identifiable. When

this option is selected, the window changes so only the **Academic Year** to start from is specified.

In the **red box**, you can select any of the following date range options:

Select lessons during a specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The Report will include all the Diary Entries between the start and finish of the Provision
Select lessons during a specified Date Range	Enter a **From** and **To date**. The Report will include all the Diary Entries between the two dates
Select lessons on a Specific Date	Enter a specific date in **As At Date**. The Report will include any Diary Entries for the entered date

The blue box highlights the **Filter Report Results** section. Here you can choose to analyse for **Schools**, **Centres** or **Groups** and additionally select a specific Record from that.

Moreover you can tick **Show Detail** to expand the summary information in the Report. The **Activity** subfield will appear, allowing you to also specify a particular Activity to filter the analysis by.

Click **Preview** to view the Report.

An example of an *Analysis of Scheduled Activity hours* is displayed below:

School Activity Analysis for Autumn 2013/2014

Payer Billed Tuition

   Group Activity

Activity	No. Of Activities	Total Duration
Orchestra	1	05:00
Group Activity		05:00

   Tuition Activity

Activity	No. Of Activities	Total Duration
Bassoon	8	40:00
Cello	6	30:00
Drums	5	25:00
Flute	5	25:00
French Horn	2	10:00
Piano	2	10:00
Saxophone	1	05:00
Triangle	2	10:00
Viola	5	25:00
Violin	1	05:00
Voice	3	15:00
Tuition Activity		200:00
Payer Billed Tuition		205:00

An example of a *Comparison of Schedule Hours* is also displayed below:

Activity Comparison

	2013		2012		2011		2010	
	Hours	Value	Hours	Value	Hours	Value	Hours	Value
Ambridge Grammar School								
School Billed								
Group Activity								
Orchestra	15:00	£0.00	00:00	£0.00	00:00	£0.00	00:00	£0.00
Total of Group Activity	15:00	£0.00	00:00	£0.00	00:00	£0.00	00:00	£0.00
Tuition Activity								
Bassoon	45:00	£0.00	30:00	£300.00	00:00	£0.00	00:00	£0.00
Cello	15:00	£0.00	00:00	£0.00	00:00	£0.00	00:00	£0.00
Clarinet	30:00	£0.00	15:00	£150.00	00:00	£0.00	00:00	£0.00
Drums	30:00	£0.00	00:00	£0.00	00:00	£0.00	00:00	£0.00
Flute	30:00	£0.00	00:00	£0.00	00:00	£0.00	00:00	£0.00
French Horn	30:00	£1,800.00	15:00	£150.00	00:00	£0.00	00:00	£0.00
Guitar	30:00	£1,500.00	15:00	£150.00	00:00	£0.00	00:00	£0.00
Piano	45:00	£0.00	30:00	£300.00	00:00	£0.00	00:00	£0.00
Saxophone	15:00	£0.00	00:00	£0.00	00:00	£0.00	00:00	£0.00
Triangle	30:00	£0.00	15:00	£150.00	00:00	£0.00	00:00	£0.00

Advanced Schedule Management

All content to be used in this chapter is optional.

1. Overview

The previous chapter illustrated how to produce simple schedules with individual Activities representing lessons. However Ensemble also has records available to organise the lessons into courses and the Activities can be organised in a hierarchical structure to cater for services with more complex schedules.

This chapter will introduce how to manually create Schedules and create additional Records such as Activity Classifications, Activity Types and Subjects which are used for more complex Schedules.

2. Activities

The Activity Hierarchy

Individual Activities are used to represent lessons and other tasks such as meetings. For a large service with many types of lessons and tasks, organising this all by Activities alone can become hard to manage and cumbersome.

Therefore the Activities can be expanding into the *Activity Hierarchy*. This is very useful for effectively organising and structuring a large range of Activities.

The hierarchy from top to bottom is:

Activity Classifications	The top of the tree. These define the major, broad areas of your business. E.g Music or Dance
Activity Types	These are pre-defined types of Activity in Ensemble.
Activity Groups	Activity Groups are defined within Activity Types and these will 'group' your Activities.
Activities	These define your specific lessons and tasks

The Activity Hierarchy is illustrated below:
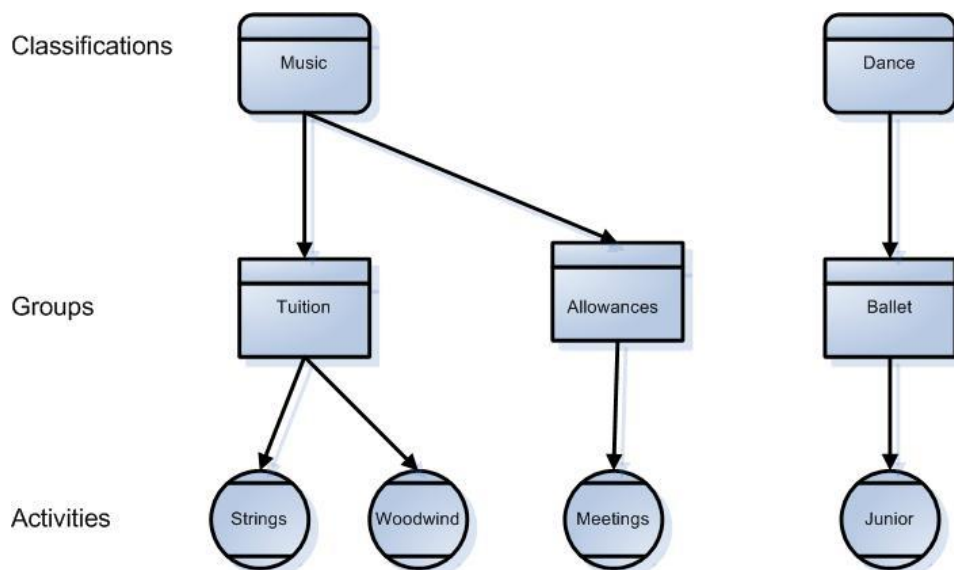
Note: This is for *display purposes only*; It is not possible to recreate this chart within the software.

Activity Classifications

Classifications are used to define the major areas of your business. You can define as many Classifications as you require and then define an Activity Hierarchy below each one. Typical Classifications would be Music, Dance and Drama.

Enable Availability in Education Parameters

When you first setup your database, it *will not show* the Activity Classifications option. You will therefore need to switch these on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Activity Classifications' > Save and Close

This is displayed in the window below, with Use Activity Classifications highlighted in the red box:
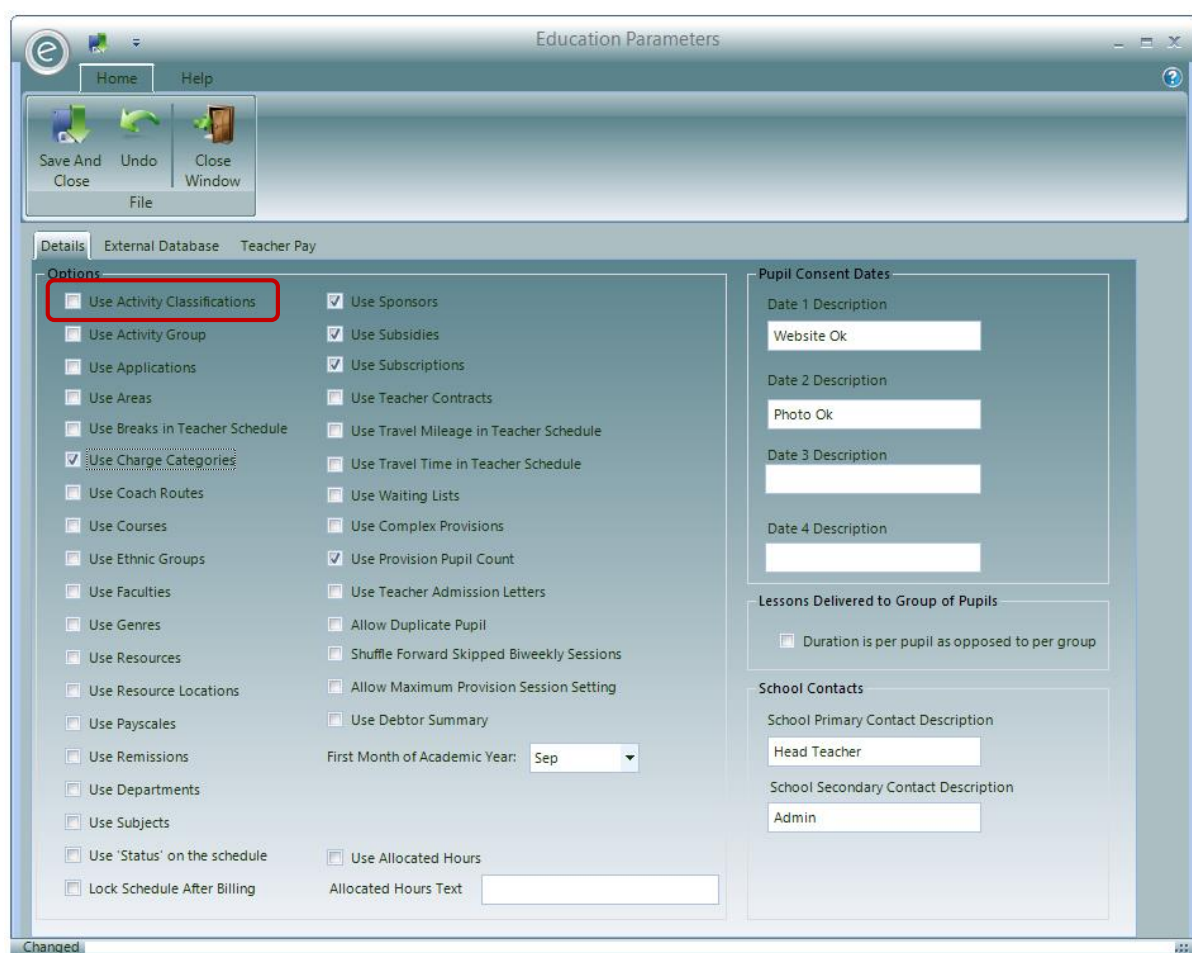
This will add the Activity Classification option to the Activities tab in the Menu Bar.

Create an Activity Classification

To create an Activity Classification click:

Activities (Menu Bar) > Activity Classifications > New Activity Classification

This will display the window below:
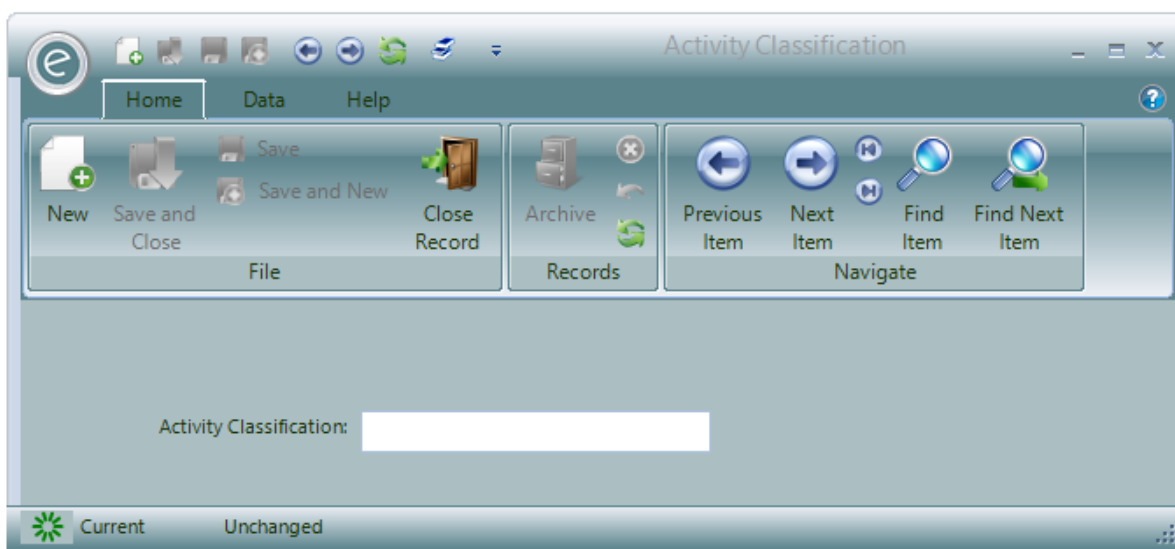
Simply type in the desired name in the Activity Classification field.

Click Save and Close to save the new Activity Classification.

Activity Types

These are pre-set within the system and cover each of the basic types of Activity. They are:

Allowance Activity	This would include all Activities that describe time given to a Teacher to allow him to administrate his or her tasks. This would include *Meetings, Parent Meetings, and Travel Time*
Course Activity	Activities that describe short courses you may run, e.g. *summer Schools, projects, events and trips*
Group Membership Activity	Activities involved with the running of your *Groups* e.g. Bands and Choirs
Tuition Activity	Activities describing the *regular tuition provided by your Teachers.*
First Access Programme	Activities designed to provide tuition under the Wider Opportunities/ First Access scheme. (England only)
Module Based	These are Activities that are Modules within a Course

Activity Groups

Activity Groups are used to group sets of Activities together into a logical order and often mirror lines of a financial budget. Each Activity Group that you define will belong to both an Activity Classification and an Activity Type.

Enable Availability in Education Parameters

When you first setup your database, it *will not show* the Activity Groups option. You will therefore need to switch these on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Activity Group' > Save and Close

This is displayed in the window below, with Use Activity Group highlighted in the red box:
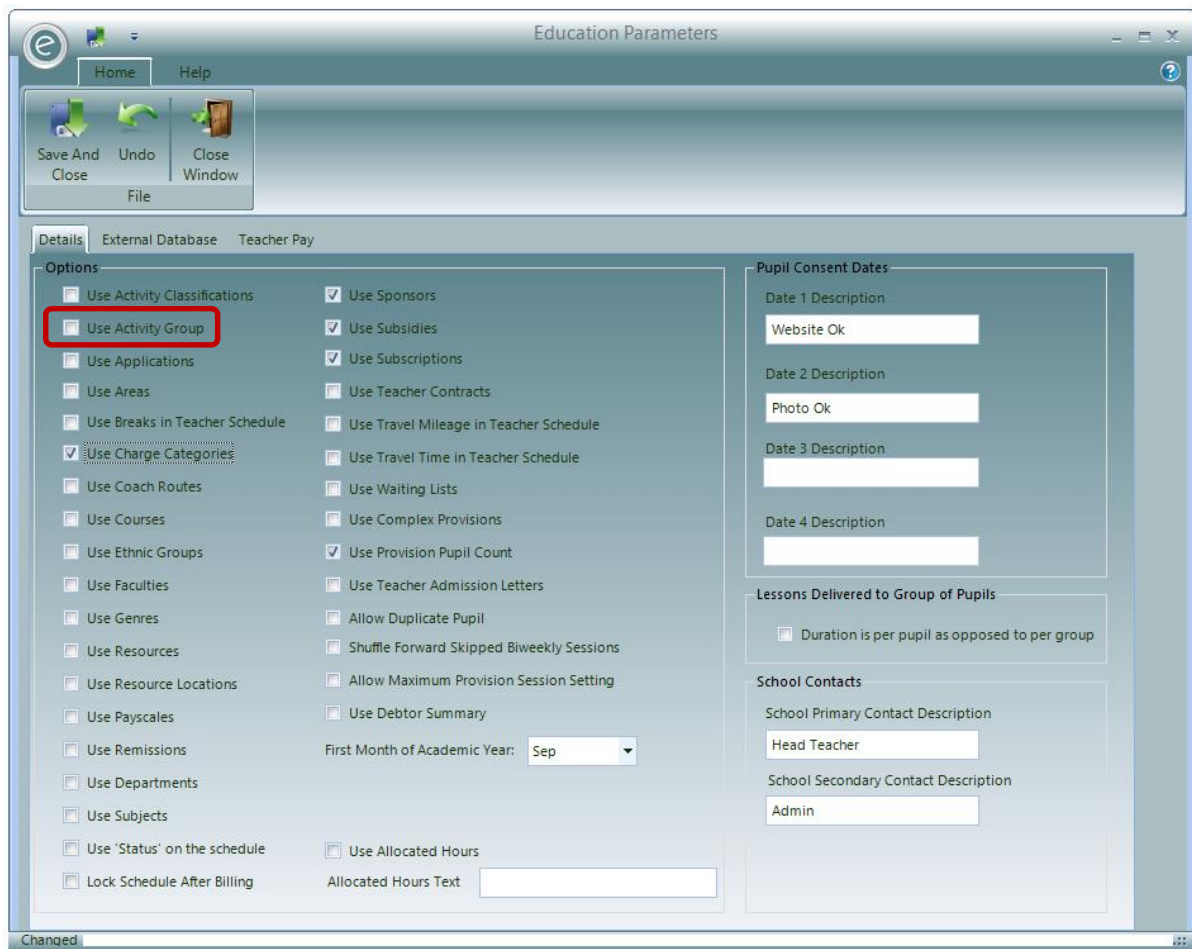
This will add the Activity Group option to the Activities tab in the Menu Bar.

Create an Activity Group

To create an Activity Group click:

Activities (Menu Bar) > Activity Groups > New Activity Group

This will display the window below:

Type in the desired name in the **Activity Group** field and choose the associated **Activity Type** and **Activity Classification**.

You can optionally enter a **VAT Code** for the Activity Group allowing you to analyse Activities according to your financial structure.

Note: For more information VAT Codes refer to **VAT Codes** in the **Finance in Ensemble** Chapter.

Each Activity Group must also have a common *Teacher Contact Type*. These are very important for Teacher Contracts. There are three types:

Contact Time	These Activities relate to the Teacher having *contact with Pupils*
Other Directed Time	Activities that *do not involve contact* with Pupils but are *scheduled* on a Teacher's timetable.
Un-Programmed Time	Activities that *do not involve contact* with Pupils and are *not scheduled* on a Teacher's timetable.

Note: For more information regarding Teacher Contracts, refer to **Teacher Contracts** in the **Teacher Pay** Chapter.

Click **Save and Close** to save the new Activity Group.

3. Subjects

If you create an Activity called 'Violin Lesson' and use that when creating an Activity Plan, it would be fair to assume that each Pupil in the lesson is taking a *subject* of Violin. Though is not always the case as you may have defined much broader activities and lessons for example the Activity and therefore lesson may be called 'Strings'.

Pupils taking part in this lesson would be learning various types of string resources e.g. violin, cello etc. To allow for this the system allows you to define a set of *Subjects* that better describes the actual thing a Pupil is learning within a lesson. As you add Pupils to Activity Plans you allocate the Subject.

Note: Subjects are merely descriptive additions and do not change how Activity Plans function once they are activated.

Enable Availability in Education Parameters

When you first setup your database, it *will not show* the Subjects option. You will therefore need to switch these on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Subjects' > Save and Close

This is displayed in the window below, with Use Subjects highlighted in the red box:
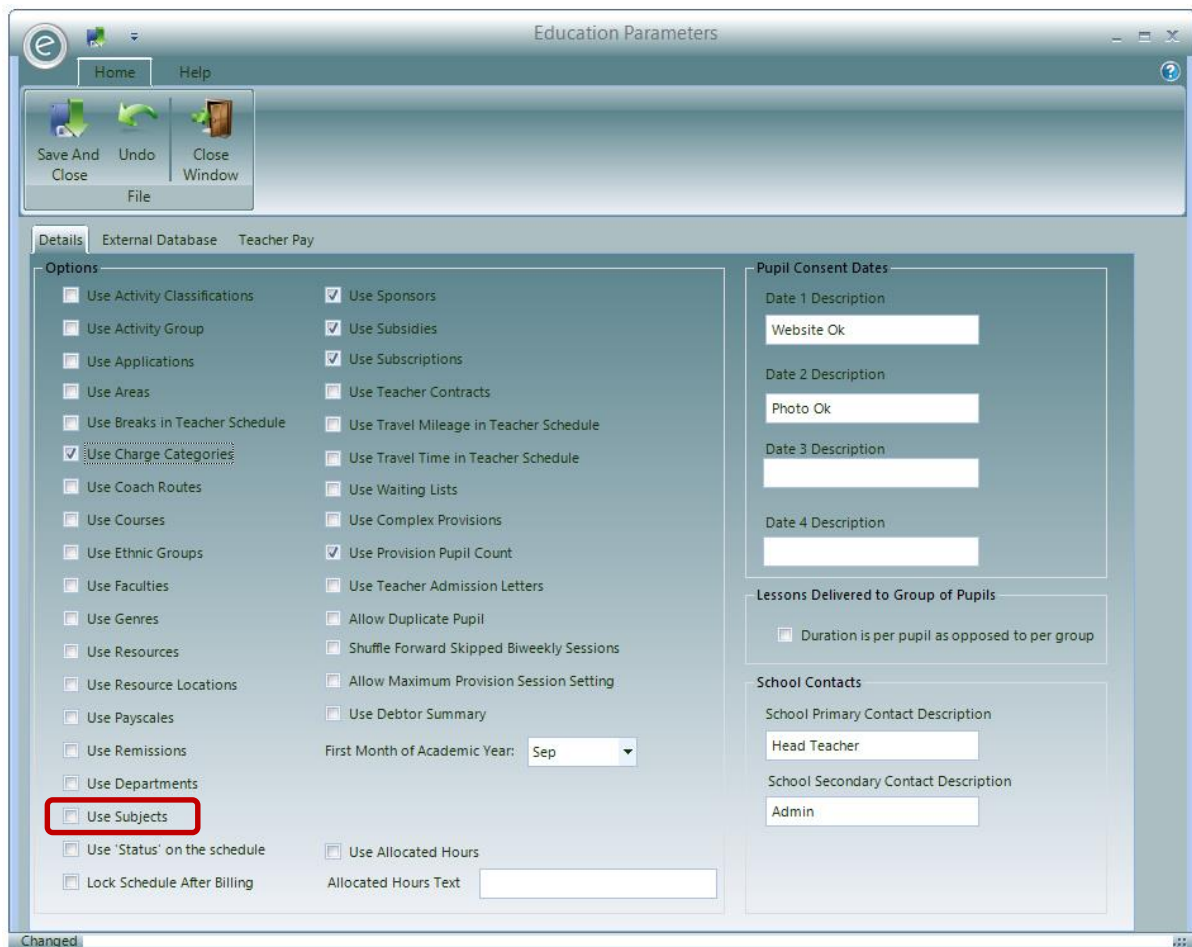
This will add the Subjects option to the Activities tab in the Menu Bar.

Create a Subject

To create a Subject click:

Activities (Menu Bar) > Subjects > New Subject

This will display the window below:
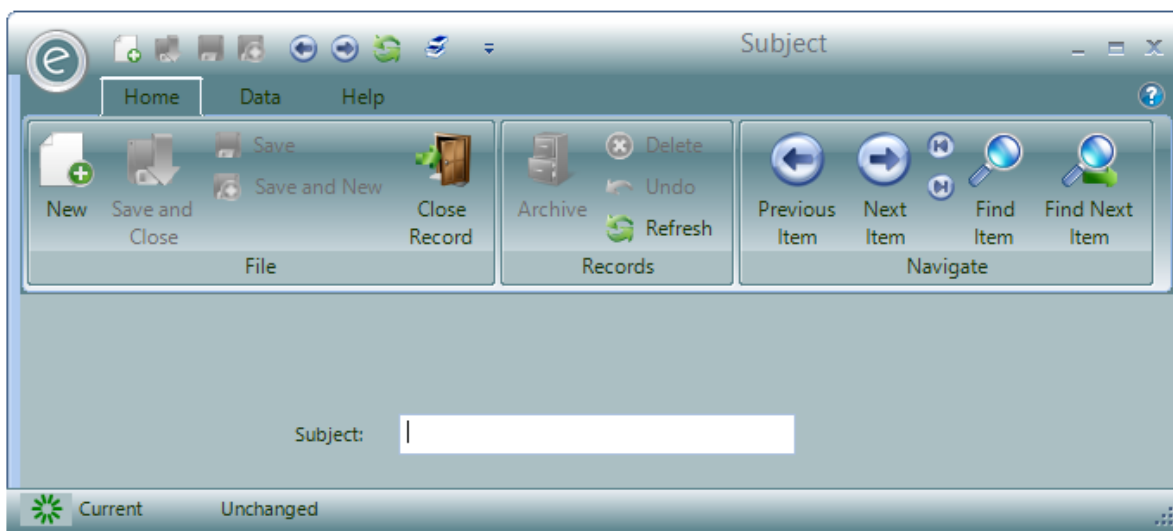
Simply name the **Subject** and click **Save and Close**.

Apply a Subject

Once Subjects are created, then can be applied in many ways. Since they are linked to Activities, they can be selected while creating Activities.

Moreover, when Pupils are added to Activity Plans, their specific Subject can also be chosen here. If their Activity already has a pre-defined Subject, the Subject can be changed to something more suitable. The Subject can also be changed as many times as you wish throughout.

For example a Pupil may be enrolled on an Activity Plan for Piano with a default Subject of 'Grade 1'. However this Pupil has Grade 3 ability and so the Subject 'Grade 3' is chosen. A year later, they progress to Grade 4 and so the Subject can be updated to 'Grade 4'.

Note: For more information regarding Pupil enrolment, refer to **Adding Pupils into Activity Plans.**

4. Courses and Modules

The Course Hierarchy

Courses allow tuition to be set up in a structured modular fashion.

This helps to organise Activity Plans.

The Course Hierarchy is as follows:

Course	The name of the course e.g Jazz, Rock, Guitar
Module	Modules within the course e.g. Performance, Composition
Activities	Tuition to be completed within the module e.g. Stage skills, Concert

The Course Hierarchy is illustrated below:
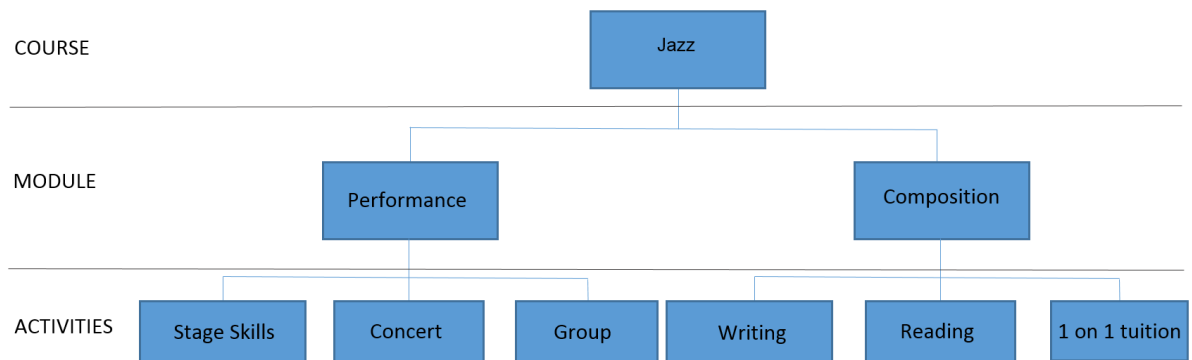
COURSE		Jazz			

| MODULE | Performance | | Composition | | |

| ACTIVITIES | Stage Skills | Concert | Group | Writing | Reading | 1 on 1 tuition |

Note: This is for *display purposes only*; It is not possible to recreate this chart within the software.

Courses

▶ [Watch the Video Tutorial here](#)

Enable Availability in Education Parameters

When you first setup your database, it *will not show* the Courses option. You will therefore need to switch these on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Courses' > Save and Close

This is displayed in the window below, with **Use Courses** highlighted in the **red box:**
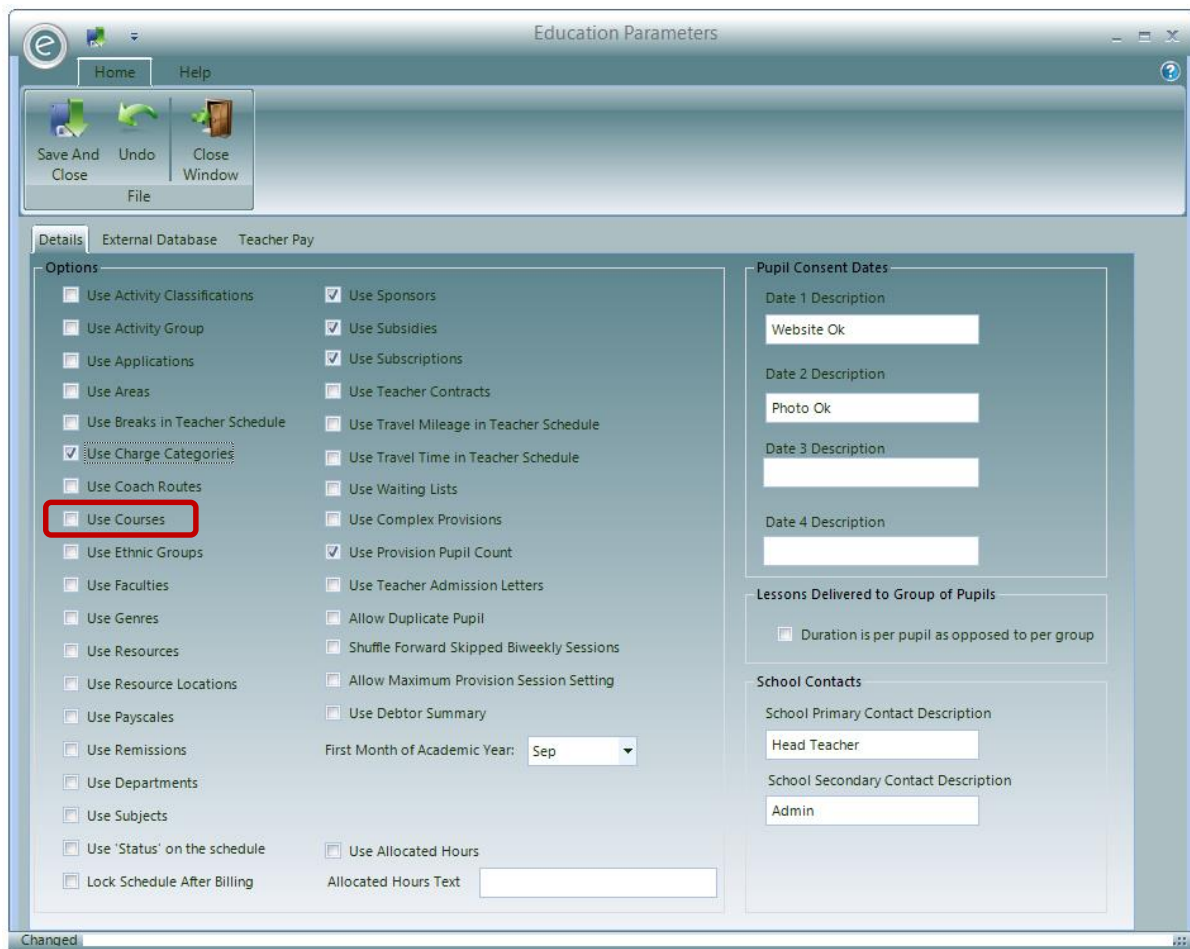
This will add the Courses option to the Activities tab in the Menu Bar.

Create Courses and Modules

▶ <u>Watch the Video Tutorial here</u>

To create a Course click:

Activities (Menu Bar) > Courses > New Course

This will display the window below:
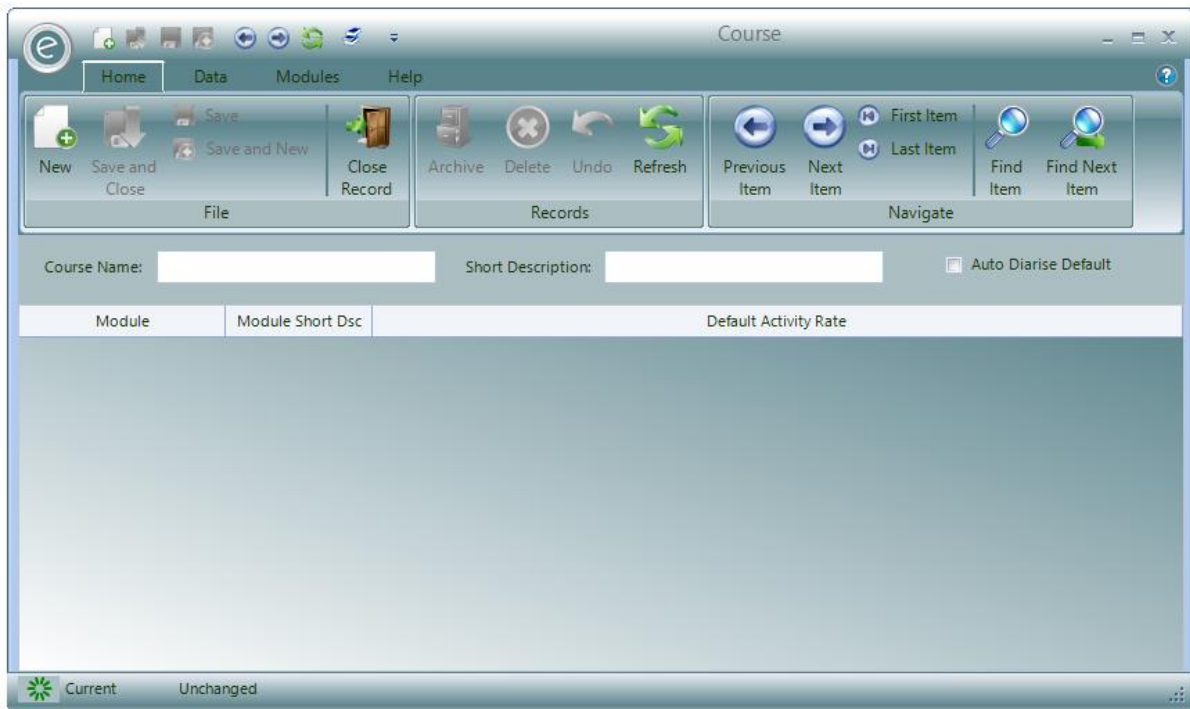
Type in the desired name in the **Course Name** field and an optional **Short Description** which may appear on Reports.

Modules within the Course are also created within this window.

To create a Module click the:

Modules tab > Add Module

This window is now displayed below:
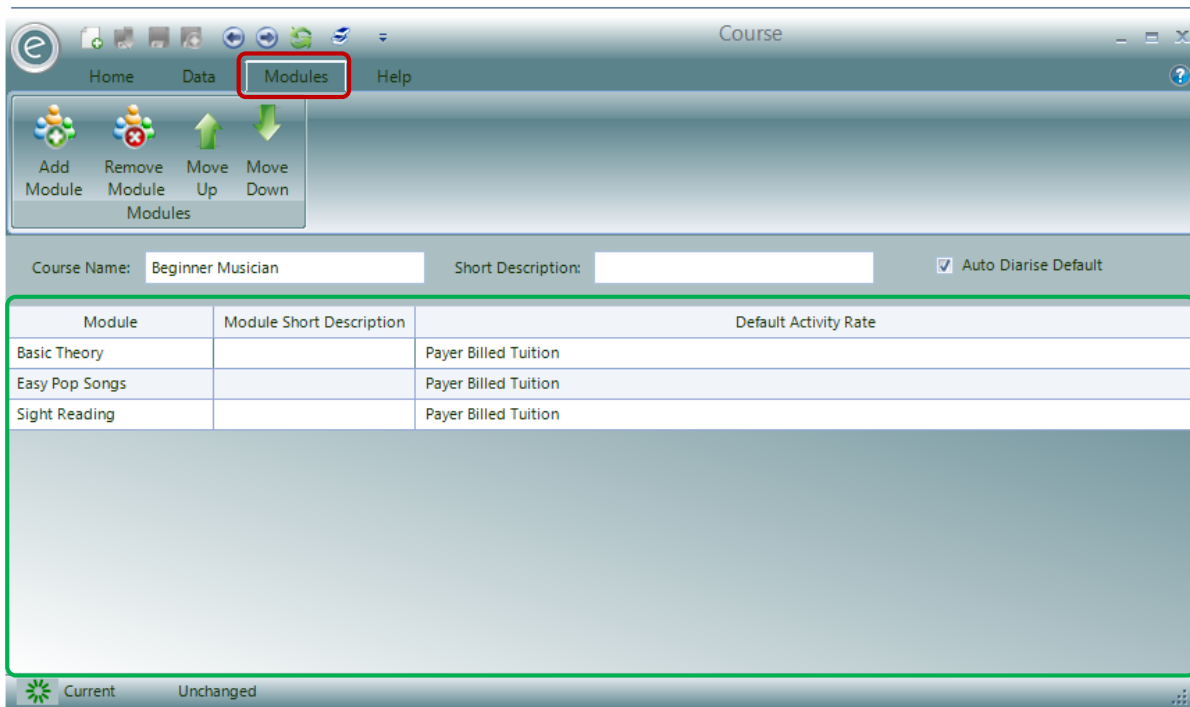
The Modules are represented as rows within the grid highlighted by the green box.

You will need to specify a name and short description under the **Module** and **Module Short Description** column headers.

You will need to specify the Charge in the **Charge Description** column. This will only list Charges defined for *Each Pupil Attending.*

Note: For more information on setting up Charges, See **Charges** within the **Core Records** Chapter.

You can create as many Modules as you wish by repeatedly clicking **Add Module** and Modules can be deleted by clicking **Remove Module**.

Use **Move Up** and **Move Down** to move an individual Module up or down the list.

Click **Save and Close** to save the new Course.

Module Activity Plans

When you have defined a Course and the Modules, you can create a *Module Activity Plan* in the Schedule for a Teacher, School or Centre.
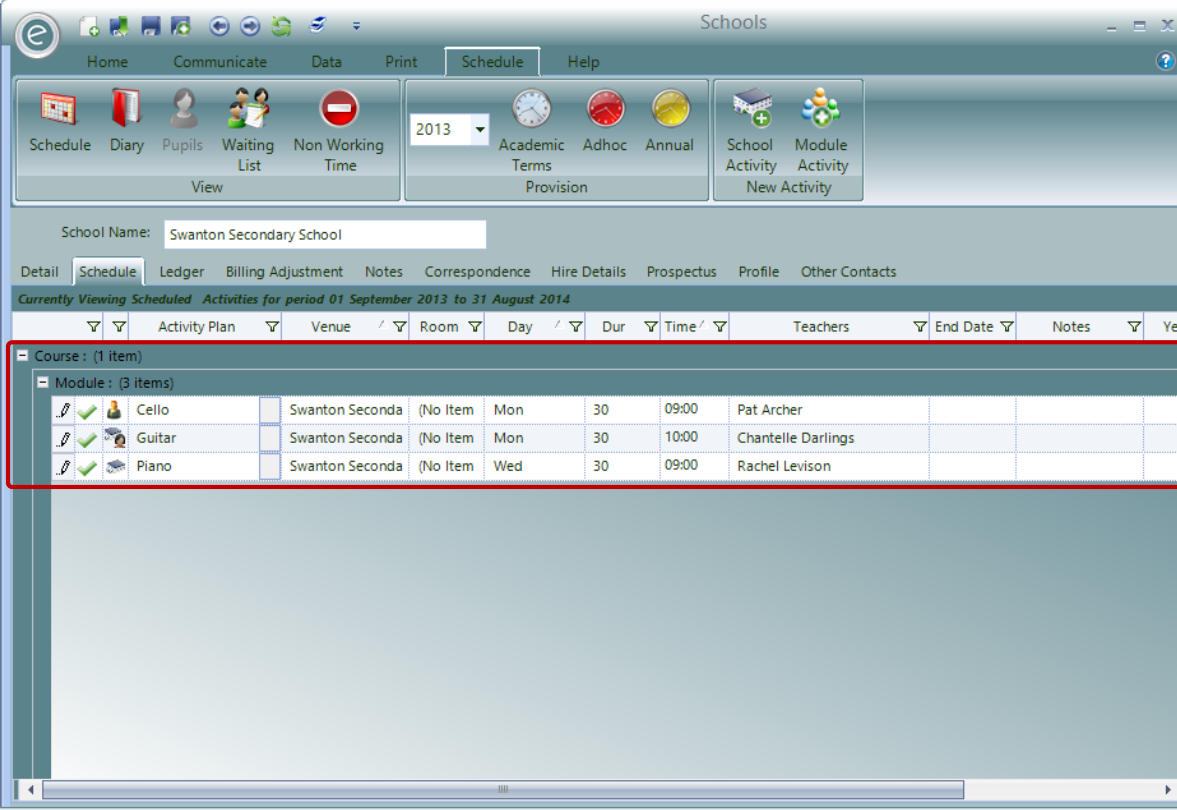
After *Courses* have been activated in *Education Parameters* the Schedule View for Records such as Schools will alter for this feature.

Note: If this hasn't been done yet, refer to **Enable Availability in Education Parameters** within **Courses**.

To view the Schedule, click:

Tuition (Menu Bar) > Open Record Card > Schedule tab

This will display the window below:

As can be seen in the **red box**, the Activity Plans are now grouped by **Course** and **Module** with the number of items contained in each.

By clicking **+** and **–** you can expand or collapse the menus.

Note: The Activity Plans in the screenshot were made *before Courses were activated* and so they will be set to a *blank Module* within a *blank Course* as a default.
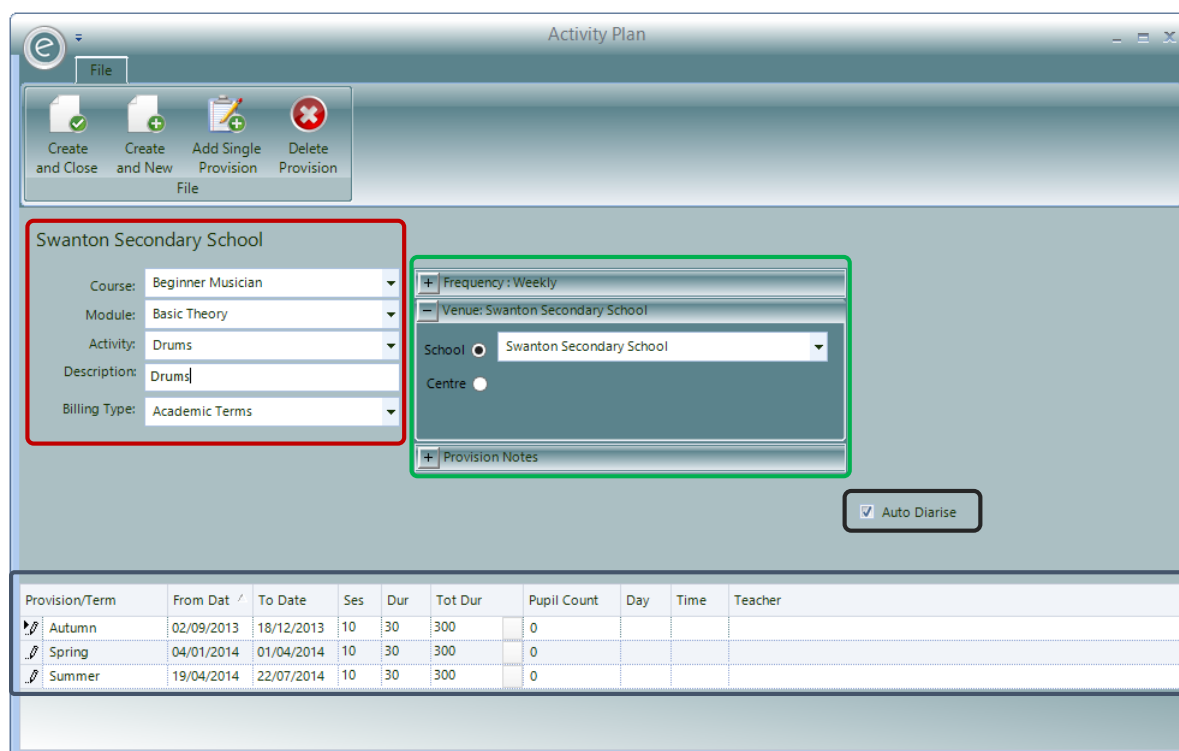
Create a Module Activity Plan

[Watch the Video Tutorial here](#)

To create a Module Activity Plan, click:

Tuition (Menu Bar) > Teachers/Schools/Centre > Open Record Card > Schedule tab > Module Activity

This will display the window below:

There are several fields to be filled in order to create the Activity Plan.

The **red box** highlights:

Course	Select the Course from the dropdown menu
Module	Select the Module from the chosen Course in the dropdown menu
Activity	Select the *Activity* from the dropdown list. The list will contain all the Activities you have defined.
Description	The description will be populated with the Activity description. This can then be modified to better describe the Activity Plan.
Billing Type	Select the Billing Type from the dropdown list. You will have previously defined your Provision Types and this will indicate the *structure that the Activity Plan will follow* (it may be based on terms). The lower half of the form contains a grid of information about the Provisions.

The **black box** highlights the Auto Diarise button. When this is ticked, the *Diary Entries will be automatically created* given the date constraints of the Provisions selected and the defined Frequency of the sessions. This ticked as a default. If it is un-ticked, the Diary Entries for the lessons will need to be created manually.

The blue box highlights the *Provision Period layout for the Activity Plan*. Each row is an individual Provision Period and the columns indicate how the Activity Plan is scheduled.

Where more than one Provision is displayed, altering any value will also change the value of the following Provisions. For example if you have three Provisions altering the number of sessions in the second will also change the number of sessions in the third but not the first.

The Provisions will *initially be set up according to the selected Provision Type*. Where the Provision Type is Term Based the Description, From Date, To Date and Sessions will be copied from the Provision Type. These values along with the other values displayed in the grid and can *all be changed*.

Provisions can also be added and removed by clicking Add Single Provision and Delete Provision respectively.

The Provision information grid contains values for the following:

Provision/Term	This is a description of the Provision. This will typically be a term such as Autumn, Spring and Summer
From Date	Select the date the first activity is to occur within the Provision.
	Note: If the Frequency is Daily then this must be the *actual first date*. Otherwise this can be the *week start date*.
To Date	Select the last possible date for the Provision. No diary entries will be made after this date.
Sessions*	This is the *number of sessions* the Activity is to be supplied within the Provision.
Duration*	This is the duration in *minutes* of a single Activity.
Total Duration*	This value will be *automatically calculated* after you enter Sessions and Duration. It is the total number of minutes that the Activity Plan will have for the Provision.
Pupil Count	Enter the number of pupils in the lesson
Day*	If you know the Day on which the Activity is to be provided then it can be entered here.
Time*	If you know the Time at which the Activity is to be delivered it can be entered here.
Teacher	If you *aren't creating a School Activity Plan on a Teacher Record Card* then you can optionally select a Teacher from the drop down list.

*Auto-Diarise will allow these fields to be automatically populated. This is *ticked as a default*.

Total Duration Calculator
On some occasions you may know the:

- Total Duration and the number of Sessions and wish to work out the Session Duration
- Total Duration and individual Session Duration but wish to know how many Sessions are required to fulfil this

This can be done by using the *Total Duration Calculator*. At the right hand side of the *Total Duration* there is a white square button which when clicked will display the Calculator. The button is highlighted below:

The Calculator window is displayed below:

The calculator takes two values and calculates a third. You can select the two values to enter from the following.

- Sessions & Duration
- Sessions & Total
- Duration & Total

Click Apply Changes when you are finished here.

The green box highlights the *frequency of the Actitity, the Venue and Notes*. These can be expanded and collapses by clicking **+** or **-**

Frequency

The *Frequency* defines how often the Activity will occur. These are: **Daily, Weekly, Bi-Weekly** and **Monthly.** If it's set to Weekly then the entries in the blue box are placed in the diary each week, if Daily then they are placed in each day.

By default the Frequency is set to:

- Weekly when the Billing Type is Term Based or Annual

- Daily if it is Ad-Hoc

Venue

The *Venue* is where the Activity will *actually take place.* In most cases this will be the School but you do have the flexibility to set this elsewhere.

For example, a Primary School may request you to organise music tuition for a set of its students, for which it *will be paying*, but asks for the tuition *to take place* at the local High School. In this case the Primary School is the Debtor but the *High School is the Venue*.

To do this, click on the expander button and select a **School** or **Centre** from the dropdown list.

Important: This can't be changed once the Activity Plan is saved.

Here you can enter any notes you want recorded against each Provision.

Click **Create and Save** or **Create and New** to create the Module Activity Plan.
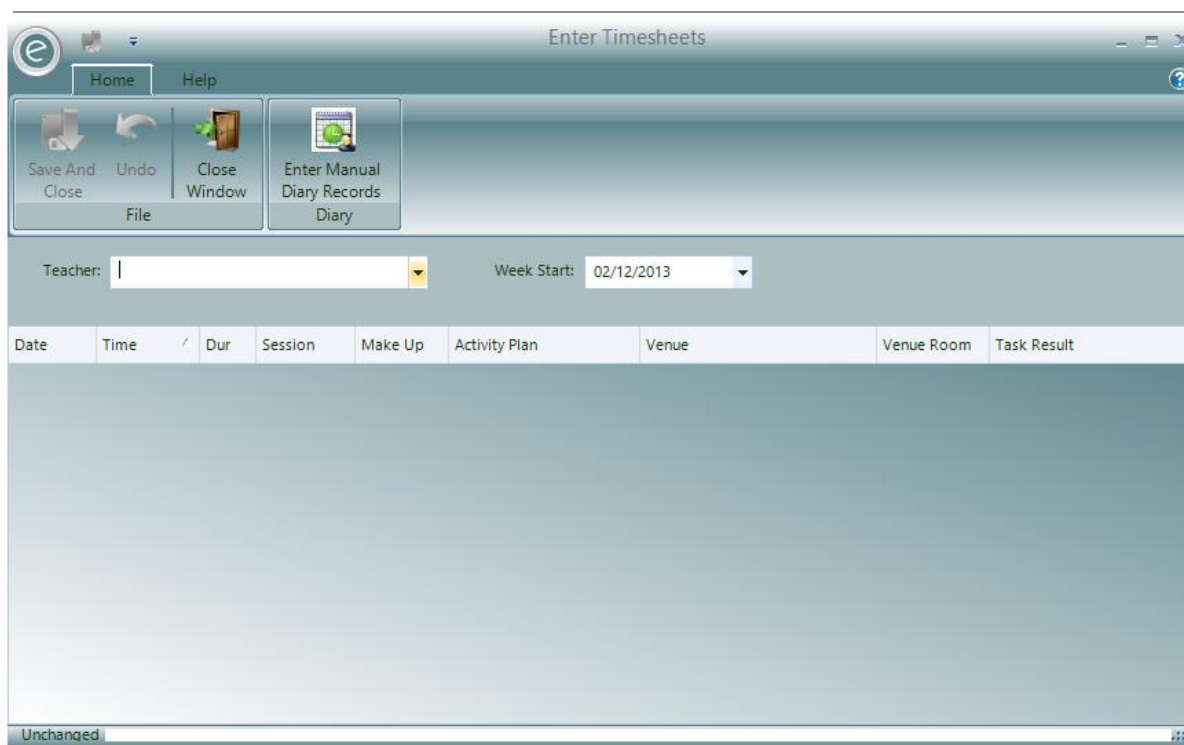
5. Entering Manual Diary Entries

When creating an Activity Plan you may opt to un-tick the *Auto Diarise* button and leave the Schedule empty. This may be because the lessons may follow an irregular weekly schedule and may need to be entered manually.

To manually enter the Diary Entries click:

Teachers (Ribbon Menu) > Enter Timesheets

This will display the window below:

You will need to select the **Teacher** with a Schedule to diarise and then the **Week Start**.

Once these have been selected, you can begin by clicking **Enter Manual Diary Records**:

This window will allow you to create a Session beginning in the selected week – 02/09/2013 in this case. You will need to select the:

Activity Plan	All Activity Plans for this Teacher that require diarising will be available in the dropdown menu
Venue Room	Select a Venue Room for the Venue
Date	Select a date for the Session. Default will be the beginning of the week. You will only be able allocate the Session to a day within that week.
Start Time	Choose a Start Time of the Session
End Time	Choose an End Time for the Session
Session No	Select the number of this session. The first Session is set to a default of 1 and then the number will go up automatically for each subsequent Session unless selected otherwise
Task Result	Indicate a Task Result if required
Make Up	Tick if the Session is a Make Up Lesson

Once you have made your selections, click **Save and Close** or click **Save and New** to create another Session for that week.

6. One-Off Events, Workshops and Summer Schools

Your service may need to produce Activity Plans for tuition that doesn't run during term time or perhaps is a one-off event or a workshop. These won't be possible to create within the default term-based Provision Type of Academic Terms. For example if your service have a workshop that runs during the Easter break, you won't be able to create an Activity Plan for this because these dates will fall outside the start and end dates for the Spring and Summer terms.

Therefore:

1. A new *Adhoc Provision Type* will need to be made.
2. Once this has been created, the *Activity Plans* can be created within it.

The topics below will discuss these steps.

Create a New Adhoc Provision Type

Adhoc Provision Types cover the Provision of activities that *do not relate to a fixed repeating period* of time such as a term. The dates in this Provision Type *continue indefinitely* and it is therefore ideal for defining *one off events* such as summer schools or trips.

To create this Provision Type, click:

System (Menu Bar) > Provision Types > New Provision Type > **Adhoc**

This will display a blank Provision Type Record Card:

Here you will need to define the:

Provision Type	Define a name for the Provision Type
Default Duration (mins)	Default length of the sessions in minutes
Default No Of Sessions	Default number of sessions to use for an Activity Plan
Default Frequency	Default frequency an Activity Plan will run for

The Calendar will allow you to specify *Non-Working Time.*

Selecting the Adhoc Provision Type in the Schedule

Now the Adhoc Provision Type has been created, the Activity Plans for the one-off events can now be created. You will need to go to the Schedule tab of the School/Centre/Teacher/Group Record Card and then firstly choose the new Provision Type; this is where the Activity Plans will be set up.

For the example below, a Teacher's Record Card will be used (The instructions below will apply to all the tuition Records above).

Therefore:

Open a Teacher's Record Card > Schedule

This will display the window below:
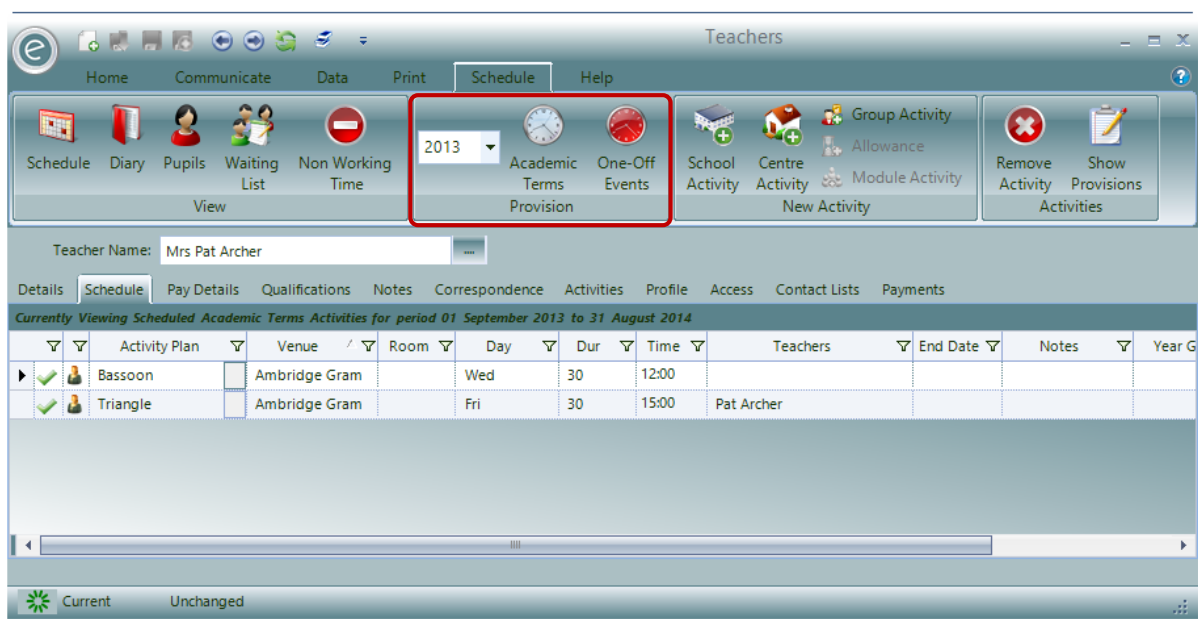
The Schedule here is currently displaying two Activity Plans (Bassoon and Triangle) for the default *Academic Terms* Provision Type.

In the area highlighted by the red box, you will be able to select the Adhoc Provision Type – which has been named One-Off Events here.

Click this to display the Schedule for this Provision Type:
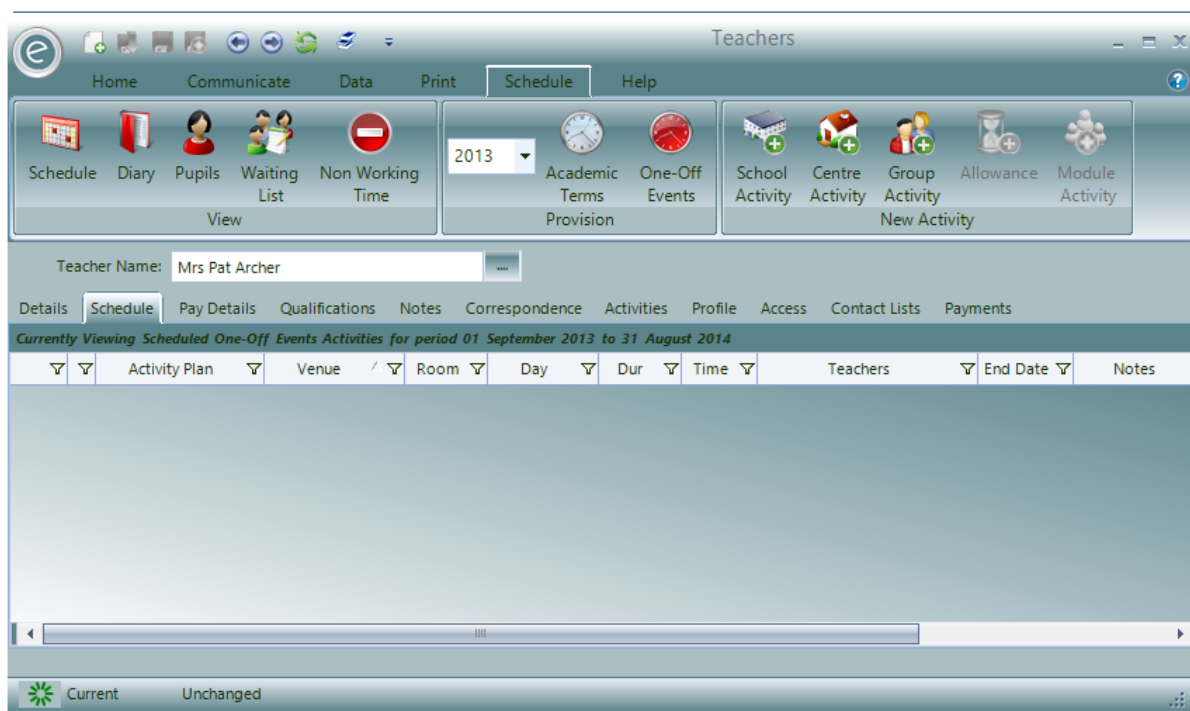
The Schedule will now be empty as no Activity Plans have been made yet.

Note: You can *double-check* you are viewing the Schedule for the *correct Provision Type and Year* by reading the *header above the column headers*. This is displayed below:
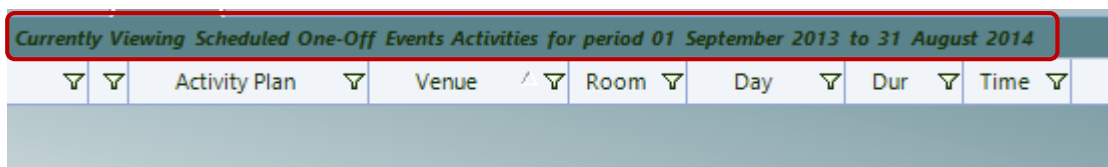
For example this header reads:

'Currently Viewing Scheduled *One-Off Events* Activities period *01 September to 31 August 2014*'

Create the Activity Plan

Now the Adhoc Provision Type has been selected in the Schedule the Activity Plans can be created.

For more information regarding how to create the different Activity Plans please refer to **How to Create an Activity Plan** in the **Schedule Management** Chapter.

7. Allowances

An Allowance *only relates to a Teacher* and not to a School, Centre or Group. These are used to schedule Activities for Teachers that aren't related to tuition such as meetings.

Define Allowance Activities

  [Watch the Video Tutorial here](#)

First Activity Groups need to be defined with '*Allowance Activity*' as the Activity Type.

This is shown below:
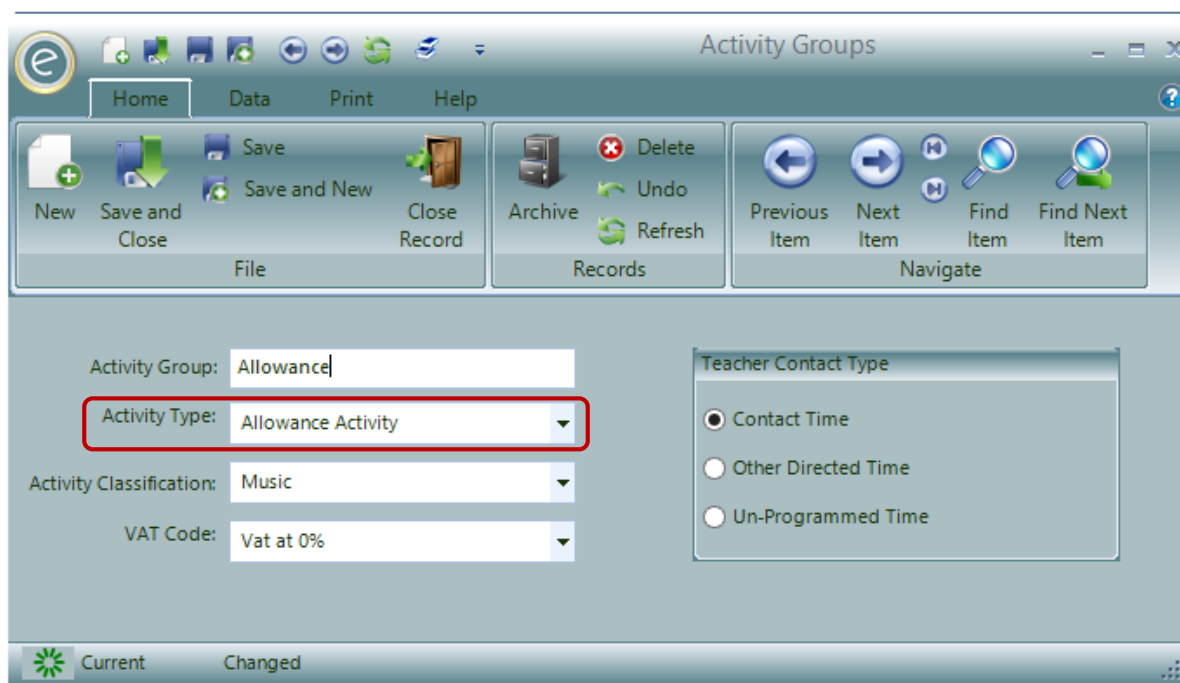
Once these have been created then the Activities for Allowances can be made. When creating a *New Activity* the previous defined Activity Group will need to be selected.

This is shown below:
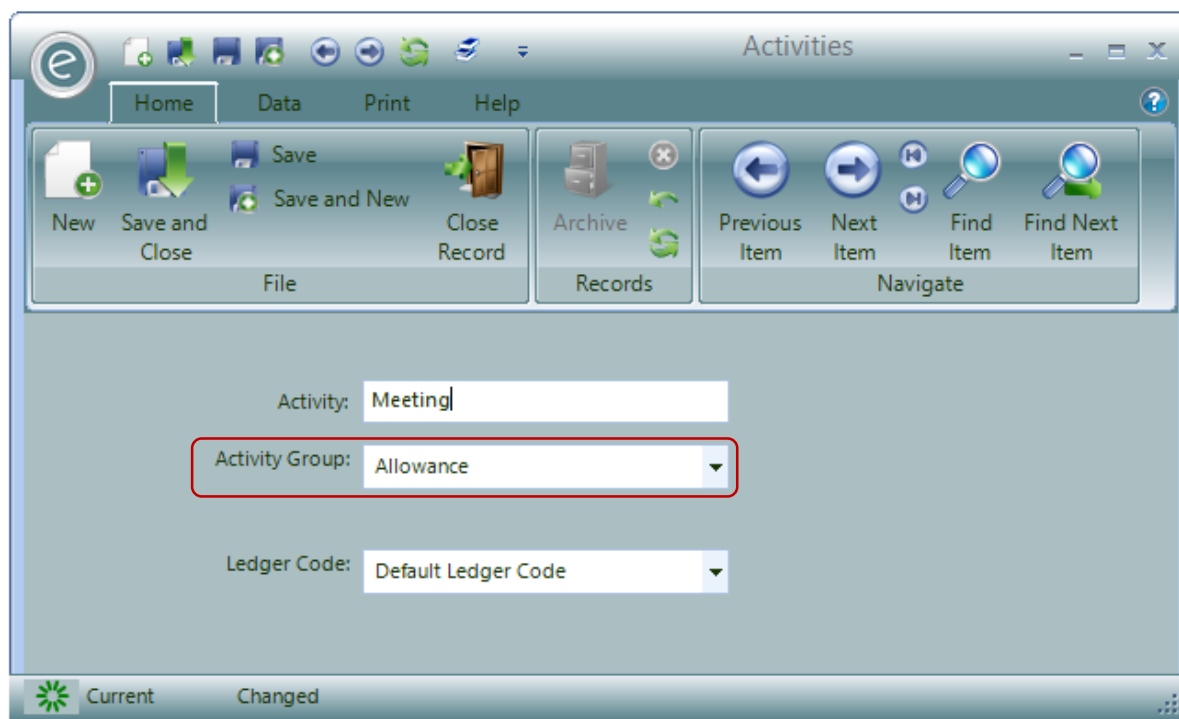
Click **Save and Close** to create the Activity.

Create an Allowance Activity Plan

 [Watch the Video Tutorial here](#)

To create an Allowance Activity Plan, click:

Tuition (Menu Bar) > Teachers > Open Teacher Record Card > Schedule tab > Allowance

This will display the window below:

There are several fields to be filled in order to create the Activity Plan.

The red box highlights:

Activity
Select the *Activity* from the dropdown list. The list will contain all the Allowance Activities you have defined.

Description
The description will be populated with the Activity description. This can then be modified to better describe the Activity Plan.

Billing Type
Select the Billing Type from the dropdown list. You will have previously defined your Provision Types and this will indicate the *structure that the Activity Plan will follow* (it may be based on terms). The lower half of the form contains a grid of information about the Provisions.

The black box highlights the Auto Diarise button. When this is ticked, the *Diary Entries will be automatically created* given the date constraints of the Provisions selected and the defined Frequency of the sessions. This ticked as a default. If it is un-ticked, the Diary Entries for the lessons will need to be created manually.

The blue box highlights the *Provision Period layout for the Activity Plan*. Each row is an individual Provision Period and the columns indicate how Activity Plan is scheduled.

Where more than one Provision is displayed, altering any value will also change the value of the following Provisions. For example if you have three Provisions altering the number of sessions in the second will also change the number of sessions in the third but not the first.

The Provisions will *initially be set up according to the selected Provision Type*. Where the Provision Type is Term Based the Description, From Date, To Date and Sessions will be copied from the Provision Type. These values along with the other values displayed in the grid and can *all be changed*.

Provisions can also be added and removed by clicking Add Single Provision and Delete Provision respectively.

The Provision information grid contains values for the following:

Provision/Term	This is a description of the Provision. This will typically be a term such as Autumn, Spring and Summer
From Date	Select the date the first activity is to occur within the Provision.
	Note: If the Frequency is Daily then this must be the *actual first date*. Otherwise this can be the *week start date*.
To Date	Select the last possible date for the Provision. No diary entries will be made after this date.
Sessions*	This is the *number of sessions* the Activity is to be supplied within the Provision.
Duration*	This is the duration in *minutes* of a single Activity.
Total Duration*	This value will be *automatically calculated* after you enter Sessions and Duration. It is the total number of minutes that the Activity Plan will have for the Provision.
Pupil Count	
Day*	If you know the Day on which the Activity is to be provided then it can be entered here.
Time*	If you know the Time at which the Activity is to be delivered it can be entered here.

*Auto-Diarise will allow these field to be automatically populated. This is *ticked as a default*.

Total Duration Calculator

On some occasions you may know the:

- Total Duration and the number of Sessions and wish to work out the Session Duration
- Total Duration and individual Session Duration but wish to know how many Sessions are required to fulfil this

This can be done by using the *Total Duration Calculator*. At the right hand side of the *Total Duration* there is a white square button which when clicked will display the Calculator. The button is highlighted below:

Provision/Term	From Date	To Date	Sessions	Duration	Total Duration	Day	Time
Autumn	02/09/2013	18/12/2013	10	30	300		
Spring	04/01/2014	01/04/2014	10	30	300		
Summer	19/04/2014	22/07/2014	10	30	300		

The Calculator window is displayed below:

The calculator takes two values and calculates a third. You can select the two values to enter from the following.

- **Sessions & Duration**
- **Sessions & Total**
- **Duration & Total**

Click **Apply Changes** when you are finished here.

The **green box** highlights the *frequency the of the Actitity, the Venue and Notes*. These can be expanded and collapses by clicking **+** or **-**

Frequency

The *Frequency* defines how often the Activity will occur. These are: **Daily, Weekly, Bi-Weekly** and **Monthly**. If it's set to Weekly then the entries in the **blue box** are placed in the diary each week, if Daily then they are placed in each day.

By default the Frequency is set to:

- Weekly when the Billing Type is Term Based or Annual

- Daily if it is Ad-Hoc

Venue

The *Venue* is where the Activity will *actually take place*.

For Group Activity Plans the default setting is for no Venue to be specified. If you wish to select a Venue, then tick **Venue** and select a **School** or **Centre** from the dropdown list.

Important: This can't be changed once the Activity Plan is saved.

Provision Notes

Here you can enter any notes you want recorded against each Provision.

Click **Create and Save** or **Create and New** to create the Allowance Activity Plan.

8. Teacher Breaks, Travel Time and Mileage

There are optional fields which can be activated in the *Education Parameters* that will record the *Break Time, Travel Time and Mileage* for a Teacher in their Activity Plan. This is very useful for Teachers that are paid on claims basis.

Break Time   The Break Time allocated to the Teacher. The Break time is added to the Teachers diary entries.

Travel Time   The Travel Time allocated to the Teacher. The Travel time is added to the Teachers diary entries.

Miles   The Travel Distance allocated.

For example if a Teacher has 60 minutes of Break Time that they should be paid for, this can be entered into their schedule.

Note: For more information concerning Teacher Pay, please refer to the **Teacher Pay** Chapter.

Enable Availability in Education Parameters

To activate these in the Education Parameters, click:

Tools (Ribbon Menu) > Parameters > Education Parameters

This is displayed in the window below:
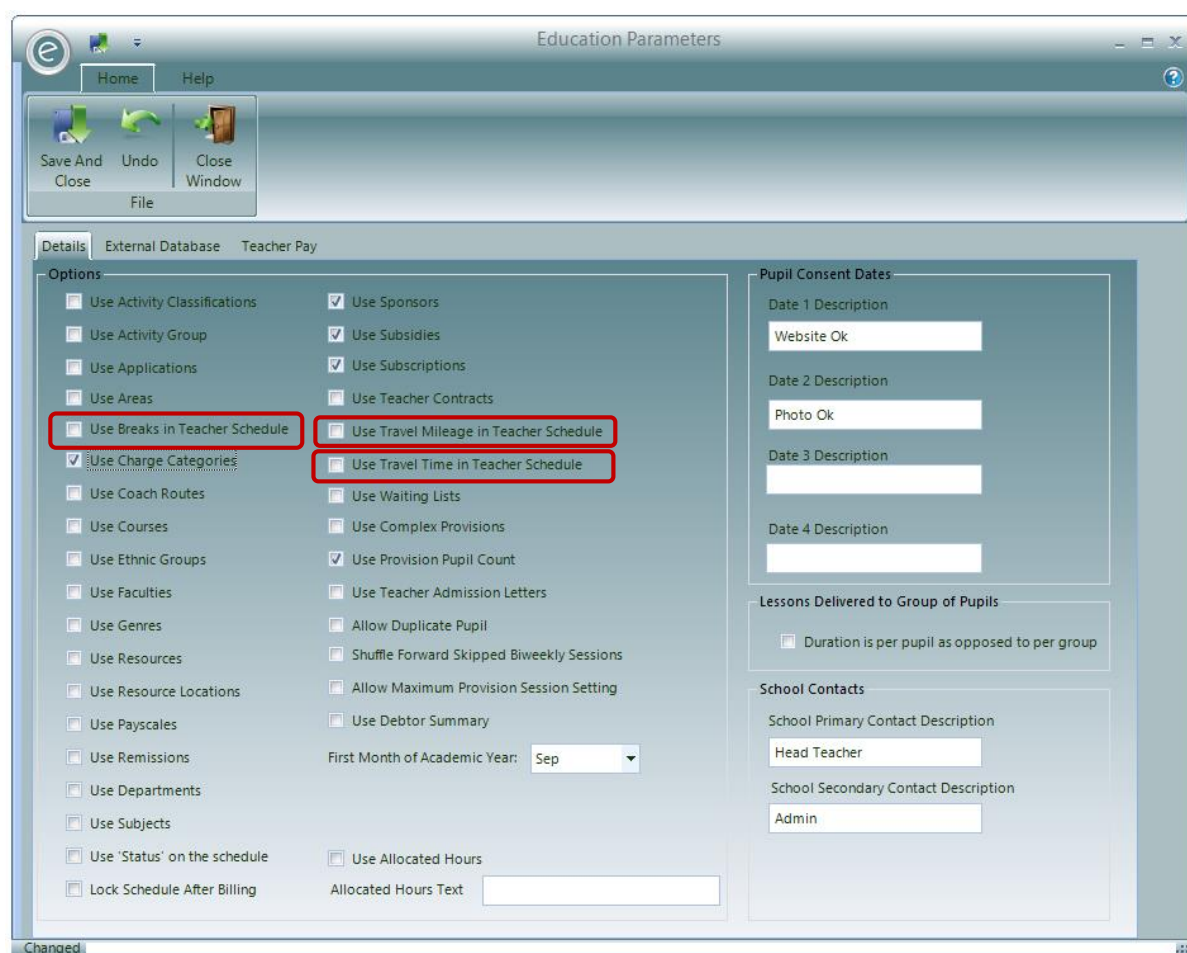
Use Breaks in Teacher Schedule, **Use Travel Mileage in Teacher Schedule** and **Use Travel Time in Teacher Schedule** are highlighted in the red boxes.

Click **Save and Close** to save the activations.

Display Location

Each one that has been activated will now be visible in the *Schedule Requirements for a Teacher*. This can be accessed by:

Opening Teacher Record Card > Schedule tab > Select Activity Plan > Show Provisions

This is displayed below:

You will be able to fill in the fields from here (highlighted in the red box above). Anything entered, is treated as an *addition to the Duration* of the Activity Plan. For example if the Teacher was teaching in a School for 240 minutes and had a break for 30 minutes that was paid for, then there should be 240 entered into **Dur** and 20 entered into **Brk.**

Click on the **Teacher's Schedule Requirements** (highlighted in the red box below) and this will now display their Teacher Diary Entries. The Teacher Breaks, Travel Time and Mileage will be visible for each Diary Entry (highlighted in the green box):

Example

Let's suppose we have a Teacher that is *teaching* in a School for 300 minutes.

During their time at the School they will also have an hour lunch that our service will *pay for.*

It also takes them 20 minutes to *travel there* and this is a distance of 4 miles.

This should indicated as such below:

Therefore the Teacher is conducting 300 minutes of chargeable time in tuition and has 60 minutes of time in which they are in a break that our service will still pay them for. The travel time of 20 minutes has been recorded and the 4 miles travelled which will be calculated for their expenses.

Note: For more information regarding paying teachers please refer to the **Teacher Pay** Chapter.

9. Teacher Travel Calculator

Ensemble has a built in Teacher Travel Calculator which can be used to calculate the distances and time that a Teacher will travel between their destinations for various time frames.

To access this, click:

Teachers (Ribbon Menu) > Calculate Teacher Travel

This will display the window below:

In the red box highlighted, you will be able to enter the Teacher and the date range for which to run the calculation.

The green box highlights the various route options and the results of the calculation which are Total Distance and Total Time. The route options are:

- Home to Home
- Home to Travel Base
- Travel Base to Travel Base
- Travel Base to Home
- School to School

For any route option selected, Ensemble will calculate the best route for the Teacher to travel between their *different Venues* for a working day. For example if *Home to Home* is selected and the Teacher teaches at two schools, the Calculator will calculate the total distance and time to get from their home to both schools and then home again.
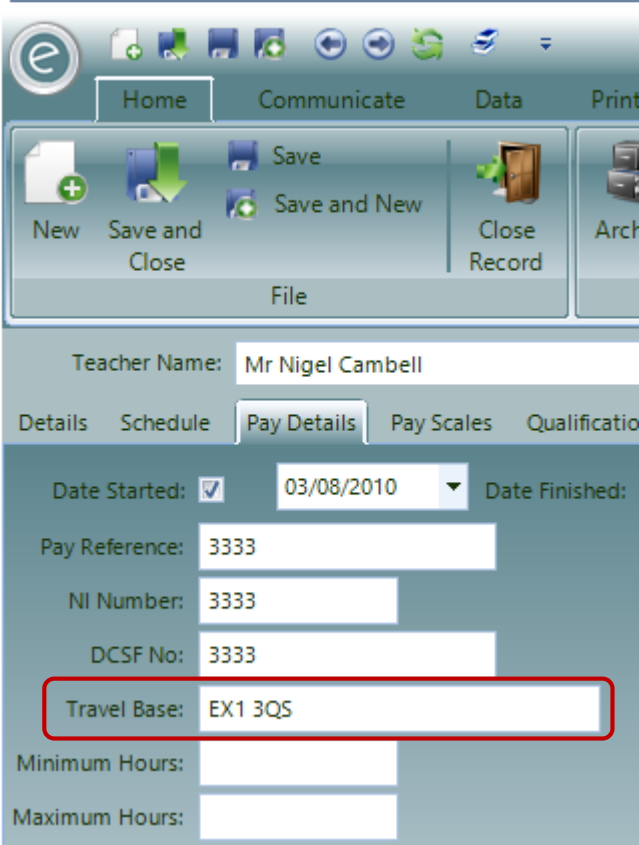
The Calculator uses the *postcodes* of their Home, Travel Base and Schools to run the Calculation.

The postcode for the Teacher's Home and each School is defined in the Details tab of these Record Cards.

The Teacher's *Travel Base* is defined in the Teacher's Record Card within the *Pay Details* tab. Therefore to access this:

Open a Teacher Record Card > Pay Details tab

This is highlighted in the screenshot below:

To run the calculation click **Start Process**. An example of the resulted calculation is displayed below:

This Teacher had his travel calculated between 10/1/2014 and 17/01/2014 and the route selected was Home to Home. After clicking Start Process, his Total Distance was calculated to be 5.3 miles and the Total Time to be 20 minutes as highlighted in the red box.

The details of this are displayed in the Travel Detail section below. Click the + symbol next to Oscar Fielding and this will display the *summary information for each day they travelled* as highlighted by the green box.

Click on the + symbol next to a particular day and this will expand the travel information for each day to display the *whole route that the teacher will have travelled*, as highlighted by the blue box.

You will then be able to view the expanded travel information in a spreadsheet by clicking Save to Excel.

Associating Pupils with Activities

This chapter will show you how to:

- Add Pupils into Activity Plans and Group Memberships
- Terminate Tuition and Memberships

- Transfer Pupils
- Produce reports such as Registers, Waiting Lists and Teacher Admission Letters
- Use Waiting Lists and Applications
- Use Batch Tuition Entry

1. Overview

Paritor Ensemble provides you with a full set of functions to record information about a Pupil including:

- Contact details
- Parent information
- School details

- Tuition history
- Membership of Groups
- Resources hired
- Exams taken

This information allows you to look at how Pupils have progressed throughout their time with you, what they have achieved and how much they have embraced the performing arts in terms of their exam grades and memberships to groups amongst others.

2. Viewing Pupils in Activity Plans

Activity Plans define Lessons and events taking place at Schools, Centres and other Venues.

In order to add, edit and remove Pupils in Activity Plans, you will need to use the *Pupils View* in the Schedule.

To do this, click:

Tuition (Menu Bar) > Open a Record Card > Schedule tab > Pupils (Ribbon Menu)

The **Pupils** button is displayed below:

The whole window is displayed below:
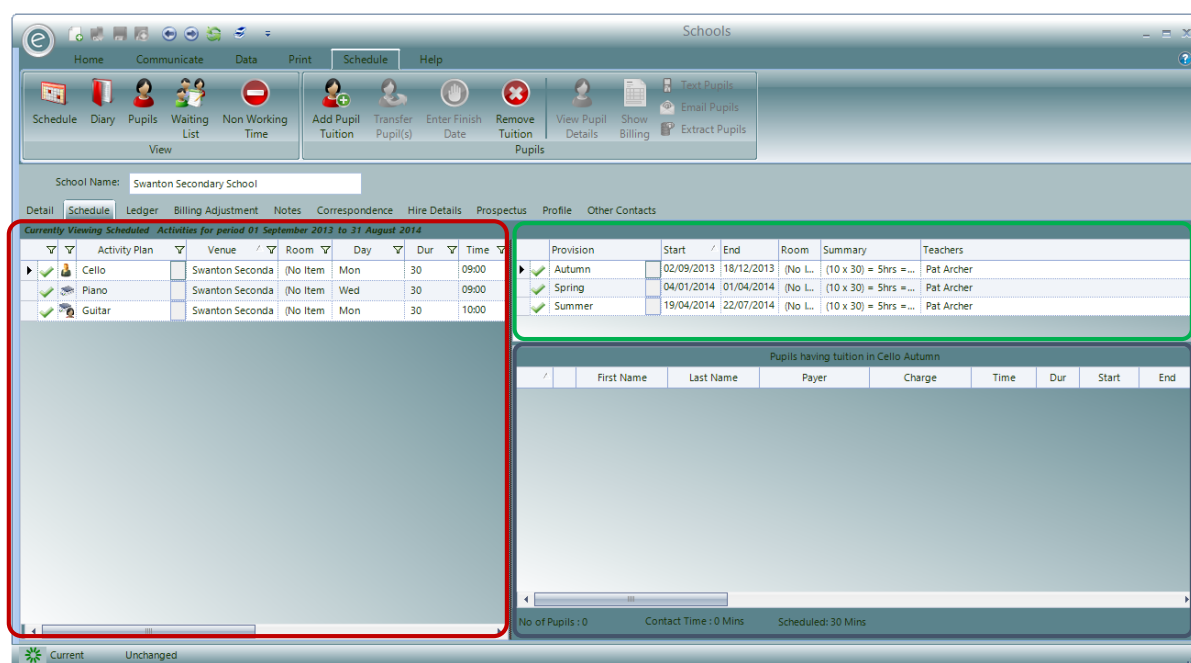
The **red box** displays the Activity Plans. The other two sections will show expanded information regarding associated Pupils for one of the selected Activity Plans.

Pupil View will expand the selected Activity Plan showing:

1. The Provisions
2. Pupils already associated with the selected Provision.

Note: Selecting one of the other Provisions will list the Pupils associated with that Provision.

Provision Periods

The **green box** displays the Provision Periods for this Activity Plan. An enlarged screen shot is shown below:

As can be seen this is very similar to previous windows showing the Provision Periods. The columns are:

Provision | Name of the Provision Period

Start | Start date of the Provision Period

End | End date of the Provision Period

Room | Room name/number that the Activity takes place in

Summary | Summarises total number of hours and minutes for the Activity Plan

Teachers | Indicates the Teacher

Additional the first column in the *Provision Period and Teacher sections* include icons indicating their *state*. The icons displayed are:

 All is OK

 The number of diary items does not match the required number.

Note: If you hover the mouse over the icon, an explanation of the actual issue is displayed.

Pupil Tuition Details

As you add each Pupil to an Activity Plan they are shown in the list of *Pupil Tuition Details* in the blue box along with information about the tuition. This is displayed below:

There are many columns here. The main information includes:

First & Last Name | First Name and Last Name of the Pupil

Time | This is the time that the *Pupil begins the Lesson* and is set to the scheduled start time of the Activity Plan but can be amended as required.

Duration | The Duration of the Pupil's tuition which is set by default to scheduled start time of the Activity Plan

261

Start Date	The Date the tuition started. Once created this cannot be modified.
End Date	The date the tuition is planned to finish or has finished. If the value is empty then this indicates that there is no planned finish date.
Type	The tuition type which can be *Individual, Shared, Group or Other*. This value can be amended.
Group	The Group the Pupil is in selected from a drop down list of letters A to Z. This is used to organise Pupils with a Tuition Type of Shared or Group into a set of groups. Pupils with the same Group letter are assumed to be taught together.
Attendance	The individual lessons attended by a Pupil can be recorded here
Notes	Any notes regarding the Pupil's tuition in the given Provision. These can be modified but any changes to the Notes are not carried forward into future Provisions.

Note: A number of the values shown can be amended; doing so will not only change the details for the Provision being shown but also for all following Provisions with the exception of the Notes value. If you are currently viewing Pupils in the *second Provision* for the year and change the Subject they are learning then the subject in the *third and all following Provisions* and years will also be amended.

Display Billing Information

When viewing scheduling information for Pupils, you will also be able to display *their billing information* for the tuition that they are being provided. This information is available when the Show Billing button is clicked:

Note: This is only available to click for Payer billed tuition. For more information regarding billing please refer to the **Finance in Ensemble** Chapter.

The information that was displaying their tuition will now display billing information:

/	First Name	Last Name	Payer	Charge	ReportAuthorisedBy	ReportTeacherID	tblContact	tblTeacher	Remission	Amount	
	Jonathan	Pope	Mrs Alice Pope	Payer Billed Tuition						£0.00	
	Katie	Gibson	Mrs Alexandra Gib	Payer Billed Tuition						£0.00	
	Billy	Archer	Mr Kenton Archer	Group lesson						£0.00	

The information included in the columns is:

First Name	First name of the Pupil
Last Name	Last Name of the Pupil
Payer	The Payer of the Pupil
Charge	The Charge for the Activity Plan

Remission	Displays any Remissions for this Charge. Can also select one from the dropdown
Amount	Displays the value of the Charge alone.
Subsidy	Displays any Subsidies for this Charge. Can also select one from the dropdown
Goods	Displays the value to be charged once discounts such as Remissions have been taken into account.
VAT	Displays the VAT Code used
Enrolment Fee	Displays the Enrolment Fee used (if applicable)

To view tuition information again, click Show Detail:

3. Adding Pupils into Activity Plans

 Watch the Video Tutorial here

Once in Pupil View, to add Pupil into an Activity Plan:

Select the Provision Period > Click Add Pupil Tuition (Ribbon Menu)

This button is displayed below:

Clicking this will open the following window, displayed below:

Enter the Pupil's Name into the *search box* and click the Search button. You can change the way the system compares the name with the database; by default the system will display Pupils whose name starts with the value you enter but you can change it to make an *Exact Match* or a *match containing the value entered*.

Note: You can also search for Pupils by their *Post Code, Tel No or Email*.

Pressing the Search button will display all the matching Pupil Records in the Paritor database. The window will change to the one displayed below:

If the Pupil you want is listed double-click on it.

If it is not found you need to create a Record for the Pupil by clicking on the New button. You can also click on the Amend button should you find the Pupil in the list but see that the information displayed requires amending. If you do create or amend a Pupil Record, the system will display this form including the new or amended Pupil once that process is complete allowing you to select it by double clicking.

If the Activity Plan has been set up as a *Charge Pupil Payer Plan* it will next require details of a Payer. It will display the following form:

This is very similar to the Pupil form but here it looks to see if there is any history of the selected Pupil having previous associations with Payers.

If any are found it displays them in the top half of the form. In the bottom half of the screen are the Payers that match the search criteria.

You are also given the option to search for Payers that are *Individuals*, *Organisations* or *Schools*.

If the Payer does not exist or the Payer you find needs amending you can do so by clicking on the New or Amend buttons on the bottom right.

To select a Payer, *double click* on it.

You will now progress to the tuition form as shown below.

This window will contain details of the Pupil and Payer you have just selected, as highlighted by the red box. If necessary you can click on the buttons Find Pupil.. and Find Payer.. above each name and address to select alternative details.

The form will also be populated with information from the Activity Plan such as the Venue and Charges.

Within the Tuition section of the window, the green box highlights scheduling information. These fields are:

School/Centre	Displays the School/Centre at which the Activity will take place
Start Date	Date that the pupil begins tuition. This will initially be set to the start of the Provision but this should if necessary be changed to reflect the actual start date
Activity Plan	Displays the Activity Plan that the Pupil taking part in
Academic Year	Displays the academic year that this tuition runs for
Start Assessment	Specify predefined Assessment criteria. Optional
Time	Specify the time that the Pupil begins in this Activity Plan
Duration	Specify the duration of the Pupil's tuition

Note: An Activity Plan may be defined to start from 9am and run for 3 hours, however the Pupil's start time and duration doesn't necessarily have to match this. For example each lesson within the Activity Plan may be 30 minutes long, so each Pupil would have a duration of 30 minutes.

If the Activity Plan has been defined as a *Charge Pupil Payer Plan*, you will have to enter the following charging information which is highlighted in the blue box:

You can select the Lesson Type to be one of four options:

Individual	A one-to-one lesson between the pupil and teacher
Group	Lesson for a group of pupils
Shared	Lesson for two pupils
Other	A lesson for any other specification of pupils

Note: The *default* Lesson Type will be selected from the *Charge* entered.

Within the blue box you can also select:

Billing Type	Billing Type is displayed
Charge	Select a Charge from the drop down lists of charges.
Notes	Enter notes

Optional when turned on in Education Parameters:

Coach Route	(Only for Centre Activity Plans) If the Pupils uses a Coach Route this can be selected and the Stop they use too.
Remission	If the tuition attracts a Remission then tick the Remission box and select a Remission from the drop down list. This Remission will be applied in addition to any that have been previously associated with the selected Payer.
Subsidy	If this tuition is taking place at a School and is being subsidised in any way by that School that tick the Subsidy box and select from the drop down box.

Note: For more information regarding finance, refer to the **Finance in Ensemble** chapter.

When all the information is entered select the option to Save and Close the data. If this tuition is taking place at a School the system will look at the School and compare this with the School registered on the Pupil's record as being the School the Pupil attends. If it is different it will display a message asking if you wish to update the Pupil information to indicate the Pupil now attends this School.

Module Activity Plans

If you have Courses activated in the Education Parameters and have Module Activity Plans already made for Centres then you will be able to add Pupils into these directly from the Pupil Record Card.

To do this:

Open a Pupil Record Card > Tuition tab > Add Module

This is highlighted below:
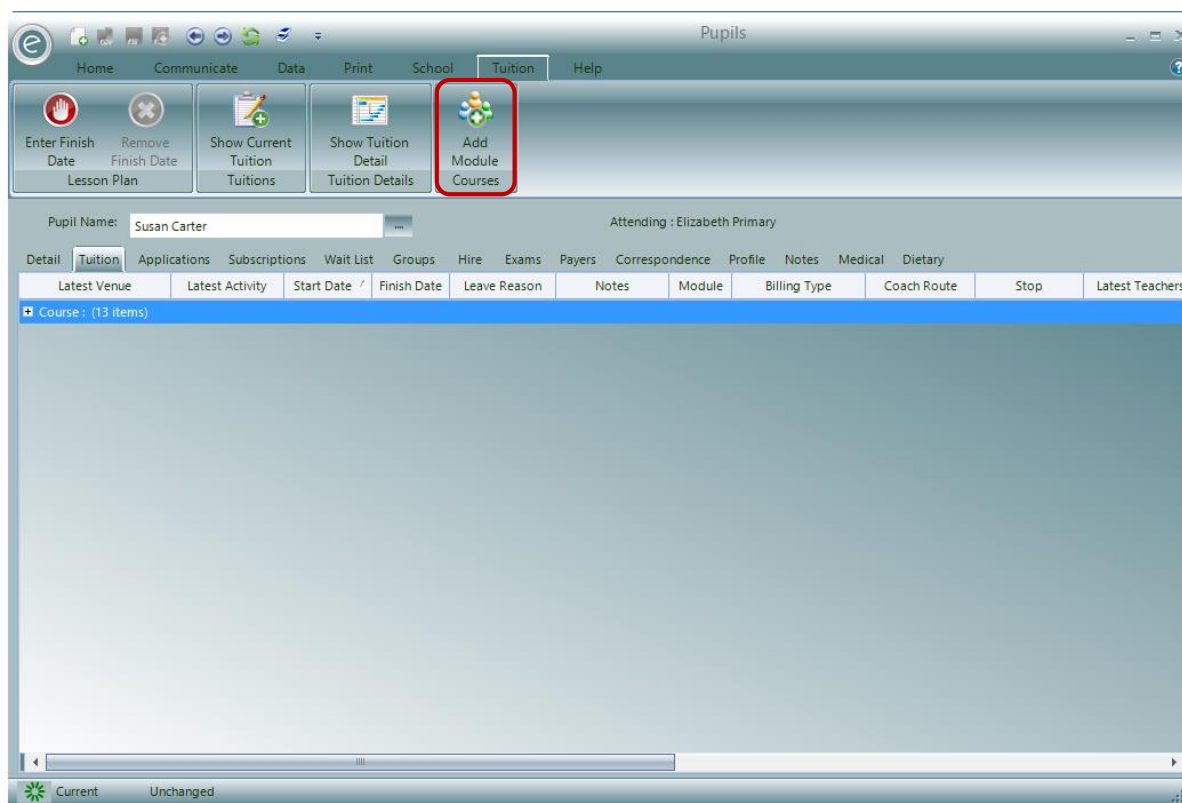
After clicking this you will need to select a Pupil and a Payer and then the window below will open:

This window will contain details of the Pupil and Payer you have just selected, as highlighted by the red box. If necessary you can click on the buttons Find Pupil.. and Find Payer.. above each name and address to select alternative details.

The form will also be populated with information from the Activity Plan such as the Venue and Charges.

Within the Tuition section of the window, the green box highlights scheduling information. These fields are:

Course	Select the Course from the dropdown menu
Course Module	Select an Module for the chosen Course from the dropdown menu
Centre	Displays the Centre at which the Activity will take place
Start Date	Date that the pupil begins tuition. This will initially be set to the start of the Provision but this should if necessary be changed to reflect the actual start date
Academic Year	Displays the academic year that this tuition runs for
Start Assessment	Specify predefined Assessment criteria. Optional
Time	Specify the time that the Pupil begins in this Activity Plan
Duration	Specify the duration of the Pupil's tuition
Charge	Select a Payer billed Charge

You can select the **Lesson Type** to be one of four options:

Individual	A one-to-one lesson between the pupil and teacher
Group	Lesson for a group of pupils
Shared	Lesson for two pupils
Other	A lesson for any other specification of pupils

Note: The *default* Lesson Type will be selected from the *Charge* entered.

Optionally when activated in *Education Parameters*:

Remission	Select a Remission from the dropdown menu

The blue box displays the available Activity Plans for the Course and Module chosen at the Centre. Select which Activity Plan to enroll the Pupil for.

Once finished click **Save and Close**.

4. View Pupil Details

Once a Pupil has been added to the Activity Plan, click **View Pupil Details** after selecting a Pupil to view their Record Card. This is highlighted below:
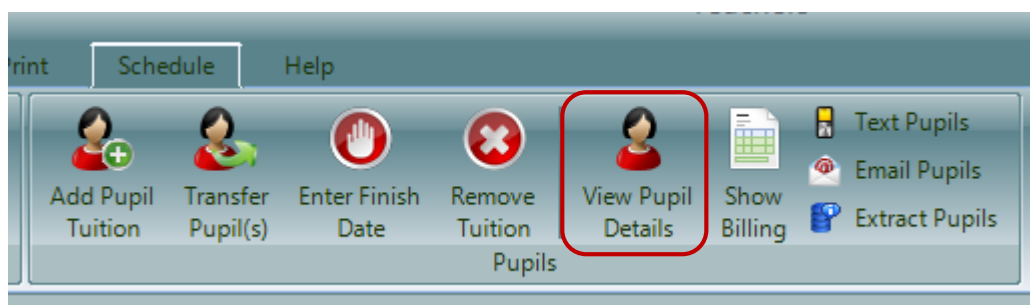
5. Removing Pupil Tuition

 [Watch the Video Tutorial here](#)

There are occasions when it is necessary to completely remove the Pupil Tuition Detail, for example when a Pupil has been added to an incorrect lesson or when a Pupil selects to join an activity but then changes their mind. In such situations the Pupil Tuition Detail should be selected and then removed by clicking on the **Remove Tuition** button found on the Ribbon Menu. This option removes all detail about the entry.

This button is displayed below:

Note: It should not be used after a Pupil has started any tuition as the record of this will be lost. If Pupils finish tuition after starting then a *finish date should be entered*, likewise if they choose to *transfer to another Activity Plan* then you should select the Transfer option.

6. Finishing Pupil Tuition

▶ [Watch the Video Tutorial here](#)

Where a Pupil terminates their tuition completely; e.g. not transferring to a different Activity, you need to enter a *Finish Date* and provide a *Leave Reason*.

Note: You can define your list of valid Leave Reasons from the option available in the System tab of the console.

To do this:

Select Pupil Tuition > Click Enter Finish Date

This is displayed below:

Clicking this will display the window below:

Select the **Leave Reason** from the dropdown list and enter a *Finish Date* by selecting either:

Finish at end of ...	The final session will be the last Diary Entry of the selected Provision Period
Finish on date	Select a finishing date in the menu

Click **Apply Changes** to confirm the action. This will enter a Finish Date onto the Record and remove all Tuition Detail for the Provisions following the Provision in to which the date falls.

If you then want to reverse this, click **Remove Finish Date** in the Ribbon Menu.

7. Batch Tuition Entry

Overview

The *Batch Tuition Entry* function provides facilities for importing batches of Pupils and Lesson details that are listed in an *Excel Spreadsheet*. This is particularly useful for importing lists of Pupils that have taken part in *Wider Opportunities or First Access* lessons.

To access, click:

Pupils (Ribbon Menu) > Enter Tuition Batch

This will display the window below:
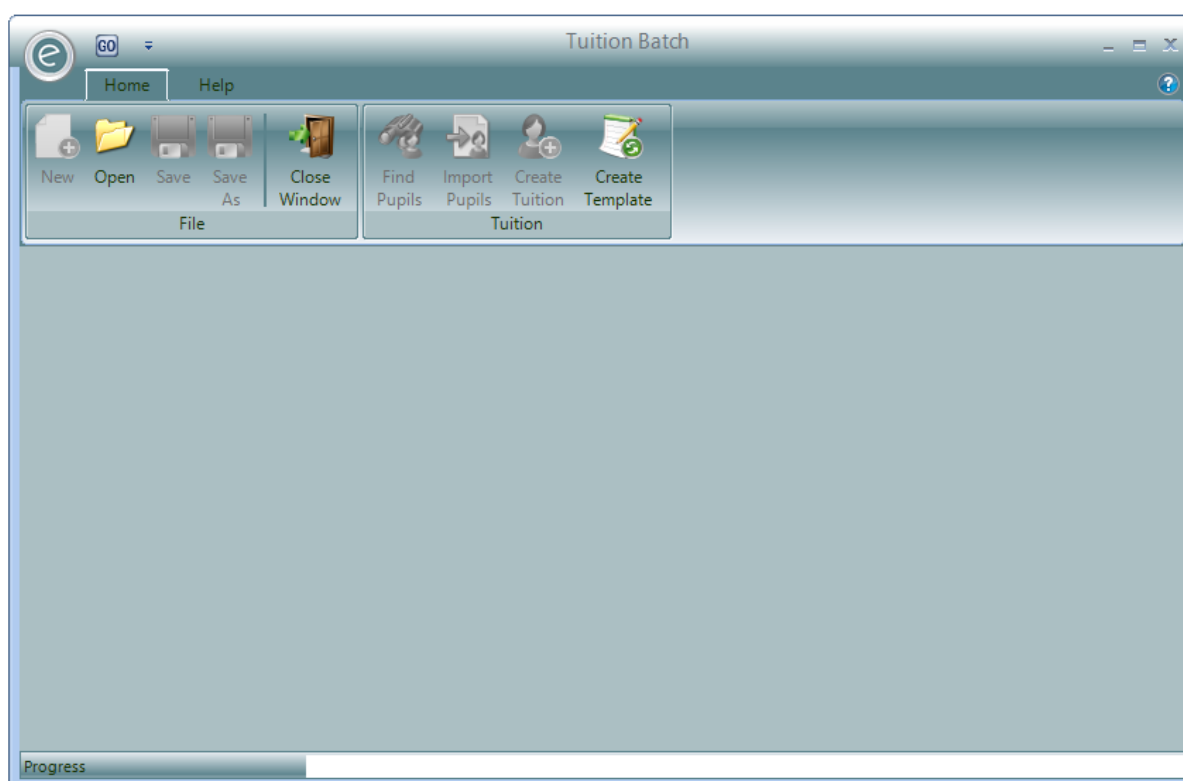
The function has three stages:

1. **Finding Pupils** – This stage attempts to find a Record for each Pupil in the list by first searching in the Ensemble database and if unsuccessful by searching in any linked external Pupil database. (See the section on Connecting to a Central Pupil Database for more information on external Pupil databases).
2. **Import of Pupils** – This stage creates a new Pupil record in Ensemble for any Pupils in the list that does not currently exist in the Ensemble database. The function uses the information from the list and any found from a search on the external Pupil database. In order for a Pupil record to be created the list must contain a first name, last name and date of birth for the Pupil being created.
3. **Create Tuition** – The final stage will add selected Pupils to specified lessons previously defined within the system.

Import List

Important: The Import List must be an *Excel Spreadsheet* with an extension of *.xls*.

The Import List can contain as many Records as required and can include Pupils from multiple Lessons and Schools. It is though *recommended that multiple small spreadsheets are used* rather than large ones containing a mix of Pupils. A single spread sheet for a lesson or at most a School is recommended.

To access the default template with this layout on excel:

Pupils (Ribbon Menu) > Enter Tuition Batch > Create Template

The spread sheet must contain a Pupils UPN ID or their First Name, Last Name and Date of Birth. It can also contain various other data relating to the Pupil. Its column layout should be as follows:

Column Letter	Description	Notes
A	Status	This column is reserved for use by the system and should be left blank. The system will update this column with a status that indicates the stage of the import.
B	Status Text	This column is reserved for use by the system and should be left blank. The system will update this column with information relating to the import.
C	UPN	This should be the Pupils UPN if known or left blank. Note: specifying the UPN is only valid if Ensemble has a connection to an External Pupil database from which it can retrieve Pupil information given a UPN.
D	First Name	If the UPN is not provided then these columns must be supplied.
E	Last name	
F	Date of Birth	

The following columns are optional and may be left blank

G	School Year	The system will calculate the School year from the date of birth. Specify this only if the date of birth is not provided.
H	Venue	The name of the Pupils venue
I	Activity Plan	The name of the Activity Plan
J	Middle Name	The Pupils middle name
K	Gender	M for Male, F for Female
L	SEN	Special Educational Needs reference
M	Ethnic Code	The ethnicity abbreviation. If specified this code should exists as one of the Central abbreviation codes added to the Ensemble Ethnicity Codes.
N	Address Line 1	
O	Address Line 2	
P	Town	

Q	County	
R	Post Code	
S	Parent Title	
T	Parent First Name	
U	Parent Last Name	
V	Parent Middle name	
W	Parent Home Tel. Number	
X	Parent Mobile Tel. Number	
Y	Parent Business Tel Number	
Z	Parent Email Address	
AA	Free School Meals	Y for Yes, N for No
AB	Looked After Child	Y for Yes, N for No

Column headers are not required; Pupil data can therefore start from line 1.

Opening the Data

Using the Open button you can locate and open any of your *Data Import Spreadsheets*. Once open the contents will be displayed such as in the window below:
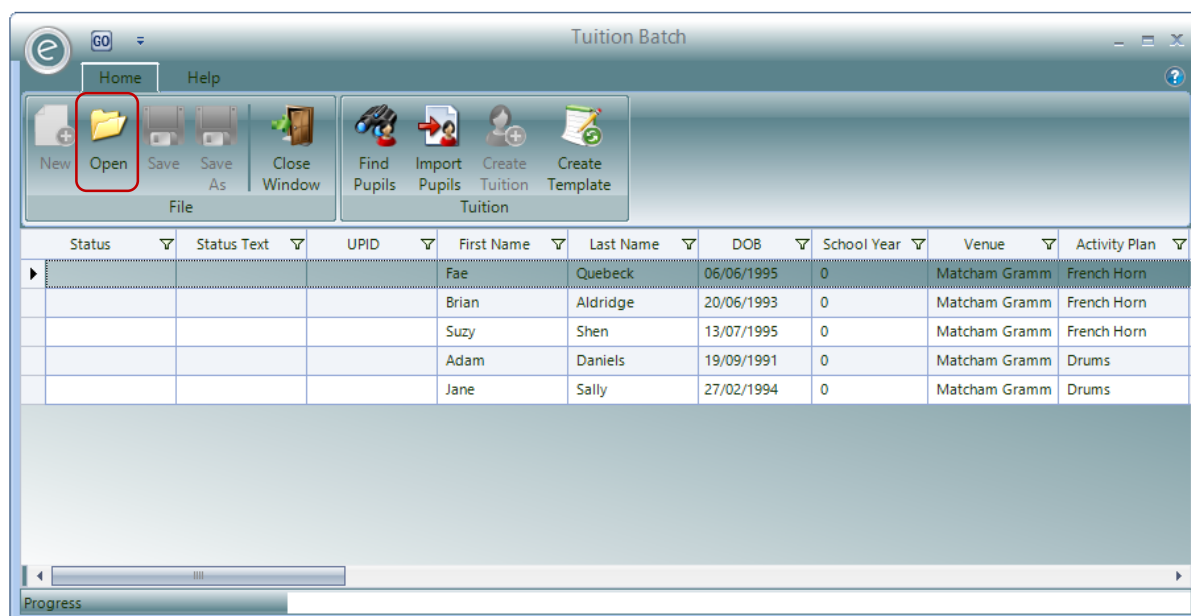
Processing a spread sheet may take to time to complete, there may be a number of Pupil Records, each of which need to be allocated to different lessons. If the whole spread sheet cannot be process during a single session it is possible to save the spread sheet and return to it at a later date. The system will save the state achieved.

Finding Pupils

Before Pupils can be added to any Activity, their records within Ensemble must be found or if they do not currently exists they must be created. Clicking on the Find Pupils button will start a process that works down the list locating existing records.

275

Ensemble will first try and find a matching Record for the Pupil within the Ensemble list of Pupils. If no matches are found the system will search an *External Pupil Database* (where one is defined). Once the stage is complete the display is updated to show the results as shown below:
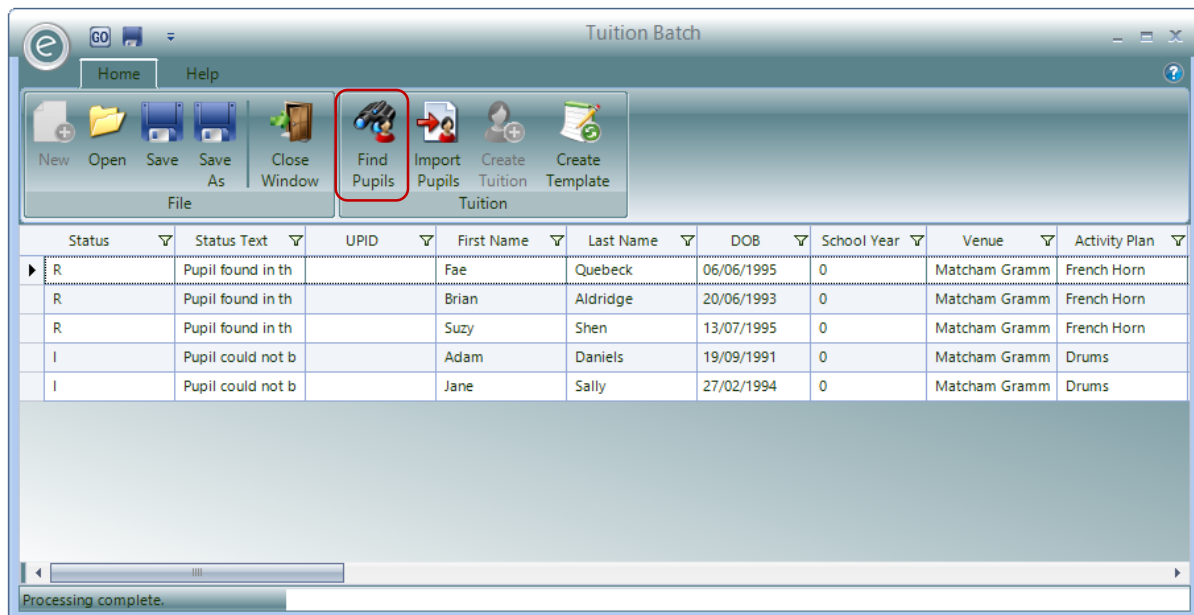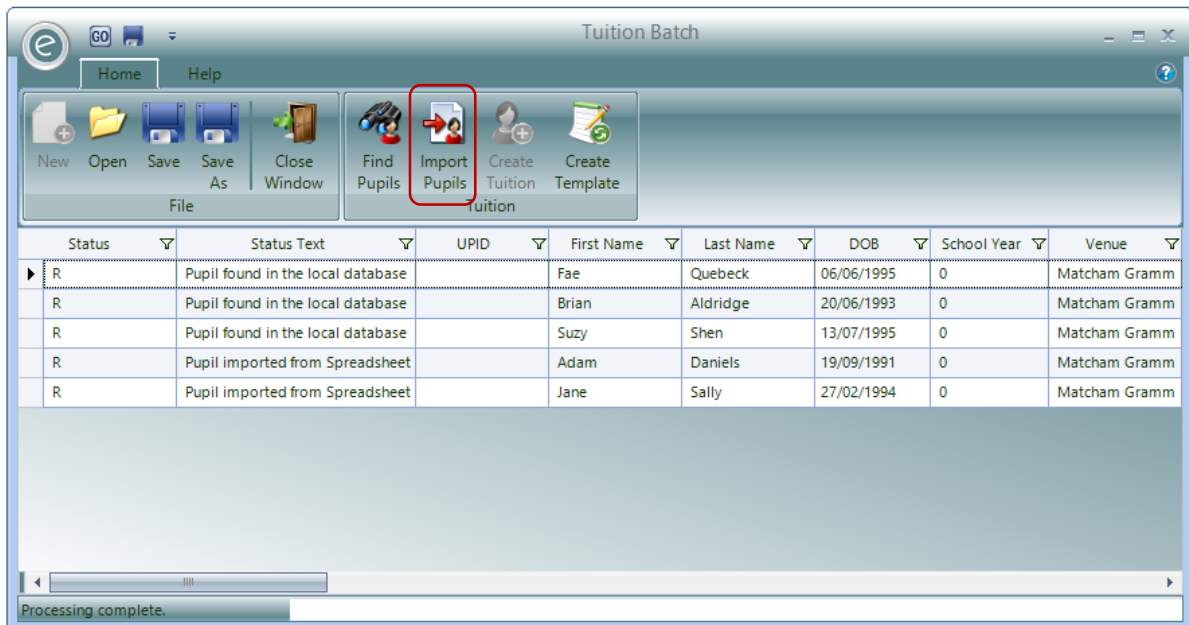
In the above example the *Find Pupils* stage found the first three Pupils from the list in the Ensemble Database. This is indicated with a *Status of R*.

The fourth and fifth Pupils weren't found in the Ensemble database and therefore can be imported. This is indicated with a *Status of I*.

Importing Pupils

This stage will create Records for any Pupils that *do not exist* in the Ensemble Database.

If a match is found in the external database a Record containing that information is created, whereas items without this match will result in a Record created from the data in this list. The list is updated to show how records were created as displayed below:

Now Adam Daniels and Jane Sally have Records created. Their *Status is now R* and the *Status Text* indicates *Pupil imported from Spreadsheet*.

Creating Tuition

The last stage is *optional* and will *create tuition Records* for any selected Pupils in the list.

Note: The Activity Plan into which the Pupils are to be entered in must first be defined within the schedule.

Pupils to be entered into an Activity Plan must first be selected either by holding down the *CTRL* key and clicking on each required Pupil line or simply *click and dragging down the list*. When at least one item has been selected the Create Tuition button is enabled.

This is displayed below:
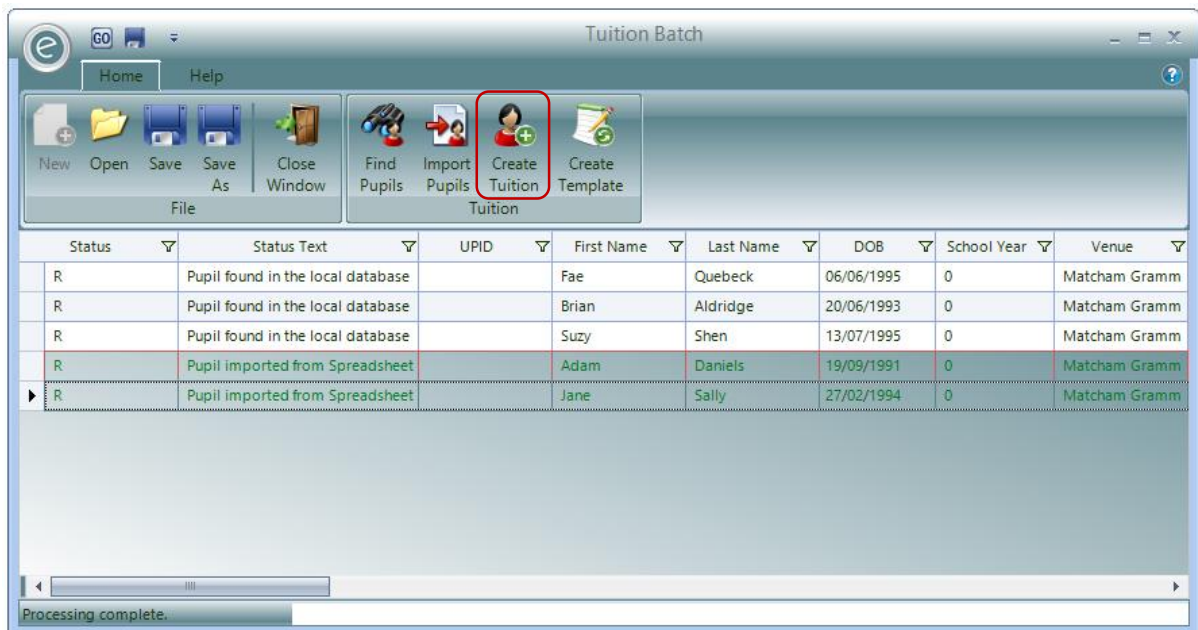
Clicking this button will display an *Activity Selection* window as shown below.

This lists the selected Pupil Records and displays a dialog area on the right where the Activity Plan and other details can be selected.

When the appropriate selections have been made, clicking the **Start Process** button will create the relevant tuition Records within the Activity Plan.

8. Viewing Tuition Information in a Pupil Record Card

You can view the current and previous tuition for a specific Pupil from their Record Card.

To do this, click:

Pupils (Menu Bar) > Open a Pupil Record Card > Tuition tab

This will display the window below:
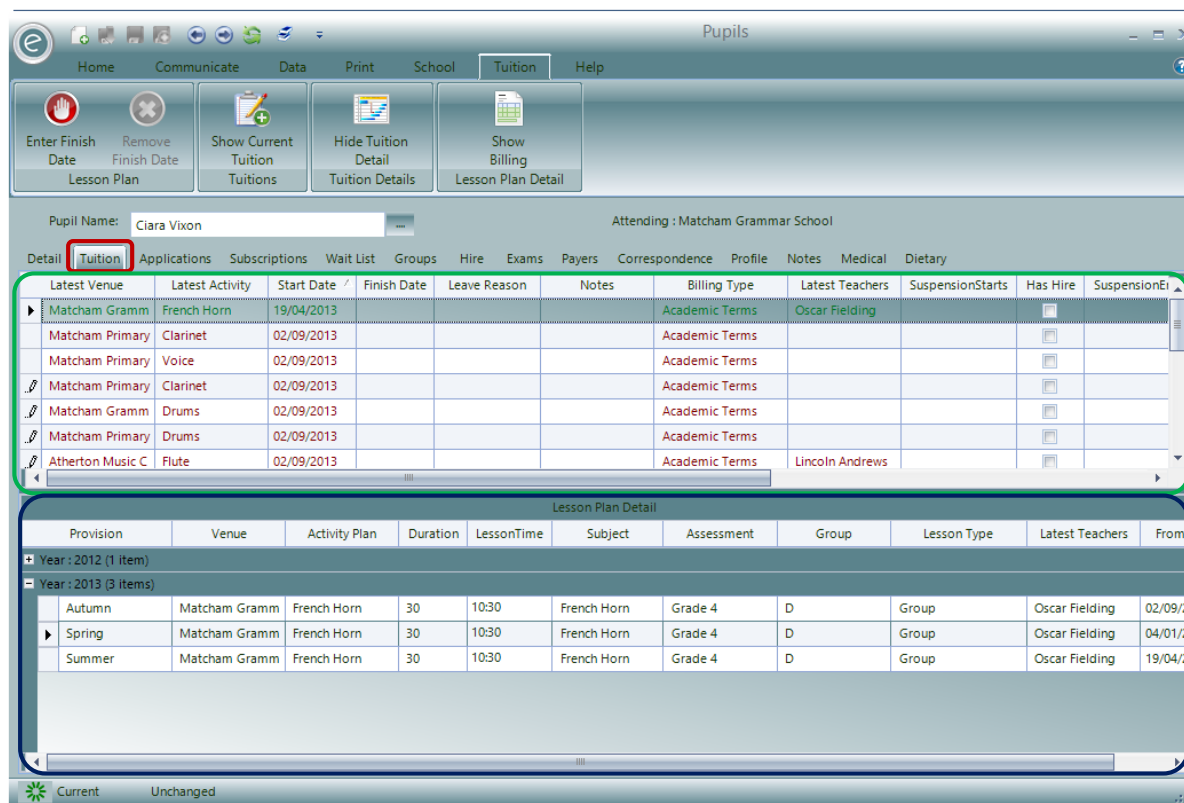
Here you will be able to view all the Activity Plans that the Pupil is currently enrolled in within the area highlighted by the green box. This will display information such as:

- Venue
- Activity Description
- Start and End Date
- Leave Reason
- Teacher
- Billing Type
- Notes

Click **Show Current Tuition** in the Ribbon Menu to display only the Activity Plans that the Pupil is *currently* in. This will change to **Show All Tuition** if you wish to reverse this and see a *complete history* of their tuition.

In the blue box, you will be able to see the expanded **Lesson Plan Detail** for the Activity Plan selected. It will display information for all the years and Provision Periods that the Pupil has been scheduled for. This includes information such as the:

- Provision
- Venue
- Activity Description

- **Start Time and Duration**
- **Teacher**
- **Lesson Type**
- **Subject**

If you wish to *hide this information* you can do so by clicking Hide Tuition Detail in the Ribbon Menu. The icon will change to Show Tuition Detail if you want to see this information again.

Within the Tuition tab you will also be able to *terminate the tuition* for the Pupil by clicking Enter Finish Date in the Ribbon Menu. If this can also be amended by clicking Remove Finish Date.

Display Billing Information

When viewing scheduling information for Pupils, you will also be able to display *their billing information* for the tuition that they are being provided. This information is available when the Show Billing button is clicked:
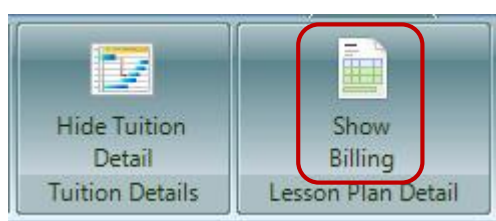
Note: This is only available to click for Payer billed tuition. For more information regarding billing please refer to the **Finance in Ensemble** Chapter.

The information that was displaying their tuition will now display billing information:

	Billing Detail									
	Billing Period	Charge	Payer Name	DD	Payer Remission	Amount	Remission	Amount	Subsidy	Coach Fee	Enrolment Fee
Year : 2012 (3 items)										
🖉👤	Autumn	Payer Billed Tuition	Mr Brian Aldridge 🖉	☑		0.00		0.00		0.00	0.00
🖉👤	Spring	Payer Billed Tuition	Mr Brian Aldridge 🖉	☑		0.00		0.00		0.00	0.00
🖉👤	Summer	Payer Billed Tuition	Mr Brian Aldridge 🖉	☑		0.00		0.00		0.00	0.00
Year : 2013 (3 items)										

The information included in the columns is:

Billing Period   First name of the Pupil

Charge   The Charge for the Activity Plan

Payer Name   The Payer of the Pupil – click the Pencil icon to change the Payer if required

DD   Ticked if billed by Direct Debit

Remission   Displays any Remissions for this Charge. Can also select one from the dropdown

Amount   Displays the value of the Charge alone.

Subsidy   Displays any Subsidies for this Charge. Can also select one from the dropdown

Goods   Displays the value to be charged once discounts such as Remissions have been taken into account.

VAT   Displays the VAT Code used

Enrolment Fee   Displays the Enrolment Fee used (if applicable)

To view tuition information again, click **Show Detail**:

9. Moving a Pupil to another Activity Plan

When a Pupil *moves from one Activity Plan to another* they should be *transferred or progressed* and not deleted or terminated and restarted. It is important in terms of following a Pupil's development that this approach is taken. Terminating a Pupil's tuition and starting a new tuition will inflate any statistics regarding Pupil dropout rates and start up rates.

There are two methods in moving a Pupil to another Activity Plan:

1. Pupil Transfer
2. Pupil Progress

Note: Pupil progression is discussed in the next chapter under **Progress Pupils**

Pupil Transfer

 [Watch the Video Tutorial here](#)

If a Pupil is moving to a different Activity Plan mid-way through an Academic Year then you should use the *Transfer Pupil(s)* option.

This allows you to select the new Activity Plan and enter a date for when the transfer is to happen. Using the Pupil Transfer leaves a record of where the Pupil was and where they have moved to. Therefore to Transfer a Pupil:

Select the Pupil Tuition > Transfer Pupil(s)

This is displayed below:

Clicking this will open the window displayed below:

Select the **School** or **Centre** the Pupil is transferring to from the appropriate drop down list. Doing so will display a list of the *Activity Plans* taking place for that School or Centre in the **red box**. Select the Activity Plan the Pupil is transferring to.

You will then need to select the date of the Transfer by first selecting one of the three date options.

Transfer as at the start of ...   Pupil will begin on the *Start Date of the selected term*. The Finish Date for the previous Activity Plan will be the day before this.

Transfer on date	This will set the day on which the Pupil starts in the new Activity Plan to be the *date entered*. The Finish Date for the previous Activity Plan will be the day before this.
Transfer as at the end of …	This will set the day on which the Pupil finishes the original Activity Plan to be the *last date of the selected term.* The Start Date for the new Activity Plan will be the following day.

To make the Transfer, click on the Apply Changes button. If you transfer a Pupil mid-way through a Provision they will show in *both the transferred to and the transferred from Provisions* and you will see a *transfer icon* with the detail.

Note: If an Invoice has *already been raised* for Provision Period that the Pupil is *transferring out* of, then Ensemble will ask if you would like to *credit* the amount on this Invoice. This is because the Pupil will now be billed for the tuition in the new Activity Plan *in addition* to their previous tuition, and so this options allows you avoid a double billing. For more information regarding billing please refer to the **Finance in Ensemble** Chapter.

In the example below, Charlie Bronton has been transferred from Cello in Autumn to Guitar in Autumn.

		First Name	Last Name	Charge	Time	Dur	Start
						Pupils having tuition in Cello Autumn	
		Brian	Aldridge	Payer Billed Tuition	09:00	10	02/09/2013
		Sally	Lloyd	Payer Billed Tuition	09:00	10	02/09/2013
▶	⇨	Charlie	Bronton	Payer Billed Tuition	09:00	10	02/09/2013
		Francis	Blackburn	Payer Billed Tuition	09:00	10	02/09/2013

		First Name	Last Name	Charge	Time	Dur	Start
						Pupils having tuition in Guitar Autumn	
▶	⇦	Charlie	Bronton	Payer Billed Tuition	10:00	10	02/09/2013
		Simon	Hocking	Payer Billed Tuition	10:00	10	02/09/2013
		Henry	Tailor	Payer Billed Tuition	10:00	10	02/09/2013

Note: If you hover the mouse over the icon it will display the transfer date.

Cancel Transfers

If a transfer has been made in error and needs to be reversed you can cancel the previous transfer by accessing their tuition in the new Activity Plan, then click Transfer Pupil(s) and then select Cancel Transfer.

Multiple Transfers

On occasion you may find that you need to perform a transfer, progress or termination of a *number of Pupils* associated with an Activity Plan. To do this select all the Pupils you want to progress or transfer while holding the *Ctrl* key and click either the Enter Finish Date or Transfer Pupil(s) icon. Before completion you will see a window of the selected Pupils.

10.   Recording Pupil Attendance

Recording the attendance of Pupils is essential for the running of any service. It is important to know which Pupils were present, which Pupils weren't and why, and if Payers should still be charged if a Pupil did or did not attend the lesson.

Register Keys

There are initial Records in Ensemble called *Register Keys* which define the attendance of Pupils. As a default there are two Register Key Records available: *Present* and *Not Present*. However more Register Keys can be defined in order to better record the attendance of Pupils.

Note: If your service uses Ensemble Live, the Register Keys will be used for Teachers to record attendance too.

Create a Register Key
To create a Register Key, click:

System (Menu Bar) > Register Keys > New Register Key

This will display the window below:

You will be able to enter:

Register Key Description	Enter the description for the Register Key
Register Key Code	This is an optional, but useful, reference for Teacher's to use when recording Pupil Registers. These may typically be symbols like /, X, -, or numbers.
Pupil is classed as present	Tick if this Register Key is recording a Pupil as present in the lesson
Colour	Another useful reference when searching for Register Keys

Customer should be billed for sessions marked with this Register Key	Tick if the customer should be billed when this is applied.

Click Save and Close when finished.

Record Attendance

Pupil attendance is recorded within the *Pupil Tuition Details* in the Pupil View for a Schedule.

Therefore:

Open a Teacher/School/Centre Record Card > Schedule > Pupil View

This will display the window below:

You will then need to select the Activity Plan and Provision in order to record the attendance of the pupils in the correct lesson and term.

Within the *Pupil Tuition Details* section there is a column header called Attendance which is highlighted by the red box. You will need to scroll to the right to see it. Once in view, you will be able to record the attendance of each Pupil by *clicking* the Pencil icon on their row. This will display the window below:
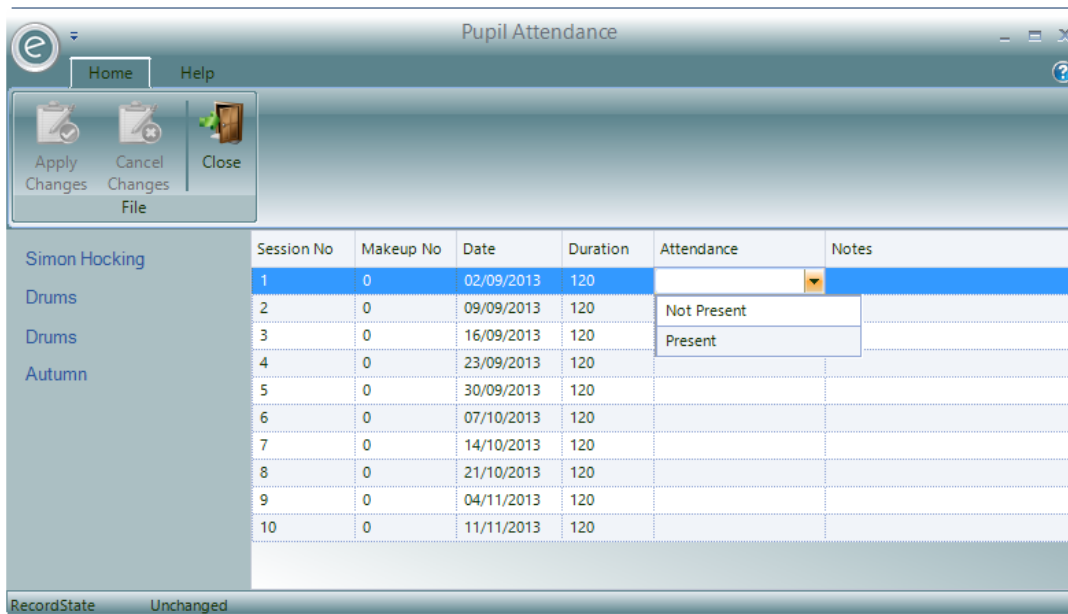
This window shows a table with the Pupil's scheduled tuition. Click on a row (lesson) under the **Attendance** column header and a *dropdown menu* will appear with the available Register Keys. Select one to record the attendance.

Once finished click **Apply Changes**.

Attendance Report

You will be able to print a Report of the attendance levels of Pupils by clicking:

Pupils (Ribbon Menu) > Pupil Reports > Print Pupil Attendance

This will display the window below:
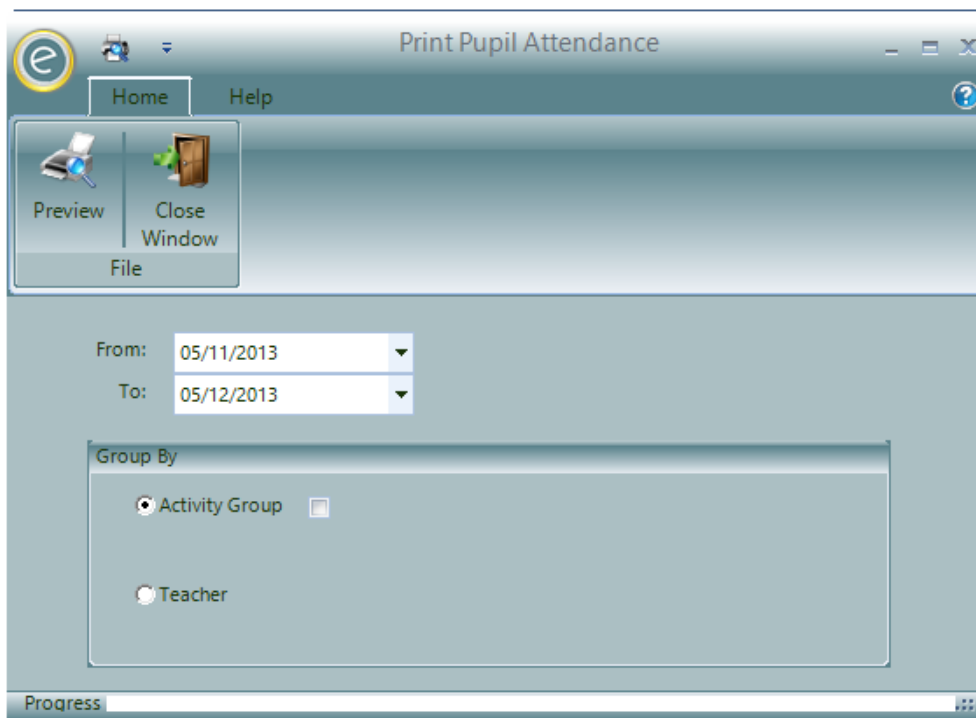
Select a **date range** for Report.

You can choose to group the Report by an **Activity Group** and furthermore by an **Activity**. Alternatively you can group the Report by **Teacher**.

When finished click **Preview** to view the Report.

Note: The Diary Entries in the Schedule will need to be marked with a Task Result confirming the session happened (Pay Teacher ticked) for the Pupils attendance to be shown.

An example is displayed below:

11. Send Emails and Texts to Pupils in an Activity Plan

You will be able to send SMS texts and emails to pupils of a particular Activity Plan straight from the Schedule of the Teacher/School/Centre Record Card. This is done by:

Opening the Teacher/School/Centre Record Card > Schedule (Ribbon) > Select an Activity Plan > Pupils (Ribbon) > Text Pupils/ Email Pupils

This is highlighted below:
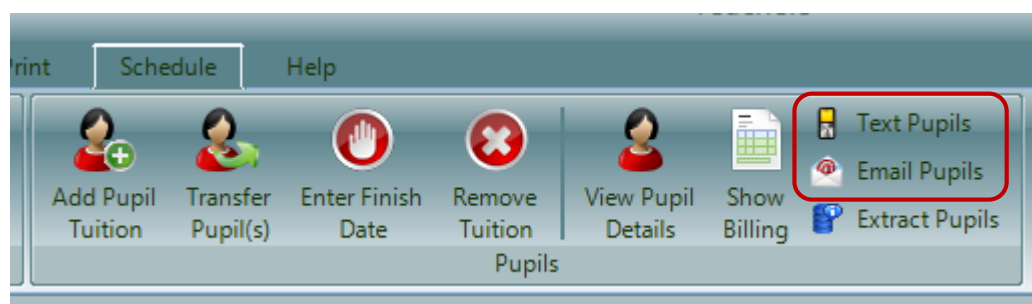
Note: For more information on sending emails and texts from Ensemble please refer to the **Communications** Chapter.

12. Extract Pupil Data

You will be able to extract the data for Pupils in particular Activity Plan straight from the Schedule of the Teacher/School/Centre Record Card. This is done by:

Opening the Teacher/School/Centre Record Card > Schedule (Ribbon) > Select an Activity Plan > Pupils (Ribbon) > Extract Pupils

This is highlighted below:
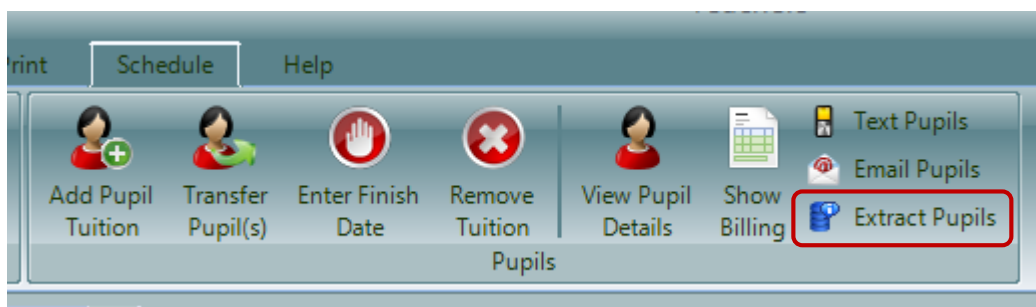
Note: For more information on data extraction in Ensemble please refer to the **Data Extraction** Chapter.

13.   Group Memberships

 [Watch the Video Tutorial here](#)

In addition to recording a Pupil's tuition you can also record their membership to Groups.

You can create Activity Plans for Groups however you do not add Pupils to these Activity Plans - instead you *add Pupils as members to the Group itself*.

Add Members to a Group

 [Watch the Video Tutorial here](#)

To add a member to a Group, click:

Tuition (Menu Bar) > Groups > Open Group Record Card > **Current Members tab >** **New Member**

This is highlighted below:

This will start the procedure to enter a new Member by *first requesting the Pupil and the Payer*. This operates in the same way as adding a Pupil to an Activity Plan at a School or Centre. Once the Pupil and Payer have been selected the following form is displayed:

This window will contain details of the Pupil and Payer you have just selected. If necessary you can click on the buttons Find Pupil.. and Find Payer.. above each name and address to select alternative details.

Enter the following details into the form:

Start Date	Enter the date the member started in the group.
Role	Enter a role if any that the member is fulfilling in the group, for example lead violin.
Membership Charge	Select a Charge from the drop down list of *Membership Charges* you will have previously defined.
Notes	Enter any notes about the Membership

Optional when turned on in *Education Parameters*:

Coach Route	If the Member uses a Coach Route this can be selected and the Stop they use too.
Sponsor	If the membership attracts a Sponsor then tick the Sponsor box and select a Sponsor from the drop down menu

| Remission | If the membership attracts a Remission then tick the Remission box and select a Remission from the drop down list. This Remission will be applied in addition to any that have been previously associated with the selected Payer. |

Click **Save and Close** to save this Member.

Amending Details of Group Memberships

When you add Members they are shown in the list of current Memberships in the Group Record Card. This is viewed in the **Current Members** tab and is displayed below:

Details	Schedule	Current Members	Leavers	Notes	Correspondence		
	First Name	Last Name	Part	Start Date	Notes		Billing Type
+	Alice	Blackburn		01/09/2013		Academic Terms	
+	Billy	Archer		01/09/2013		Academic Terms	
+	Francis	Blackburn		01/09/2013		Academic Terms	
+	Azealia	Lloyd		01/09/2013		Academic Terms	
+	Victoria	Sky		01/09/2013		Academic Terms	
	Current Members : 5						

For example, you can amend the Subject, Role and Notes values by simply *amending the values on the line*.

You can also expand a line to view the billing information such the Payer, Charge and Remission for each Provision. You can amend the values in there by clicking the **+** next to the row for that Member.

For example, Billy Archer's Membership has been expanded below:

Details	Schedule	Current Members	Leavers	Notes	Correspondence				
	First Name	Last Name	Part	Start Date	Notes		Billing Type		
+	Alice	Blackburn		01/09/2013		Academic Terms			
−	Billy	Archer		01/09/2013		Academic Terms			
	Year	Period	Payer		Membership Charge	Charge	SponsorAmount	Sibling Discount Amount
	2012	Summer	Mr Kenton Archer		Group Activity Charge	£0.00	£0.00	£0.00
	2013	Autumn	Mr Kenton Archer		Group Activity Charge	£35.00	£0.00	£0.00
	2013	Spring	Mr Kenton Archer		Group Activity Charge	£0.00	£0.00	£0.00
	2013	Summer	Mr Kenton Archer		Group Activity Charge	£0.00	£0.00	£0.00

Any change made to a Provision line will be propagated through to all the following Provision lines.

For more information regarding billing please refer to the **Finance in Ensemble** Chapter.

Removing a Member

If a Member is added into an incorrect Group or changes their mind before joining, this can be rectified by completely removing their Membership. This will delete any record of their Membership. It should not therefore be used after a Pupil has actually started in a group as the record of this will be lost. To do this:

Open Group Record Card > Current Members > Select a Member > Remove Member

This is displayed below:
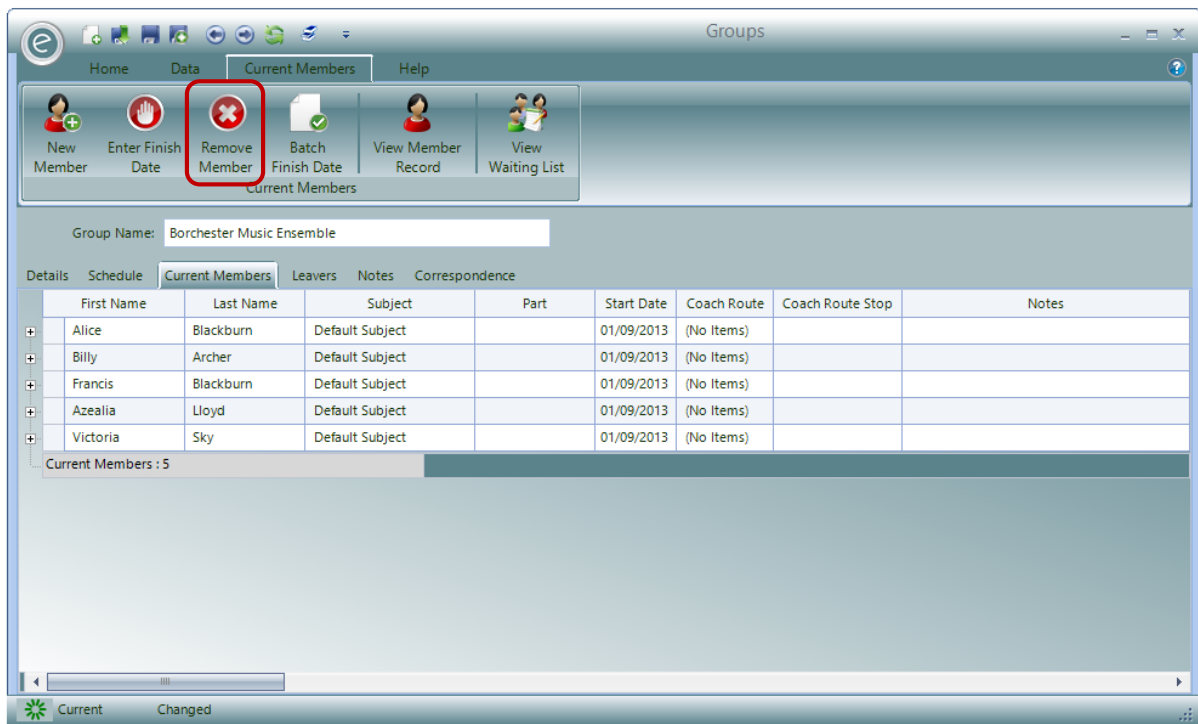
Finishing Group Membership

When Members leave Groups you need to update their Membership with a *Leave Date and a Leave Reason.*

To do this:

Open Group Record Card > Current Members > Select a Member > Enter Finish Date

This will display the following window:

Select the **Leave Reason** from the drop down list of Leave Reasons previously defined and enter a **Finish Date**.

Finally click on the **Apply Changes** button.

Note: Leave Reasons can be created by clicking:

System (Menu Bar) > Leave Reason > New Leave Reason

Leavers List

The Member will now be moved from the Current Members List and added to the *Leavers List*.

This can be accessed by clicking the **Leavers** tab highlighted below:
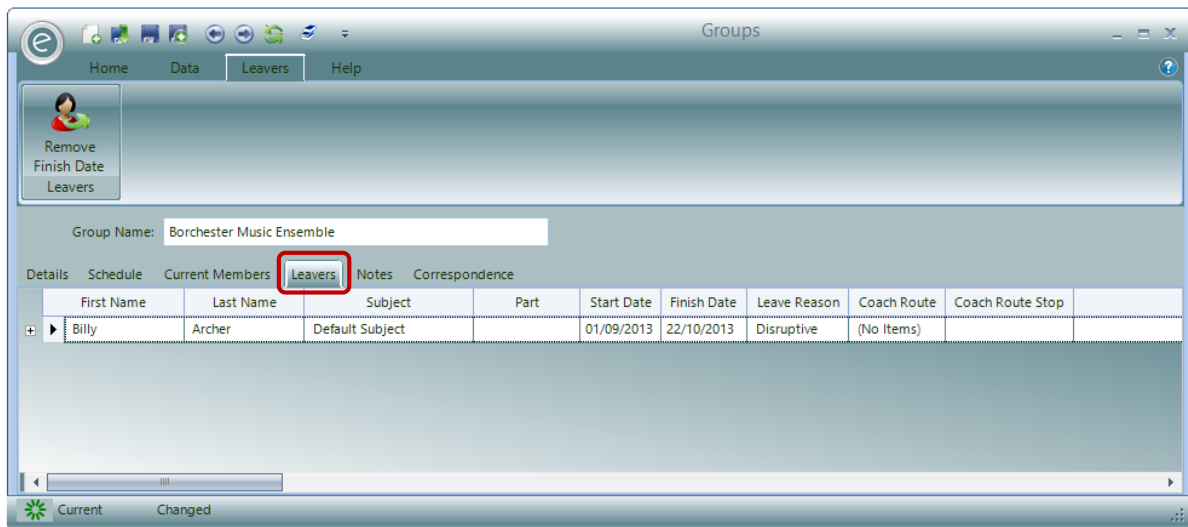
The Leaver can be made a Member again by clicking **Remove Finish Date**.

Finishing all Members of a Group

You can also mark all Members of a Group as *leaving.* This can be done by:

Opening a Group Record Card > Current Members > Batch Finish Date

This is highlighted below:
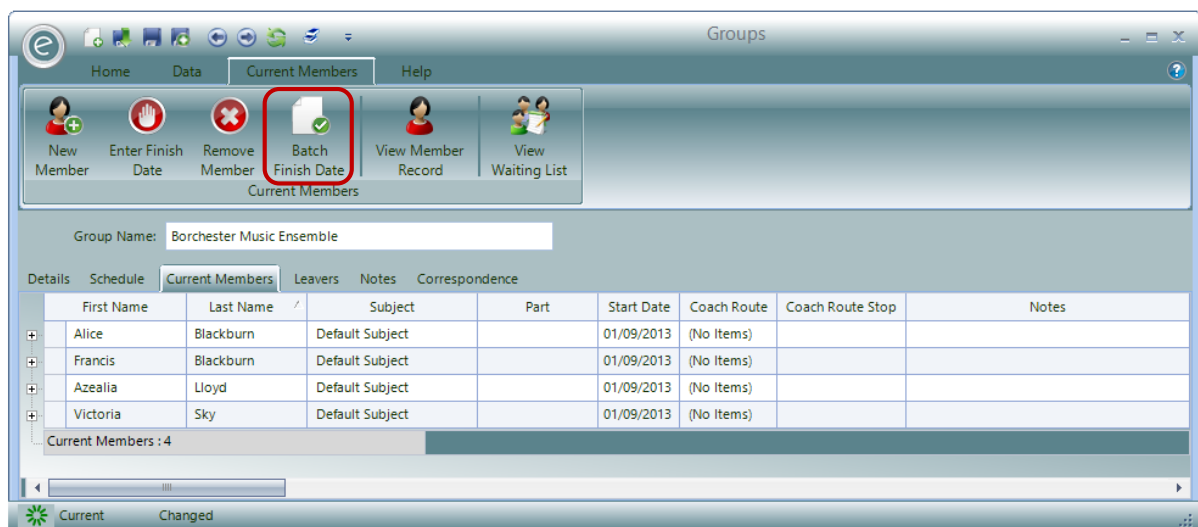
This will display the following window:

Enter the **Finish Date**, the **Leave Reason** and optionally enter a date to select members who start before that date in **Members Starting Before**.

Click **Apply Changes** to apply this.

14.   Subscription Membership

Pupils may also pay by Subscription to join a Group or use a Music Centre. This can be recorded within the Subscription Record Card.

Add Members to a Subscription

To add a member to a Subscription, click:

Tuition (Menu Bar) > Subscriptions > Open Subscription Record Card > Current Members tab > New Member

This is highlighted below:

This will start the procedure to enter a new Member by *first requesting the Pupil and the Payer*. This operates in the same way as adding a Pupil to an Activity Plan at a School or Centre. Once the Pupil and Payer have been selected the following form is displayed:

This window will contain details of the Pupil and Payer you have just selected. If necessary you can click on the buttons **Find Pupil..** and **Find Payer..** above each name and address to select alternative details.

Enter the following details into the form:

Start Date	Enter the date the member started in the Subscription.
Membership Fee	Select a Charge from the drop down list of *Membership Charges* you will have previously defined.
Sponsor	If the membership attracts a Sponsor then tick the Sponsor box and select a Sponsor from the drop down menu
Remission	If the membership attracts a Remission then tick the Remission box and select a Remission from the drop down list. This Remission will be applied in addition to any that have been previously associated with the selected Payer.
Notes	Enter any notes about the Membership

Click **Save and Close** to save this Member.

Amending Details of Subscription Memberships

When you add Members they are shown in the list of current Memberships in the Subscription Record Card. This is viewed in the **Current Members** tab and is displayed below:

For example, you can amend the Start Date and Notes values by simply *amending the values on the line*.

You can also expand a line to view each Provision line and amend the values in there, by clicking the **+** next to the row for that Member. For example, Billy Archer's Membership has been expanded below:

Any change made to a Provision line will be propagated through to all the following Provision lines.

Removing a Member

If a Member is added into an incorrect Subscription or changes their mind before joining, this can be rectified by completely removing their Membership. This will delete any record of their Membership. It should not therefore be used after a Pupil has actually started in a Subscription as the record of this will be lost. To do this:

Open Subscription Record Card > Current Members > Select a Member > Remove Member

This is displayed below:
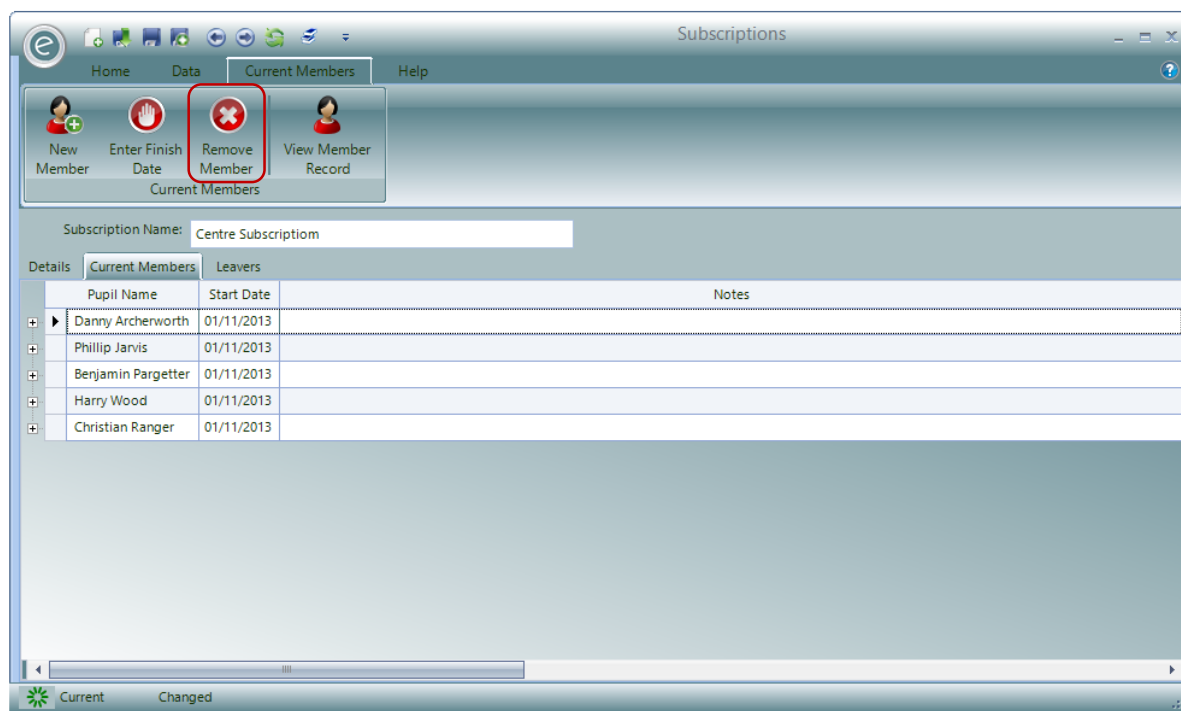
Finishing Subscription Membership

When Members leave Subscriptions you need to update their Membership with a *Leave Date and a Leave Reason.*

To do this:

Open Subscription Record Card > Current Members > Select a Member > Enter Finish Date

This will display the following window:

Select the **Leave Reason** from the drop down list of Leave Reasons previously defined and enter a **Finish Date**.

Finally click on the **Apply Changes** button.

Note: Leave Reasons can be created by clicking:

System (Menu Bar) > Leave Reason > New Leave Reason

Leavers List

The Member will now be moved from the Current Members List and added to the *Leavers List*.

This can be accessed by clicking the **Leavers** tab highlighted below:
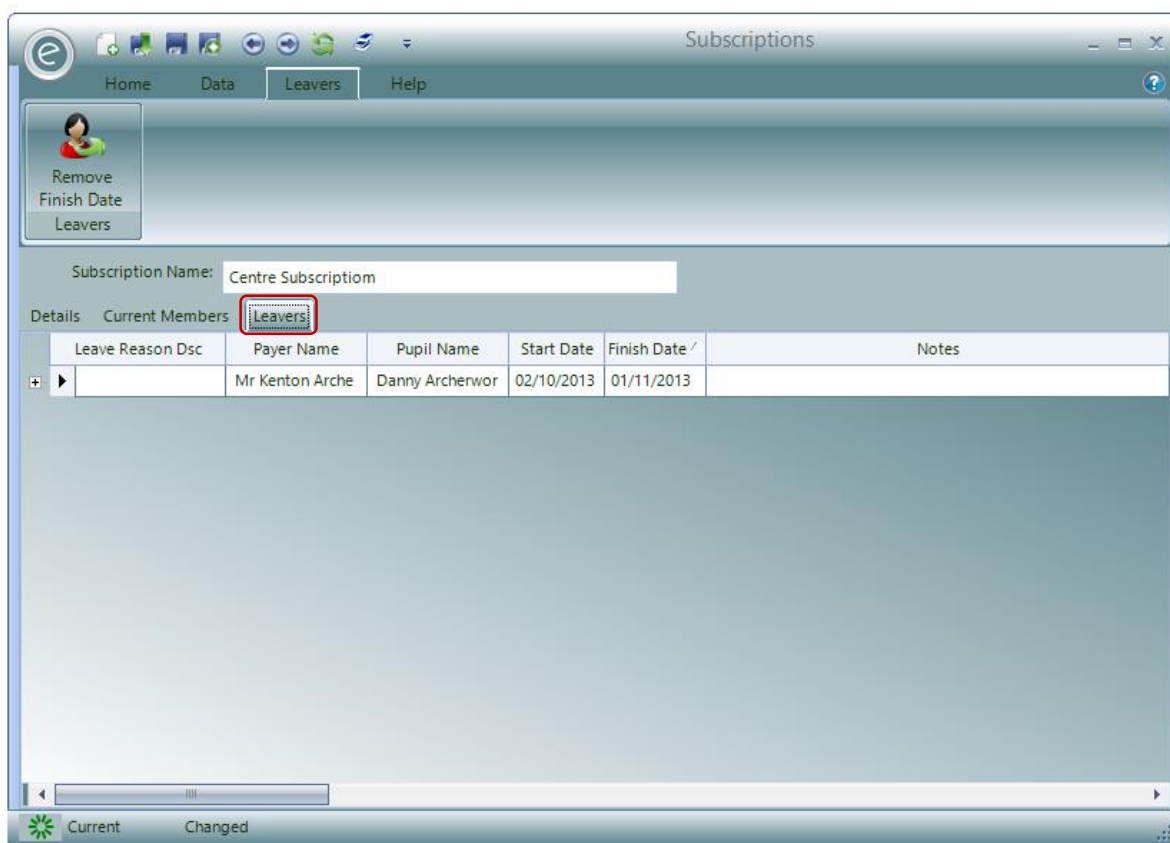
The Leaver can be made a Member again by clicking **Remove Finish Date**.

15. Reports of Pupil Tuition

▶ [Watch the Video Tutorial here](#)

There are two specific Reports provided to list Pupils participating in tuition. These are:

Pupil Lists   A listing of Pupils.

Registers   A formatted Register showing Pupils and dates of lessons.

Pupil Lists

▶ [Watch the Video Tutorial here](#)

You can produce *Pupil Lists* for Activity Plans categorised by Centres, Schools or Teachers. These Reports will simply list the Pupils enrolled in the specified Activity Plans.

Teacher Pupil List
To produce a Teacher Pupil List, click:

Teachers (Ribbon Menu) > Pupil Reports > Print Teacher Pupil Lists

Alternatively, you can *view the Report for a specific Teacher* directly from their Record Card by:

Opening a Teacher Record Card > Print tab > Print Pupil Lists

Either of these options will display the window below:

The wizard allows you to select various criteria for producing the Report including date information. There are three options for selecting the date of the report.

Select pupils in lessons during a specified Period	This requests a *Provision Type, Academic Year and Provision Period* and lists all Pupils inside the specified date range.
Select pupils in lessons during a specified Date Range	This requests *a From and To date* and lists Pupils who have tuition within these dates
Select pupils in lessons on a Specific Date	This requests a *specific date* and lists only those Pupils who were having tuition at that time.

You will also need to specify the Provision Type, Year and Period.

The Report can be further refined by specifying Schools, Centres, Activities and Teachers.

You can also choose the Page Breaks. As a default the page will break when Teachers change for this Report.

Click Preview to view the Teacher Pupil List.

An example of a Teacher Pupil List is as follows:

School Pupil List

To produce a School Pupil List, click:

Schools (Ribbon Menu) > Print School Pupil Lists

Alternatively, you can *view the Report for a specific School* directly from the Record Card by:

Opening a School Record Card > Print tab > Print Pupil Lists

Either of these options will display the window below:

The wizard allows you to select various criteria for producing the Report including date information. There are three options for selecting the date of the report.

Select pupils in lessons during a specified Period	This requests a *Provision Type, Academic Year and Provision Period* and lists all Pupils inside the specified date range.
Select pupils in lessons during a specified Date Range	This requests *a From and To date* and lists Pupils who have tuition within these dates
Select pupils in lessons on a Specific Date	This requests a *specific date* and lists only those Pupils who were having tuition at that time.

You will also need to specify the **Provision Type**, **Year** and **Period**.

The Report can be further refined by specifying **Schools** and **Activities**.

You can also choose the **Page Breaks**. As a default the page will break when Venues change for this Report.

Click **Preview** to view the School Pupil List.

An example of a School Pupil List is as follows:

Centre Pupil List

To produce Centre Pupil List, click:

Centres (Ribbon Menu) > Print Centre Pupil Lists

Alternatively, you can *view the Report for a specific Centre* directly from the Record Card by:

Opening a Centre Record Card > Print tab > Print Pupil Lists

Either of these options will display the window below:

The wizard allows you to select various criteria for producing the Report including date information. There are three options for selecting the date of the report.

Select pupils in lessons during a specified Period	This requests a *Provision Type, Academic Year and Provision Period* and lists all Pupils inside the specified date range.
Select pupils in lessons during a specified Date Range	This requests *a From and To date* and lists Pupils who have tuition within these dates
Select pupils in lessons on a Specific Date	This requests a *specific date* and lists only those Pupils who were having tuition at that time.

You will also need to specify the **Provision Type**, **Year** and **Period**.

The Report can be further refined by specifying **Centres** and **Activities**.

You can also choose the **Page Breaks**. As a default the page will break when Venues change for this Report.

Click **Preview** to view the Centre Pupil List.

An example of a Centre Pupil List is as follows:

Course Pupil List

If you have Courses and Modules set up you will be able to print a *Course Pupil List* which will display the Pupils enrolled. To produce a Course List click:

Pupils (Ribbon Menu) > Pupil Reports > Print Course List

This will display the window below:

The window allows you to select various criteria for producing the Report including date information. There are three options for selecting the date of the report.

Select pupils in lessons during a specified Period	This requests a *Provision Type, Academic Year and Provision Period* and lists all Pupils inside the specified date range.

Select pupils in lessons during a specified Date Range	This requests *a From and To date* and lists Pupils who have tuition within these dates
Select pupils in lessons on a Specific Date	This requests a *specific date* and lists only those Pupils who were having tuition at that time.

You will also need to specify the Provision Type, Year and Period.

The Report can be further refined by specifying Pupils, Centres and Courses.

Click Preview to view the Course Pupil List.

An example of a Course Pupil List is as follows:

Pupil List by Consent Date

If you are using *Pupil Consent Dates* you will be able to produce a Pupil List by their Consent Dates.

Note: For more information regarding Pupil Consent Dates, refer to **Pupil Consent Dates** in the **Optional Descriptive Records** Chapter.

To produce the Report click:

Pupils (Ribbon Menu) > Pupil Reports > Print Pupil List by Consent Date

This will display the window below:

The wizard allows you to select various criteria for producing the Report including date information. There are three options for selecting the date of the report.

Select pupils in lessons during a specified Period	This requests a *Provision Type, Academic Year and Provision Period* and lists all Pupils inside the specified date range.
Select pupils in lessons during a specified Date Range	This requests *a From and To date* and lists Pupils who have tuition within these dates
Select pupils in lessons on a Specific Date	This requests a *specific date* and lists only those Pupils who were having tuition at that time.

You will also need to specify the Provision Type, Year and Period.

The Report can be further refined by specifying Schools, Centres and Groups.

You will then be able to select a defined Pupil Consent Date in the Select pupils with field and if the date is:

Set	Consent Date selected *has been set* for the Pupil
Not Set	Consent Date selected *has not been set* for the Pupil
Later Than	A date field will appear. Pupils with the Consent Date *after* this date will show on the Report

A date field will appear. Pupils with the Consent Date *before* this date will show on the Report

Click **Preview** to view the Report

An example of a Pupil List by Consent Date is as follows:

Teacher Pupil Contact List

▶ [Watch the Video Tutorial here](#)

A Teacher Pupil Contact List will produce a Report listing all the Teachers with Pupils and the contact details for those Pupils.

To produce this report, click:

Teachers (Ribbon Menu) > Pupil Reports > Print Teacher Pupil Contact List

This will display the window below:

The wizard allows you to select various criteria for producing the Report including date information. There are three options for selecting the date of the report.

Select pupils in lessons during a specified Period	This requests a *Provision Type, Academic Year and Provision Period* and lists all Pupils inside the specified date range.
Select pupils in lessons during a specified Date Range	This requests *a From and To date* and lists Pupils who have tuition within these dates
Select pupils in lessons on a Specific Date	This requests a *specific date* and lists only those Pupils who were having tuition at that time.

The Report can be further refined by specifying particular Schools or Centres. Furthermore after selecting a specific School or Centre, you can specify the Activity and/or Teacher, or the Activity Plan.

Click Preview to view the Report.

An example is displayed below:

Pupil Contact List for Autumn 2013/2014 — Jenny Smith

Group Member List

To produce a Group Member List, click:

Groups (Ribbon Menu) > Print Member Lists

Alternatively, you can *view the Report for a specific Group* directly from their Record Card by:

Opening a Group Record Card > Print tab > Print Group Membership Listing

Either of these options will display the window below:

The wizard allows you to select various criteria for producing the Report including date information. There are three options for selecting the date of the report.

Select pupils in lessons during a specified Period	This requests a *Provision Type, Academic Year and Provision Period* and lists all Pupils who are *Current Members* for the specified date range.
Select pupils in lessons during a specified Date Range	This requests *a From and To date* and lists Pupils who are *Current Members* within these dates
Select pupils in lessons on a Specific Date	This requests a *specific date* and lists only those Pupils who are *Current Members* at that time.

The Report can be further refined by specifying *a Group.*

Click **Preview** to view the Group Member List.

An example of a Group Member List is as follows:

Pupil Registers

 [Watch the Video Tutorial here](#)

The option to produce Pupil Registers can be found in:

Teachers (Ribbon Menu) > Pupil Reports > Print Teacher Pupil Registers

Alternatively, you can *view the Report for a specific Teacher* directly from their Record Card by:

Opening a Teacher Record Card > Print tab > Print Pupil Registers

Either of these options will display the window below:
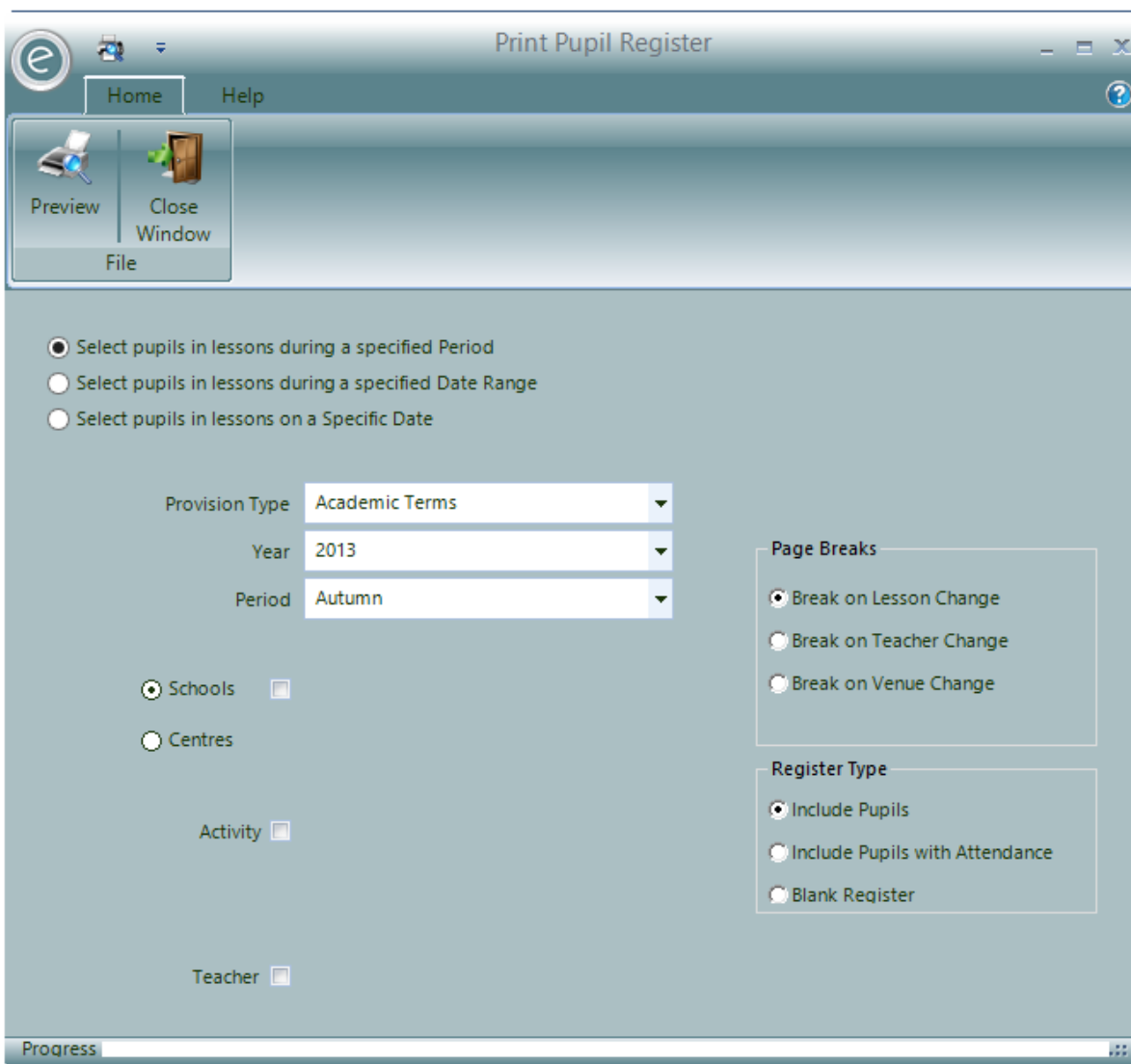
The window displayed is similar to the window which produces Pupil Listings. There are three **Register Types**:

Include Pupils   Default Register type with dates and the Pupils enrolled

Include Pupils with Attendance   This Register will include the completed attendance of the Pupils
                                     as indicated by the defined *Register Keys*

Blank Register   Registers that are populated with details of the Activity Plans but
                                     do not contain any Pupils details

There are three options for selecting the date of the report.

Select pupils in lessons during a   This requests a *Provision Type, Academic Year and Provision
specified Period   Period* and lists all Pupils inside the specified date range.

Select pupils in lessons during a   This requests *a From and To date* and lists Pupils who have
specified Date Range   tuition within these dates

Select pupils in lessons on a   This requests a *specific date* and lists only those Pupils who
Specific Date   were having tuition at that time.

You will also need to specify the **Provision Type**, **Year** and **Period**.

The Report can be further refined by specifying **Schools**, **Centres**, **Activities** and **Teachers**.

Click **Preview** to view the Pupil Register.

An example of a Pupil Register is as follows:

Pupil Register for Autumn 2013/2014

Teacher(s):	Pat Archer			Day:	Monday
Venue:	Swanton Secondary School			Time:	09:00 AM
Activity:	Cello			Duration:	00:30

Pupil	Home Tel	Subject	Instrument No	Lesson Ty	GRP	Time	Dur	Start Asmt	02-Sep	16-Sep	23-Sep	30-Sep	07-Oct	14-Oct	21-Oct	04-Nov	11-Nov						End Asmt
Brian Aldridge		Default Subj		Group	A	09:00	00:10	Not K															
Francis Blackburn	01495737282	Default Subj		Group	A	09:00	00:10	Not K															
Charlie Bronton		Default Subj		Group	A	09:00	00:10	Not K															
Sally Lloyd		Default Subj		Group	A	09:00	00:10	Not K															

This is an example of a *Register with the Pupil attendance* selected:

Pupil Register for Spring 2013/2014

Jenny Smith				Day:	Tuesday
Ambridge Grammar School				Time:	09:00 AM
Piano				Duration:	00:30

	Home Tel	Subject	Instrument No	Lesson Ty	GRP	Time	Dur	Start Asmt	07-Jan	14-Jan	21-Jan	28-Jan	04-Feb	11-Feb	25-Feb	04-Mar	11-Mar	18-Mar			
		Default Subj		G	A	09:00	00:10	Grad	/	/	/	/	/	/	/	/	/	/			
s		Default Subj		G	A	09:00	00:10	Grad	/	/	/	/	/	/	/	/	/	/			
		Default Subj		G	A	09:00	00:10	Grad	/	X	X	/	/	/	/	/	/	/			

Group Register
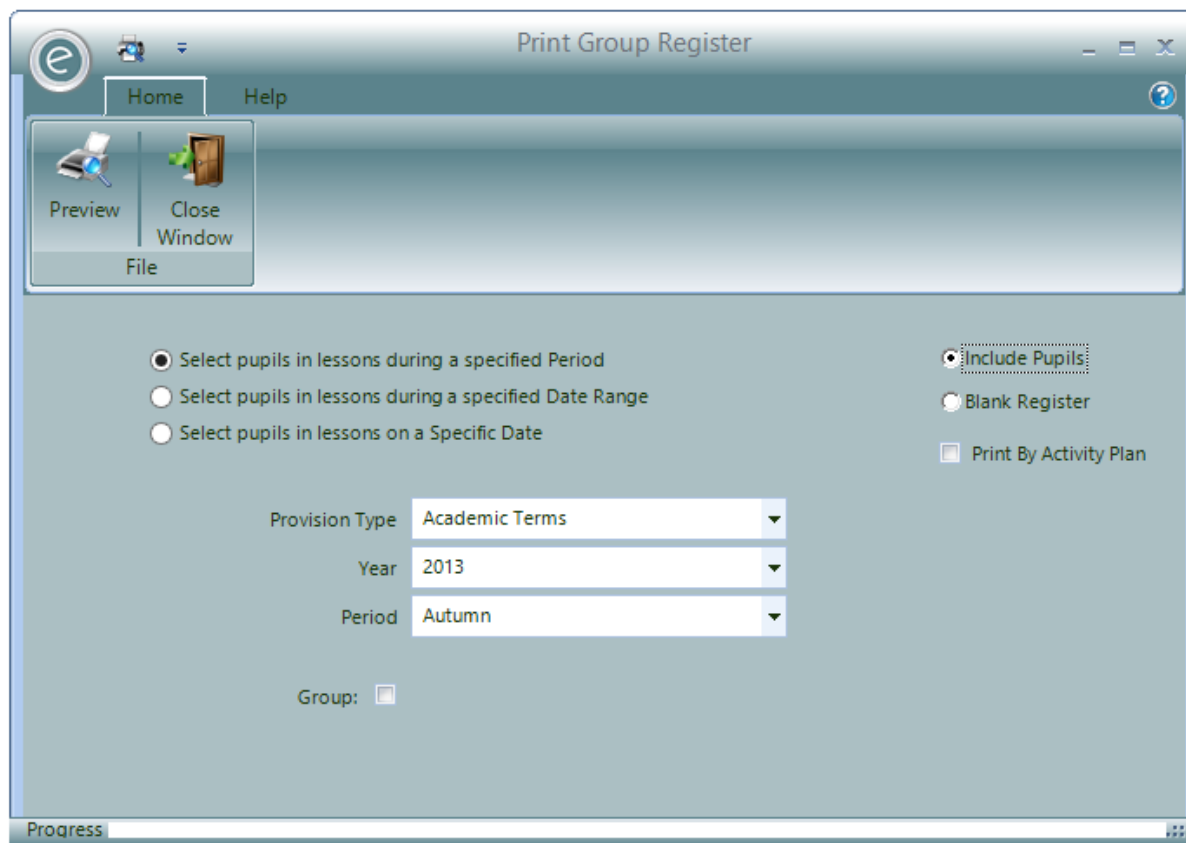
The option to produce Group Registers can be found in:

Groups (Ribbon Menu) > Print Registers

Alternatively, you can *view the Report for a specific Group* directly from their Record Card by:

Opening a Group Record Card > Print tab > Print Group Register

Either of these options will display the window below:

The window displayed is similar to the window which produces the Group Member List, except you have an additional option to produce Blank Registers. These are Registers that are populated with details of the Activity Plans but *do not contain any Pupils details*.

Note: If Pupils leave a Group throughout the term, they will *still appear on the Register* if it is run for the whole term. Therefore you should use another date range option such as a Specific Date to view the most recent update of the Register.

If you want to produce a Register for a particular Activity Plan that the Group is in, click Print By Activity Plan. You will also be able to specify the Activity Plan.

Click Preview to view the Group Register.

An example of a Group Register is as follows:

Pupil Timetable

   [Watch the Video Tutorial here](#)

A Timetable can also be produced which shows the Activity Plans that each Pupil is enrolled in. To produce the Report click:

Pupils (Ribbon Menu) > Pupil Reports > Print Pupil Timetable

This will display the window below:

You will need to select the **Provision Type**, **Provision Year** and **Provision Period** to view the Timetable for.

You can view the Timetable as a **Schedule** or **Diary**. As a *Schedule*, the Timetable will only produce summarised information regarding the Activity Plans that the Pupil is enrolled in. If the Timetable is a *Diary*, then each Diary Entry for the tuition will be displayed.

When the Schedule is selected you will be able to specify to view **All** tuition for the Pupil, **Centres Only**, **Groups Only** or **Centres and Schools**.

Click **Preview** to view the Report.

An example *Schedule Timetable* is displayed below:

16. Analysis of Pupil Tuition

There are special Reports in Ensemble that will produce an analysis of the pupils in tuition.

To calculate the required time, the Reports need to know how the minutes are allocated to *individual or group tuition*. When creating a Charge you can enter default values as minutes for these in the **Duration** fields of the **Default Pupil Detail** section then the value entered for the Duration is interpreted as the Duration of the group lesson.

Teacher Pupil Analysis

▶ [Watch the Video Tutorial here](#)

It is important to know how the Charge you are making relates to the number of Pupils being taught. The system includes a *Teacher Pupil Analysis* which can be found in:

Teachers (Ribbon Menu) > Pupil Reports > Print Teacher Pupil Analysis

Alternatively, you can *view the Report for a specific Teacher* directly from their Record Card by:

Opening a Teacher Record Card > Print tab > Print Teacher Pupil Analysis

Either of these options will display the window below:
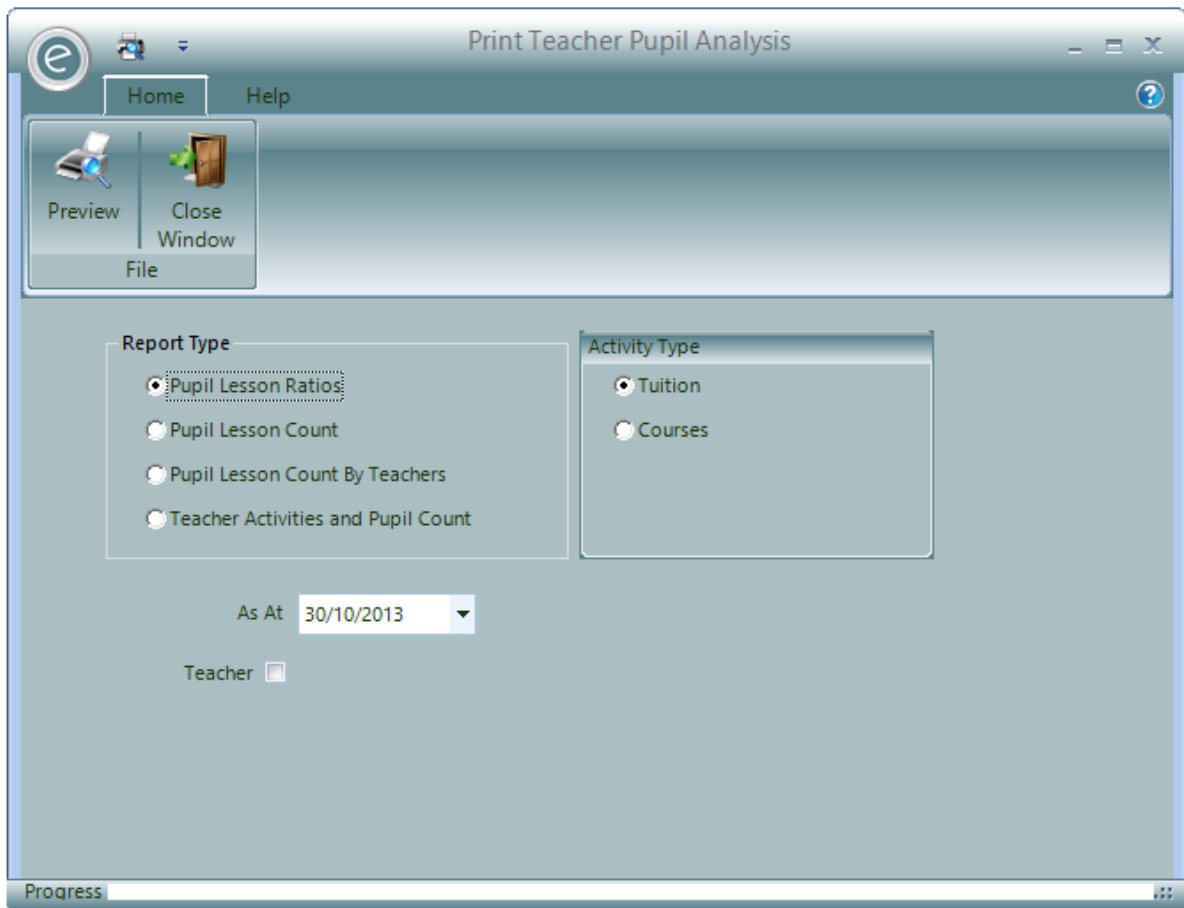
There are 4 Reports that can be made from this window and they are listed under **Report Type**:

Pupil Lesson Ratios

This report calculates how much time a Teacher requires to tutor the Pupils in a lesson compared to how much time has been scheduled.

Select the **Activity Type** to be **Tuition** or **Courses**.

Pupils enrolled on the **As At** date will appear on the Report.

Moreover the **Teacher** can be specified.

Click **Preview** to view the Report.

An example is displayed below:

Pupil Lesson Count

The Pupil Lesson Count will analyse the *number of active Pupils by the Venue*.

Select the Activity Type to be Tuition or Courses.

Pupils enrolled on the As At date will appear on the Report.

Click Preview to view the Report.

An example is displayed below:

Pupil Lesson Count By Teachers

The Pupil Lesson Count will analyse the *number of Pupils by the Teachers within the Venues*.

Select the **Activity Type** to be **Tuition** or **Courses**.

Pupils enrolled on the **As At** date will appear on the Report.

Click **Preview** to view the Report.

An example is displayed below:

30-Oct-13		Paritor Performing Arts
Teacher Pupil Count by Teachers as at 30 October 2013		
		No Of Pupils
Bochester Music Centre		
Bassoon	Chantelle Darlings	0
		0
Ambridge Grammar School		
Drums	Michael Birchfield	1
French Horn	Michael Birchfield	3
Voice	Rachel Levison	4
Guitar	Chantelle Darlings	5
Flute	Jenny Smith	5
Triangle	Rachel Levison	0
Viola	Chantelle Darlings	10
Bassoon	Jenny Smith	0
Drums	Rachel Levison	2
Violin	Rachel Levison	9
Cello	Nigel Cambell	6

Teacher Activities and Pupil Count

This Report shows the scheduled hours of tuition that a Teacher has been given (Activity Plan) against the number of hours that Pupils have enrolled for. This allows you to assess which Activity Plans are most over/undersubscribed and therefore the best way to allocate the Teacher's time.

Pupils enrolled on the **As At** date will appear on the Report.

Click Preview to view the Report.

An example is displayed below:

In the example Nigel Cambell has 10 hours under the *Scheduled Duration* column, indicating a total of 10 hours in his Activity Plans. However there are only 5 hours under the *Total Required* column meaning that there are 5 hours of enrolled tuition. Therefore Nigel has half of his time filled.

School Pupil Analysis

To produce a School Pupil Analysis click:

Schools (Ribbon Menu) > Print School Pupil Analysis

This will display the window below:
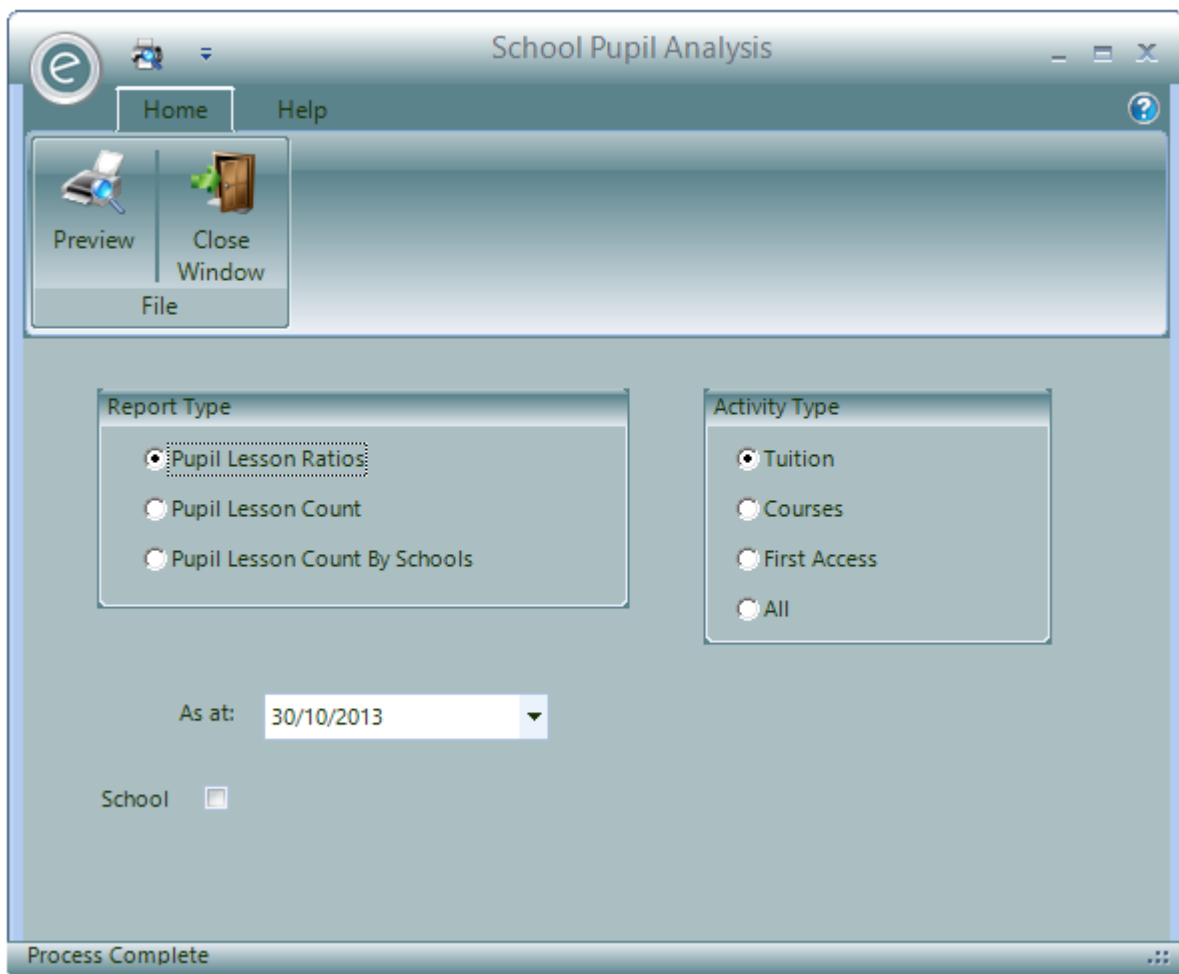
There are 3 Reports that can be made from this window and they are listed under Report Type

Pupil Lesson Ratios

This report calculates how much time a Teacher requires to tutor the Pupils in a lesson compared to how much time has been scheduled.

Select the Activity Type to be Tuition, Courses, First Access or All.

Pupils enrolled on the As At date will appear on the Report.

Moreover the School can be specified.

Click Preview to view the Report.

Pupil Lesson Count

The Pupil Lesson Count will analyse the *number of Pupils by the School.*

Select the Activity Type to be Tuition or Courses.

Pupils enrolled on the As At date will appear on the Report.

Click Preview to view the Report.

An example is displayed below:

Pupil Lesson Count By Schools

The Pupil Lesson Count will analyse the *number of Pupils by the School*.

Select the **Activity Type** to be **Tuition** or **Courses**.
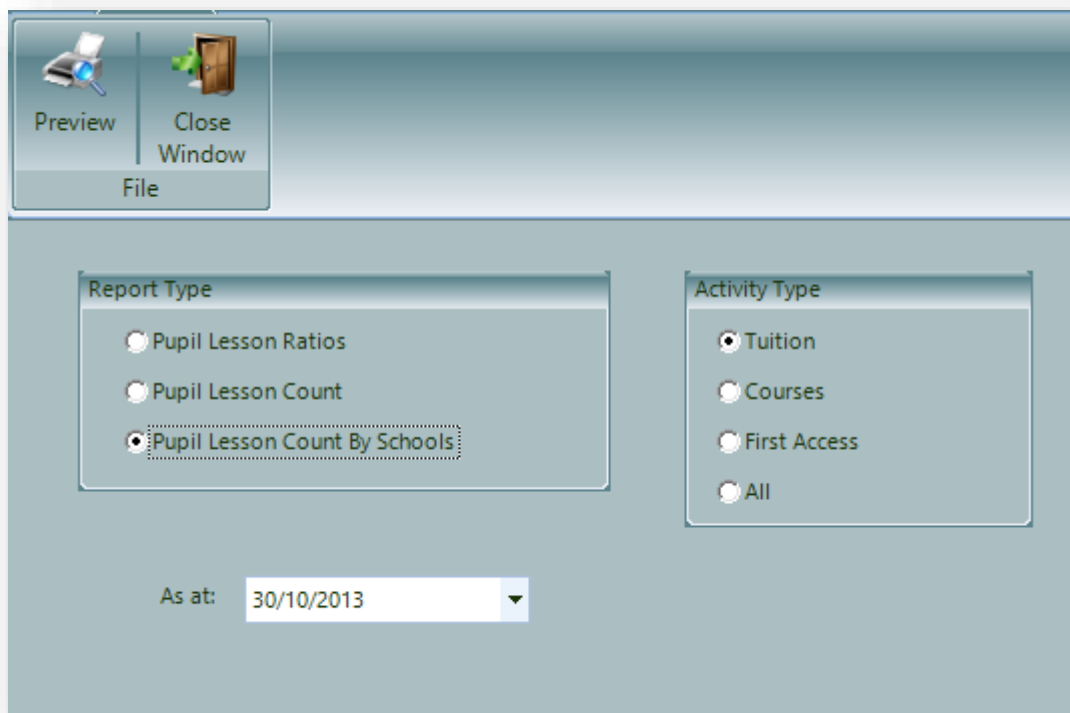
Pupils enrolled on the **As At** date will appear on the Report.

Click **Preview** to view the Report.

An example is displayed below:

```
30-Oct-13                                                                          Paritor Performing Arts

                                  School Pupil Count by schools as at 30 October 2013

                                                                                   No Of Pupils

         Bassoon                        Chantelle Darlings                              0
                                                                                        0

    Ambridge Grammar School
         Drums                          Michael Birchfield                              1
         French Horn                    Michael Birchfield                              3
         Voice                          Rachel Levison                                  4
         Guitar                         Chantelle Darlings                              5
         Flute                          Jenny Smith                                     5
         Triangle                       Rachel Levison                                  0
         Viola                          Chantelle Darlings                             10
         Bassoon                        Jenny Smith                                     0
         Drums                          Rachel Levison                                  2
         Violin                         Rachel Levison                                  9
         Cello                          Nigel Cambell                                   6
```

17.   Waiting Lists

You may wish to maintain a list of Pupils waiting to join an Activity Plan, if it is currently full. This can be done with a *Waiting List*.

These can be regularly reviewed and Pupils can be transferred from the Waiting List into Activity Plans.

Adding a Pupil to the Waiting List

▶ [Watch the Video Tutorial here](#)

There are three Waiting Lists available:

1. School Waiting List
2. Centre Waiting List
3. Group Waiting List

School Waiting List
To add a Pupil to a School Waiting List, click:

Pupils (Ribbon Menu) > Enter School Waiting List

When this is selected Ensemble will first request the Pupil and then the associated Payer. This process is similar to entering a Pupil directly into an Activity Plan. After selecting a Pupil and Payer the following window is displayed:

This window will contain details of the Pupil and Payer you have just selected, highlighted by the red box. If necessary you can click on the buttons Find Pupil.. and Find Payer.. above each name and address to select alternative details.

The fields in the green box request the following information:

Application Date	Enter the date of the request to be added to the Waiting List was received. The value will default to the current date.
Billing Type	Enter the Provision Type offered in the dropdown menu.
School	Select the School from the drop down list.
Activity	Enter the required Activity from the drop down list.
Teacher	If the request specified a Teacher you can click on the Teacher tick box and select a Teacher from the drop down list. Waiting Lists requests are often channel via a Teacher and entering the Teacher here means that a list of Pupils on the Waiting List can be produced for each Teacher.
Start On or After	Enter the date the Pupil wishes to *start tuition*. This date will default to the current date.
Resource Source	Select the option to show the source of the Resource to be used for tuition where this is relevant. The options are.

- *Hire* – They wish to hire/loan from you.
- *Schools* – They plan to use a Resource provided by the School (Only is School waiting list).
- *Own* – They are planning on using their own Resource.
- *Unknown* – Resource is not required for this tuition.

Resource Group	Select a Resource Group from the dropdown menu.

Notes   Any notes about the entry.

Optional when turned on in *Education Parameters*:

Subject   Choose a Subject from the dropdown menu

Remission   Select a Remission

Subsidy   Select a Subsidy

If the request to be added to the Waiting List included any payment, the details of this payment can be added in the Payment Details section, highlighted by the blue box. The options are:

Cash   A cash payment has been received. You will need to specify the amount.

On Account   Payment will be taken later

Cheque   A Cheque has been received. You will need to specify the amount and the Cheque No

Where a payment has been received a Receipt Posting will be made. The Posting will be added to any other Postings with the same reference. The reference is automatically generated as WL-YYYY/MM/DD-NN. Where

- *WL* Indicates a waiting list payment
- *YYYY* is the current year.
- *MM* is the current month
- *DD* is the day
- *NN* is a sequential number added to the reference if the generated reference number is not available. The system will keep incrementing this number until it finds a reference that is available. A reference is not available if there are already Receipt Postings with the reference that have been allocated a Payslip Number i.e. they have been marked as banked, or the reference has been used by another User.

You may also enter any Notes regarding the payment.

Any payments made that relate to a Waiting List will not automatically be allocated to any outstanding debt the payer has, nor will it appear on any outstanding transaction statement included on any Invoice. The payment is held in reserve for the waiting list entry to be transferred to an activity and an Invoice produced. At this point the payment is allocated to that Invoice.

Note: For more information regarding Receipts and debt allocation, refer to **Receipts** and **Managing Debtors Accounts in the Debtor's Ledger** in the **Finance in Ensemble** Chapter.

Click **Save and Close** to add the Pupil to the Waiting List.

Centre Waiting List
To add a Pupil to a Centre Waiting List, click:

Pupils (Ribbon Menu) > Enter Centre Waiting List

When this is selected Ensemble will first request the Pupil and then the associated Payer. This process is similar to entering a Pupil directly into an Activity Plan. After selecting a Pupil and Payer the following window is displayed:

This window will contain details of the Pupil and Payer you have just selected, highlighted by the red box. If necessary you can click on the buttons Find Pupil.. and Find Payer.. above each name and address to select alternative details.

The fields in the green box request the following information:

Application Date
Enter the date of the request to be added to the Waiting List was received. The value will default to the current date.

Billing Type
Enter the Provision Type offered in the dropdown menu.

Centre
Select the Centre from the drop down list.

Activity
Enter the required Activity from the drop down list.

Teacher
If the request specified a Teacher you can click on the Teacher tick box and select a Teacher from the drop down list. Waiting Lists requests are often channel via a Teacher and entering the Teacher here means that a list of Pupils on the Waiting List can be produced for each Teacher.

Start On or After
Enter the date the Pupil wishes to *start tuition*. This date will default to the current date.

Resource Source
Select the option to show the source of the Resource to be used for tuition where this is relevant. The options are.

- *Hire* – They wish to hire/loan from you.
- *Schools* – They plan to use a Resource provided by the School (Only is School waiting list).
- *Own* – They are planning on using their own Resource.
- *Unknown* – Resource is not required for this tuition.

Notes   Any notes about the entry.

Optional when turned on in *Education Parameters*:

Subject   Choose a Subject from the dropdown menu

Remission   Select a Remission

If the request to be added to the Waiting List included any payment, the details of this payment can be added in the Payment Details section, highlighted by the blue box. The options are:

Cash	A cash payment has been received. You will need to specify the amount.
On Account	Payment will be taken later
Cheque	A Cheque has been received. You will need to specify the amount and the Cheque No

Where a payment has been received a Receipt Posting will be made. The Posting will be added to any other Postings with the same reference. The reference is automatically generated as WL-YYYY/MM/DD-NN. Where

- *WL* Indicates a waiting list payment
- *YYYY* is the current year.
- *MM* is the current month
- *DD* is the day
- *NN* is a sequential number added to the reference if the generated reference number is not available. The system will keep incrementing this number until it finds a reference that is available. A reference is not available if there are already Receipt Postings with the reference that have been allocated a Payslip Number i.e. they have been marked as banked, or the reference has been used by another User.

You may also enter any Notes regarding the payment.

Any payments made that relate to a Waiting List will not automatically be allocated to any outstanding debt the payer has, nor will it appear on any outstanding transaction statement included on any Invoice. The payment is held in reserve for the waiting list entry to be transferred to an activity and an Invoice produced. At this point the payment is allocated to that Invoice.

Note: For more information regarding Receipts and debt allocation, refer to **Receipts** and **Managing Debtors Accounts in the Debtor's Ledger** in the **Finance in Ensemble** Chapter.

Click Save and Close to add the Pupil to the Waiting List.

Group Waiting List

To add a Pupil to a Group Waiting List, click:

Groups (Ribbon Menu) > Enter Group Waiting List

When this is selected Ensemble will first request the Pupil and then the associated Payer. This process is similar to entering a Pupil directly into an Activity Plan. After selecting a Pupil and Payer the following window is displayed:

This window will contain details of the Pupil and Payer you have just selected, highlighted by the red box. If necessary you can click on the buttons Find Pupil.. and Find Payer.. above each name and address to select alternative details.

The fields in the green box request the following information:

Application Date	Enter the date of the request to be added to the Waiting List was received. The value will default to the current date.
Billing Type	Enter the Provision Type offered in the dropdown menu.
Group	Select the Group from the drop down list.
Teacher	If the request specified a Teacher you can click on the Teacher tick box and select a Teacher from the drop down list. Waiting Lists requests are often channel via a Teacher and entering the Teacher here means that a list of Pupils on the Waiting List can be produced for each Teacher.
Start On or After	Enter the date the Pupil wishes to *start tuition*. This date will default to the current date.
Resource Source	Select the option to show the source of the Resource to be used for tuition where this is relevant. The options are.

- *Hire* – They wish to hire/loan from you.
- *Schools* – They plan to use a Resource provided by the School (Only is School waiting list).

332

- *Own* – They are planning on using their own Resource.
- *Unknown* – Resource is not required for this tuition.

Notes   Any notes about the entry.

Optional when turned on in *Education Parameters*:

Subject   Choose a Subject from the dropdown menu

Remission   Select a Remission

If the request to be added to the Waiting List included any payment, the details of this payment can be added in the Payment Details section, highlighted by the blue box. The options are:

Cash   A cash payment has been received. You will need to specify the amount.

On Account   Payment will be taken later

Cheque   A Cheque has been received. You will need to specify the amount and the Cheque No

Where a payment has been received a Receipt Posting will be made. The Posting will be added to any other Postings with the same reference. The reference is automatically generated as WL-YYYY/MM/DD-NN. Where

- *WL* Indicates a waiting list payment
- *YYYY* is the current year.
- *MM* is the current month
- *DD* is the day
- *NN* is a sequential number added to the reference if the generated reference number is not available. The system will keep incrementing this number until it finds a reference that is available. A reference is not available if there are already Receipt Postings with the reference that have been allocated a Payslip Number i.e. they have been marked as banked, or the reference has been used by another User.

You may also enter any Notes regarding the payment.

Any payments made that relate to a Waiting List will not automatically be allocated to any outstanding debt the payer has, nor will it appear on any outstanding transaction statement included on any Invoice. The payment is held in reserve for the waiting list entry to be transferred to an activity and an Invoice produced. At this point the payment is allocated to that Invoice.

Note: For more information regarding Receipts and debt allocation, refer to **Receipts** and **Managing Debtors Accounts in the Debtor's Ledger** in the **Finance in Ensemble** Chapter.

Click Save and Close to add the Pupil to the Waiting List.

Viewing Waiting Lists

[Watch the Video Tutorial here](#)

Waiting List entries can be viewed in the Schedule of a School/Centre/Group Record Card.

For Schools and Centres, click:

Tuition (Menu Bar) > Open Record Card > Schedule tab > Waiting List (Ribbon Menu)

Alternatively for Groups, click

Tuition (Menu Bar) > Open Record Card > Current Members tab > View Waiting List (Ribbon Menu)

The Waiting List button is displayed below:

The whole window is displayed below:
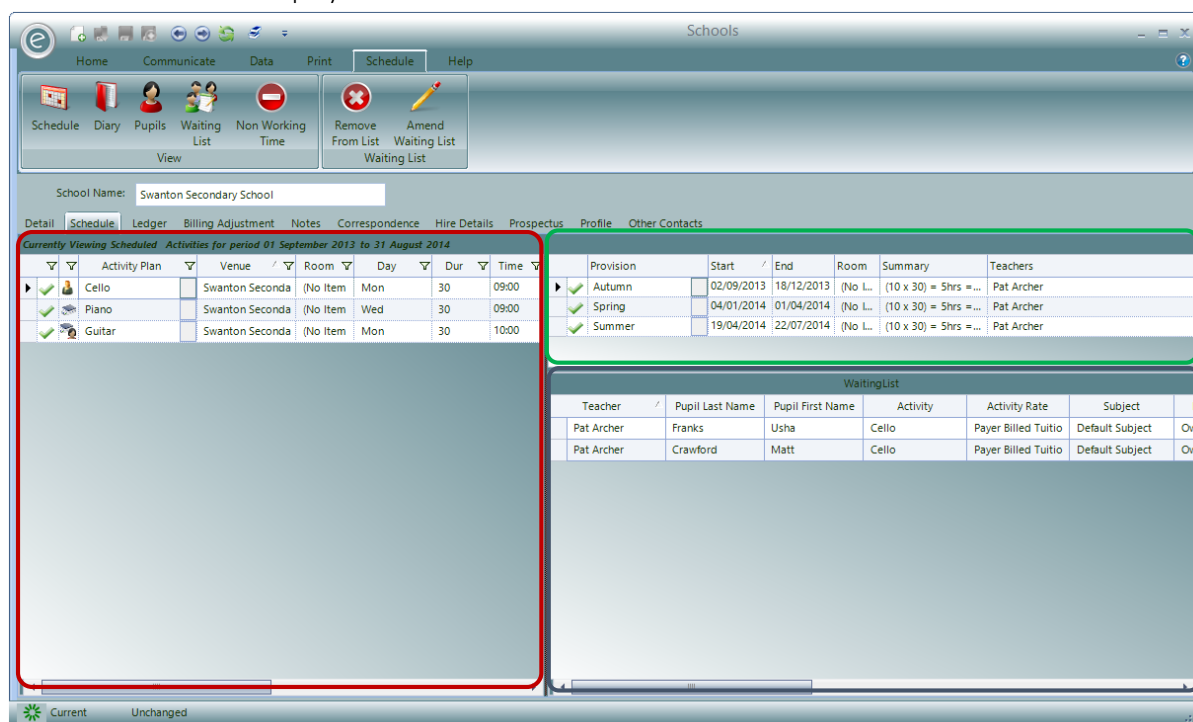
Similarly to the normal *Schedule View* and *Pupils View*, the red box highlights the Activity Plans and the green box highlights the available Provision Periods.

Pupils in the Waiting List are now displayed within the blue box.

This is expanded below:

The main information here includes:

Teacher   Teacher requested by the Pupil

Pupil Last Name   Last name of the Pupil

Pupil First Name   First name of the Pupil

Activity   Activity requested by the Pupil

Application   Date that Pupil applied to be on the Waiting List

Start   Date the Pupil wishes to start Tuition

Payer   Payer associated with the Pupil

View in a Pupil Record Card

You can also view the Waiting Lists for a *particular Pupil* by checking their Record Card.

To do this, click:

Open Pupil Record Card > Wait List tab

This displayed below:
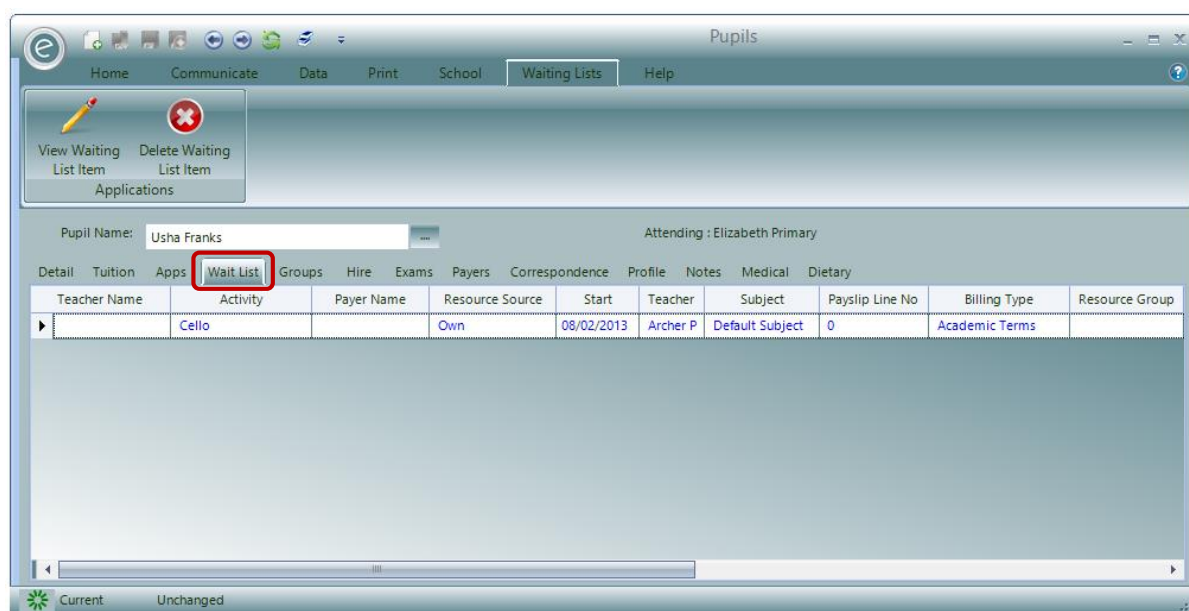
The status of their Waiting List entry (either on the Waiting List or now in tuition) is colour coded.

The entry will be coloured blue if the Pupil is *still on the Waiting List*:

Or it will be coloured **green** if they have *started tuition*:

Amending a Waiting List Entry

You can modify any Waiting List Entry by selecting it and clicking **Amend Waiting** for Schools and Centres and clicking **View Waiting List Item** for Groups.

This is highlighted below:

This will display a form you can use to alter the items details, as displayed below:

You can change the Pupil and Payer and other information such as:

Application Date   Enter the date of the request to be added to the Waiting List was received. The value will default to the current date.

Billing Type   Enter the Provision Type offered in the dropdown menu.

School/Centre/Group   Select the Centre from the drop down list.

Activity   Enter the required Activity from the drop down list.

Teacher   If the request specified a Teacher you can click on the Teacher tick box and select a Teacher from the drop down list. Waiting Lists requests are often channel via a Teacher and entering the Teacher here means that a list of Pupils on the Waiting List can be produced for each Teacher.

Start On or After   Enter the date the Pupil wishes to *start tuition*. This date will default to the current date.

Resource Source   Select the option to show the source of the Resource to be used for tuition where this is relevant. The options are.

- *Hire* – They wish to hire/loan from you.
- *Schools* – They plan to use a Resource provided by the School (Only is School waiting list).
- *Own* – They are planning on using their own Resource.
- *Unknown* – Resource is not required for this tuition.

Notes   Any notes about the entry.

Click **Apply Changes** to save the changes.

Remove a Waiting List Entry

You can also remove an Entry from the Waiting List by selecting it and clicking on the **Remove From List** button. This is highlighted below:

Converting a Waiting List Entry to Actual Tuition

▶ [Watch the Video Tutorial here](#)

As and when places in Activity Plans become available you will need to transfer Pupils from the Waiting list into the Activity Plan. To do this, select the Pupil to transfer from within the Waiting List and *drag it across to the left and drop it onto the chosen Activity Plan*.

This is illustrated below. For example transferring Usha Franks into the Cello Activity Plan:
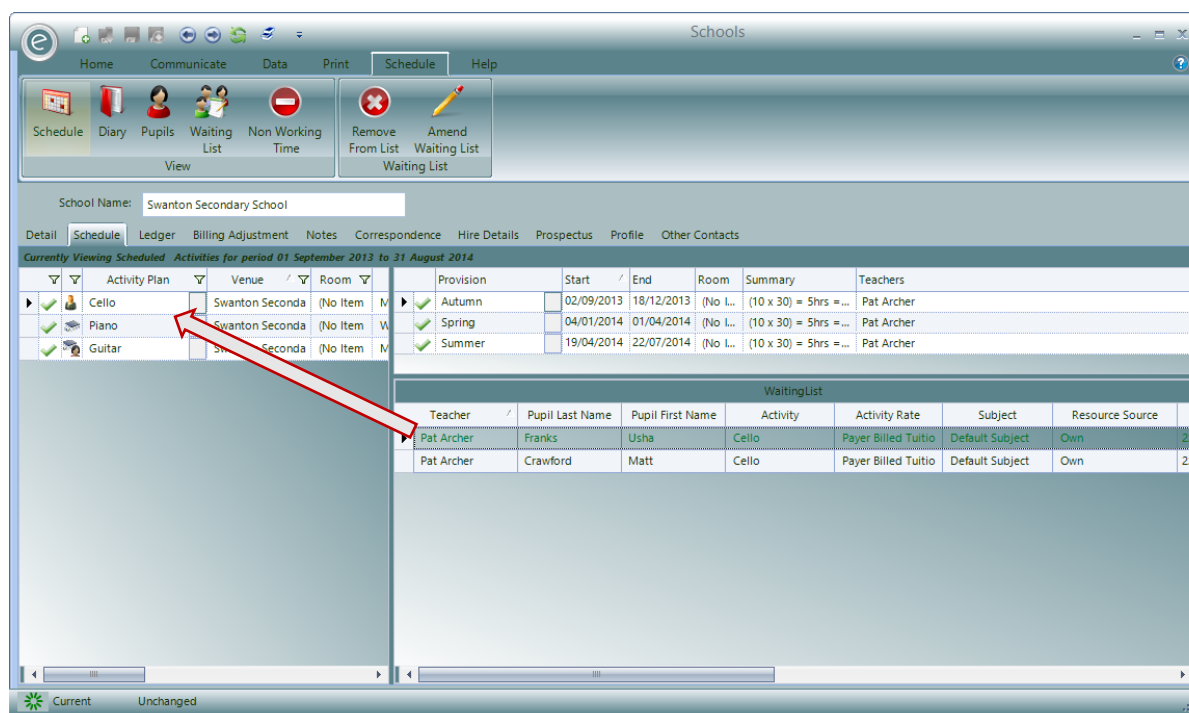
Ensemble will then open the window displayed below:
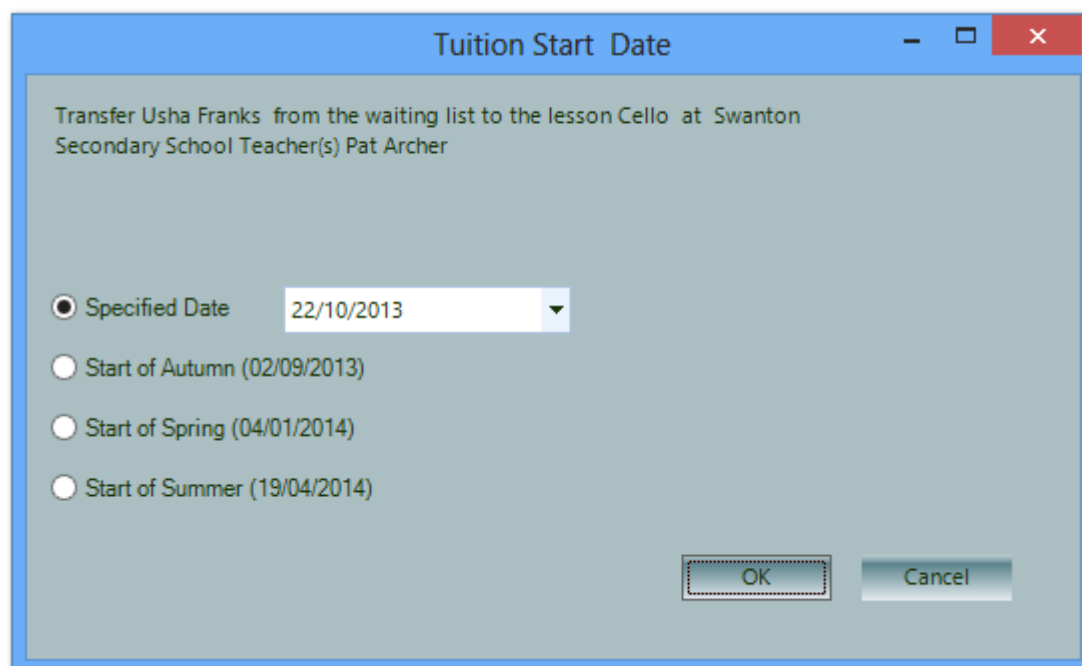
Here you will need to specify the Date that the Pupil will begin the tuition.

Print a Waiting List
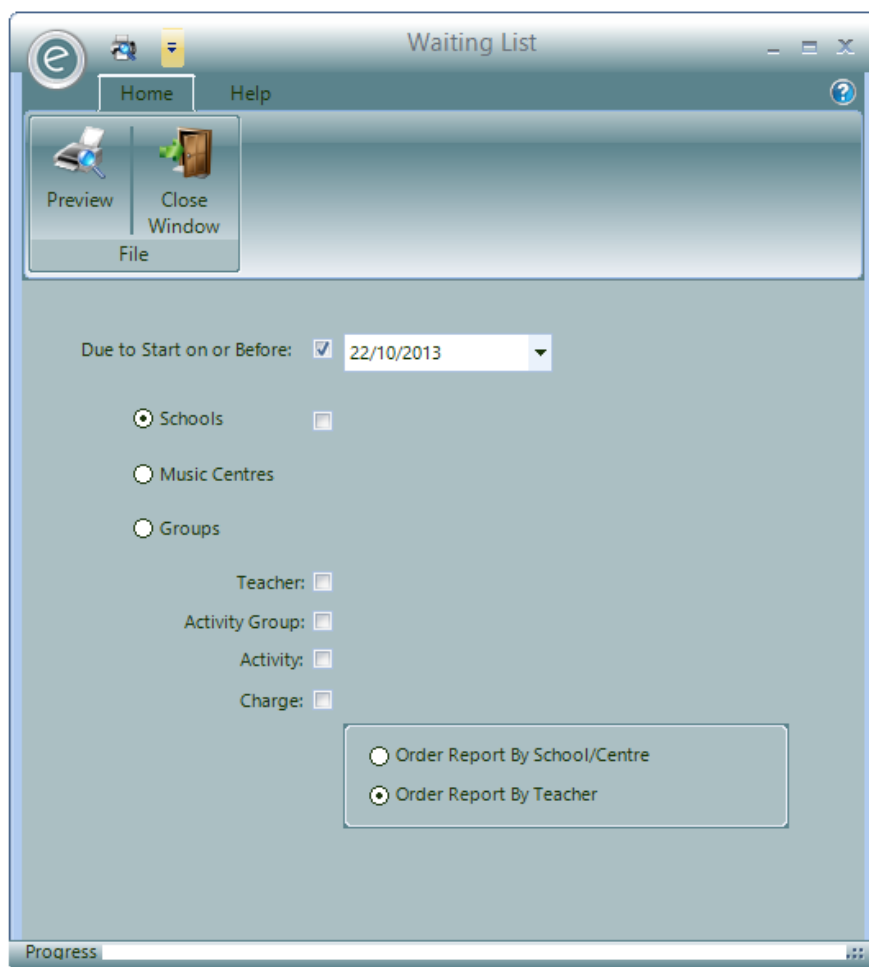
You can print a Waiting List by clicking:

Pupils (Ribbon Menu) > Pupil Reports > Print Waiting List

Alternatively, you can *view the Report for a specific School/Centre/Group* directly from their Record Card by:

Opening a School/Centre/Group Record Card > Print tab > Print Waiting List

Either of these options will display the window below:

This allows you to select to print the report by Teacher or Centre/School and to include Pupils who wish to start tuition before a specified date. You can also select a specific School/Centre, Teacher, Activity or Charge.

Click **Preview** to view the Report.

The Waiting List is displayed below:

18. Teacher Admission Letters

This Letter is designed to be sent to Teachers *making them aware of the students on a Waiting List.* This gives the Teacher a chance to assess the Pupil and decide if they are suitable for the lesson.

To produce this you will need to click:

Teacher (Ribbon Bar) > Pupil Reports > Print Teacher Admission Letters

This will display the window below:

Simply choose the date range for Pupil applications and you can additionally select a particular **Teacher**.

Click Preview to view the Admission Letter.

This is partially displayed below:

> Elizabeth House
> Exeter Business Park
> Exeter
> Devon
> EX1 3QS
>
> 24 October 2013
>
> TO: Pat Archer
>
> We have received an application on behalf of the pupil named below. Would you please assess the pupil's suitability on your next visit to the school. Should there be any reason why this child should not learn the instrument requested, please contact the parent/carer to explain the reasons for this and return the pro forma below to the Admin Team at Stoneham Court.
>
> When a place becomes available for lessons, you **must** advise the parent/carer. Once confirmed, please complete and sign the attached pro forma and return to Admin at the address above. This must be done as sooon as the place and stat date has beemn agreed with parents/carers.
>
> **Pupil:**
>
> Usha Franks   Age: 10   DOB: 24/07/2003   SCHOOL YEAR: 6
>
> Instrument: Lesson Type: G
> Lesson Location:

19.   Applications

Unlike entering details of a Pupil onto a Waiting List, entering *Applications* assumes a *place is available for the Pupil* and that the Pupil's tuition can start. The details entered are similar to a Waiting List Entry although you can create an Activity Plan as part of the process if it does not already exist.

The other difference is because we are assuming the tuition can start, the system creates the Invoice for the tuition element at the same time and where a payment is entered allocates the payment to the Invoice.

Entering a School or Centre Application

To enter an application, click:

Pupils (Ribbon Menu)> Enter School Applications / Enter Centre Applications

This process begins by first requesting the Pupil and then the Payer.

After selecting a Pupil and Payer the following form is displayed:

The red box highlights the Pupil and Payer chosen for this Application.

Begin the Application in the green box. Here you must first indicate if the Pupil is applying to join an existing Activity Plan or if a new Activity plan needs creating by selecting Use Existing Lesson or Create New Lesson respectively. If you select the option to Create New Lesson you are taken to a new window where this can be done. When completed, you are returned to the current window.

School/Centre	Depending on this being a Centre or School request select the appropriate entry from the drop down list.
Provision Type	Enter the Provision Type for the type of Activity Plan the Pupil is waiting to join.
Activity Plan	Select the Activity Plan from those defined at the School/Centre and displayed in the drop down list.
Provision	Select the Provision Period/term in which the Pupil is starting.
Subject	Enter the Subject being taken by the Pupil from the drop down list.
Lesson Type	Select from the following:

- Individual – The Pupil is receiving individual tuition.
- Shared – The Pupil is sharing tuition with one other
- Group – The Pupil is in a group
- Other – Some other tuition arrangement such as class teaching.

Note: If you select Shared or Group then you can also select a Group Letter, allowing you the opportunity to organise Pupils into sets of Groups. The Group Letters range from A to Z.

Resource	Select from the following:

- Hire – Pupil is hiring a Resource
- Schools – Schools supply a Resource
- Own – Pupil provides their own Resource

Optional when turned on in *Education Parameters*:

Subject	Select a Subject from the dropdown

As you enter details of the Application, the form will calculate the cost and display this on the form. This is highlighted in the blue box:

Charge	Select the Charge Rate the Pupil will be charged for the tuition.
Assessment	Select the Pupils starting Assessment Level from the drop down box.
Start On or After	Enter the date the Pupil starts tuition. This date will *default to the first date in the selected Provision*.
Tuition Notes	Any notes about the entry.

Optional when turned on in *Education Parameters*:

Subsidy	If the Pupil is entitled to a Subsidy from the School, select the Subsidy check box and choose the Subsidy. This is only relevant if it is a *School Tuition Application*.
Payer Remission	If the Pupil is entitled to a Remission, tick the box and choose a Remission from the drop down list.

If the Application included any payment, the details of this payment can be added in the Payment Details section, highlighted by the blue box. The options are:

Cash	A cash payment has been received. You will need to specify the amount.
On Account	Payment will be taken later
Cheque	A Cheque has been received. You will need to specify the amount and the Cheque No

Where a payment has been received a Receipt Posting will be made. The Posting will be added to any other Postings with the same reference. The reference is automatically generated as WL-YYYY/MM/DD-NN. Where

- *WL* Indicates a waiting list payment
- *YYYY* is the current year.
- *MM* is the current month
- *DD* is the day
- *NN* is a sequential number added to the reference if the generated reference number is not available. The system will keep incrementing this number until it finds a reference that is available. A reference is not available if there are already Receipt Postings with the reference that have been allocated a Payslip Number i.e. they have been marked as banked, or the reference has been used by another User.

You may also enter any Notes regarding the payment.

The Application generates an Invoice when the Application is added. If the Receipt Required tick box is *ticked*, the Invoice will be *marked to be printed*. If this is not ticked, printing will be suppressed.

If marked for printing it will be included the next time the *Print Invoice* option is selected.

Note: For more information regarding Receipts and printing Invoices, refer to **Receipts** and **Print Invoices** in the **Finance in Ensemble** Chapter.

Click Save and Close to save the Application.

Entering a School Course or Centre Course Application

When Courses are enabled in the *Education Parameters* you will be able to enter an Application for a Course in a School or Centre. To do this click:

Pupils (Ribbon Menu)> Enter School Course Applications / Enter Centre Course Applications

This process begins by first requesting the Pupil and then the Payer.

After selecting a Pupil and Payer the following form is displayed:

The red box highlights the Pupil and Payer chosen for this Application.

Begin the Application in the green box. Here you must first indicate if the Pupil is applying to join an existing Activity Plan or if a new Activity plan needs creating by selecting Use Existing Lesson or Create New Lesson respectively. If you select the option to Create New Lesson you are taken to a new window where this can be done. When completed, you are returned to the current window.

School/Centre	Depending on this being a Centre or School request select the appropriate entry from the drop down list.
Course	Select a Course from the dropdown menu
Module	Select a Module from the dropdown menu
Provision Type	Enter the Provision Type for the type of Activity Plan the Pupil is waiting to join.
Activity Plan	Select the Activity Plan from those defined at the School/Centre and displayed in the drop down list.
Provision	Select the Provision Period/term in which the Pupil is starting.
Subject	Enter the Subject being taken by the Pupil from the drop down list.
Lesson Type	Select from the following:

- Individual – The Pupil is receiving individual tuition.
- Shared – The Pupil is sharing tuition with one other
- Group – The Pupil is in a group
- Other – Some other tuition arrangement such as class teaching.

Note: If you select Shared or Group then you can also select a Group Letter, allowing you the opportunity to organise Pupils into sets of Groups. The Group Letters range from A to Z.

Resource	Select from the following:

- Hire – Pupil is hiring a Resource
- Schools – Schools supply a Resource
- Own – Pupil provides their own Resource

Optional when turned on in *Education Parameters*:

Subject	Select a Subject from the dropdown

As you enter details of the Application, the form will calculate the cost and display this on the form. This is highlighted in the blue box:

Invoice Set	Select an Invoice Set from the dropdown menu
Charge	Select the Charge Rate the Pupil will be charged for the tuition.
Assessment	Select the Pupils starting Assessment Level from the drop down box.
Start On or After	Enter the date the Pupil starts tuition. This date will *default to the first date in the selected Provision*.
Tuition Notes	Any notes about the entry.

Optional when turned on in *Education Parameters*:

Subsidy	If the Pupil is entitled to a Subsidy from the School, select the Subsidy check box and choose the Subsidy. This is only relevant if it is a *School Tuition Application*.
Payer Remission	If the Pupil is entitled to a Remission, tick the box and choose a Remission from the drop down list.

If the Application included any payment, the details of this payment can be added in the Payment Details section, highlighted by the blue box. The options are:

Cash	A cash payment has been received. You will need to specify the amount.
On Account	Payment will be taken later
Cheque	A Cheque has been received. You will need to specify the amount and the Cheque No

Where a payment has been received a Receipt Posting will be made. The Posting will be added to any other Postings with the same reference. The reference is automatically generated as WL-YYYY/MM/DD-NN. Where

- *WL* Indicates a waiting list payment
- *YYYY* is the current year.
- *MM* is the current month
- *DD* is the day
- *NN* is a sequential number added to the reference if the generated reference number is not available. The system will keep incrementing this number until it finds a reference that is available. A reference is not available if there are already Receipt Postings with the reference that have been allocated a Payslip Number i.e. they have been marked as banked, or the reference has been used by another User.

You may also enter any Notes regarding the payment.

The Application generates an Invoice when the Application is added. If the Receipt Required tick box is *ticked*, the Invoice will be *marked to be printed*. If this is not ticked, printing will be suppressed.

If marked for printing it will be included the next time the *Print Invoice* option is selected.

Note: For more information regarding Receipts and printing Invoices, refer to **Receipts** and **Print Invoices** in the **Finance in Ensemble** Chapter.

Click Save and Close to save the Application.

Entering Subscription Applications

To enter a Subscription Application, click:

Pupils (Ribbon Menu) > Enter Subscription Applications

This process begins by first requesting the Pupil and then the Payer.

After selecting a Pupil and Payer the following form is displayed:

The red box highlights the Pupil and Payer chosen for this Application.

Begin the Application in the green box. Here you can select:

Subscription
: Select the Subscription that is be being applied from in the dropdown menu

Period
: Select the Provision Period from the dropdown menu

Charge
: Select the Charge Rate the Pupil will be charged for the tuition.

Start On or After
: Enter the date the Pupil starts tuition. This date will *default to the first date in the selected Provision*.

Optional when turned on in *Education Parameters*:

Payer Remission
: If the Pupil is entitled to a Remission, tick the box and choose a Remission from the drop down list.

Sponsor
: Select a Sponsor from the dropdown menu if the Pupil has a Sponsor.

If the Application included any payment, the details of this payment can be added in the Payment Details section, highlighted by the blue box. The options are:

Cash
: A cash payment has been received. You will need to specify the amount.

On Account
: Payment will be taken later

Cheque
: A Cheque has been received. You will need to specify the amount and the Cheque No

Where a payment has been received a Receipt Posting will be made. The Posting will be added to any other Postings with the same reference. The reference is automatically generated as WL-YYYY/MM/DD-NN. Where

- *WL* Indicates a waiting list payment
- *YYYY* is the current year.
- *MM* is the current month
- *DD* is the day
- *NN* is a sequential number added to the reference if the generated reference number is not available. The system will keep incrementing this number until it finds a reference that is available. A reference is not available if there are already Receipt Postings with the reference that have been allocated a Payslip Number i.e. they have been marked as banked, or the reference has been used by another User.

You may also enter any Notes regarding the payment.

In the Summary section you can select:

Enrolment Fee	If an Enrolment Fee applies it can entered
Total Due	The total charge for the Resource hire
Receipt Required	The application generates an Invoice when the application is added. If the *Receipt Required* tick box is ticked the Invoice will be marked to be printed, else printing will be suppressed. If marked for printing it will be included the next time the *Print Invoice* option is selected.

Note: For more information regarding Receipts and printing Invoices, refer to **Receipts** and **Print Invoices** in the **Finance in Ensemble** Chapter.

Click Save and Close to save the Application.

Entering Resource Applications

To enter a Resource Application, click:

Pupils (Ribbon Menu) > Enter Resource Applications

This process begins by first requesting the Pupil and then the Payer.

After selecting a Pupil and Payer the following form is displayed:

The red box highlights the Pupil and Payer chosen for this Application.

Begin the Application in the green box. Here you can select:

Hire Type	Select from the following:
	• Pupil – Pupil is applying to hire a Resource
	• School – School is applying to hire a Resource
	• School Hire For Pupil – School is applying to hire a Resource for a Pupil
	• Centre – Centre is applying to hire a Resource
Resource	Select an available Resource
Charge	Select the Charge Rate the Pupil will be charged for the tuition.
Subsidy	If the Pupil is entitled to a Subsidy from the School, select the Subsidy check box and choose the Subsidy. This is only relevant if it is a *School Tuition Application*.

Payer Remission	If the Pupil is entitled to a Remission, tick the box and choose a Remission from the drop down list.
Start On or After	Enter the date the Pupil starts tuition. This date will *default to the first date in the selected Provision*.
Hire Notes	Any notes about the entry.

If the application included any payment, the details of this payment can be added in the Payment Details section highlighted by the blue box. The options are Cash, On Account, Cheque and Card. You will also need to select the Billing Type which this applied for. Where the payment type indicates a payment you may also enter any notes regarding the payment in Payment Notes.

Inside the Summary section:

Total Due	The total charge for the Resource hire
Receipt Required	The application generates an Invoice when the application is added. If the *Receipt Required* tick box is ticked the Invoice will be marked to be printed else printing will be suppressed. If marked for printing it will be included the next time the *Print Invoice* option is selected.

Note: For more information regarding Invoices and Receipts refer to **Automatic Generation of Invoices** and **Receipts** in the **Finance in Ensemble** chapter.

Click Save and Close to save the Application.

Viewing Applications

Applications can be viewed in a Pupil Record Card:

Pupils (Menu Bar) > Open a Pupil Record Card > Applications tab

This is displayed below:

Amending an Application

You can modify any application by selecting it and clicking **View Application**. This will display a form you can use to alter the items details:

You can only change **Assessment** and **Payment Notes**. Changes made to an Application will be applied to all the associated tuition details.

Removing an Application

You can also remove an Application by selecting it and clicking on the **Delete Application** button. This will also remove all the related tuition details and is displayed below:

20.   Coach Routes

Pupils may need to use a Coach to get to their location of tuition. For example there may be a special event that Pupils are travelling to for a trip. To record this, Coach Routes are an optional Record that can be activated and created in Ensemble.

Note: Coach Routes are not available to Schools because it is the concern of the School to provide travel arrangements for the Pupils.

Enable Availability in Education Parameters

When you first setup your database, it *will not show* the Coach Routes option. You will therefore need to switch these on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Coach Routes' > Save and Close

This is displayed in the window below, with Use Coach Routes highlighted in the red box:
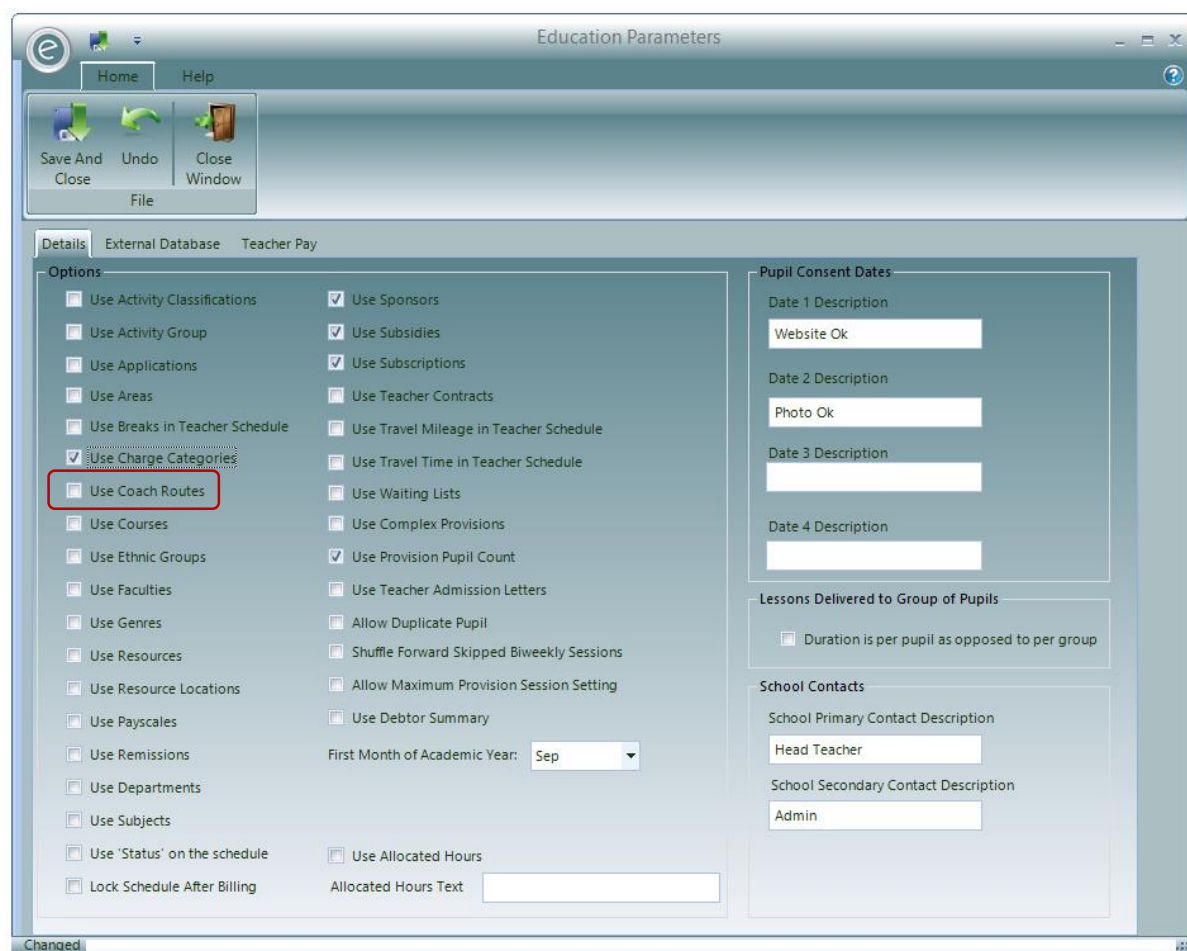
This will add the Coach Routes option to the System tab in the Menu Bar.

Create a Coach Route

To create a Coach Route click:

System (Menu Bar) > Coach Routes > New Coach Route

This will display the window below:
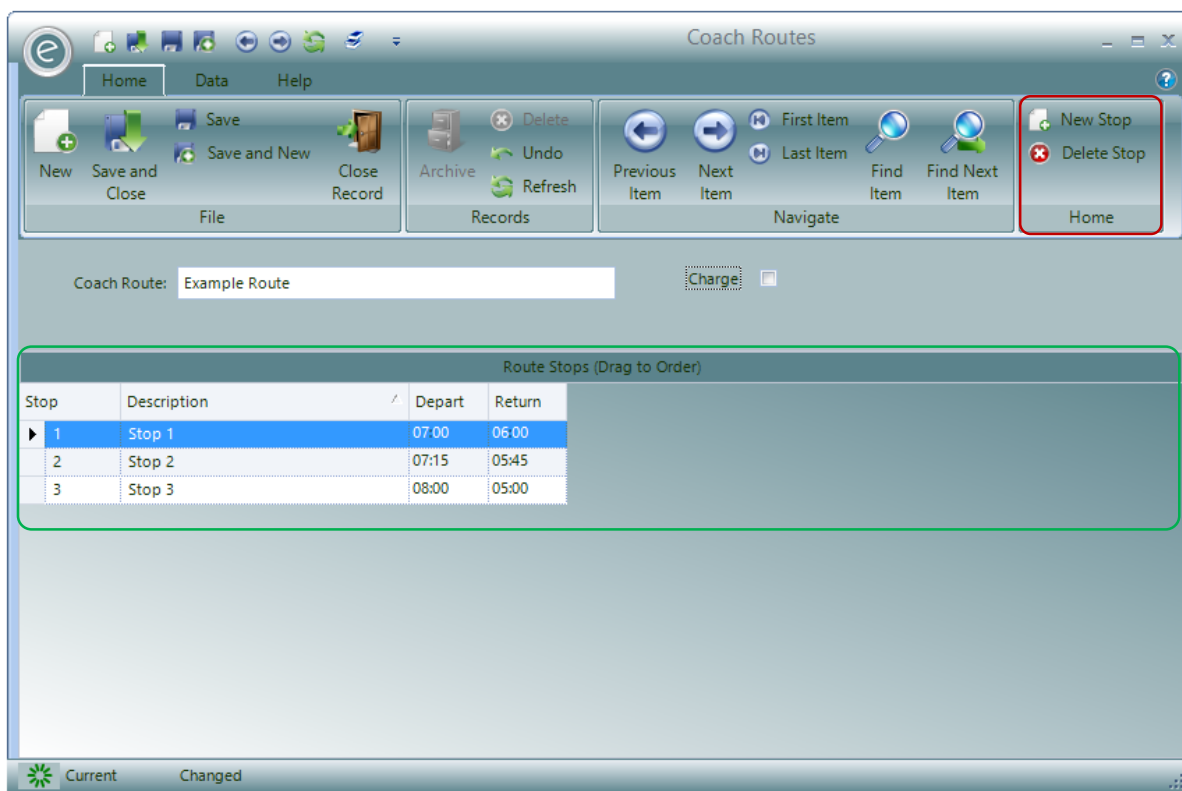
Type in the name of the Coach Route in **Coach Route** and tick **Charge** if you want to apply a pre-defined Charge for a Coach fee.

Note: Refer to **Charges** within the **Core Records** Chapter if you wish to have more information regarding Charges.

The Record Card will contain *Route Stops* for the journey. To create a Route Stop click New Stop as highlighted in the **red box**. This will add a row in the **green box** as a new Route Stop. You can then enter the **Description** and **Depart** and **Return** time of each Stop.

Click **Save and Close** to create the Coach Route.

Applying a Coach Route

Defined Coach Routes are applied when:

- Pupils are added to a Centre Activity Plan
- Pupils are added as a Member of a Group

The window displayed below, is an example for *adding a Pupil as a Member to a Group*:

Choose the Coach Route and the Route Stop as highlighted in the red box.

After completing the other click **Save and Close**.

Coach Routes can also be added after the tuition or membership record is created. For example if a Member of a Group will be using the Coach, then this can be entered from the Current Members tab of the Group Record Card:

Coach Reports

Once Pupils are using Coach Routes, you will be able to produce Reports such as Pupil List and a Register.

Coach Pupil List
The *Coach Pupil List* will display a list of the Pupils using the Coach Route at each Stop.

To produce a Coach Pupil List for a *Centre* click:

Centres (Ribbon Menu) > Coach Pupil Listing

Alternatively, to produce a Coach Pupil List for a *Group* click:

Groups (Ribbon Menu) > Print Coach Pupil List

Either option will display the window below:

Select the **Coach Route** for the Centre or Group and select the **Date Range**.

Click **Preview** to view the Report.

An example is displayed below:

Coach Register

The *Coach Register* will display a Register of the Pupils using the Coach Route at each Stop.

To produce a Coach Register for a *Centre* click:

Centres (Ribbon Menu) > Coach Register

Alternatively, to produce a Coach Register for a *Group* click:

Groups (Ribbon Menu) > Print Register

Either option will display the window below:

Select the **Coach Route** for the Centre or Group.

Select the **From Date** for the Register to start from and the **No of Days**.

Click **Preview** to view the Report.

An example is displayed below:

Pupil Assessment

1. Assessment Codes
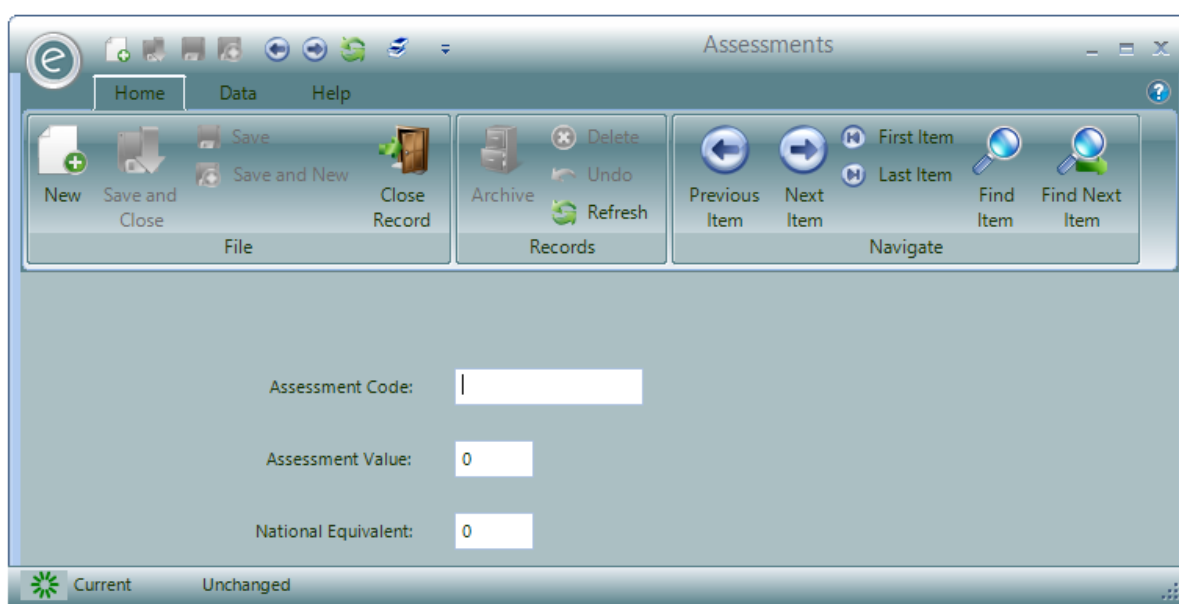
▶ [Watch the Video Tutorial here](#)

Assessment Codes represent the *level of an Exam*. For example these may be Grade 1, 2,3 and so on. You are also given the option to *define your own Assessment Values* and the equivalent nationally recognised value.

To create an Assessment, click:

Pupils (Menu Bar) > Assessments > New Assessment Code

This will display the window below:

Enter the **Assessment Code** and a numerical value for its **Assessment Value** and **National Equivalent**.

Click **Save and Close** to save.

2. Exams

Exam Boards

All exams taken by Pupils will be run by an Exam Board.

To create an Exam Board, click:

Pupils (Menu Bar) > Exam Boards > New Exam Board

This will display the window below:
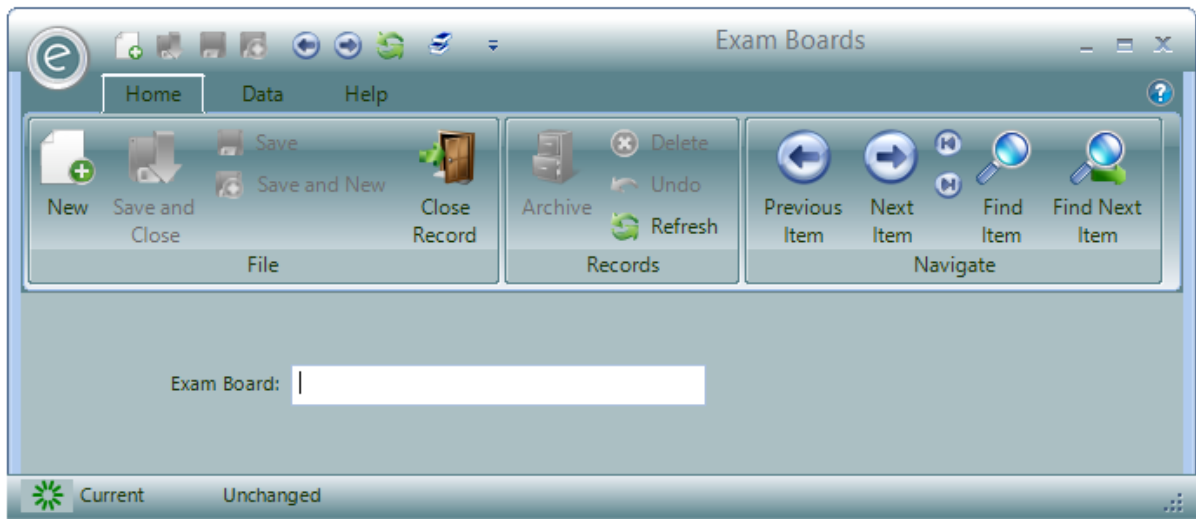
Simply type in the name of the **Exam Board**.

Click **Save and Close** to save.

Add Exams

To record the Exams that Pupils have taken:

Open a Pupil Record Card > Exams tab > New Exam

This will enter a *new row* in the window displayed below:
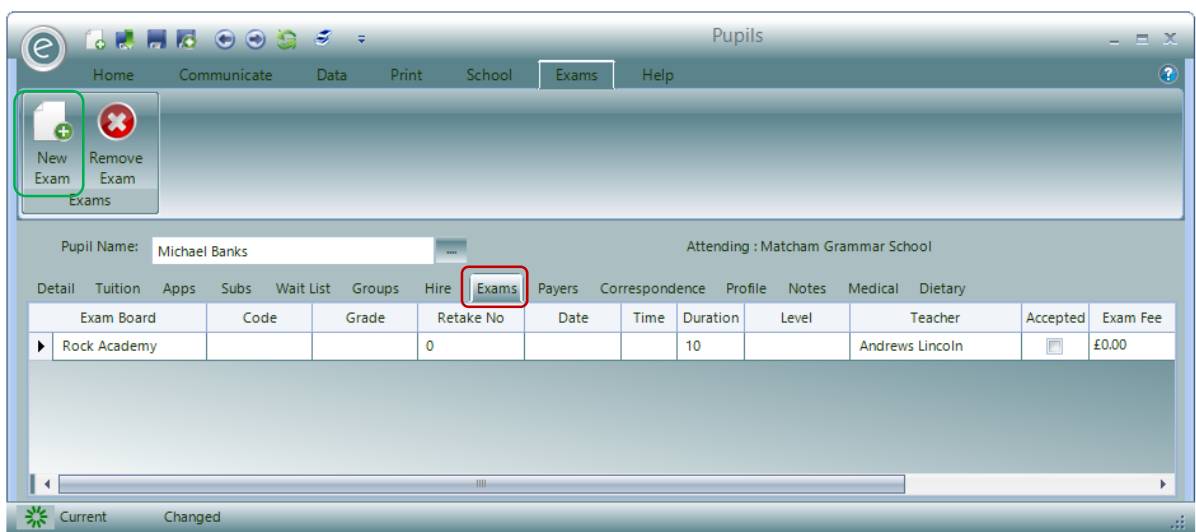
You will then be able to enter and change the information within the column headers:

Exam Board	Select from the pre-defined Exam Boards
Code	Specify an Exam Code from the Exam Board
Grade	Enter the Grade of the Exam
Retake No	Enter the number of retakes for this Exam
Date	Date of Examination
Time	Time that the Exam begins

Duration	Duration in minutes of the Exam
Level	Specify the level of Exam taken
Teacher	Select the Teacher of the Pupil for this Exam
Accepted	Tick when the Pupil has been accepted to take exam.
Exam Fee	Fee of the Exam
Venue Fee	Fee for use of the Venue (if applicable)
Accompanist Fee	Fee for use of an Accompanist (If applicable)
Notes	Additional notes

Click Save and Close to save.

Pupil Exam List

You can print off a Report which will list the Pupils who have Exams by clicking:

Pupils (Ribbon Menu) > Pupil Reports > Print Pupil Exam List

This is will display the window below:
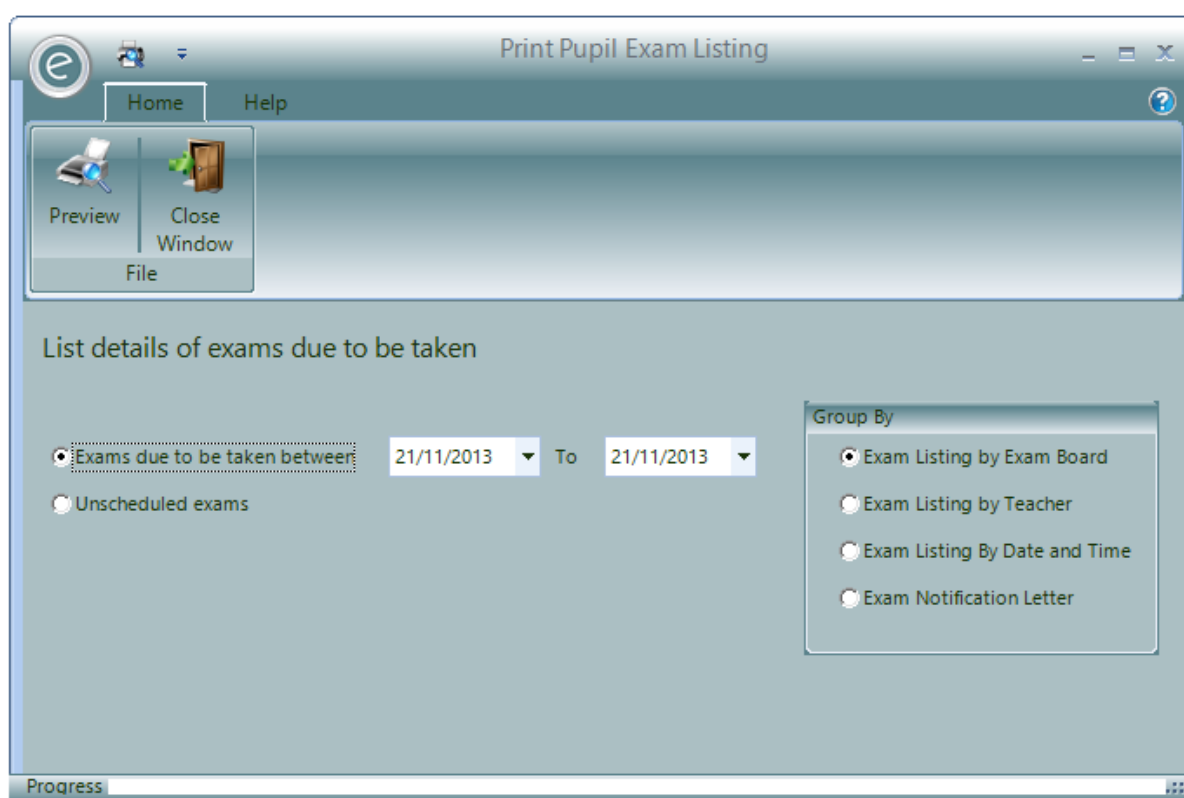
You will be able to specify a *date range* for when the exams are taken or choose to view Unscheduled exams.

There are various ways to group the Report on the right.

Click Preview to view the Report.

An example is displayed below:

3. Pupil Analysis

Pupil Assessment Analysis

 [Watch the Video Tutorial here](#)

This will analysis the Assessment levels of Pupils and their progression. To access this, click:

Pupils (Ribbon Menu) > Pupil Analysis > Print Assessment Analysis

This will display the window below:
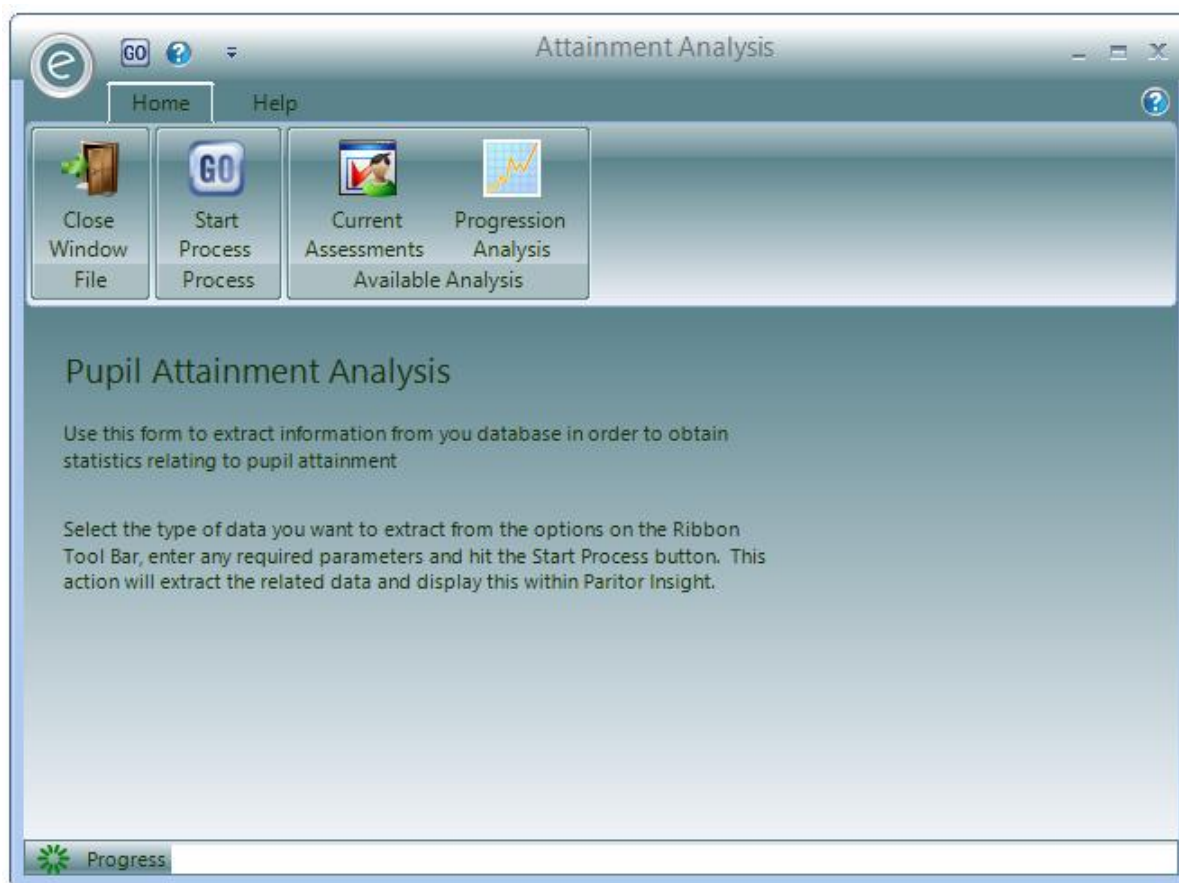
There are two different analyses that you can do here: An analysis for **Current Assessments** and a **Progression Analysis**.

Current Assessments

Clicking on **Current Assessments** will display the window below:
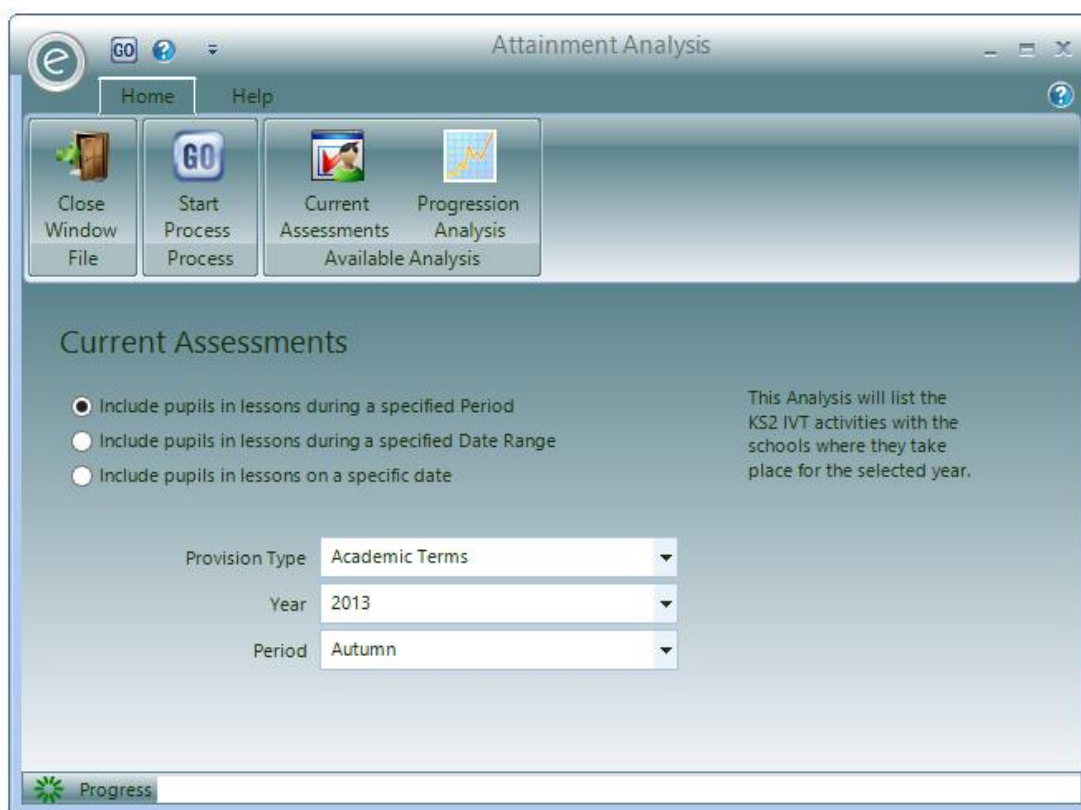
There are three options for selecting the date range of the analysis.

Select pupils in lessons during a specified Period	This requests a *Provision Type, Academic Year and Provision Period* and lists all Pupils inside the specified date range.
Select pupils in lessons during a specified Date Range	This requests *a From and To date* and lists Pupils who have tuition within these dates
Select pupils in lessons on a Specific Date	This requests a *specific date* and lists only those Pupils who were having tuition at that time.

Click Start Process to begin the analysis.

Progression Analysis
Clicking on Progression Analysis will display the window below:
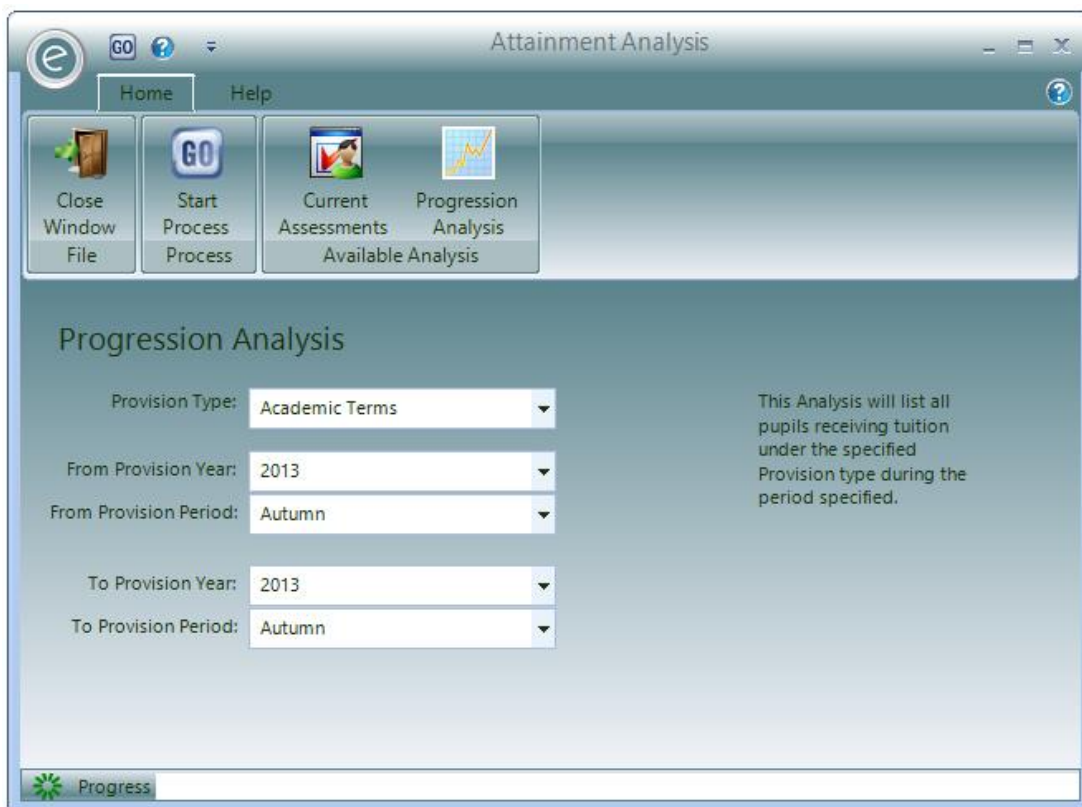
Select the **Provision Type** that you will perform the analysis for.

Then you will need to choose the range of the **Provision Year** and **Provision Period**.

Click **Start Process** to begin the analysis.

First Access Analysis

The *First Access Analysis* will allow you to determine how many Schools are taking up First Access lessons, how many Pupils are in those lessons and continue in them.

Note: For more information on setting up First Access lessons, refer to **Activity Types** in the **Advanced Schedule Management** chapter.

To access First Access Analysis, click:

Pupils (Ribbon Menu) > Pupil Analysis > KS2 IVT Analysis

This will display the window below:
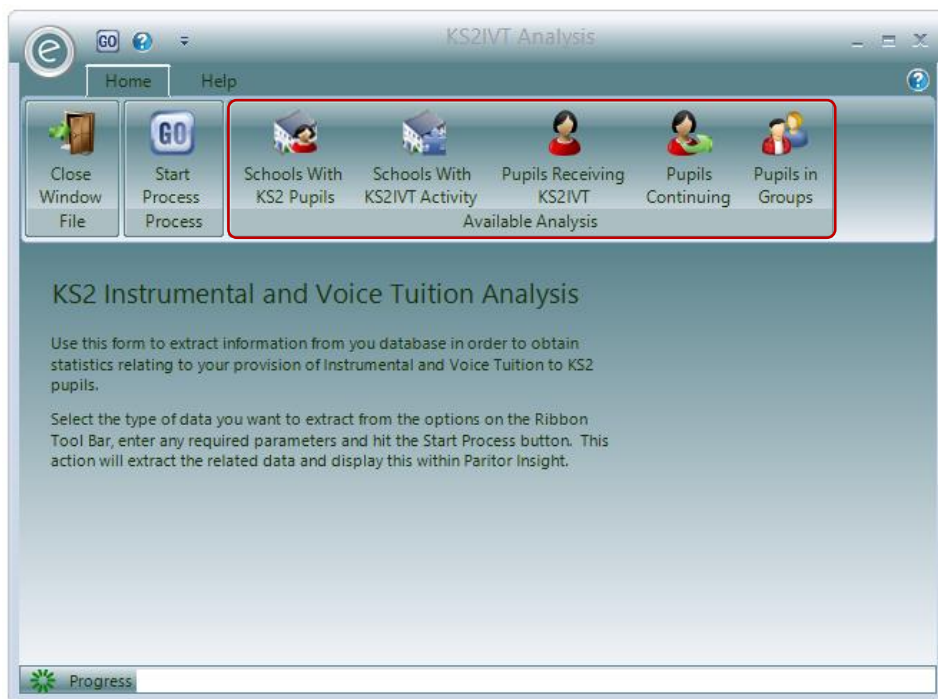
As highlighted by the red box, there are 5 analyses to be done in turn:

1. Schools with First Access Pupils
2. Schools with First Access Activity
3. Pupils Receiving First Access
4. Pupils Continuing
5. Pupils in Groups

Each is now discussed below:

Schools with First Access Pupils

This will list the Schools that *can teach* First Access Pupils and is an important baseline for the statistics that follow. Clicking on Schools with KS2 Pupils will display the window below:
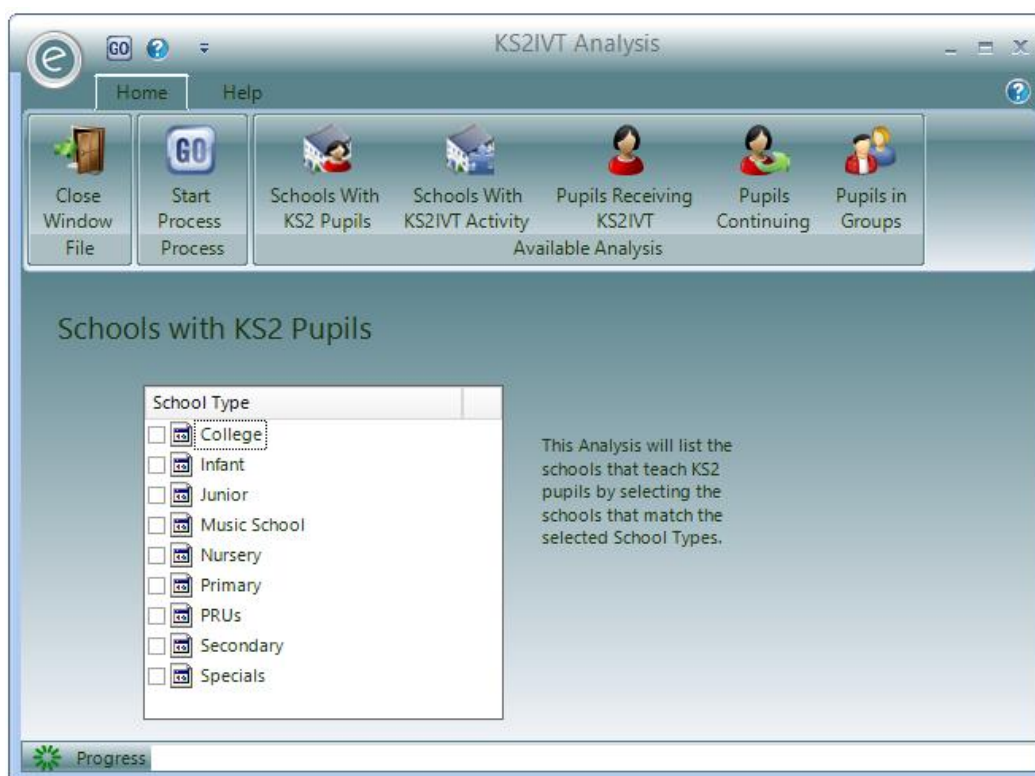
You can select the **School Types** you wish to include in the analysis.

Once happy, click **Start Process** to begin.

An example of the analysis is displayed below for *Primary Schools*:

Therefore as a result of the analysis, there are 5 Schools which can teach First Access Pupils.

Note: PupilCount is *not related* to the number of Pupils in Activity Plans. This refers to the *number of Pupils in the School*. This field is defined in the Details tab of a School Record Card.

Schools with First Access Activity

This will list the Schools that actually have First Access Activity Plans (defined with *First Access Programme* Activity Types).

Note: For more information on Activity Types, refer to **Activity Types** in **the Advanced Schedule Management** chapter.

Clicking on **Schools with KS2IVT Activity** will display the window below:

Select the **year** to perform the analysis for.

Click **Start Process** to perform the analysis.

An example is displayed below:

Therefore as a result of the analysis, there were two Schools with First Access Activity Plans. Which means that 2/5, or 40%, of the available Schools are providing First Access tuition.

Pupils Receiving First Access

This will now list the Pupils who are receiving tuition from First Access Activity Plans.

Clicking on **Pupils Receiving KS2IVT** will display the window below:

Select the year you wish to analyse for.

Click **Start Process** to begin.

Pupils Continuing

The *Pupils Continuing* analysis will analyse the Pupils that began with First Access/Wider Opportunities tuition and list those that have continued with the tuition the following year.

Clicking on **Pupils Continuing** will display the window below:

Select the one year range you wish to analyse.

Click **Start Process** to begin.

Pupils in Groups

This will list the Pupils that are in First Access lessons that are also Group lessons.

Note: This is not the referring to lessons for Groups such as Orchestras and Bands. Here it simply specifies whether the lesson is conducted with a group of pupils rather than one-to-one tuition.

Clicking on **Pupils in Groups** will display the window below:
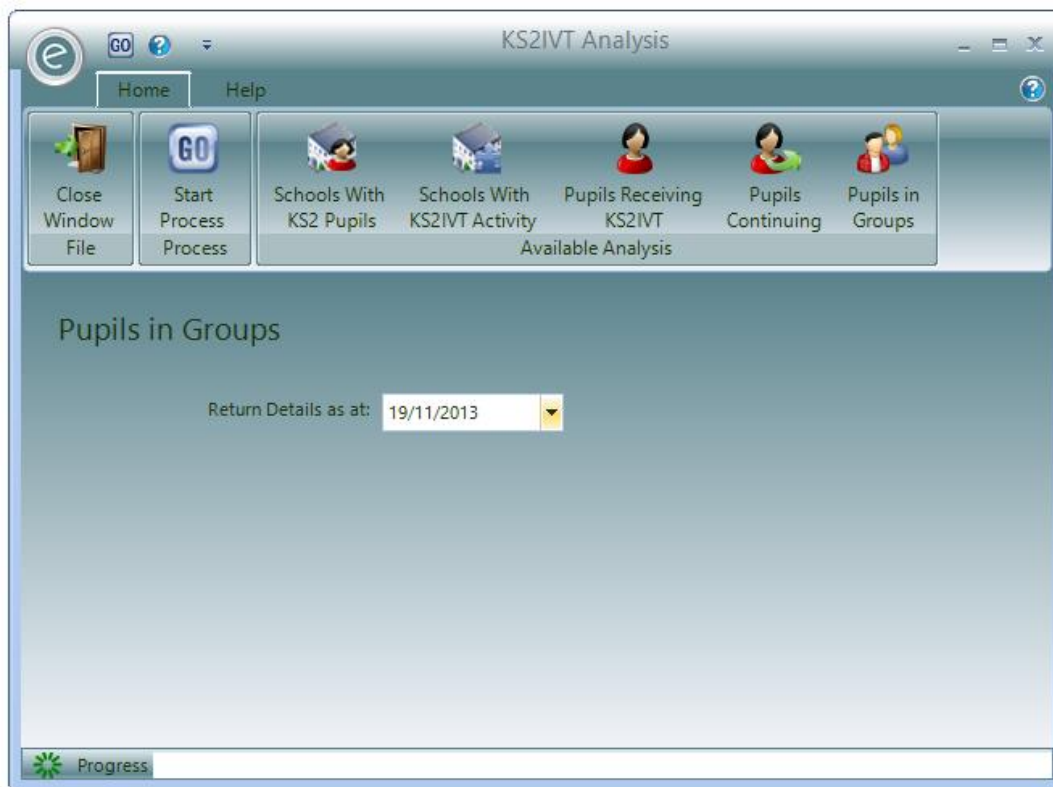
Select the date to run the analysis from.

Click **Start Process** to begin.

Report Master

On purchase of this tool, one of the Paritor team will activate the Report Master tool on your database. Once this has happened, there are areas that need attention before you can proceed with producing the reports.
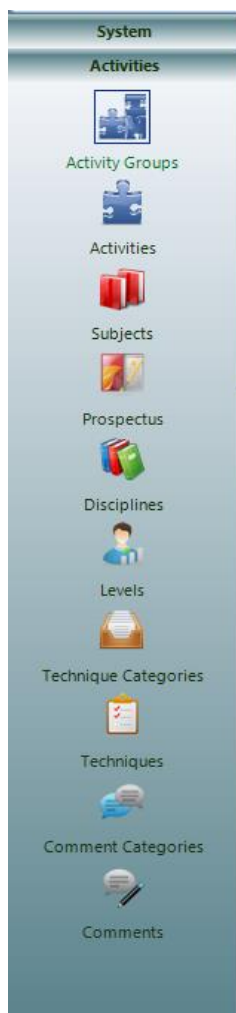
To start with, you need to set up these records within Ensemble.

These are:

1. Discliplines
2. Technique Categories
3. Techniques
4. Levels
5. Comment Categories
6. Comments

1. Disciplines

The first of these areas are *Disciplines*. These will relate closely to the Activities that your service delivers and contain the *Techniques* that your Teachers will use to assess their Pupils.

Important: Each Discipline must correspond to an existing Activity Record in Ensemble. For example if an Activity has been specified as Piano, then it's corresponding Discipline should be called Piano.

To create a Discipline, click:

Activities (Menu Bar) > Disciplines > New Discipline

This will display the window below:

Specify the name of the Discipline in the **Discipline** field.

If this is a Discipline that will be reported on, tick **Reportable**. This will already be ticked as a default.

After completing this, you are able to move onto the next stage; creating *Technique Categories.*

Apply a Discipline to an Activity

To apply a Discipline to an Activity, click:

Activities (Menu Bar) > Activities > Open an Activity record card

This will display the window below:
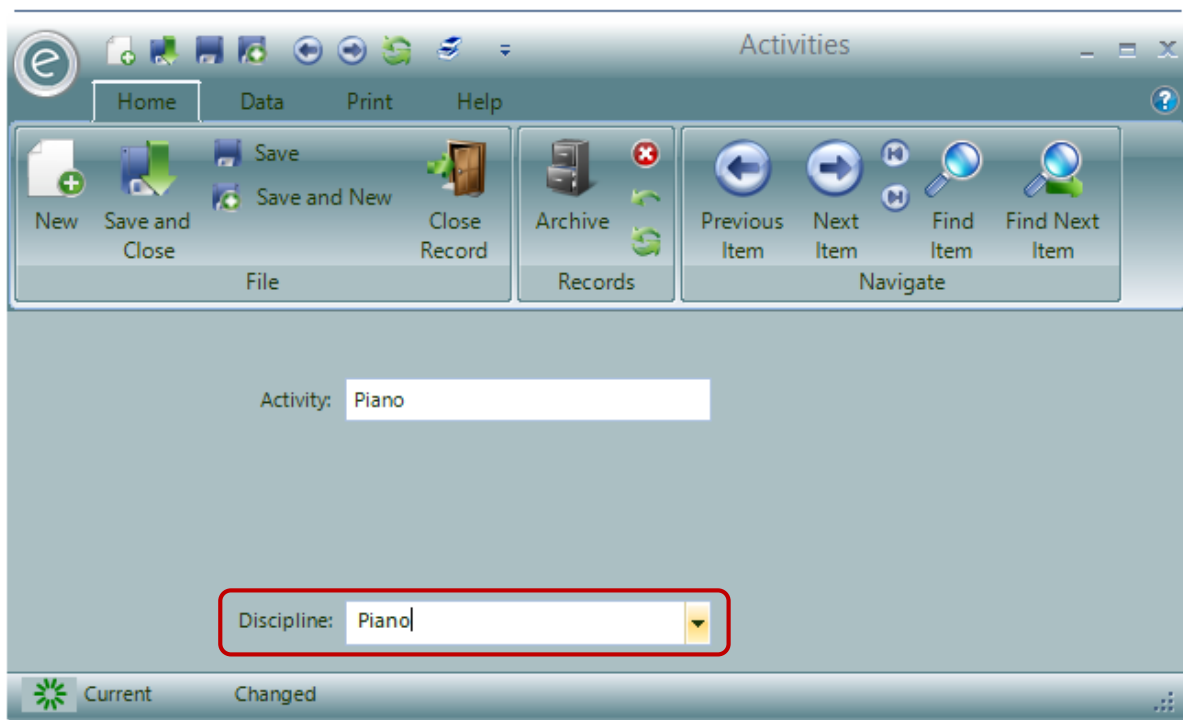
You can then apply the **Discipline** in the field highlighted.

Click **Save and Close** to save this change.

2. Techniques and Attainment Levels

Technique Categories

Technique Categories are used to group the different types of *Technique* that can be created. These must be created in order to create the specific Techniques which are the assessable qualities for a Pupil within each Discipline.

To create a Technique Category, click:

Activities (Menu Bar) > Technique Categories > New Technique Category

This will open a new window as displayed below:
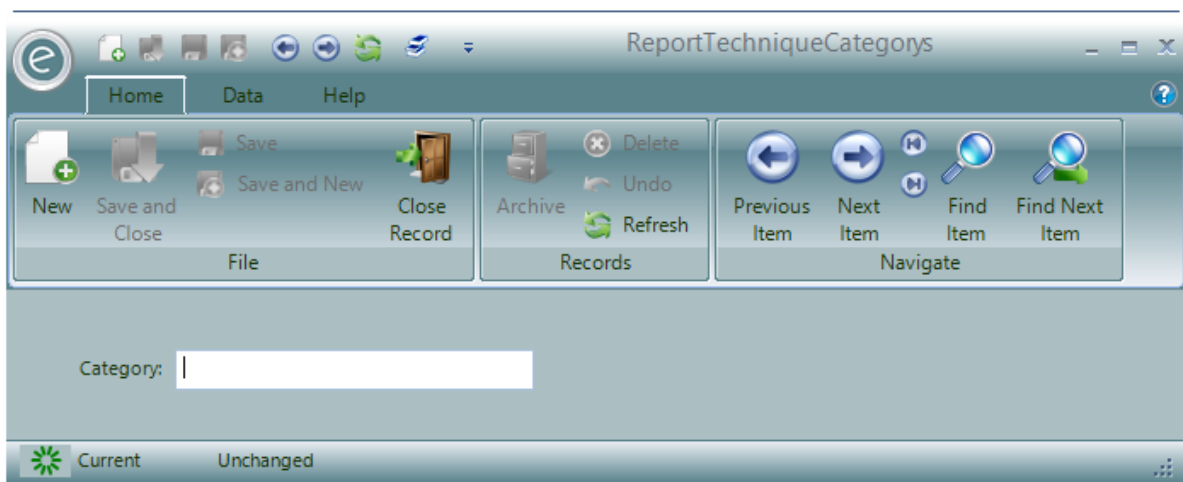
Here you can simply define the **Technique Category** and then **Save and Close**.

Techniques

To create an individual Technique click:

Activities (Menu Bar) > Techniques > New Technique

This will display the window below:

You can name your Technique to assess in the **Technique** field and assign a previously defined **Technique Category** in the dropdown box below.

Levels

The green box highlights the defined attainment levels which are referred to as *Levels* in Ensemble. A Teacher will be able to use these options to specify how well a pupil has performed in regard to this Technique. There are five pre-defined here. To make a Technique available its corresponding tickbox needs to be selected.

Once the Technique has been defined, click **Save and Close**.

Create a Level

To create a Level, click:

Activities (Menu Bar) > Levels > New Level

This will display the window below:
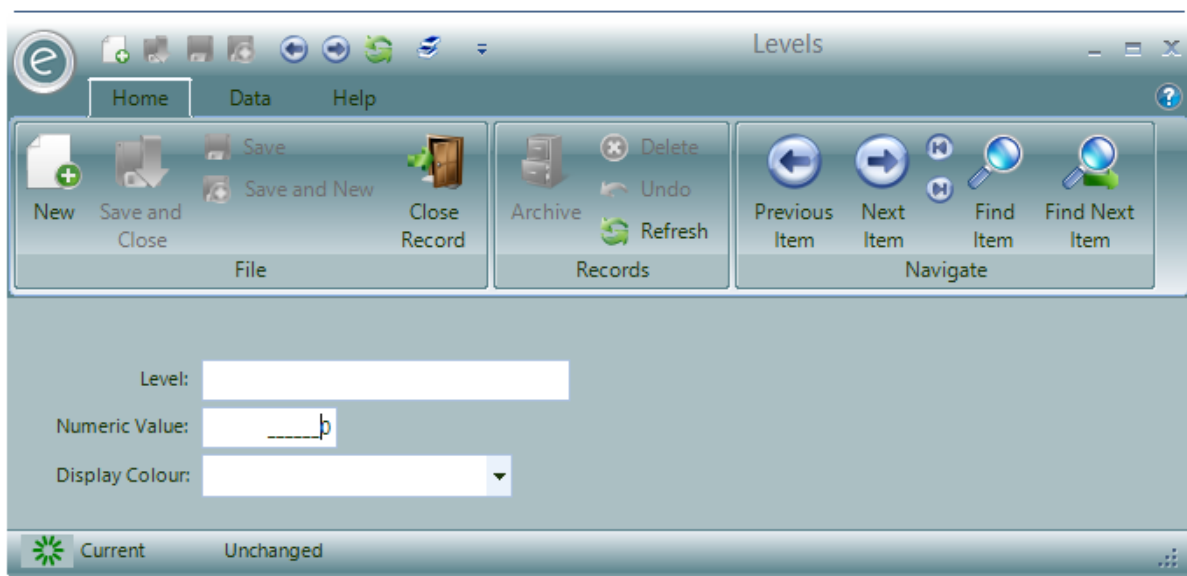
You will be able to give a description of the Level in the **Level** field.

You can define its **Numeric Value** which be applied to its sort order in Ensemble Home Screen.

Finally you can specify a **Display Colour**. This is will also be displayed on the printed reports.

Once finished click **Save and Close**.

3. Comments

You will be able to define remarks and any range of dialogue to be used in the pupil reports as *Comments*. Using the Report Master tool, these will be quickly copied into a report.

Comment Categories

Comment Categories are used to organise the Comments. Example categories are 'Excellent Progress', 'More Practice' or 'Future Wishes'.

To create a Comment Category, click:

Activities (Menu Bar) > Comment Categories > New Comment Category

This will display the window below:
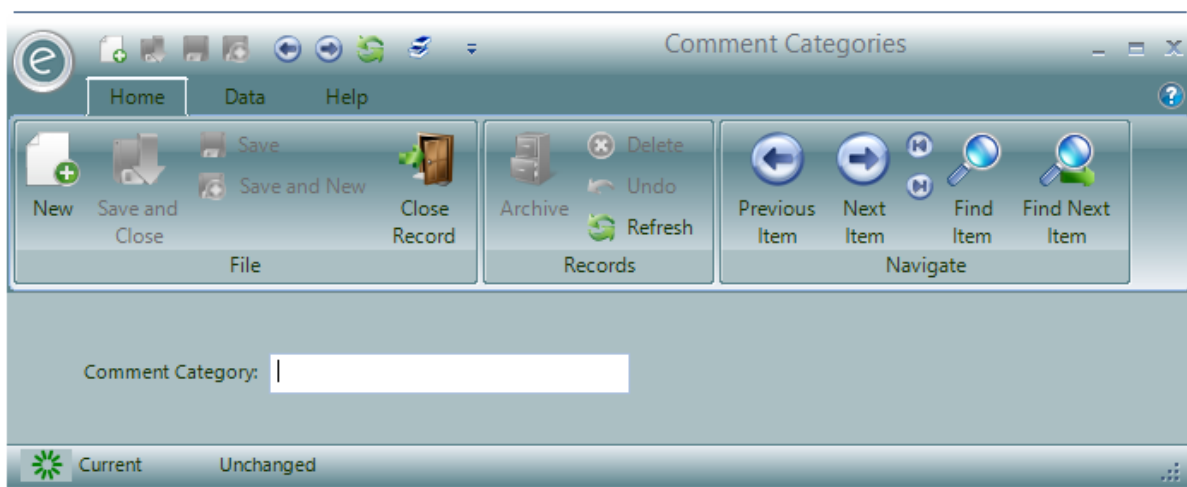
Simply write a description in the **Comment Category** field and click **Save and Close**.

Create Comments

To create a Comment to be used in a report click:

Activities (Menu Bar) > Comment > New Comment

This will display the window below:

You will be able to specify a previously defined **Comment Category** and then write the dialogue for the **Comment** in the textbox.

Note: There is a 4000 word limit.

When finished, click **Save and Close**.

4. Reportable Provision Periods

You will need to specify which Provision Periods (terms) your Teachers will need to produce end of term reports for. This is completed within the associated Provision Type record card. To access this click:

System (Menu Bar) > Provision Types > Open a Provision Type record card

In the window that opens there is a now an additional column for the Provision Periods on the far-right called **Open Reporting**. This is displayed below:

Period Description	PeriodNo	From Date	Break From Date	Break To Date	To Date	No. of Sessions	Open Reporting
Autumn	1	09/09/2013	28/10/2013	01/11/2013	20/12/2013	14	☐
Spring	2	06/01/2014	17/02/2014	21/02/2014	04/04/2014	12	☐
Summer	3	22/04/2014	26/05/2014	30/05/2014	17/07/2014	12	☐

To select a Provision Period that needs end of term reports made, *select the relevant tick-box*.

Note: We advise that once all the reports are completed and submitted that the Provision Period is de-selected to ensure that no duplicate

When finished click **Save and Close**.

5. Accessing Report Master Online

This section will show you how to access the Report Master tool via a webpage. You will need to ensure that your computer or device is connected to the internet.

Firstly, you will need to open a new webpage, and type the URL; live.paritor.com/t/XXXX

Note: Replace XXXX with your Customer Number. If your number is less than 4 digits long you must include the zeros. E.g. 0020.

This will open the webpage shown below.

Here, you need to enter your email address and password, and the click **Log On**. There is an option to reset your password if you have forgotten it. Entering your correct email address and password will log you on to the Report Master tool, and take you to the next webpage below.

The above webpage allows you to access the Report Master tool, by clicking on the **My Reports** button. Other tabs such as **My Account**, allows you to change your password. Finally, if you have purchased the **Live Teacher Add-On**, you will be able to access this tool from this webpage as well.

Viewing Reports

Clicking on the **My Reports** will open the webpage below.

Logging into the webpage will allow teachers to see a list of their pupils, as well as what stage of the reporting process each pupil is at. At the top of this view, you are provided with a drop down box. This allows you to choose which term you a reporting for. Then, you can filter the pupils into their different stages of the reporting process – *Incomplete, Completed, Submitted, Authorised, and All*.

- The **Incomplete** tick box will only show the reports that are not currently completed.
- The **Completed** tick box will only show reports that have comments added, as well as assessing all of the relevant techniques.
- The **Submitted** tick box will only show reports that have been completed and submitted to the music service administrator or potential line manager. If there is no line manager, the report will be set as 'Authorised'.
- The **Authorised** tick box will only show reports that have been submitted to the teacher's line manager, and the report has then been approved to be delivered to the pupil. This tick box only appears if the *Line Manager Parameter* is in use.

Completing Reports

Comments

The below view shows the comment bank that are allocated to each Pupil's report. After these comments are applied, you are able to edit the overall comment text on the report, but not the individual comments within the bank.

Michael Birchfield

Comments

Pupil: Dante Agg   **Activity:** Lower Strings   **Venue:** Ambridge Grammar School

Category: CODA ▼

Comment

+ Dante is working with a positive attitude and determination to tackle new ideas. His understanding of musical concepts is increasing and as a result the standard of his playing is being raised.

+ Dante produces good work in lesson time. There has been an improvement recently in his attempts to play using a correct hand position and he is progressing well.

+ Dante produces good work in lessons. He was experiencing some difficulty with the pulse and counting of beats but there has been considerable improvement in this area recently.

+ I am pleased to see considerable improvement in Dante's work recently. I feel he can make real progress now, given a more determined attitude to tackle new ideas and techniques.

```
Dante has made a good start, playing with confidence. However, he is sometimes too
talkative and misses important instructions. He now needs to channel his enthusiasm,
paying more attention to details of technique.
```

Save   Back

Techniques

When you edit Techniques will be taken to a pre-populated form with a range of techniques outlined by your Line Managers. Use the drop down boxed to assess performance on the defined Techniques.

Reviewing and Submission

Once the Techniques have been assessed the Comments written, the pupil's report will be automatically moved to *Completed.* You will now need to review it and check that the information entered is correct before submitting it.

The below view shows the review stage of the reporting process. From here, you are provided with the chosen marks for each technique, as well as the summary of comments at the bottom. You also have options to Submit the report, or to go back to make further changes.

Once the report has been submitted, it will await authorisation from the Line Manager to be published the parents of the pupil.

6. Reviewing Reports

Once reports have been submitted online, they will need to be authorised by respective *Line Managers* before they can be published to the Parents of the Pupils. A Line Manager can choose to authorise their reports via:

- Ensemble
- Report Master web-page

Each Line Manager for a Teacher is specified in the record card of the Teacher. To view this click:

Tuition (Menu Bar) > Teachers > Open a Teacher record card > Details tab

This will display the window below:

The Line Manager for this Teacher has been highlighted in the red box.

Authorising Reports in Ensemble

To authorise reports in Ensemble you need to click:

Pupils (Ribbon Menu) > Review Pupil Reports

This will display the window below:

You will need to select the **Provision Period** and the **Line Manager**. Then click **Review Reports**.

This will displays all the Teachers for Line Manager and the current status of their reports. If a report is allocated to *With Manager* then it will require authorisation. *Double-click* on the row to display the authorisation form below:

Here you will be able to see each report from this Teacher that requires authorisation one-by-one.

Highlighted in the red box, at the top-left is the number of *reports remaining* that require authorisation. You also can see the basic information for the report such as the *Pupil, Teacher (Report Author) and their Discipline*.

The green box highlights the Techniques and the Level that the Pupil achieved.
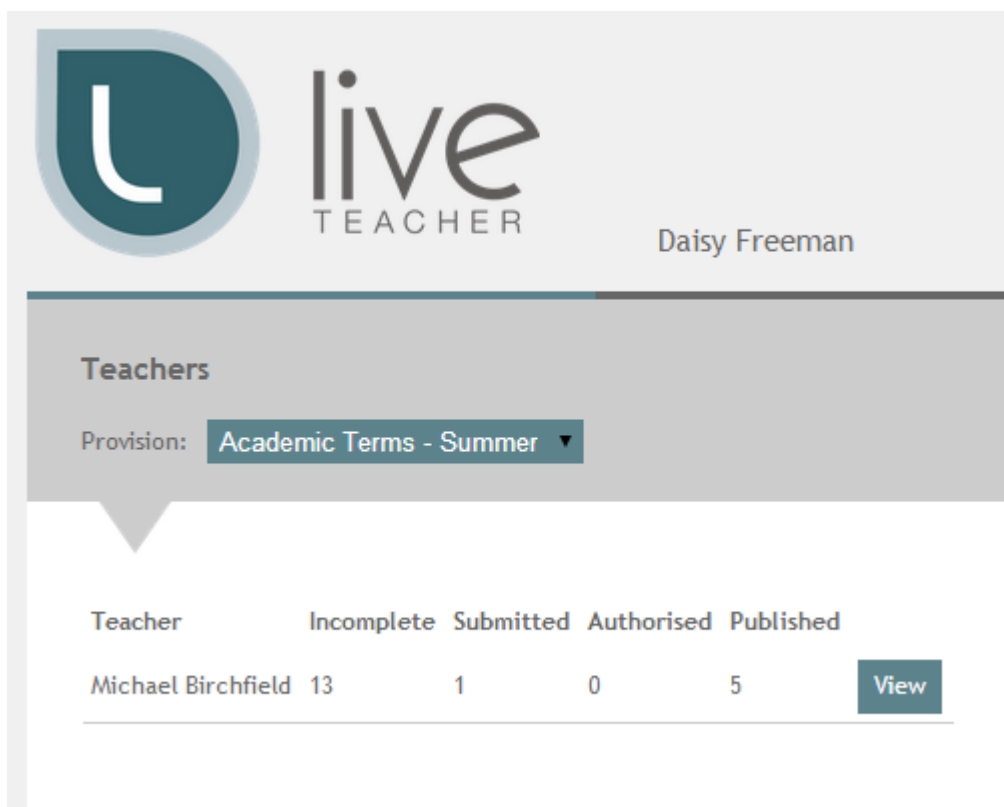
The blue box displays the completed comments from the Teacher, which you can also edit. You will also be able to enter your own comments in the **Manager Comment** field. If you are going to return this report to the Teacher you can also enter your **Reasons for Rejection**.

To authorise a report, click **Authorise** at the top. Alternatively if this reports needs corrections, click **Reject** to return it to the Teacher. You can also **Skip** through.

Authorising Reports Online

If you have been listed as a *Line Manager* you will need to authorise all the reports for your Teachers before they are sent to the parents of the pupils. You can also review your submitted reports in the online Report Master web-page.

As a Manager you will have an additional option in the home-page called **Managers Reports** in which you can authorise your submitted reports:
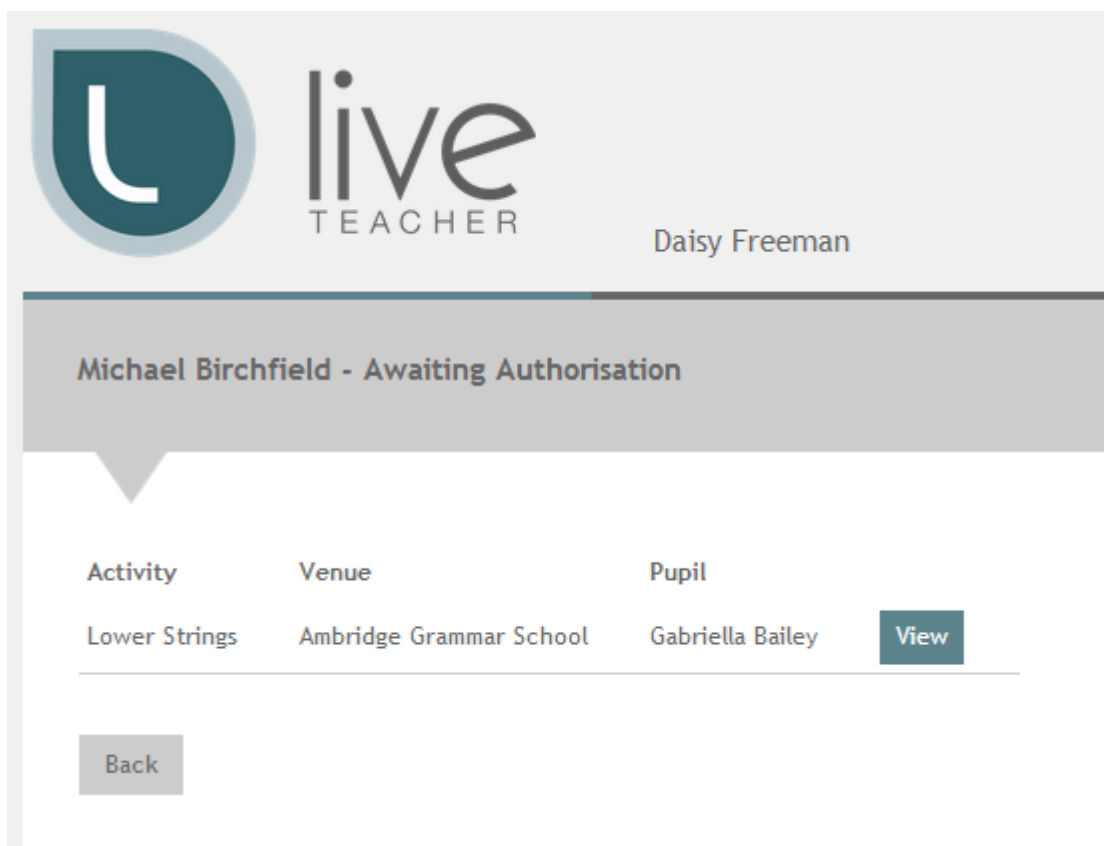
You will be able to select the **Provisions** to view your Teachers and their reports. You can see how reports they have that are *Incomplete, Submitted, Authorised and Published.*

To list the reports that need authorisation (*Submitted*) from a Teacher click **View**.

You will then be view each report that requires authorisation by clicking **View**:

You will now see the submitted report from the Teacher. It will display the required Techniques, the Attainment Levels awarded and the Teacher's comments.

You can your own comments by clicking **Add Comment**.

To authorise a report click **Authorise**, alternative select **Return** if the report requires amendments from the Teacher.

Click **Back** to return to the previous page.

7. Printing the Reports

Once a report has been authorised it will now be awaiting publication to the parents of the pupils. You will need to print the reports from within Ensemble. This is done by clicking:

Pupils (Ribbon Menu) > Print Pupil Reports:
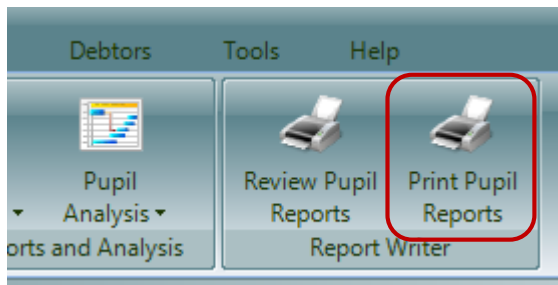
This will display the window below:
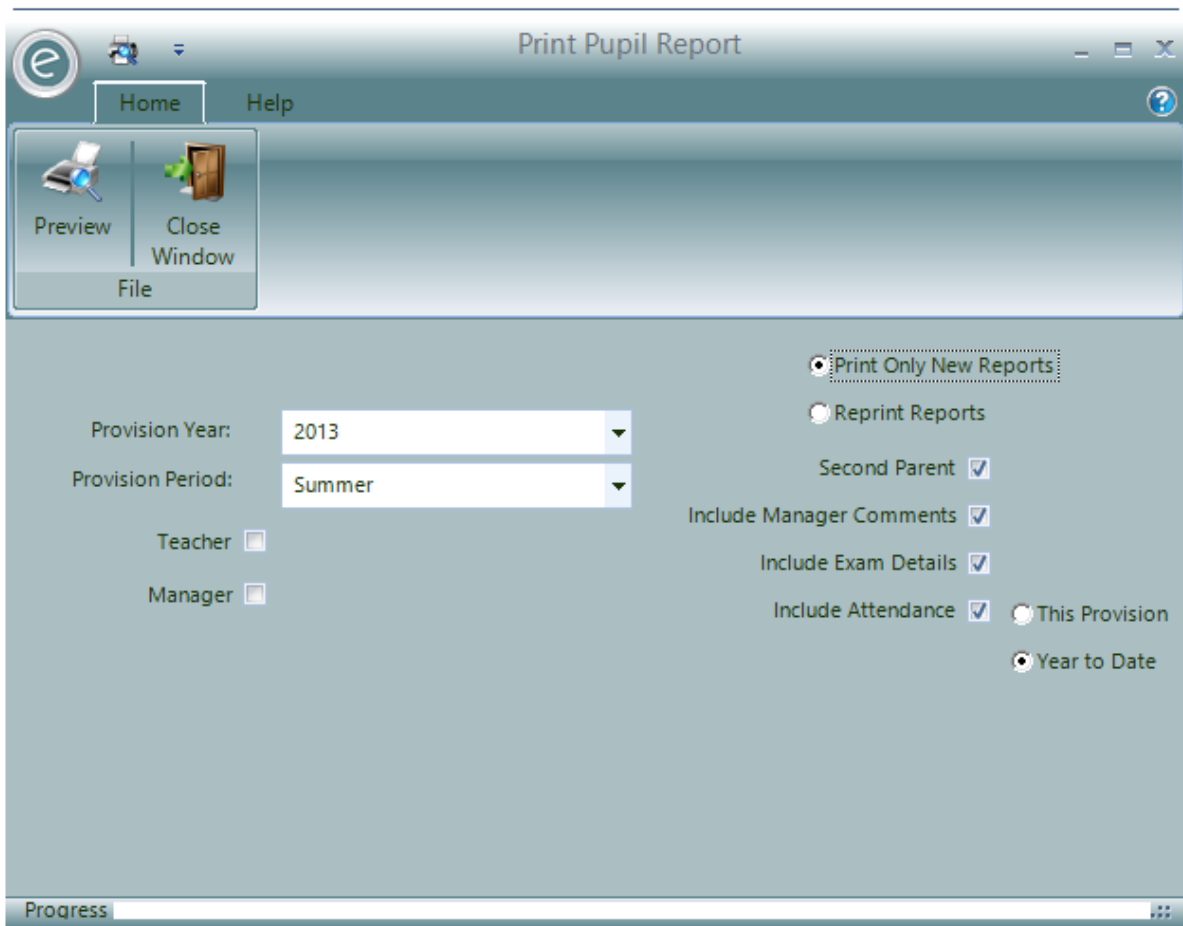
You will need to select the relevant **Provision Year** and **Period**. You can also filter the reports to be displayed for a specific **Teacher** or **Manager**.

You will also need to select to **Print Only New Reports** or to **Reprint Reports** again if they have already been printed once before.

There are also four tick-boxes that are selected by default:

Second Parent	The report will addressed to their second Parent. Un-tick to address to their first parent
Include Manager Comments	Comments from the Manager will be included in the report
Include Exam Details	Details of the pupil's exams will be included
Include Attendance	The Pupil's attendance will be included. You can then choose to display the attendance for **This Provision** or from the whole **Year to Date**

When happy with your options, click **Preview** to view the reports.

An example is displayed below:

New Academic Year

In order to start working on a new academic year, the following processes have to be completed in the correct order:

1. Define the new Calendar
2. Progress the Schedules and Diary Entries
3. Progress Pupil's tuition

1. Setting up the Calendar
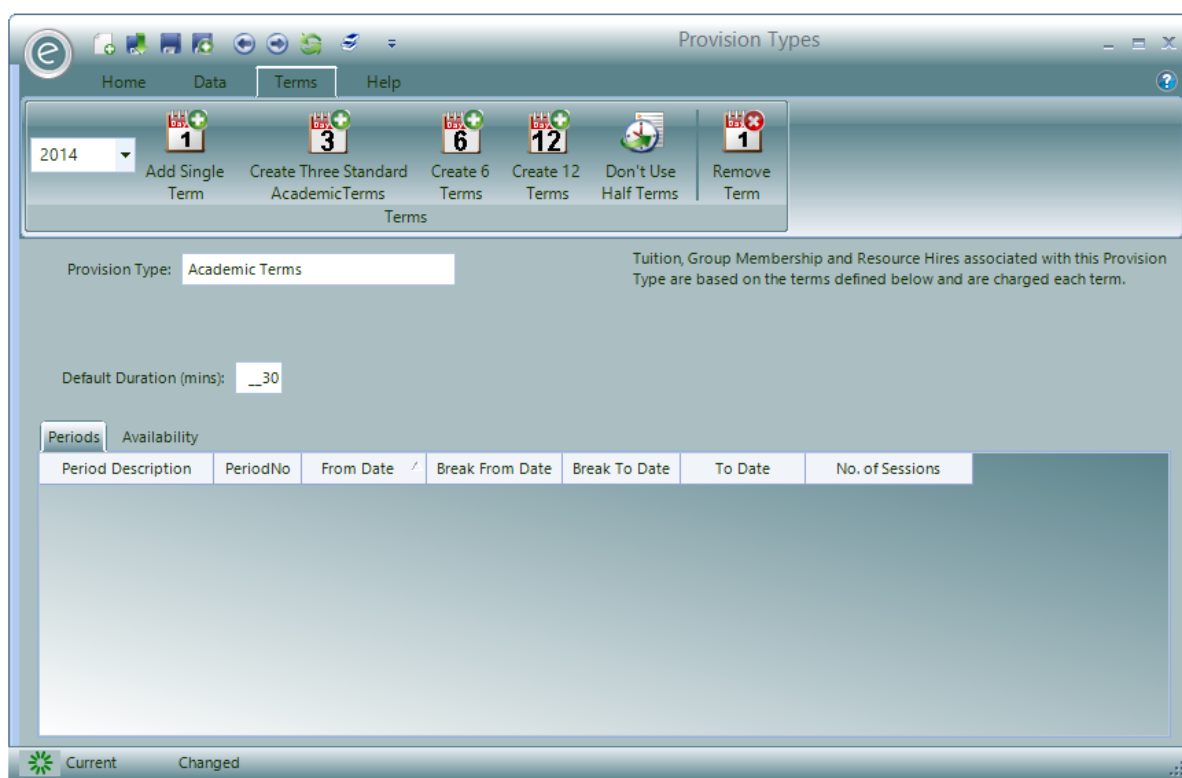
Provision Types

▶ <u>Watch the Video Tutorial here</u>

First update those Provision Types that define tuition with the new Academic Year's terms. To do this open up:

System (Menu Bar) > Provision Types > Open Provision Type Record Card

This is displayed below:

Change the year to the new year then use the appropriate term length creation button on the toolbar to create a set of terms.

For example if you have a three term based year, click on the **Create Three Standard Academic Terms** button. Once these have been created you can adjust the dates and number of weeks as required.

If there are any dates that lie within any of your terms on which *no Activity is to take place* and these dates have not previously been defined in the *Non-Working Time* then you can select these on the **Availability Tab**.

Non-Working Time

For system wide *Non-Working Time*, this can be found under:

Tools (Ribbon Menu) > Housekeeping > Non-Working Time

This is displayed below:
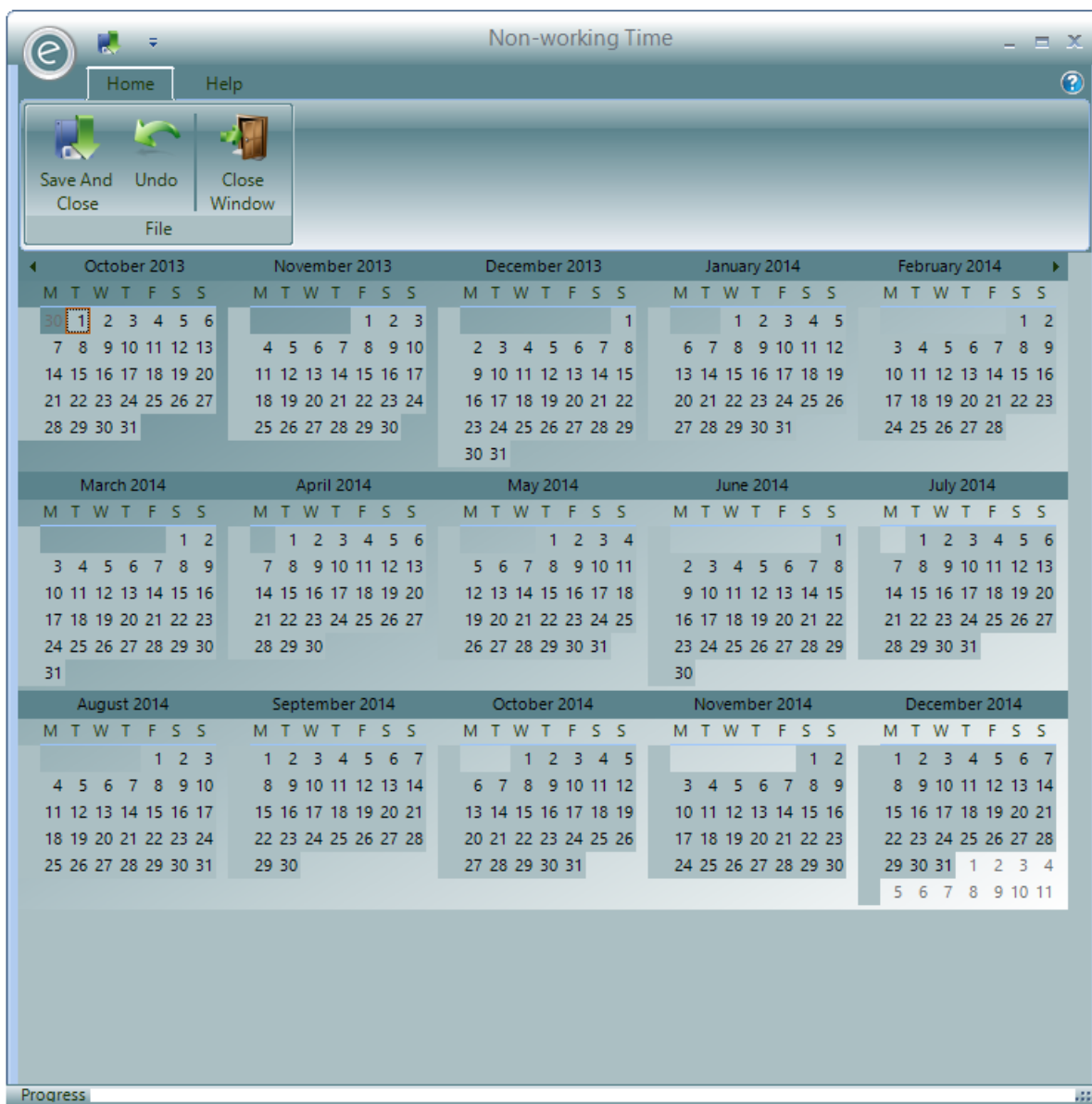
Select the dates you wish to define as unavailable by simply *clicking* on the calendar or for *multiple dates* you can *drag across*. They will appear as *red squares*.

When finished, click **Save and Close**.

Important: If you have already set up your lesson Schedule you will need to run the *re-diarise* procedure for these changes to be made effective. Otherwise your changes will not appear in the Diary Entries. Therefore we advise that this is inputted before an Academic Year begins.

Note: For more information regarding the re-diarise process please search for **Reset Schedule Diary**.

2. Progressing Schedules

▶ [Watch the Video Tutorial here](#)

Once you have defined the Calendar information for the new Academic Year you can create the new Schedule.

You can select to manually do this by creating a set of new Activities Plans at each Venue or you can *extend your existing Schedules into the new Academic Year* and create the related Diary Entries.

To do this select:

Teachers (Ribbon Menu) > Progress Schedules

This is displayed below:
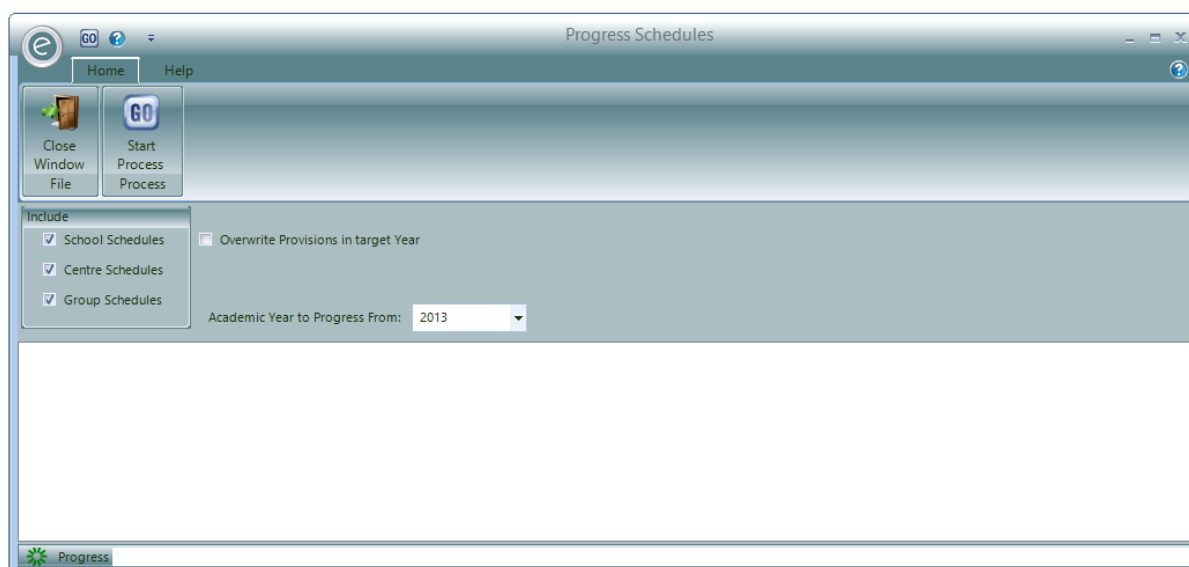
Select the types of Schedules you want to extend (Tickboxes under Include Section) and the year you are *progressing from* i.e. the current year.

If you have already manually done this for some Schedules you can tick the Overwrite box should you want to replace them.

When you click on the Start Process button, the system will extend the selected Schedules into the new Academic Year creating a set of new Provisions for each term.

Schedule Changes for the New Academic Year

The Schedule progression can also accommodate any changes to an Activity Plan in the new academic year. You must firstly progress the schedules as they are from the previous year. Once this done been done, any editions to existing Activity Plans can be made. For example this includes changed day, time and description.

Important: Do not delete the progressed Activity Plan and then create a new if you want to make an edition to it. Ensemble will not be able to progress the Pupils correctly!

3. Progressing Pupils

Updating a Pupil's School

▶ [Watch the Video Tutorial here](#)

Each Pupil's Record Card contains a list of Schools they have attended or will attend with a Start Date for each one.

You will be able to update this information from *within the Pupil Record Card* by:

Opening a Pupil Record Card > School (Ribbon Menu) > New School

This is displayed below:

A new row will appear in the Schools Attended by Pupil section of the Pupil Record Card.

You will be able to select the School, Start Date and Finish Date.

When Ensemble progresses a Pupil's School tuition it looks at this list to see if the Pupil is moving to a new School in the new Academic Year, and if so, it looks for a similar lesson at that School. It is therefore important that Pupil records are updated with planned School changes before Pupils are progressed.

Progressing Pupils

 Watch the Video Tutorial here

Once you have set up your Activity Plans for the new Academic Year you can progress Pupils from the current year into the new academic year.

To do this click:

Pupils (Ribbon Menu) > Progress Pupils

This will display the window below:
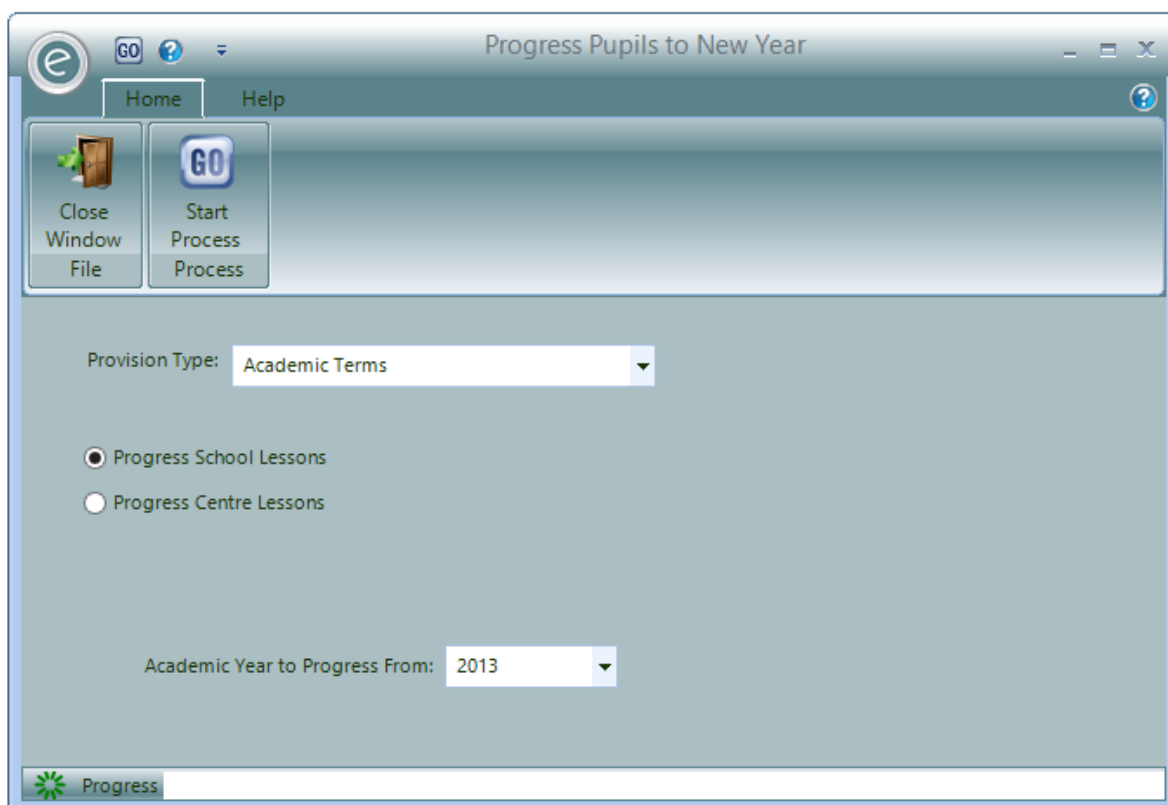
This process works its way through all the Pupils that have tuition for the **Provision Type** selected and *do not* have a finish date in the current year.

Select to **Progress School Lessons** or **Progress Centre Lessons.**

Select the *current academic year* as the **Academic Year to Progress From.**

Click **Start Process** to begin transferring Pupils.

For each Pupil it looks to see if they are in the same School by checking the School list defined on the Pupil Record Card. If they are and the existing schedule has been extended into the new academic year it simply extends their Pupil tuition into the new terms. If they have changed School or a new set of activities have been created the system looks for a similar lesson and transfers them to that lesson. When looking for a similar lesson it looks for matches on each of the values listed below, until it finds a matching lesson.

Note: If it fails to find a lesson it does not progress the Pupil.

Pupils that have been Unallocated

▶ [Watch the Video Tutorial here](#)

The system will fail to progress a Pupil if a *suitable lesson could not be found* in the new academic year. Therefore you will need to take one of the following actions:

- Create a suitable Activity Plan and re-progress Pupils
- Enter a finish date for the Pupil to be the end of the current year
- Manually progress a Pupil as at the end of the current year into a different Activity Plan in the new academic year (This is covered in **Manually Progress a Pupil to the New Academic Year**)
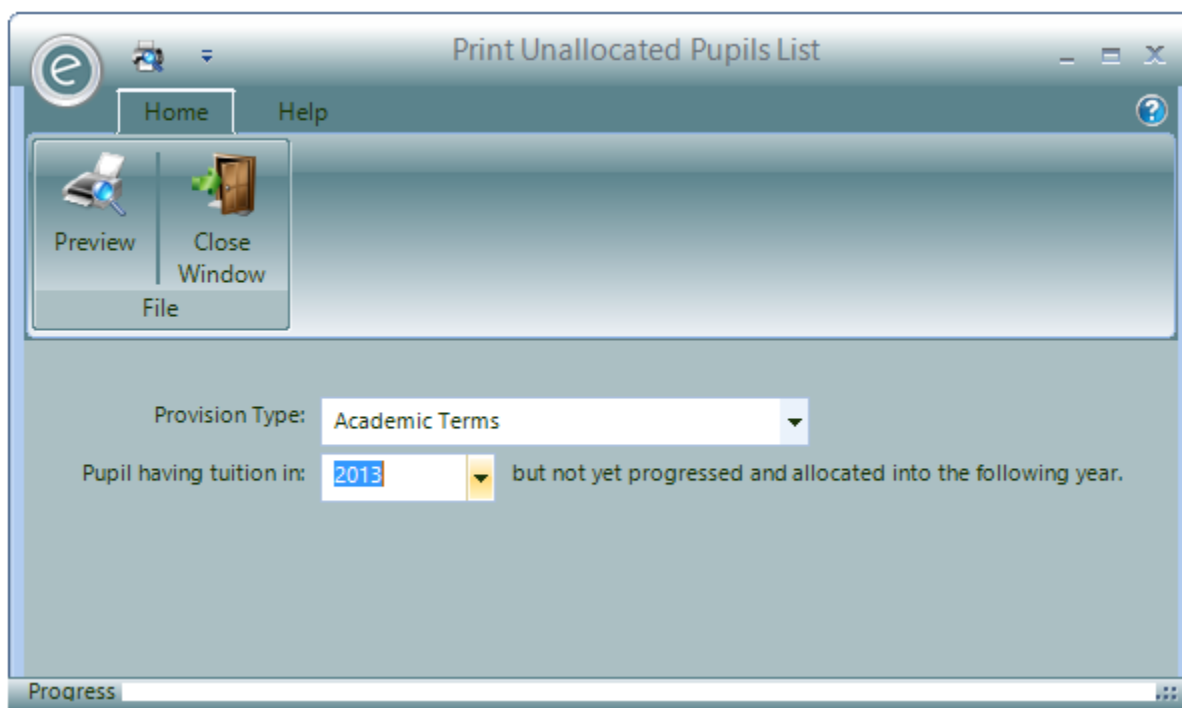
It is important that they are resolved and that there are no Pupils left unallocated.

Unallocated Pupils List
You can get a list of these Pupils by going to:

Pupils (Ribbon Menu) > Pupil Reports > Print Unallocated Pupils

This will display the window below:

Select the **Provision Type** and the academic year for which they *did not* progress from.

Click **Preview** to view the Report.

An example is displayed below:

Pupils from 2012 not yet progressed and allocated to 2013

Schools

Activity	Pupil		Moving To
Ambridge Grammar School			
Bassoon	Aldridge	Brian	St Marys Academy
Bassoon	Attlee	Richard	St Marys Academy
Piano	Craig	Ian	St Marys Academy
Piano	Daniels	Amelie	St Marys Academy
Piano	Jones	Jack	St Marys Academy
Piano	Attlee	Richard	St Marys Academy
Piano	Crawford	Matt	St Marys Academy
Piano	Franklin	Harriet	Elizabeth Primary
Viola	Bellamy	Lilian	St Marys Academy

Manually Progress a Pupil to the New Academic Year

▶ [Watch the Video Tutorial here](#)
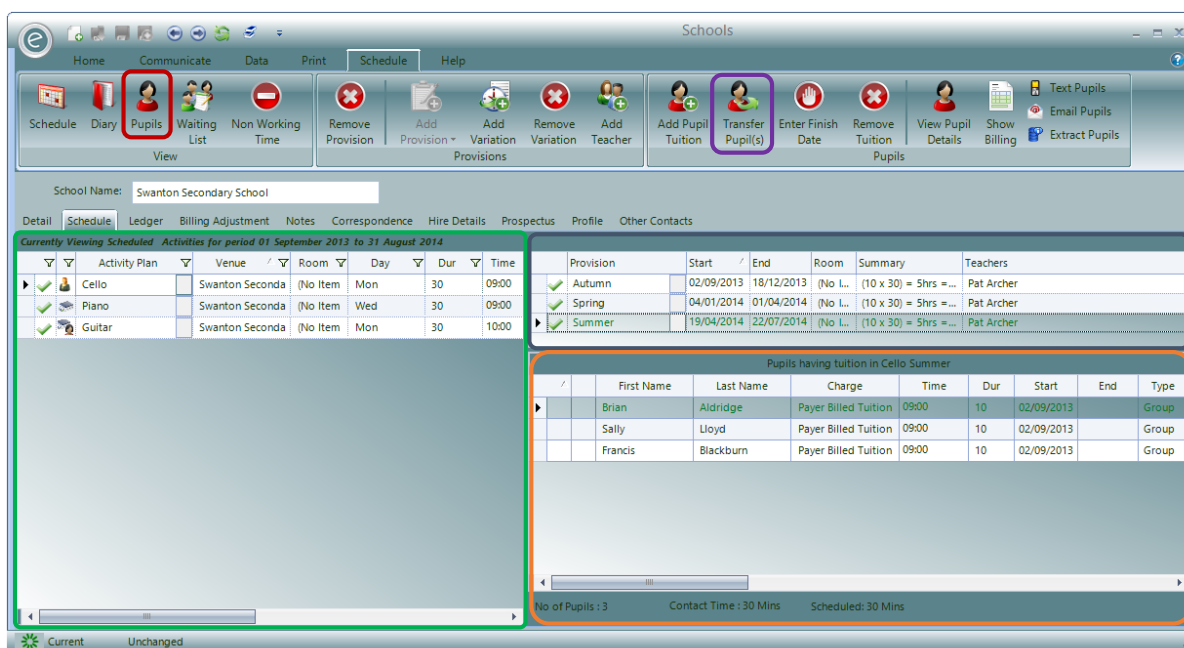
Where a Pupil cannot be automatically progressed you can *manually* progress their tuition by *transferring* them to a new Activity Plan in the next academic year.

Note: A Pupil being transferred must be moved to a *different* Activity Plan, Ensemble will not allow you to transfer a Pupil to the *same* Activity Plan.

To do this click:

Tuition (Menu Bar) > Open Teacher/School/Centre/Group Record Card > Schedule Tab > Pupils (Ribbon) > Select Lesson / Activity Plan > Select last Provision Period > Select Pupil > Transfer Pupil(s) (Ribbon)

This is displayed in the window below:

After clicking **Transfer Pupil(s)**, this will open a form on which you can select the School or Centre where the Pupil is to be progressed to. This is displayed below:

Select the **School/Centre** and then select to **Transfer at end of ...** highlighted in the **red box**. Therefore the Activity Plans available will be for the *new academic year.* Now select the new Activity Plan listed below.

Click on the **Apply Changes** button to progress the Pupil.

Finance in Ensemble

This section will layout a step-by-step guide for the financial tasks in Ensemble. This includes understanding:

1. Financial Parameters
2. Charges
3. Invoices
4. Management of Debt

1. Introduction

Finance Parameters

▶ [Watch the Video Tutorial here](#)

Financial Parameters define the *available options* to be used in Ensemble for financial purposes such as Invoices and Debtors.

To access Financial Parameters click:

Tools (Ribbon Menu) > Parameters > Finance Parameters

This will display the window below:
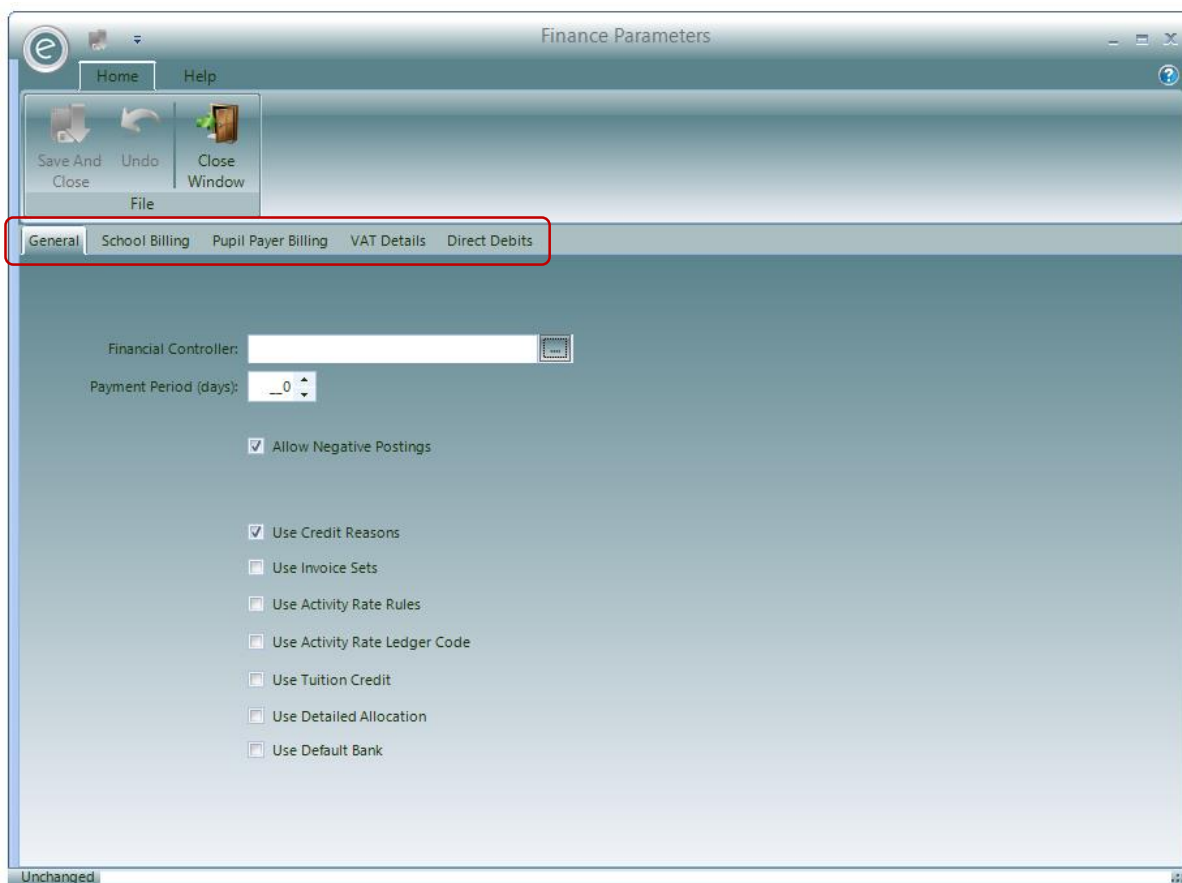
The Parameters are arranged in different tabs that are highlighted in the red box. They are:

General	This is the currently displayed tab. Select the **Financial Controller**, define the **Payment Period** and select Parameters *that are visible* in the system such as **Negative Postings** i.e. an Invoice with a negative charge.
School Billing	Select available Parameters to be used for schools such as a default Invoice Title
Pupil Payer Billing	Extensive options for Pupil Payers with sections for Subscriptions, Siblings, Instruments and Invoices and more.
VAT Details	Define how VAT is used in the system
Direct Debits	Define how VAT is used in the system

You will return to Parameters throughout.

Debtor's Ledger

A *Ledger* is maintained for all Debtors.

This is a *collection of all transactions* such as Invoices, Credits and payments. The Ledger is displayed within a tab whenever you open any of the Debtor record types i.e. School, Payer Individual and Payer Organisation.

To access:

Open a Debtor Record Card (Menu Bar) > Ledger tab

An example is displayed below for an individual Payer:
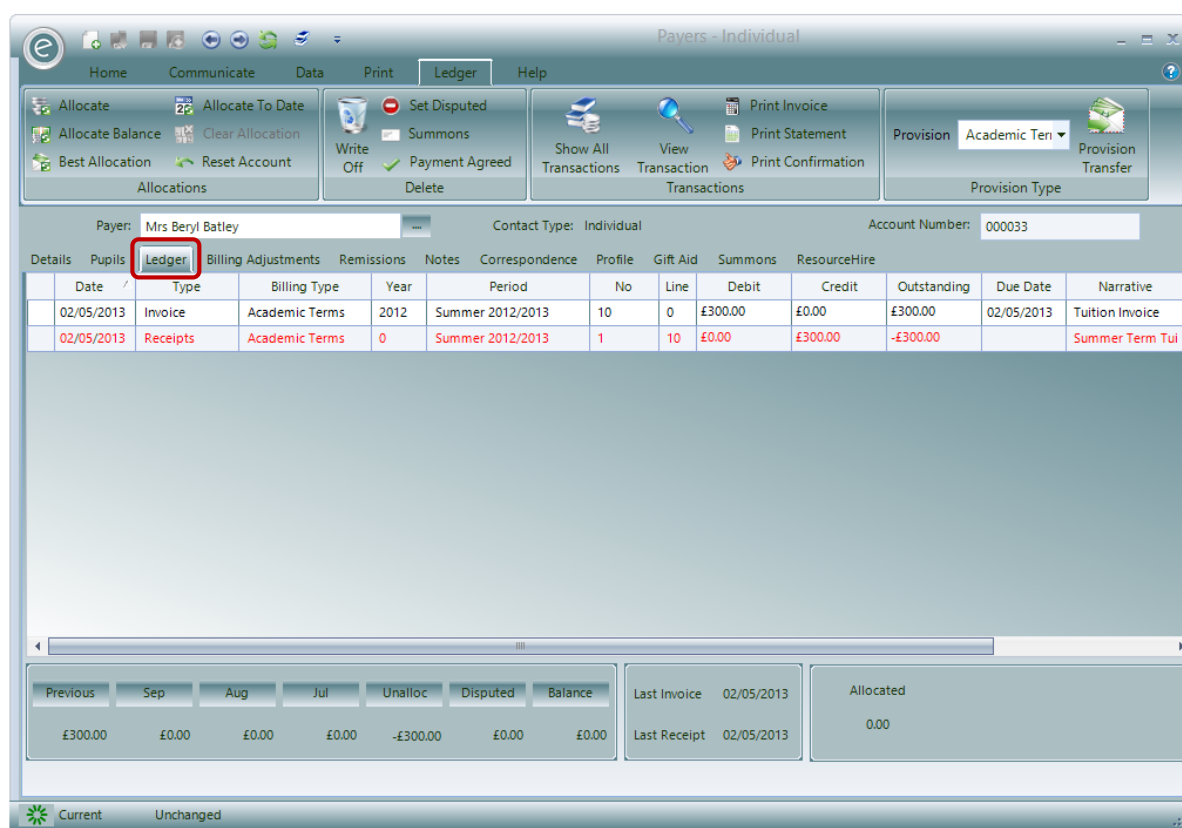
Double-clicking on one of the rows will open a new window will expanded information related to the transaction.

Transaction Types

Invoices

Invoices reflect charges to apply to a Debtor. They consist of one or more items each reflecting a different item to be charged. Items in Payer Invoices will normally relate back to a child and cover charges such as tuition, instrument hire and membership. An Invoice can also contain items for different pupils *providing they share the same Payer.*

Invoices for Payers may also contain items that don't relate to a specific pupil i.e. you can just apply a Charge directly to a Payer.

Invoices to schools may also consist a number of items and relate to services provided to that school ranging from Charges for teaching time to the hire of instruments and provision of tuition to specific pupils.

Invoices to both Schools and Payers are created from one of two methods:

- They can be created by the software from information it holds such as scheduled lessons and instrument hires.
- They can also be manually created i.e. you can go into the system and create an Invoice line by line specifying the narrative for each line and the value to Charge

Note: These are covered in **Automatic Generation of Invoices** and **Raising Manual Invoices**

Credits

Credits are used to *reverse a charge* made to a customer via an Invoice.

They are constructed in a similar same way to Invoices but when posted to the Debtor's Ledger the values are posted as *negatives*.

Credits are normally created via a *manual process*. The user will specify the detail for the Credit or where the original Invoice Number is known, it can be entered and the system will populate a Credit based on the Invoice.

In some circumstances, Credits are automatically created. An example of this will be where an Invoice has been automatically raised for a terms instrument hire after which the terms hire has been cancelled. The system will recognise that the Debtor will require the Invoice to be Credited and offer to automatically raise the Credit.

Receipts

Receipts are types of transactions that describe payments made by Debtors.

In most cases Receipts will relate to Invoices e.g. a Payer is sent an Invoice for say £100 and they send back a payment of £100. There are cases when payments are made that do not relate to an Invoice. A Payer may for example send as a deposit for a trip.

Receipts can be manually entered one by one or be imported as a batch normally provided by some external online payment system.

Journals

Journals are the last type of transaction that can be posted to the Debtor's Ledger. Journals are *created by the system and reflect adjustments made to the Ledger*. The most common one of these happens when a user selects to write-off a balance on an account.

2. Billing Types and Billing Periods

A *Billing Type* defines the *period of time covered by a Charge* applied to any service. This is used to decide at which points during a year Debtors are invoiced. E.g. Annually or number of sessions.

To create a Billing Type click

System (Menu Bar) > Billing Types > New Billing Type

This will display the window below:
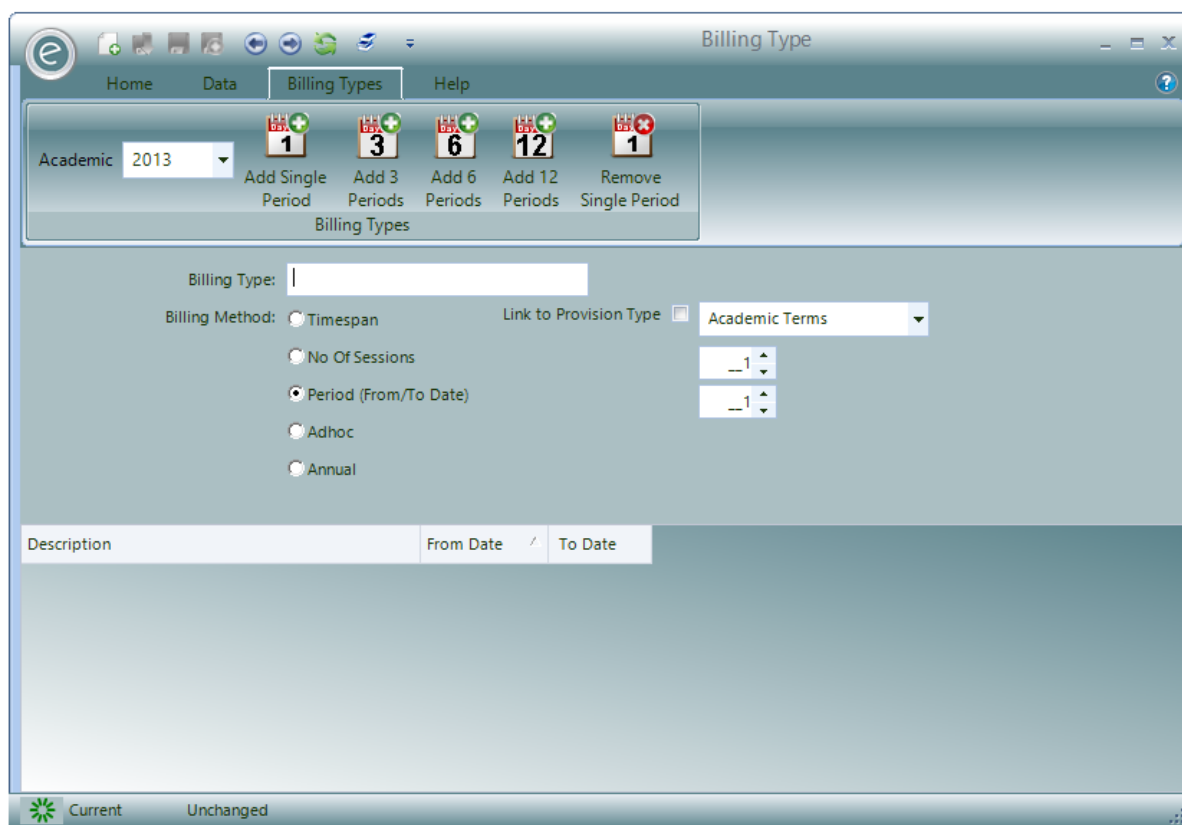
You can define **Billing Method** by the following options:

Timespan	This is set up by the *number of months*, varied by the amount of whole calendar months
No Of Sessions	This set up via scheduled lesson, you will need to *choose number of sessions*, notify session number (this lets customers know there billing period is coming to end and they will need to request more lessons), Invoice session number (This is when Invoices are sent)
Period	This requires you to add a number of *Billing Periods* to bill per year, these options become *highlighted* when this is selected
Adhoc	This allows you to *bill at any point* during the year
Annual	Allowing you to bill *once per year*
Link to Provision Type	This follows the *same pattern* as your Provision types, billing at the end of each

In a simple case a Billing Type will contain Billing Periods that mirror academic terms and therefore any Invoices raised will relate to a term but Billing Periods can be set up to *define different periods of time* other than a termly basis. They can for example cover a whole year where Invoices are charged *annually*. All *automatically raised* Invoices relate to a *single* Billing Type.

Provision Types and Periods define the various time models you may have for scheduling and delivering services. Nearly all users will have at least one Provision Type defining academic terms, which Ensemble will automatically create for them.

For example members of a Group may have their rehearsal Activities held on a termly basis via an *Academic Terms Provision Type*, but they'll be charged annually which means they need an *Annual Billing Type.*

Note: For more information on Provision Types refer to the **Provision Types and Calendars** section in the manual.

3. Ledger Codes

Ledger Codes can be added to *easily identify lines within a Debtor's Ledger*. They essentially enable users to *categorise services* in a detailed and organised manner, which allows for a great depth of income analysis.

They are *recommended* particularly for users with a *large range of charges and products.*

To create a Ledger Code, go to:

Accounts (Menu Bar) > Ledger Codes > New Ledger Code

This will display the window below:
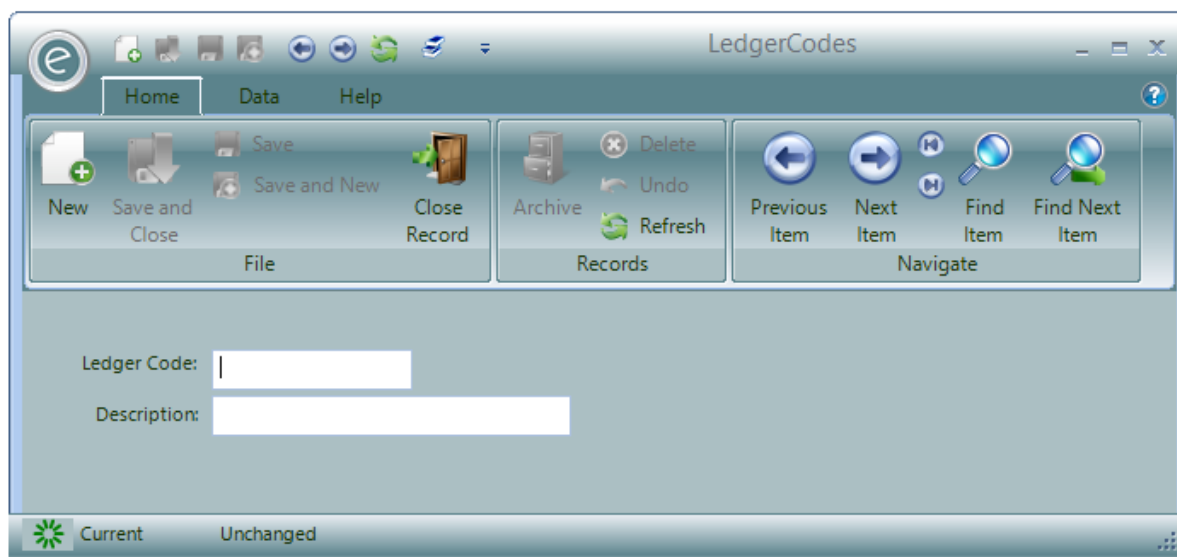
Ledger Codes allow you to define your income based on two different methods:

- Income is based on what you sell
- Income is based on the rate you sell it at

The first of these options requires you to apply the appropriate Ledger Codes to each service you sell i.e. you apply the Ledger Code to a particular lesson.

This methodology will work well for many organisations but for some it presents a problem. Take for example the situation where you need to show the income derived from *School Tuition separately* from the income derived from *Centre Tuition* but you provide the *same service in both* for example you may well provide cello lessons at schools and also at a centre.

Since the Ledger Code is attached to *the Activity*, you will need two different Ledger Codes for the system to separate School from Centre income. It follows that you will need two different Activity records to represent Cello. This can cause confusion.

To solve this problem you can switch the system to apply Ledger Codes *to the Charge rate* you use when you sell the service. You therefore set up a Charge for tuition at Centres and give that one Ledger Code and another Charge for tuition at schools and give that a Ledger Code. You will only require one Activity to be defined for the service.

Note: To switch the mode go back to the Financial Parameters and tick the box Use Activity Rate Ledger Code.

4. Charges

▶ [Watch the Video Tutorial here](#)

Before defining any service you provide, you must first define the *Charge* to apply to that service. The Charge will set down the value of the service and how that service should be applied. For example if a Charge is to be applied to the supply of a teacher into a school, what is the *charge*?

- Is it a total charge for providing the service or is it a charge per visit or per hour?
- Does the charge decrease according to the amount of time purchased?

 All these sort of things are defined within the Charge.

Overview

To create a new Charge click:

Debtors (Menu Bar) > Charges > New Charge > New Charge Amount

This will display the window below:

Inside the blue box, there is a row for you specify the Effective Date from which the Charge is implemented and the amount charged. New rows can be added by clicking New Charge Amount again, you will typically do this when a charge has expired and needs updating.

Note: If your Charge changes, you do not have to enter a new Charge which would then have to be associated with each Pupil. All that is required is to update the Charge that you already have by clicking New Charge Amount.

Charge For

The red box illustrates *six different categories* of Charge. Together they cover the various types of services offered. Each one of these is *specialised to the type of Activity it is classified for*. For example when defining Groups, only the 'Group Membership' Charges will be available. They are listed below:

Teacher(s) Attending Schools	Used when supplying teachers to Schools and charging for their time.
Each Pupil Attending	Charge relates to a Pupil receiving tuition
Group Membership	Fee for joining a Group such as an Orchestra
Resource Hire	Charges for hiring Resources such as instruments
Subscription	Charge for a Subscription
Coach Fees	Fee for using the coach service

Depending on the Charge method you are defining you can specify various ways as to *how* the Charge is applied. These options are discussed below.

Regardless of the method, each charge detail contains a set of prices with an *effective date* for each one. It is therefore possible to set up prices in advance by specifying the date the new price becomes effective.

Charge Type

Applicable for these *Charge For* types:

- Teacher(s) Attending (Schools)
- Each Pupil Attending

Here the red box shows the Charge Type. This defines the relationship between the price and what is being delivered. There are three available Charge Types:

Hour   The price you specify is a price for each hour the service is provided.

Session/Week   The price is for each session or week the service is provided regardless of the duration of visit.

Provision/Term   The price is for the duration of the Provision. This includes the academic term, or if the charge is for a course or an event then it's the total price of that course or event.

Banding Type

Applicable to all *Charge For* types.

You have the option to apply a Banding Type to the charge, which is highlighted in the red box. A Banding Type allows you to set up a *discounted price structure* that sets a different price depending on some sort of *quantity.* For example, the more hours purchased the lower the price.

You can elect *not to use* banding, or select one of the four available banding options. These are:

Provision/Term No	You specify a *different price for each Provision*. For example you may offer a price structure whereby the first term is free the second is at half price and the third and following terms are at full price.
Session No	You specify a *different price for each session*. For example you offer a two day course where the first day is at full price but the second is at half price.
Session Duration	The session duration banding type provides method for charging a *different price based of the duration in minutes of each session*. This is often used to offer a lower price when a longer session is purchased.
Provision/Term Duration	The type allows you to offer a different price depending on the total amount of time purchased for the *Provision in hours*. For example the more time purchased in a term the lower the price.
Coach Stop No	This only applies when the Charge is for a Coach Fee. The banding applies a different price to the Stop on the route.

Depending of the Banding Type you select, the *pricing grid* (where you enter the prices) will change to allow you to enter the *band value and the price for the band*.

For example if you select the Session Duration Banding Type, the grid will change to display a set of *dual columns* where you can enter pairs of the *number of minutes and the charge*, as shown below:

Effective Date ▽	Minutes 1	Charge 1	Minutes 2	Charge 2	Minutes 3	Charge 3	Minutes 4	Charge 4	Minutes 5	Charge 5	Minutes
23 09 2013	0	£0.00	0	£0.00	0	£0.00	0	£0.00	0	£0.00	0

You can enter up to nine pairs although you do not need to enter all nine. The system will take the last value you enter and apply it for any Banding Values over and above the last one.

 For example if you wanted to offer a price of £25 per hour for the first 60 minutes, £20 for the next 60 minutes and £15 there after you would enter the following:

Effective Date ▽	Minutes 1	Charge 1	Minutes 2	Charge 2	Minutes 3	Charge 3
23 09 2013	60	£25.00	60	£20.00	0	£15.00

Banding Option

Applicable for these *Charge For* types:

- Teacher(s) Attending (Schools)
- Each Pupil Attending

If you have used a Session Duration Banding Type then you can use the Banding Option to specify how the Banding Values are used. This is highlighted in the red box above. There are two Banding Options:

Standard	Each Banding represents the *next* Band of values. For example a banding such as the one below will be treated as follows. For example if anything between 0 and 100 minutes are purchased they will be billed at £25, between 100 and 150 minutes will be billed at £23 and anything above that will be as £20.
Cumulative	Each banding is *added to the previous* one to get the banding value. For example a banding such as the one below will be treated as follows. If anything up to 100 minutes are purchased they will be billed at £25, up to 250 minutes will be billed at £23 and anything above that will be as £20.

Multi Discount

Applicable for these *Charge For* types:

- Teacher(s) Attending (Schools)

- **Each Pupil Attending**

The red box highlights the **Multi Discount** option which provides a method for you to offer a discount where *more than one* service is taken up at the *same* Charge rate. If you offer this then you can enter either a:

Percent Discount	Selecting the option will produce a box for you to enter the percentage
Value Discount	A box will also appear here in which you can enter a flat discount in British Pounds

This is then applied to all second and subsequent services provided they use the same Charge Rate and are of the same Provision Type.

Lesson Type

Applicable for these *Charge For* types:

- **Teacher(s) Attending (Schools)**
- **Each Pupil Attending**
- **Coach Fee**

The red box highlights the Lesson Type option. This allows you to specify if the lesson is for an:

Individual	A one-to-one lesson between the pupil and teacher
Group	Lesson for a group of pupils
Shared	Lesson for two pupils
Other	A lesson for any other specification of pupils

Default Pupil Detail

Applicable for these *Charge For* types:

- Teacher(s) Attending (Schools)
- Each Pupil Attending

Default Pupil Detail outlines the *length of time that Pupils or groups of Pupils have for their lesson* and hence the length of time that they are charged for. Enter the duration for Pupils and groups in **Duration Per Pupil** and **Duration Per Group** respectively.

Schedule/Diary

Applicable for these *Charge For* types:

- **Teacher(s) Attending (Schools)**
- **Each Pupil Attending**

Schedule/Diary outlines how the teacher calculates the bill for the delivery of lessons and is highlighted in the **red box**. The options are:

Bill by Schedule

The teacher will be *paid in advance* of lessons being delivered according to their schedule

Bill by Delivery

The teacher will have to record the delivery of lessons in their diary and receive payment through a *claims process*

Overrides

The Charge also allows you to select a number of *Override* options, as highlighted in the red box. The number of Overrides available will change depending on which Charge For category you have defined your Charge to. The Overrides are:

Suppress All Discounts	Disables any other defined discounts e.g. Sibling Discounts.
Suppress any Payer Remission	Disables any Remissions which have been defined on the Payer.
Suppresss any Enrolment Fee	Disables any Enrolment Fees defined for the Charge.
Apply to Tuition Credits*	The Charge will create Tuition Credits, which payers use to purchase lessons.

*This override is only applicable to Charges defined as Each Pupil Attending.

5. Charge Categories

In some situations you may be supplying the *same service to more than one* type of customer. For example you may be providing the same service to both Local Authority Schools and Independents

but would like to Charge for these services at a *different rate*. This can be achieved through the use of *Charge Categories*.

Enable Availability in Education Parameters

When first setup your database, it *will not show* the Charge Categories option. You will therefore need to switch these on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Charge Categories' > Save and Close

This is displayed in the window below, with Use Charge Categories highlighted in the red box:
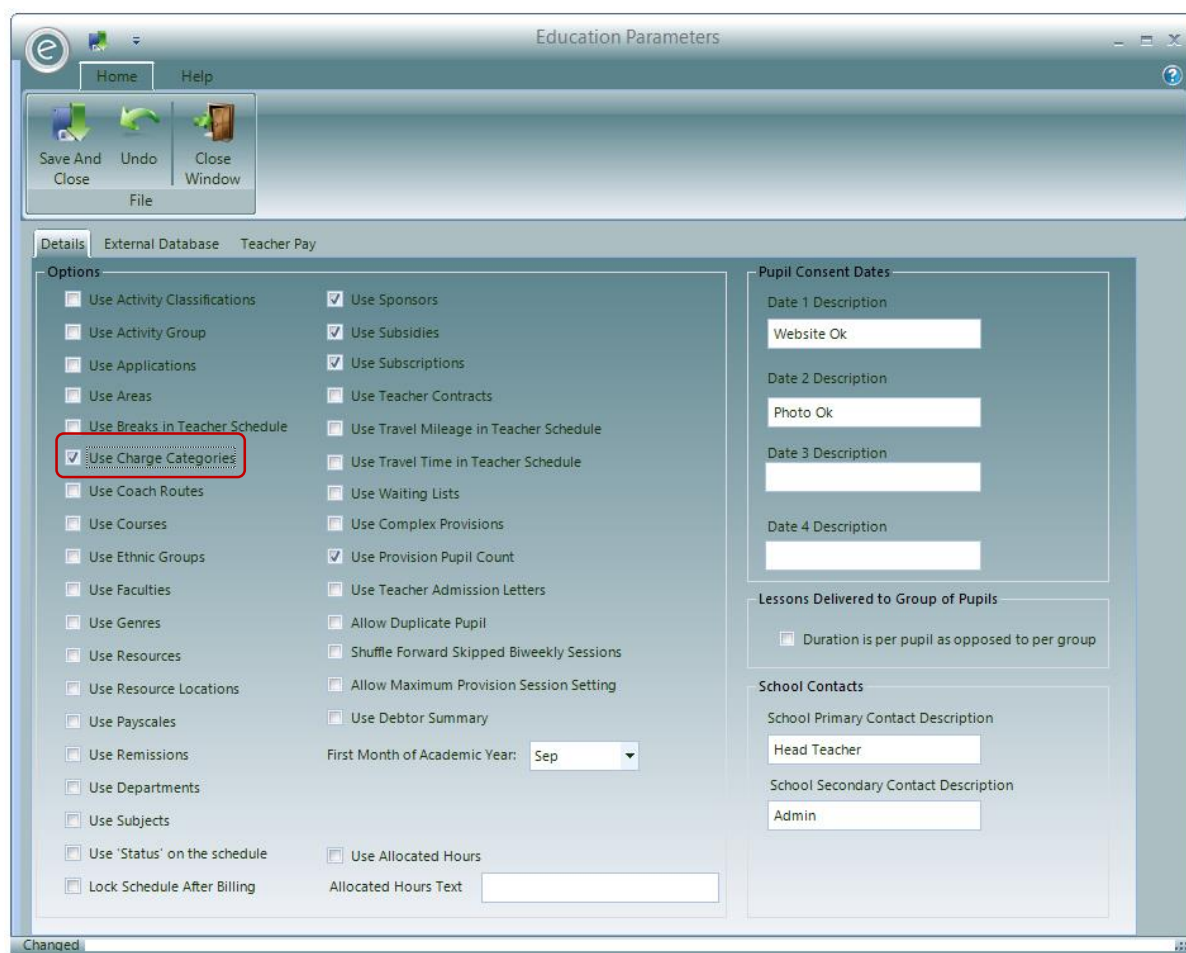
This will add the Charge Category option to the Debtors tab in the Menu Bar.

Create a Charge Category

To create a Charge Category click:

Debtors (Menu Bar) > Charge Categories > New Charge Category

This will display the window below:
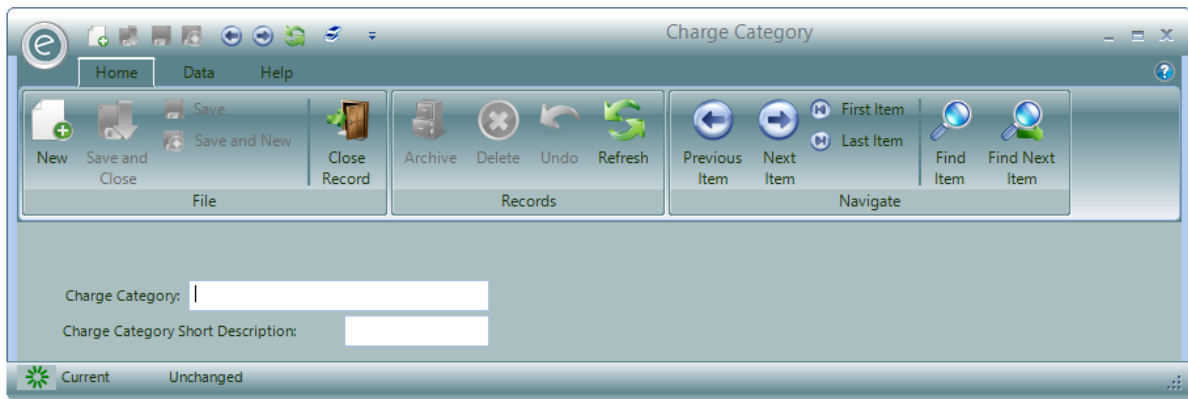
Simply type in the desired name in the **Charge Category** field. A shortened name can also be entered in the **Charge Category Short Description**.

Click **Save and Close** to save the new Charge Category.

6. Remissions

 [Watch the Video Tutorial here](#)

A *Remission* is a type of discount you apply to your Charges when billing to Payers (Not Schools). You can apply *up to two* Remissions to any Charge, one relating to the Payer and one to the pupil.

To define a Remission click:

Debtors (Menu Bar) > Remissions > New Remission

This will display the window below:
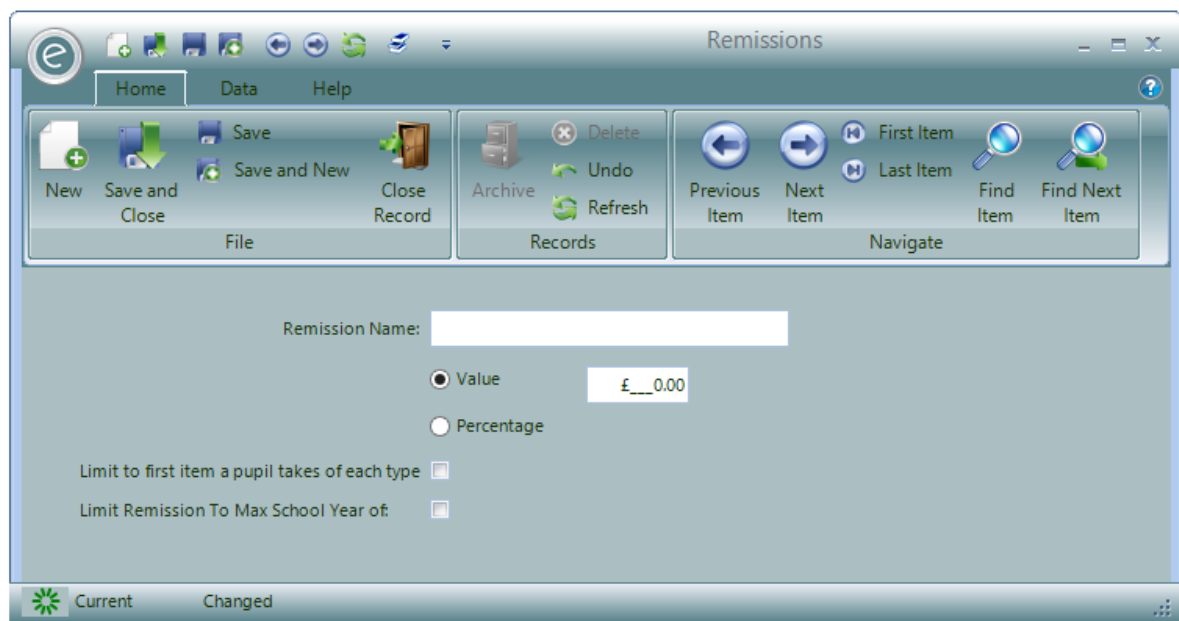
You will then be able to enter information into the following fields in the window:

Remission Name   Enter a name for the Remission

Value   Define a flat monetary value for the Remission

Percentage	Alternatively define a percentage discount for the Remission
Limit to first item a pupil takes of each type	The Remission looks at whether a pupil is being charged for Tuition, Group Membership and Hire and is *only applied to the first Charge* for each of these. For example, if a pupil is having two lessons, the Remission will *only apply to the first lesson*.
Limit Remission To Max School Year of	Specify a maximum school year for which the Remission will be applied.

Once you have defined your Remissions you can apply them. They can be applied to the Payer or to the Pupil.

Note: If you do not wish to use Remissions you can turn them off completely via an option on the *Education Parameters*.

Payer Remissions

▶ [Watch the Video Tutorial here](#)

You can apply a set of Remissions to a Payer's account, one for each area of business; School Tuition, Centre Tuition, Group Membership and Resource Hire.

To apply a Remission to a Payer click:

Debtors (Menu Bar) > Payers > Open Payer Record Card > Remissions

This will display the window below:
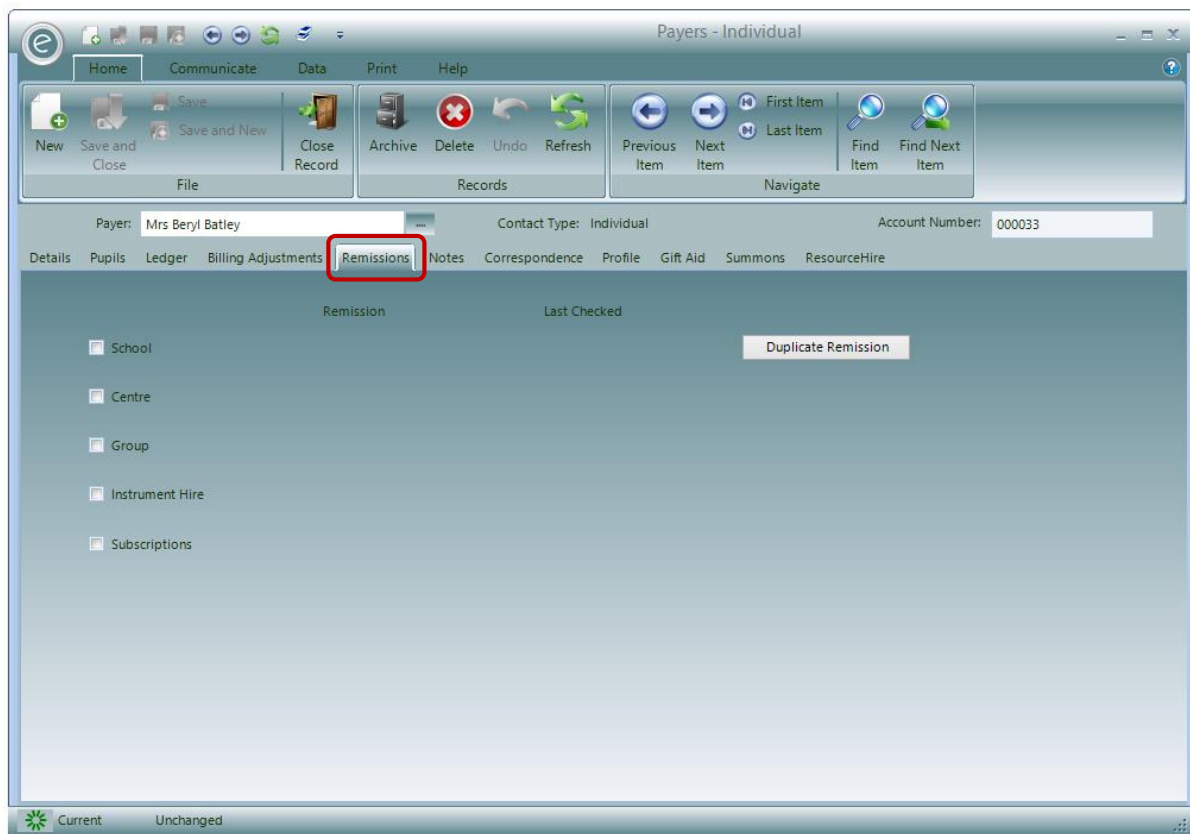
You can now specify the services for which this Remissions is applied by ticking:

- School
- Centre
- Group
- Instrument Hire
- Subscriptions

Now all chargeable items of that type for Pupils whose bills are to be paid by the payer will receive the Remission. For example by ticking School, then *all* School Charges for pupils where the payer is being charged will receive the Remission.

The Duplicate Remission icon copies a Remission that you have set against one category to all of them.

When applying a Remission to a payer you can also enter a Last Checked date. The date you enter should be the date the *entitlement evidence was provided*. With this date recorded you can request a list of Payers in a Receipt of a Remission who have not provided evidence for a specified period of time.

Remissions applied to Payers will discount *all activities the family is involved in* and will tend to be ones that result a social support issue such as families on low income. It may therefore be necessary to check with a payer that that they still receive the social support and are therefore still entitled to your Remission. The last checked date can be used to record when proof of the social support was received.

Example

The window below gives an example for how to specify Remissions in this window:

Pupil Remissions

Use of *Pupil Remissions* provides a more *targeted approach*. Using this method you select the pupil and the specific service you wish the Remission to be applied. You may for example decide to discount by 50% the tuition and hire costs for a gifted pupil player of a rare instrument.

After defining the Remission you can open up the specific hire and the tuition detail and apply the discount.

To do this click:

Pupils (Menu Bar) > Open Pupil Record Card > Tuition tab

This will display the window below:

You will then need to click Show Billing in the red box, to display the Billing Detail.

The window will now change to this below:

You will now be able to enter a Remission for the Provision selected under the column **Remission**, highlighted in the **red box**.

7. Subsidies

  [Watch the Video Tutorial here](#)

Another form of discount available to a Payer is the *Subsidy*. Subsidies are used when a *School elects to pay for part or all of a Pupils fees*.

Ensemble does allow you to add pupils to lessons and specify that the Charge is to be made to the school, but this is only suitable when the school pays 100% of the fee and it is a continuing situation.

When the school is *only paying part of the fee* or it is only paying the fee for a *limited period of time*, Subsidies are a better route to take.

Important: When you bill your Schools for the Subsidy, you must *calculate the billing for Payers first* and then calculate the billing for Schools. Otherwise the School will not be charged until the next run of Invoices. For more information regarding this please refer to the **Automatic Generation of Invoices** section of this chapter.

Enable Availability in Education Parameters

Subsidies can be turned on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Subsidies' > Save and Close

This is displayed in the window below, with **Use Subsidies** highlighted in the **red box**:
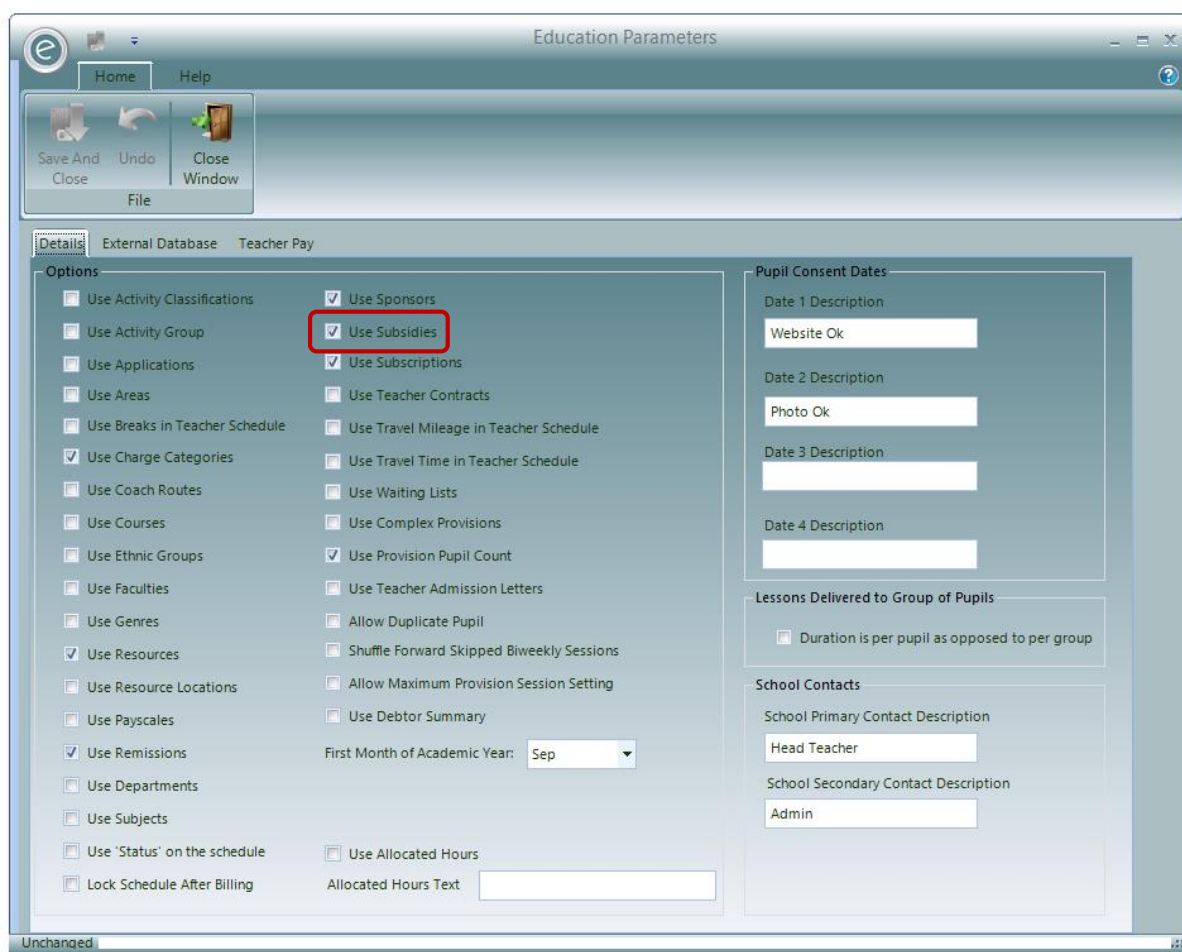
Now Subsidies are available to use in Ensemble.

Create a Subsidy

▶ [Watch the Video Tutorial here](...)

To create a Subsidy, click:

Debtors (Menu Bar) > Subsidy > New Subsidy

This will display the window below:
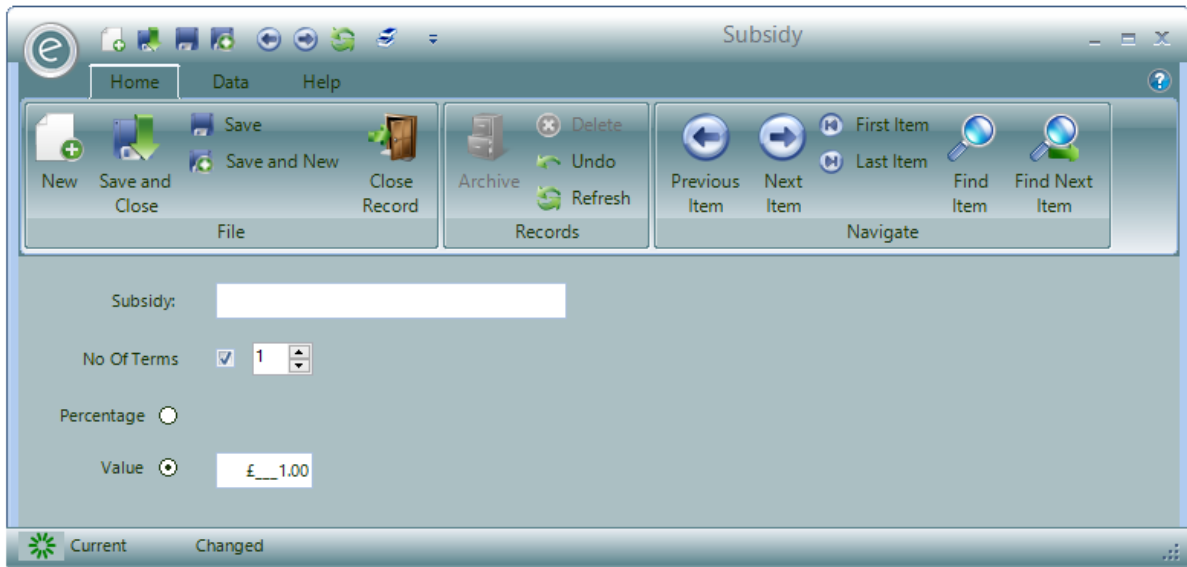
When you create a Subsidy you must give it a description which is entered into the Subsidy field.

You can optionally set the number of Provisions/Terms the Subsidy is to be applied by ticking No Of Terms and selecting a number. If you do not specify this number then the subsidy *will always be applied*.

You also specify if the Subsidy is to be a percentage or a value by selecting either Percentage or Value respectively and specifying the amount.

Pupil Subsidies

Subsidies can then be applied to *individual pupil tuition records*. This is very similar to how Pupil Remissions were previously made.

To do this click:

Pupils (Menu Bar) > Open Pupil Record Card > Tuition tab

This will display the window below:
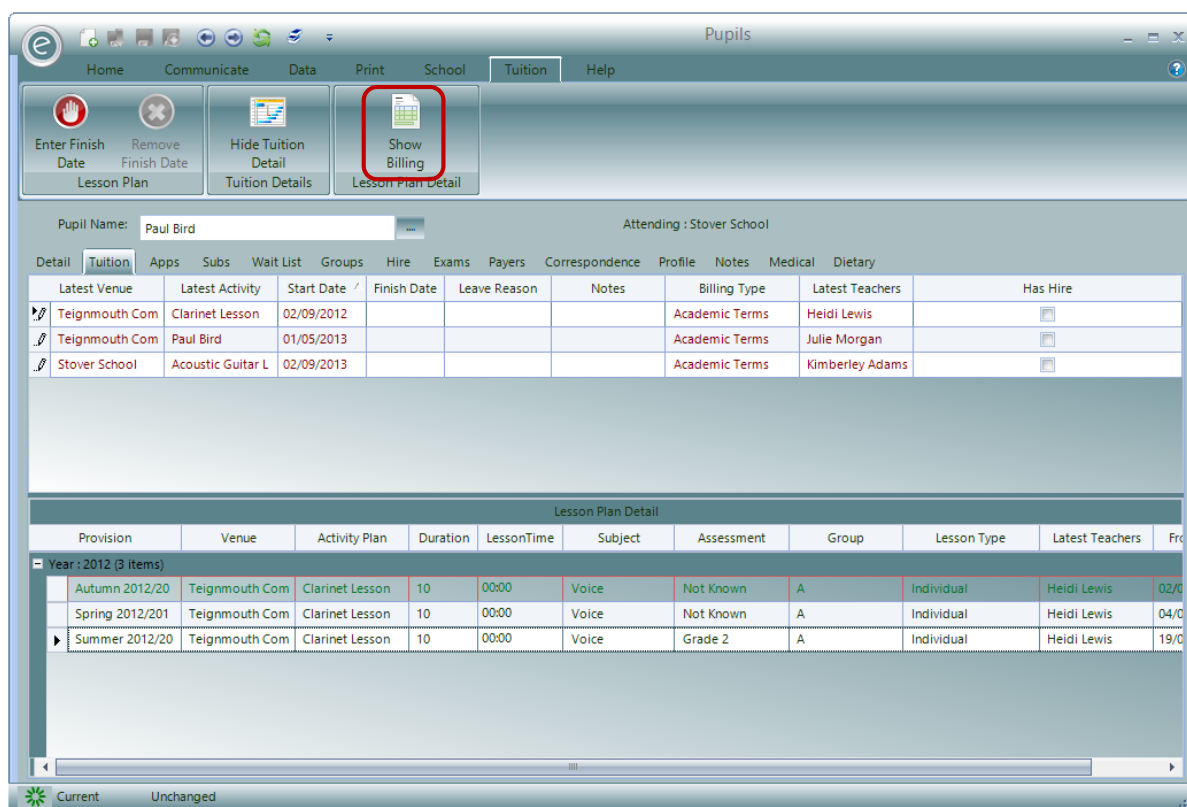
You will then need to click **Show Billing** in the **red box**, to display the Billing Detail.

The window will now change to this below:
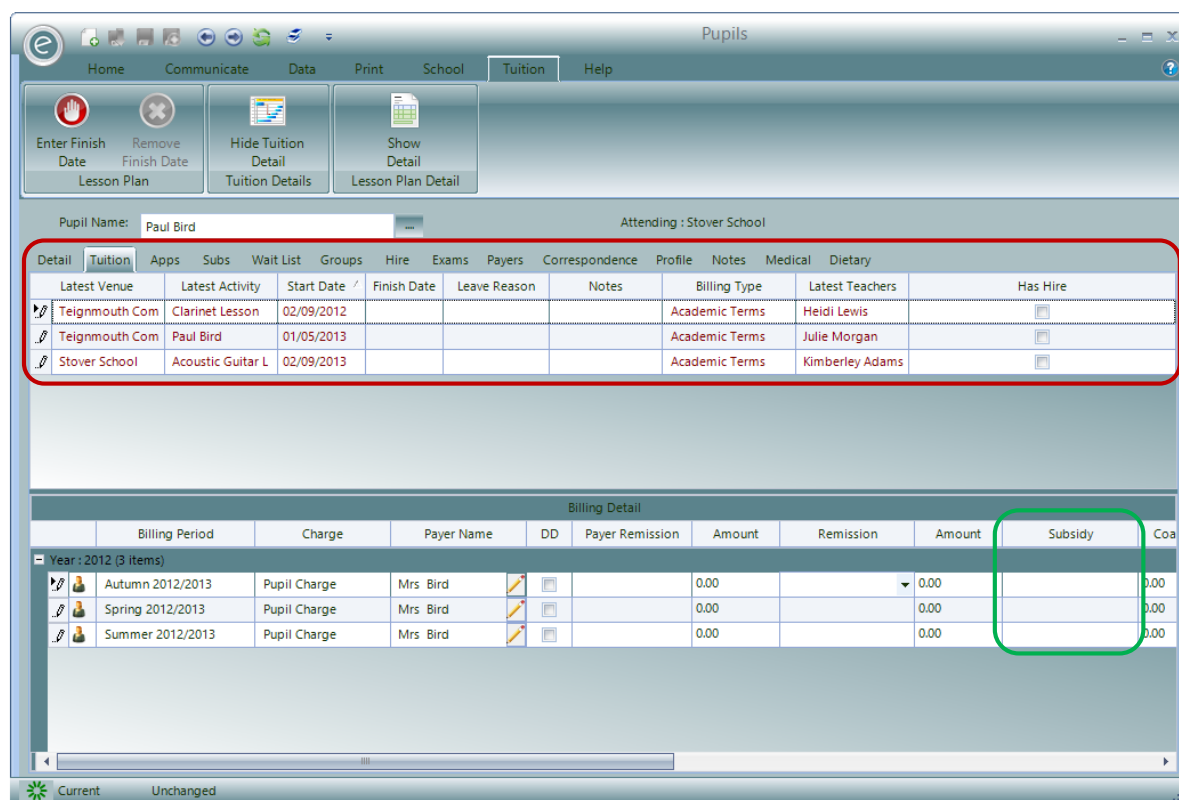
Select the tuition you wish to apply the Subsidy for in the **red box**.

Note: Subsidies can *only be applied* to tuition within the School itself. E.g. If a Pupil if is having tuition in a Centre then a subsidy is no longer available.

You will now be able to enter a Subsidy for the Provision selected under the column Subsidy, highlighted in the green box.

The value of the Subsidy is calculated when the Payer Charges are calculated and *applied as a discount*. The subsequent Subsidy value is then charged to the school when the school billing is calculated.

Note: It is therefore *important* that the Payer Billing for a Billing Period is processed *before* the school billing is processed.

Calculate Subsidies Before or After Remissions

Finally you can decide if the Subsidy is to be calculated *before or after* any Remissions are applied.

Take for example the situation where you have a pupil taking tuition with a Charge of £100. If the pupil is entitled to a 60% discount and a 50% Subsidy the final Charge to the Payer will *always* be £20 regardless of the order of the calculation. However, the order will affect the fee re-Charged to the school to be *£30 or £50*.

By default the system will apply the Remission *after* the Subsidy but this can be overridden via a setting within the *Finance Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Finance Parameters > Pupil Payer Billing tab **> Tick 'Apply Remission discount before calculating subsidy amount' > Save and Close**

This is displayed in the window below, where Apply Remission discount before calculating subsidy amount is highlighted in the red box:
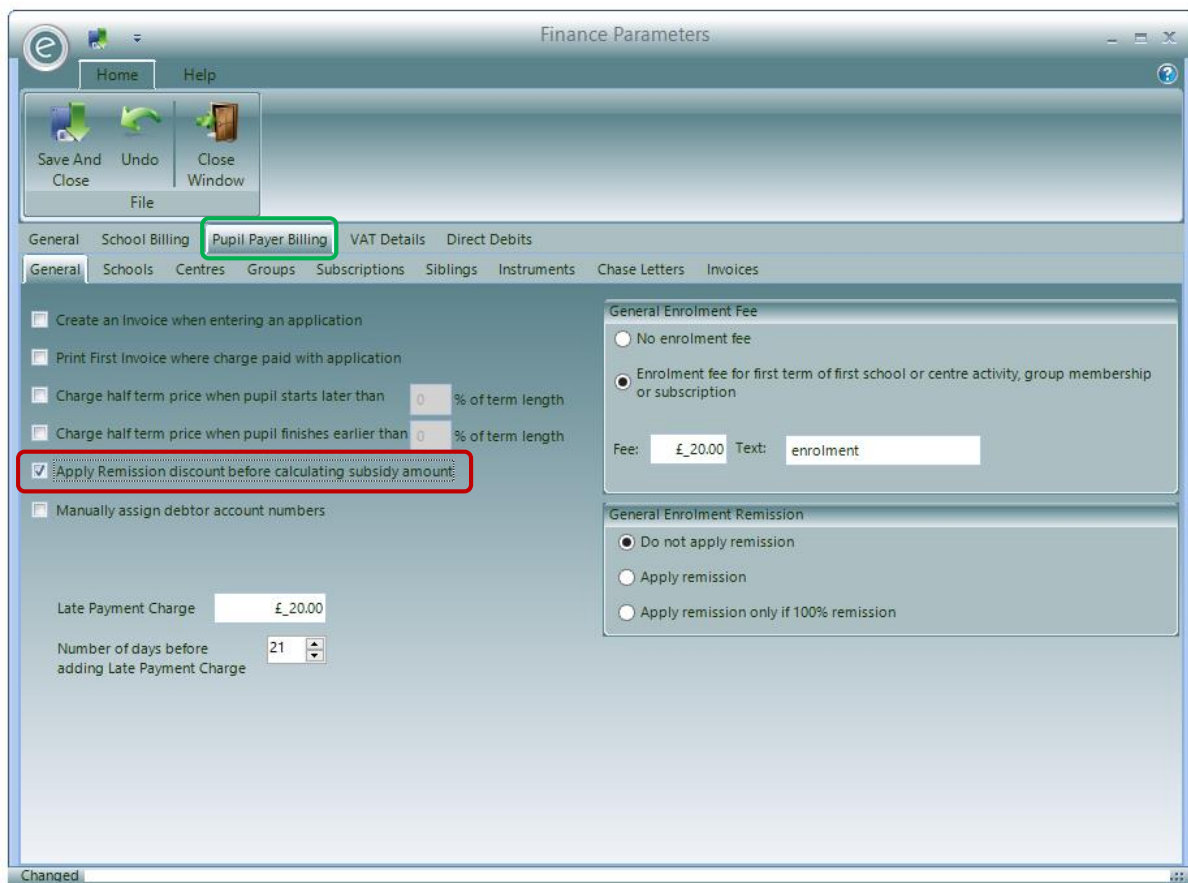
8. Sponsorships

Whereas Subsidies apply to school tuition, Sponsorships *apply to Group Memberships*. They are used when a sponsor such as a charity or an organisation (although this can be another individual Payer) offers to pay for all or part of a group's membership costs.

Enable Availability in Education Parameters

Sponserships can be turned on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Sponsors' > Save and Close

This is displayed in the window below, with Use Sponsors highlighted in the red box:
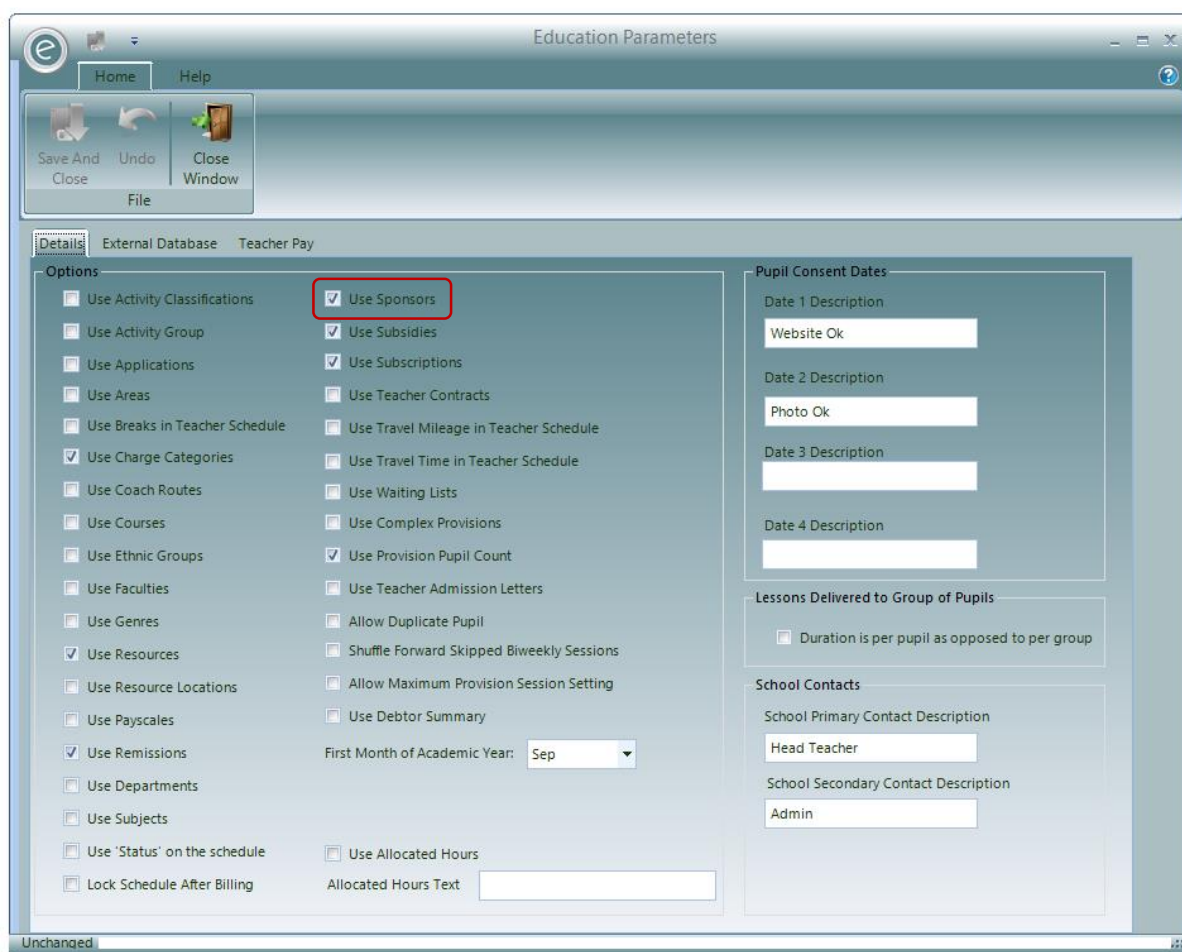
Now Sponsors are available to use in Ensemble.

Create a Sponsor

To create a Sponsor click:

Debtors (Menu Bar) > Sponsors > New Sponsor

This will display the window below:
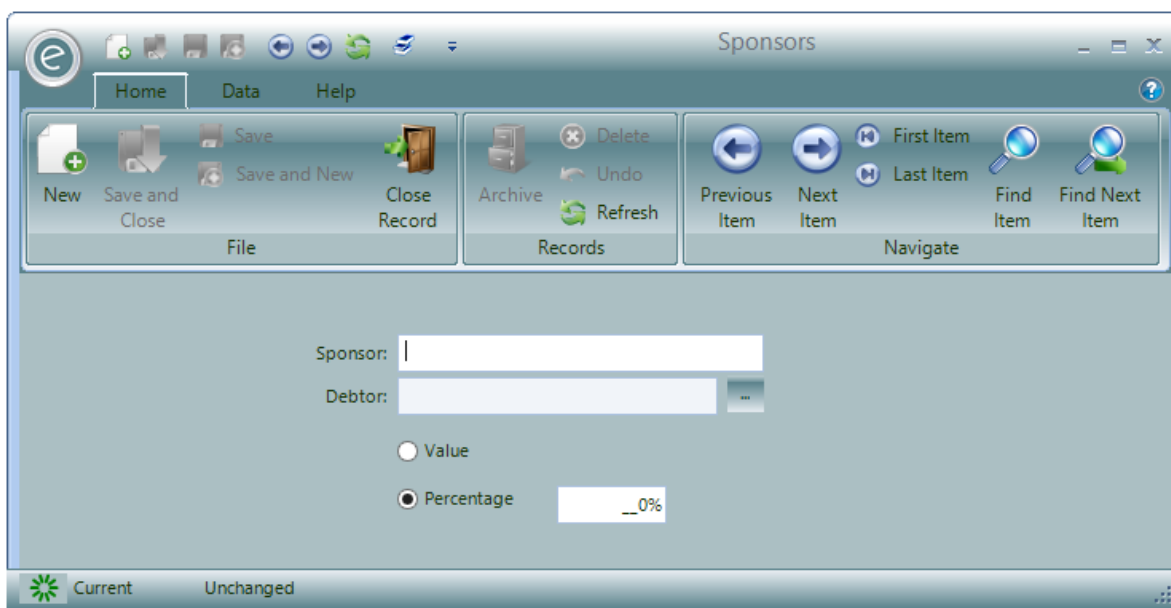
 The definition will include:

- A name for the **Sponsor**
- A link to the **Debtor** (normally an organisation but can be an individual)
- The sponsorship amount expressed as a **Value** or as a **Percentage**

Once defined they can be applied to each member of a group.

Apply a Sponsor

Sponsors are applied to Pupils who are members of a Group or Subscription. When adding a Pupil to a Group or Subscription, this option will be available when turned on in the Education Parameters.

Note: For more information regarding adding Pupils to *Groups*, *Subscriptions* or *Subscription Applications* refer to **Group Membership**, **Subscription Membership** or **Applications** in the **Associating Pupils with Activities** Chapter.

9. Allocated Hours

Allocated Hours are a *discount* that can be applied to *School Charges*. They provide a way of offering a *predefined number of hours within a Billing Type at a reduced or free Charge*. You can define any number of Allocated Hour discount definitions, each for a different discount value but a school can *only be awarded one at any one time*.

Enable Availability in Education Parameters

Allocated Hours can be turned on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Allocated Hours' > Save and Close

This is displayed in the window below, with **Use Allocated Hours** highlighted in the **red box**:

Important: There is also a text box within the **red box** called **Allocated Hours Text** that *must be filled in*, if left blank then *no text will be displayed* for this Record in the menus. This textbox enables users to

rename this Record, for example to Assisted Hours or Discounted Hours. However we shall refer to this as 'Allocated Hours' throughout the manual.
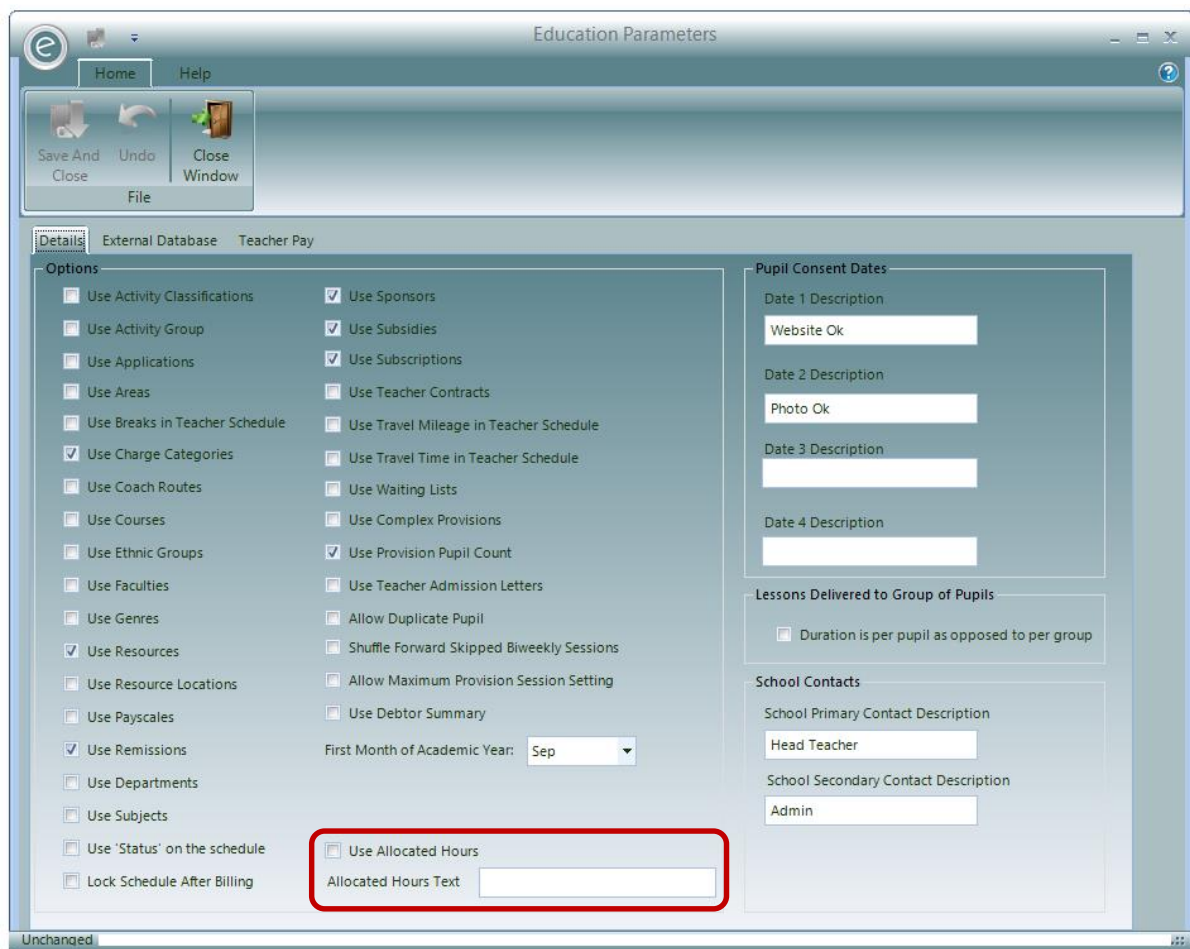
Now Allocated hours are available to use in Ensemble.

Create Allocated Hours

To create an Allocated Hours Record, click:

Debtors (Menu Bar) > Allocated Hours > New Allocated Hours

This will display the window below:
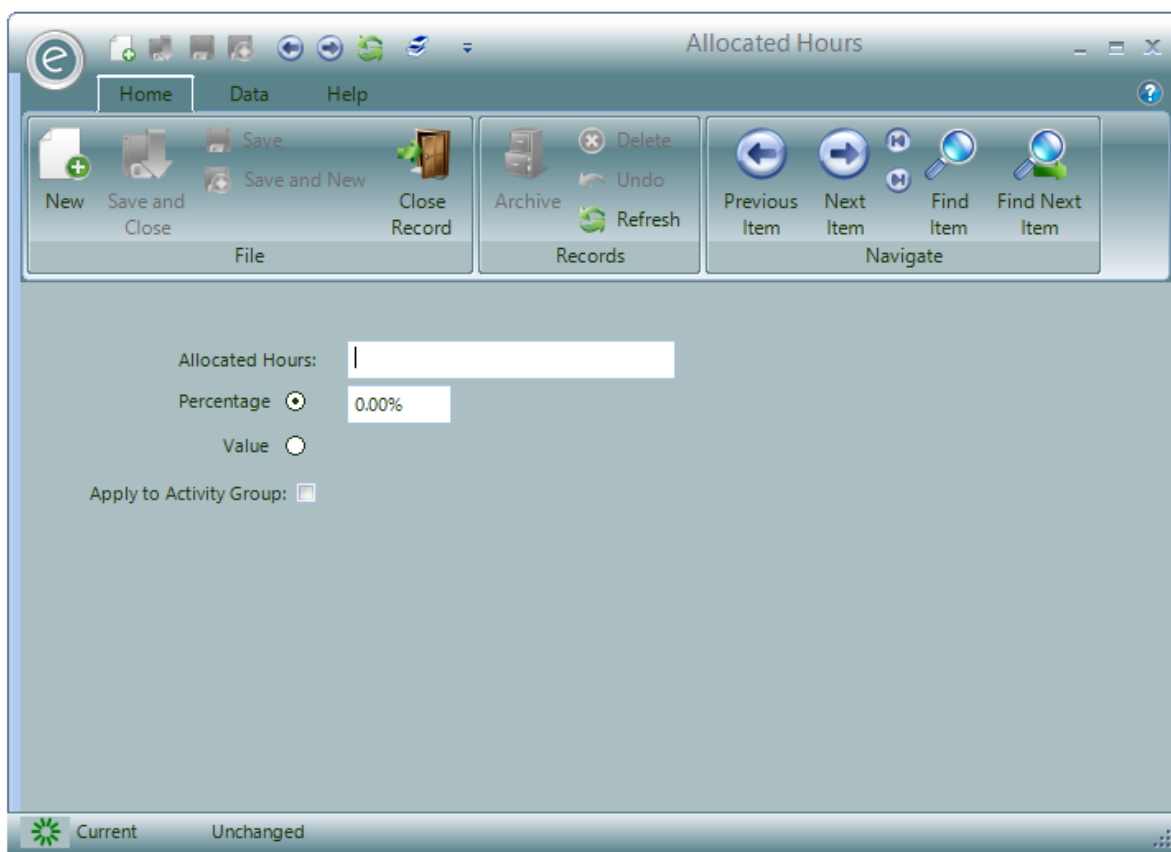
This will allow you to specify:

- A description in the **Allocated Hours** field
- An amount expressed as a value or percentage in the **Value** and **Percentage** fields respectively
- (Optionally) **Apply to Activity Group** in order to *limit* the Allocated Hours to a set type of tuition. For example if you have your School Tuition Activities defined as 'Standard Tuition' and 'First Access', you could elect to only apply the Allocated Hours discount to the 'Standard Tuition' and not 'First Access'.

Apply the Allocated Hours

To assign a School with Allocated Hours click:

Tuition (Menu Bar) > Schools > Open a School Record Card > Tick 'Allocated Hours'

This will display the window below:

After clicking Allocated Hours, the fields below will appear which are all highlighted in the red box:

Plan   Select the Allocated Hours Record you wish to use

Minutes   Specify how many minutes the Allocated Hours discount will run for

10. Other Discounts

Ensemble also includes a number of *other discounts* which are automatically applied to Payer's Charges during the Invoice calculation process.

These discounts are setup within the *Finance Parameters* window under the tab called **Pupil Payer Billing**.

To access Pupil Payer Billing click:

Tools (Ribbon Menu) > Parameters > Finance Parameters > Pupil Payer Billing

This will display the window below:
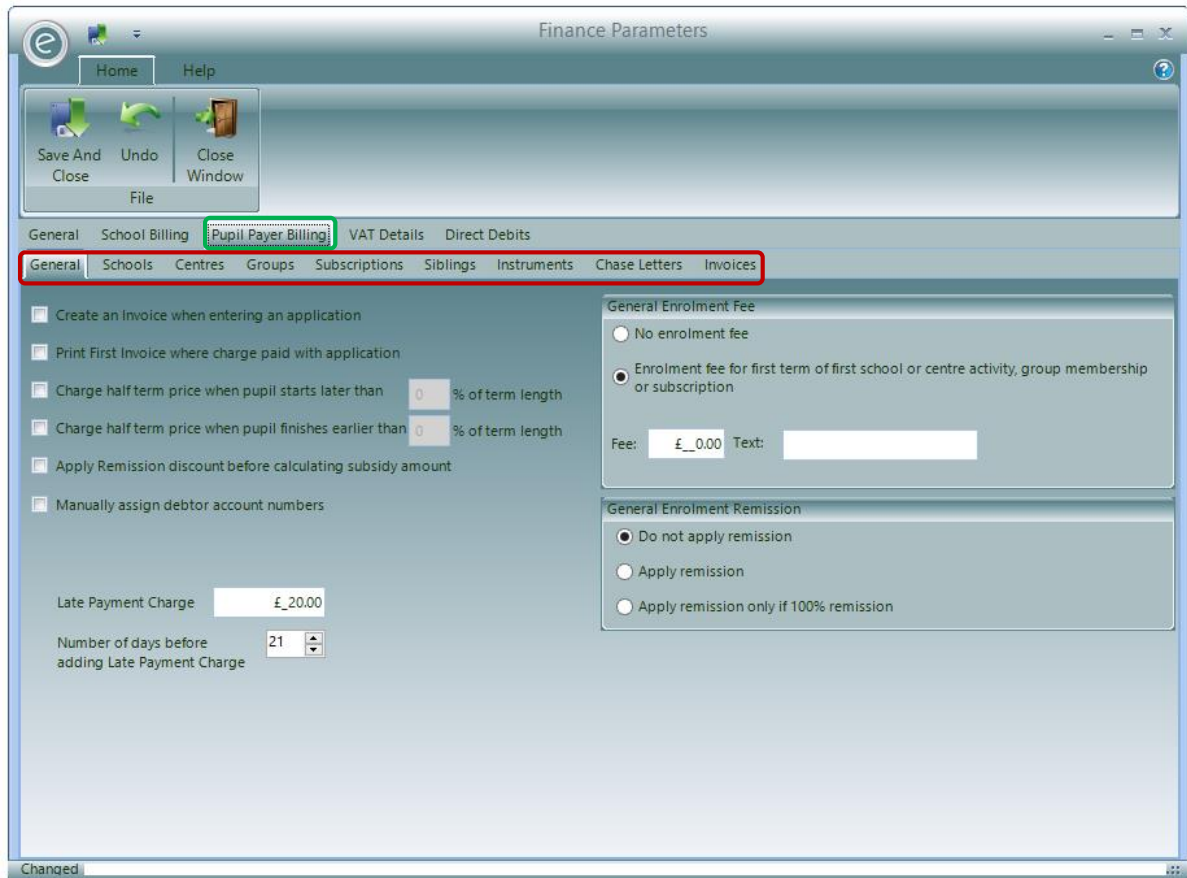
Underneath Pupil Payer Billing are a collection of subtabs highlighted in the red box. The other discounts are contained within the Schools, Centres, Groups, Subscriptions and Siblings tabs.

Selecting Subscriptions will list the most common discounts (that are also available for Schools, Centres and Groups). This will display the window below:

The **Subscription Membership** section contains the *available discounts*, highlighted in the **red box**. They include:

Charge for each Subscription	*No discount is given*, the payer is charged for every subscription purchased.
Single Highest Charge	The payer will only be charged for the subscription of the *highest value*. For example if they purchased two subscriptions worth £20 and £30, they will only be charged £30.
Multi Subscription Value Discount	As shown in the window above, this will *discount for multiple subscriptions* purchased. The discounts are a flat monetary value. For example, the 2nd Subscription can have £10 off and the 3rd Subscripton can have £5 off.
Multi Subscription Percentage Discount	This is very similar to the previous option, however the discount is a *specified percentage* off the chosen subscription. For example, the 1st subscription can have 50% off and the 3rd subscription can have 10% off.

Sibling Discount

Another type of discount specified in this area of the Finance Parameters is the *Sibling Discount.*

This can be accessed from the **Siblings** tab within Pupil Payer Billing, displayed below:

Here you can specify if any discount is to be given to younger brothers and sisters.

Note: The order of the sibling, is listed by *date of birth*.

The Sibling Discount section in the red box will allow you to specify if the discount should be applied as *value or percentage* by selecting Discount Given as amount and Discount Given as percentage respectively.

The Sibling Discount Amounts section in the green box will allow for different *discounts to be specified for each sibling* allowing great flexibility. Typically the 1st Child Discount (for the eldest) is left at 0.

The Apply Discount To section in the blue box will allow you to define *which services you offer the Sibling Discount to*, by ticking the available boxes. You may for example wish to apply it only to School Tuition. Furthermore you can Include Adults in Sibling and Apply even when multi-activity discount given since these do not apply by default.

11.   Enrolment Fees

Ensemble provides a method to automatically apply *Enrolment Fees* to Payer's Charges whenever pupils start. Enrolment Fees are defined within the *Finance Parameters*. They can be used as a fee for:

General Enrolment	This will charge a payer when a pupil takes up their *first service of any type* i.e. they will just get the *one Enrolment Fee whatever they do first*.
School Enrolment	Charge for enrolment in a school activity
Centre Enrolment	Charge for enrolment in a centre activity

Group Enrolment	Charge for enrolment in a group membership
Subscription Enrolment	Charge for enrolment in a Subscription

General Enrolment Fees

To access click:

Tools (Ribbon Menu) > Parameters > Finance Parameters > Pupil Payer Billing tab

This will display the window below:

The General tab (in the blue box) is the first tab displayed.

The red box highlights how the *General Enrolment Fee* can be set. Simply specify the fee in the Fee field and a reference to this which will appear on the payers Invoice in Text.

Service Specific Enrolment Fees

To access the other Enrolment Fees for specific services, click on either the Schools, Centres, Groups or Subscriptions tab in the blue box (above screenshot).

Selecting Schools will display the window below:

Note: The options below for the School Enrolment Fee are also available similarly for Centres, Groups and Subscriptions Enrolment Fees and can be accessed by selecting the respective tabs.

The *School Enrolment Fee* is highlighted in the red box. In addition to entering the Fee and Text field, you can set:

Enrolment fee for first of each activity	The Enrolment Fee shall be incurred, *each time* a new school activity is joined
Enrolment fee for first term of first acivity	The Enrolment Fee will only be *charged once*, regardless of how many school activities a pupil joins

While defining the Enrolment Fee you can also set the rules stating *how Remissions should be applied* to the fee when calculating the Enrolment, highlighted in the green box. The options are:

Do not apply remission	The Remission specified for the service provided *will not be applied* to the Enrolment.
Apply remission	Apply the Remission specified for the service provided to the *Enrolment Fee as well*
Apply remission only if 100% remission	The Remission is not applied to the Enrolment Fee unless it is 100%, in which case apply it thereby setting the enrolment to be *free*

The options above for the School Enrolment Fee are also available similarly for Centres, Groups and Subscriptions Enrolment Fees and can be accessed by selecting the respective tabs.

Note: If you select a General Enrolment Fee and another Enrolment Fee for a specific service, the payer will be *charged for both.*

12.   VAT Codes
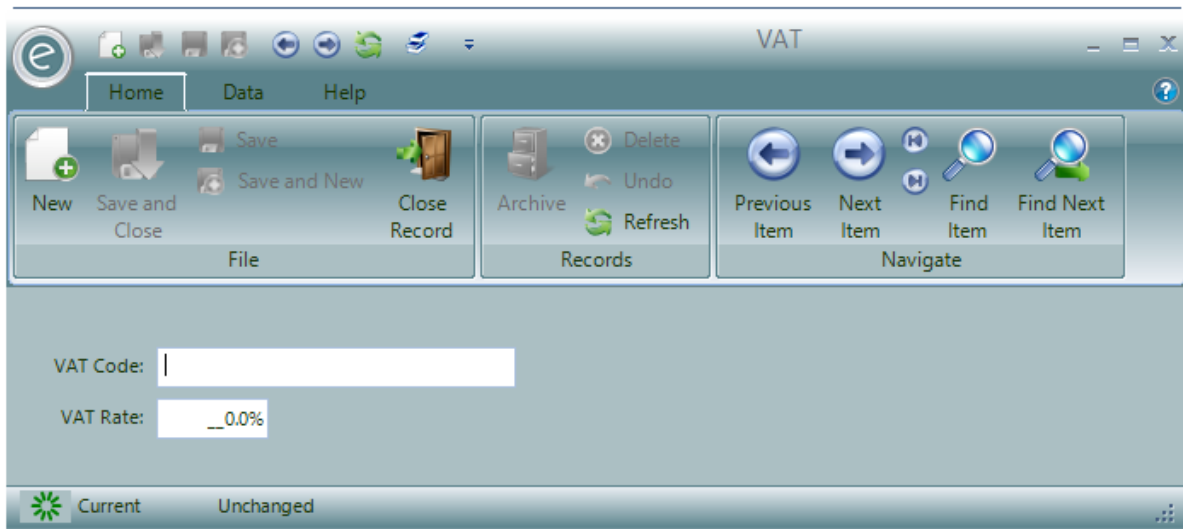
This is used to add VAT to items that fall inside government tax rules. Different rates can be added for flexibility and to keep up with changes in government policy.

Create a VAT Code

To add a VAT Code, go to:

Accounts (Menu Bar) > VAT Codes > New VAT Code

This will display the window below:

You will need to name this in the **VAT Code** box and enter the percentage of VAT in **VAT Rate**.

Apply a VAT Code

To implement the VAT Code, go to:

Tools (Ribbon Menu) > Parameters > Finance Parameters > VAT Details

This will display the window below:
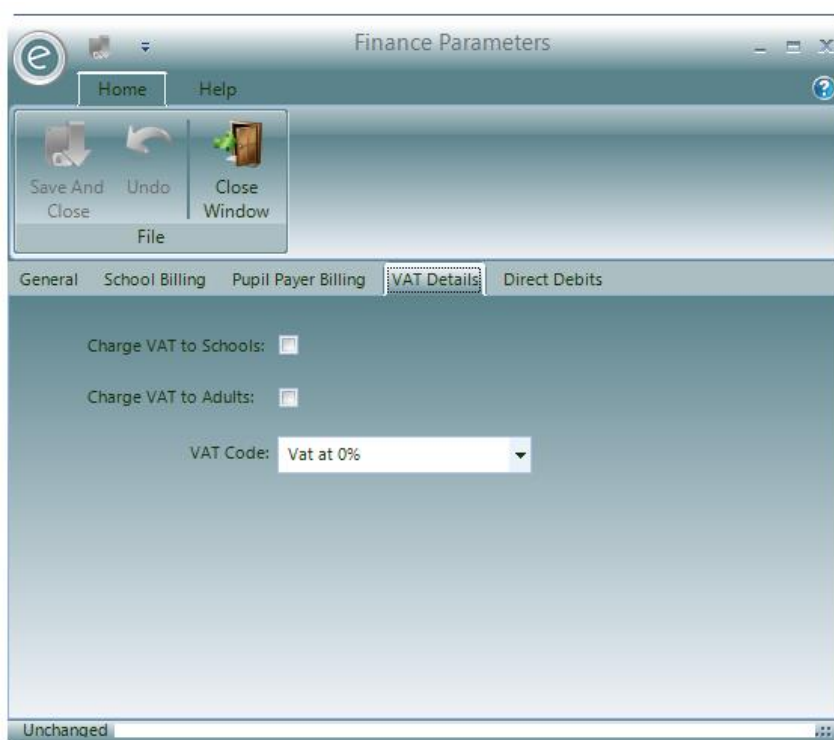
Select the VAT Code to use from the **VAT Code** field.

Ticking **Charge VAT to Schools** and/or **Charge VAT to Adults** will implement the VAT Code.

Note: They can also be applied to other individual Records such as Activity Groups.

Click **Save and Close** when finished.

13.   Debtor Billing Adjustments

Ensemble allows you to produce automatic Invoices and manual Invoices. However sometimes it is necessary to make an additional Charge (or Credit) but rather than manually creating a one off Invoice it may be *more desirable to add a Billing Adjustment to a Debtors Account* and have that adjustment added to the next automatic run of Invoices.

Billing Adjustments can also be *set to be effective from a specific date*. For example if you want to raise a Credit for a Debtor but do not want it to affect an Invoice due to go out in 7 days time, you can set the effective date to be in 8 days time and the credit will not affect the Invoice.

Create a Debtor Billing Adjustment

▶ [Watch the Video Tutorial here](#)

To create a Billing Adjustment for a Debtor, click:

Debtors (Menu Bar) > Open Payers Record Card > Billing Adjustments tab

Note: The **Billing Adjustment** tab is also available within a School Record Card.

This is displayed below:
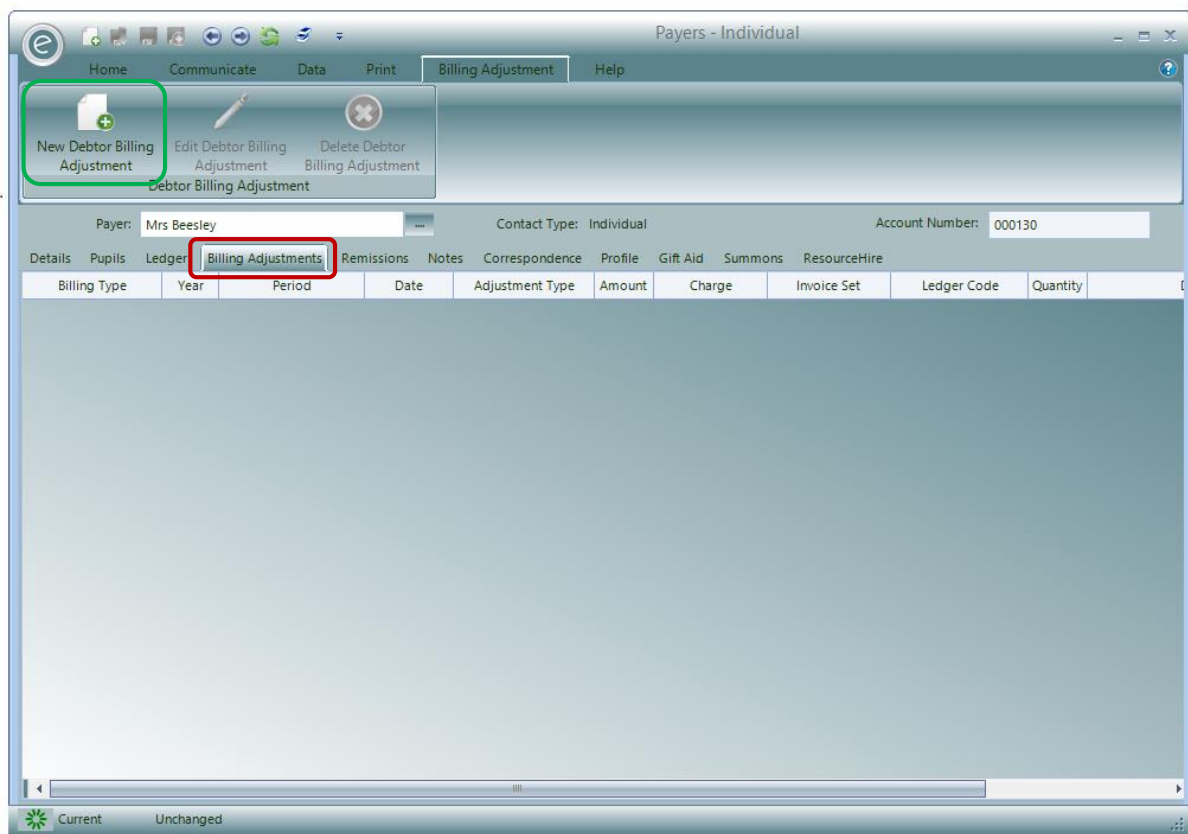
Now click **New Debtor Billing Adjustment** inside the **green box** and the window below will appear:
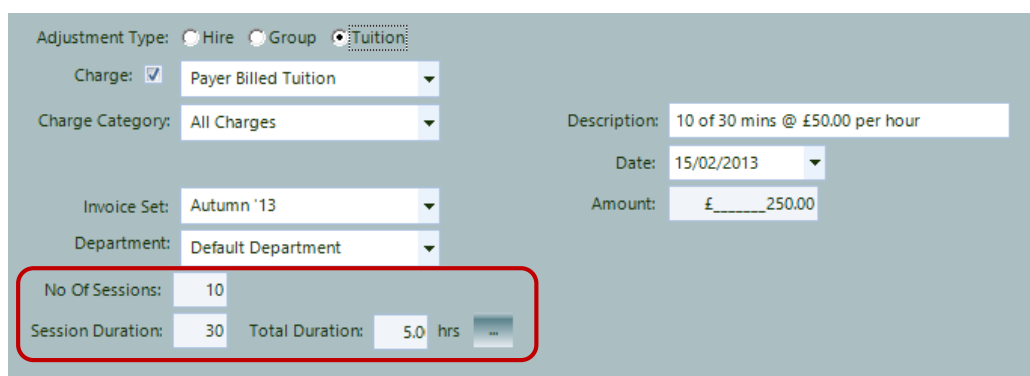
In the **red box** you can set the **Billing Type, Year** and **Period** for which this Billing Adjustment will be used for.

Now in the **green box** you can select the **Charge, Charge Category** and **Ledger Code**. From **Adjustment Type** you may specify if the Billing Adjustment is related to a **Hire, Group** or **Tuition**.

Note: When **Charge** is ticked, the amount of the Billing Adjustment will be fixed to the amount of the Charge. Untick this and you can enter any positive or negative amount you wish.

Finally in the **blue box** you can select the associated Record (**Group** in the above screenshot) and enter a **Description** to apply to the amount as narrative. You can also set a **Date** for when you want the adjustment to be applied. The **Amount** can be entered below this. The Amount will not show on the Debtor's Ledger until the Date given in the field above.

You can enter the **Quantity** of Billing Adjustments to be made too. Typically for Groups this will be 1 but when defined for Tuition this will change to **No Of Sessions, Session Duration** and **Total Duration** as displayed below:

Note: A difference between Billing Adjustments and Credits is that Billing Adjustments *can be edited* after they have been created. This reduces the issue of raising Credits for incorrect amounts.

14.   Payer Confirmation

As can be seen there are many factors affecting the generation of a Payer's Invoice. It can consist of many services for any number of pupils and have an array of Remissions and Discounts applied.

Therefore the *Payer Confirmation Letter* is designed to show all the items a Payer is responsible for and the Charges that will be applied, thus providing an *opportunity to check* these details.

To view this report, click:

Debtors (Ribbon Menu) > Documents > Print Payer Confirmation

Alternatively, this Report can be opened for a *specific Payer* by:

Opening a Payer Record Card > Print > Print Payer Confirmation

Either option will display the window below:
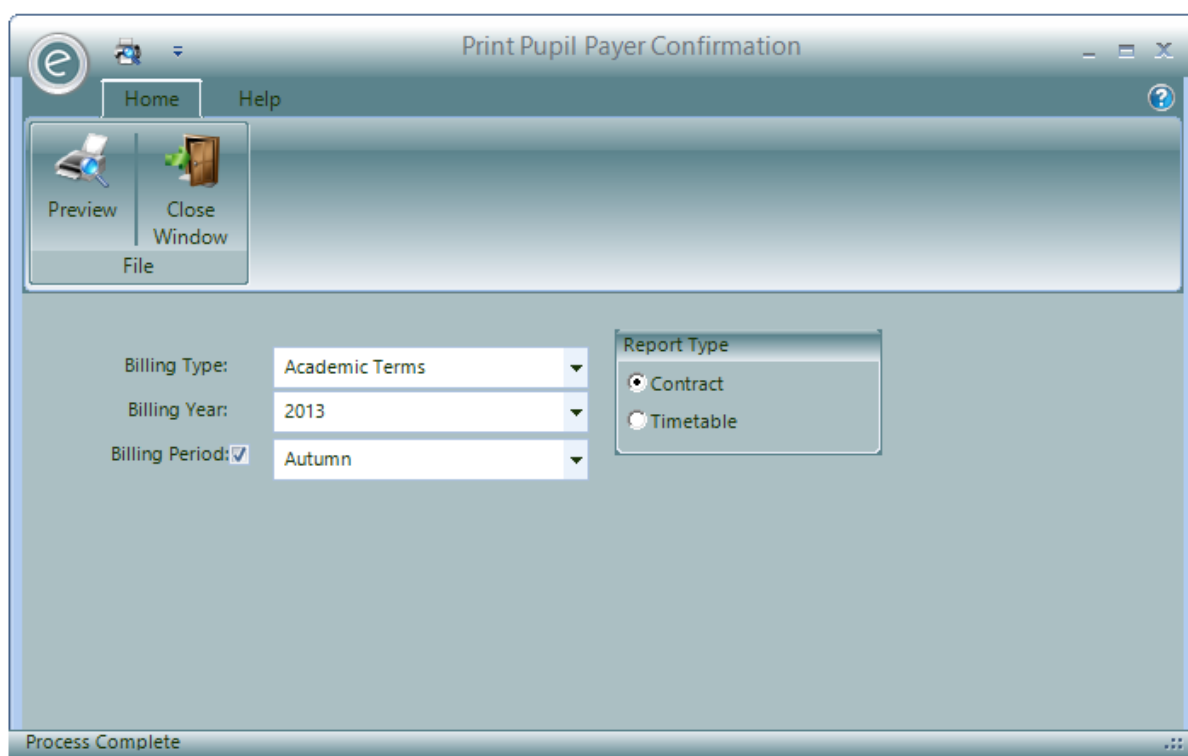
You will need to specify the Payers within a **Billing Type**, **Billing Year** and **Billing Period** (optional).

Specify if the *Report Type* should be a **Contract** or **Timetable**. A *Contract* will display the Report in a similar fashion to an Invoice, with financial information next the tuition information for the associated Pupil. A *Timetable* focuses on the tuition information.

Click **Preview** to view the Report.

An example for a Report Type that is a *Contract* is displayed below:

Paritor Performing Arts

Elizabeth House
Exeter Business Park
Exeter
Devon
EX1 3QS

Timetable : Academic Terms 2013/2014 Autumn

Dated: 29-Oct-13

Mr Harry Barham
64 High Grove
Westbury
Borsetshire
BO8 3ER

Tel No:

Mobile No:

Email Address:

	Cost	Charge
Leigh Barham DOB 17-Mar-00		
School Lessons		
(trf) Payer Billed Tuition Flute at Elizabeth Primary on Tuesday from 03 Sep 2013	£250.00	£250.00
(trf) Payer Billed Tuition Drums at Elizabeth Primary on Monday from 02 Sep 2013	£250.00	£250.00
School Lessons		£500.00
Francis Blackburn DOB 04-Jul-07		
School Lessons		
(trf) Payer Billed Tuition Cello at Swanton Secondary School on Monday at 09:00 from 02 Sep 2013	£0.00	£0.00
School Lessons		£0.00
Total Charge		£500.00

School Remission:		
Centre Remission:		
Group Remission:		
Resource Remission:		
Subscription Remission:		

15.   School Contracts

Contract Service Advice

▶ [Watch the Video Tutorial here](#)

When you are renewing tuition Contracts with Schools, you can produce a Report called a *Contract Service Advice*. This outlines the tuition charged to the School and gives them the option to accept or decline proposed level of services.
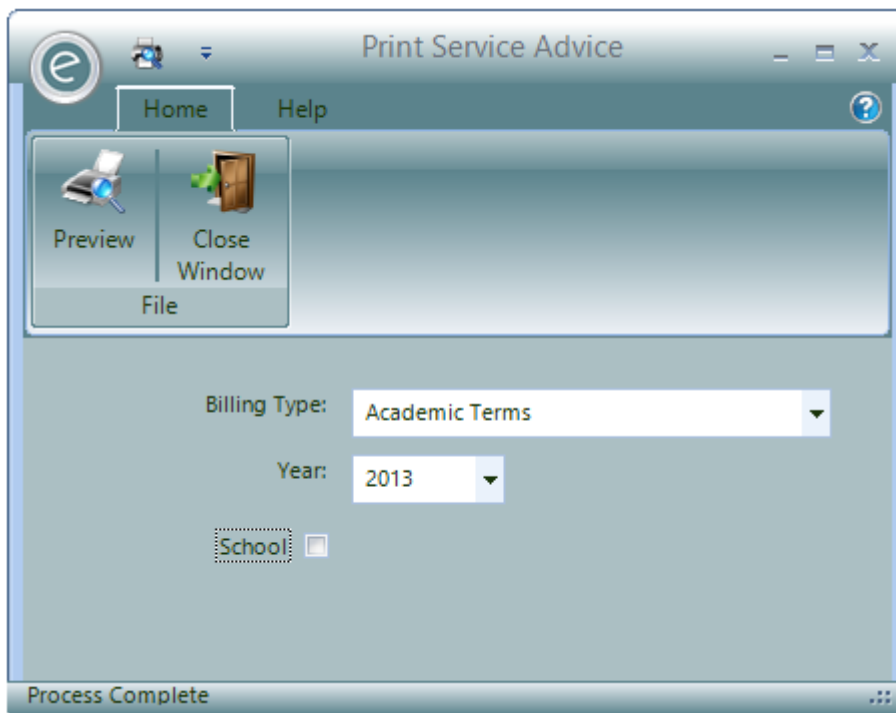
To produce this Report, click:

Schools (Ribbon Menu) > School Contract Service Advice

Alternatively, you can *print the Report for a specific School* directly from the Record Card by:

Opening a School Record Card > Print tab > Print Service Advice

Either of these options will display the window below:

You will need to specify the **Year** and the **Billing Type**.

Furthermore you can specify a particular **School**.

Click **Preview** to view the Report.

An example of the bottom of the Report is displayed below:

School Service Level Agreements (SLA)

▶ [Watch the Video Tutorial here](#)

The *Service Level Agreement (SLA)* is a contract between the School and your service that specifies the tuition services that they have bought from you and the charges. This makes it clear for both parties what has been confirmed.

Note: Tuition that is charged to a School on a *per Pupil* basis will *not appear* on this Report since this is paid on a claims basis.
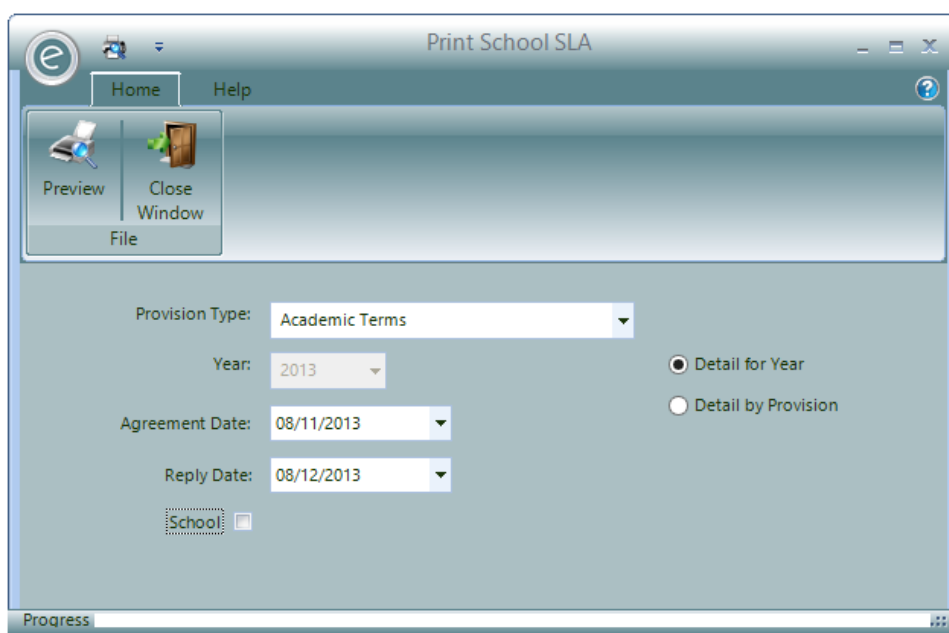
To produce a Service Level Agreement, click:

Schools (Ribbon Menu) > School Contract SLA

Alternatively, you can *print the Report for a specific School* directly from the Record Card by:

Opening a School Record Card > Print tab > Print School Contracts

Either of these options will display the window below:

You will need to select the **Provision Type**, **Agreement Date** and the **Reply Date**.

You can choose between giving detail by year or Provision by clicking **Detail for Year** or **Detail by Provision** respectively.

Finally you can optionally specify a **School.**

Click **Preview** to view the Report.

An example is displayed below:

Service Level Agreement 2013/2014

Matcham Grammar School
Matcham Grammar School
Kent Drive
Matcham
Borsetshire

Duration of the Agreement
This is confirmation of the agreement between Paritor Performing Arts and Matcham Grammar School to provide the following tuition for the Academic Year 2013/2014 from September until July.

Tuition Activity

Activity	Teacher(s)	From	Duration	Sessions	Total Hrs	Charge
Drums	Lincoln Andrews	02-Sep-13	01:30	30	45:00	£480.00
Drums	Lincoln Andrews	02-Sep-13	01:00	30	30:00	£320.00
Drums	Lincoln Andrews	02-Sep-13	02:00	30	60:00	£640.00
First Access - Piano	Natalie Fairhead	02-Sep-13	01:00	30	30:00	£900.00
First Access - Piano	Natalie Fairhead	02-Sep-13	02:00	30	60:00	£1,800.00
First Access - Piano	Natalie Fairhead	02-Sep-13	01:30	30	45:00	£1,350.00
First Access - Piano	Natalie Fairhead	02-Sep-13	01:00	30	30:00	£900.00
First Access - Piano	Natalie Fairhead	02-Sep-13	01:30	30	45:00	£1,350.00
First Access - Piano	Natalie Fairhead	02-Sep-13	01:30	30	45:00	£1,350.00
First Access - Piano	Natalie Fairhead	02-Sep-13	02:00	30	60:00	£1,800.00
First Access - Piano	Natalie Fairhead	02-Sep-13	02:00	30	60:00	£1,800.00
First Access - Piano	Natalie Fairhead	02-Sep-13	01:00	30	30:00	£900.00
Voice	Derek Dawley	02-Sep-13	02:00	30	60:00	£360.00
Voice	Derek Dawley	02-Sep-13	01:30	30	45:00	£360.00
Voice	Derek Dawley	02-Sep-13	01:00	30	30:00	£360.00

Total cost of tuition for the Academic Year 2013/2014 is £13,770.00

Conditions of the Agreement
Full terms and conditions of the Service Level Agreement can be found on our website www.xxxxxxx.xxx or by emailing xxxxx@xxxxxx.xx.xx.

Charging Policy
Charges will be made. The breakdown of the total charge above is:

Autumn Total (charged Dec)	£4,650.00
Spring Total (charged March)	£4,560.00
Summer Total (charged July)	£4,560.00

Enquiries
General enquiries should be directed to the office

School Contract Summary

▶ [Watch the Video Tutorial here](#)

You will be able to print a summary of all the contracts for the tuition services that you charge to Schools. This is called the *School Contract Summary*. It gives details such the Total Hours and Total Cost at each School and Grand Totals across all Schools at the bottom.

Note: Tuition that is charged to a School on a *per Pupil* basis will *not appear on this Report* since this is paid on a claims basis.

To produce this, click:
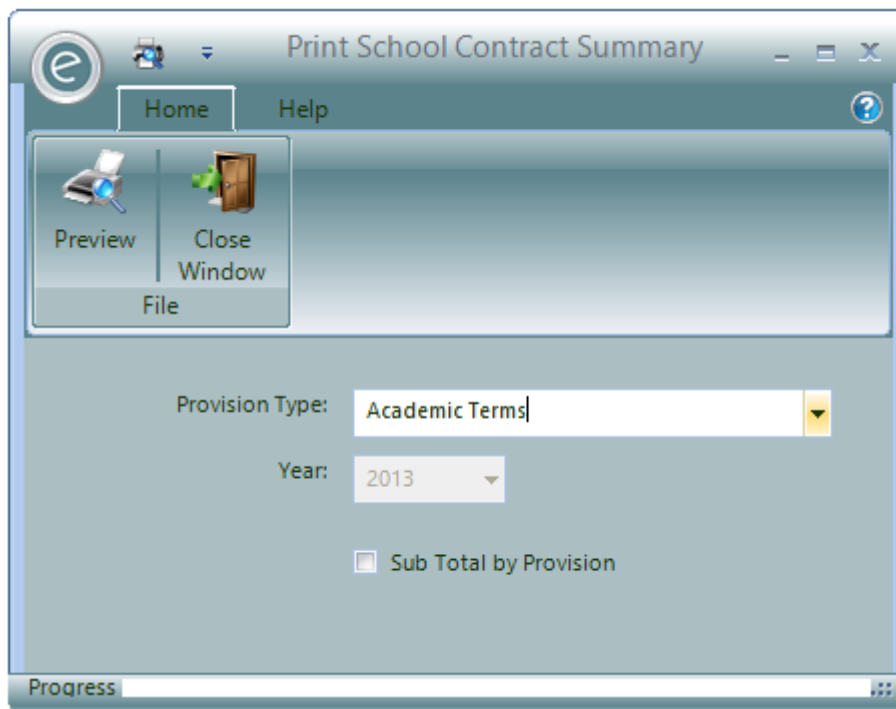
Schools (Ribbon Menu) > School Contract Summary

Alternatively, you can *print the Report for a specific School* directly from the Record Card by:

Opening a School Record Card > Print tab > Print School Tuition Requirements

Either of these options will display the window below:

You need to select the Provision Type. Furthermore ticking Sub Total by Provision will group the rows in the Report by Provision.

Click Preview to view the Report.

An example is displayed below:

School Contract Summary for Period 01-Sep-13 to 31-Aug-14

Ambridge Grammar School

	Frequency	Provision/Term	From	Sessions	Duration	Total	Teacher		Charge
Tuition Activity									
French Horn	Weekly	Autumn	02-Sep-13	10	00:30	05:00	Michael Birchfield		£600.00
		Spring	04-Jan-14	10	00:30	05:00	Michael Birchfield		£600.00
		Summer	19-Apr-14	10	00:30	05:00	Michael Birchfield		£600.00
		Total Sessions/Weeks		30	Hours	15:00		French Horn	£1,800.00
Guitar	Weekly	Autumn	02-Sep-13	10	00:30	05:00	Nigel Cambell		£500.00
		Spring	04-Jan-14	10	00:30	05:00	Nigel Cambell		£500.00
		Summer	19-Apr-14	10	00:30	05:00	Nigel Cambell		£500.00
		Total Sessions/Weeks		30	Hours	15:00		Guitar	£1,500.00
Piano	Weekly	Autumn	02-Sep-13	10	00:30	05:00	Jenny Smith		£60.00
		Spring	04-Jan-14	10	00:30	05:00	Jenny Smith		£0.00
		Summer	19-Apr-14	10	00:30	05:00	Jenny Smith		£0.00
		Total Sessions/Weeks		30	Hours	15:00		Piano	£60.00
					Total Hours	45:00		Total Cost	£3,360.00

Elizabeth Primary

	Frequency	Provision/Term	From	Sessions	Duration	Total	Teacher		Charge
Tuition Activity									
French Horn	Weekly	Autumn	02-Sep-13	10	00:30	05:00	Chantelle Darlings		£120.00
		Spring	04-Jan-14	10	00:30	05:00	Chantelle Darlings		£600.00
		Summer	19-Apr-14	10	00:30	05:00	Chantelle Darlings		£600.00
		Total Sessions/Weeks		30	Hours	15:00		French Horn	£1,320.00
Guitar	Weekly	Autumn	02-Sep-13	10	00:30	05:00			£60.00
		Spring	04-Jan-14	10	00:30	05:00			£500.00
		Summer	19-Apr-14	10	00:30	05:00			£500.00
		Total Sessions/Weeks		30	Hours	15:00		Guitar	£1,060.00
					Total Hours	30:00		Total Cost	£2,380.00

16.   Invoice Settings in Finance Parameters

Before you begin to raise your Invoices there are settings which can be selected in the *Finance Parameters* which will define how detailed the documents will or won't be.

Payer Invoices

General Settings

You will be able to define general layouts for the Invoices sent to Payers for Pupils here. To open the Finance Parameters click:

Tools (Ribbon Menu) > Parameters > Finance Parameters

In the window that opens you will then need to select the tabs:

Pupil Payer Billing > Invoices

This will now be displayed as below:
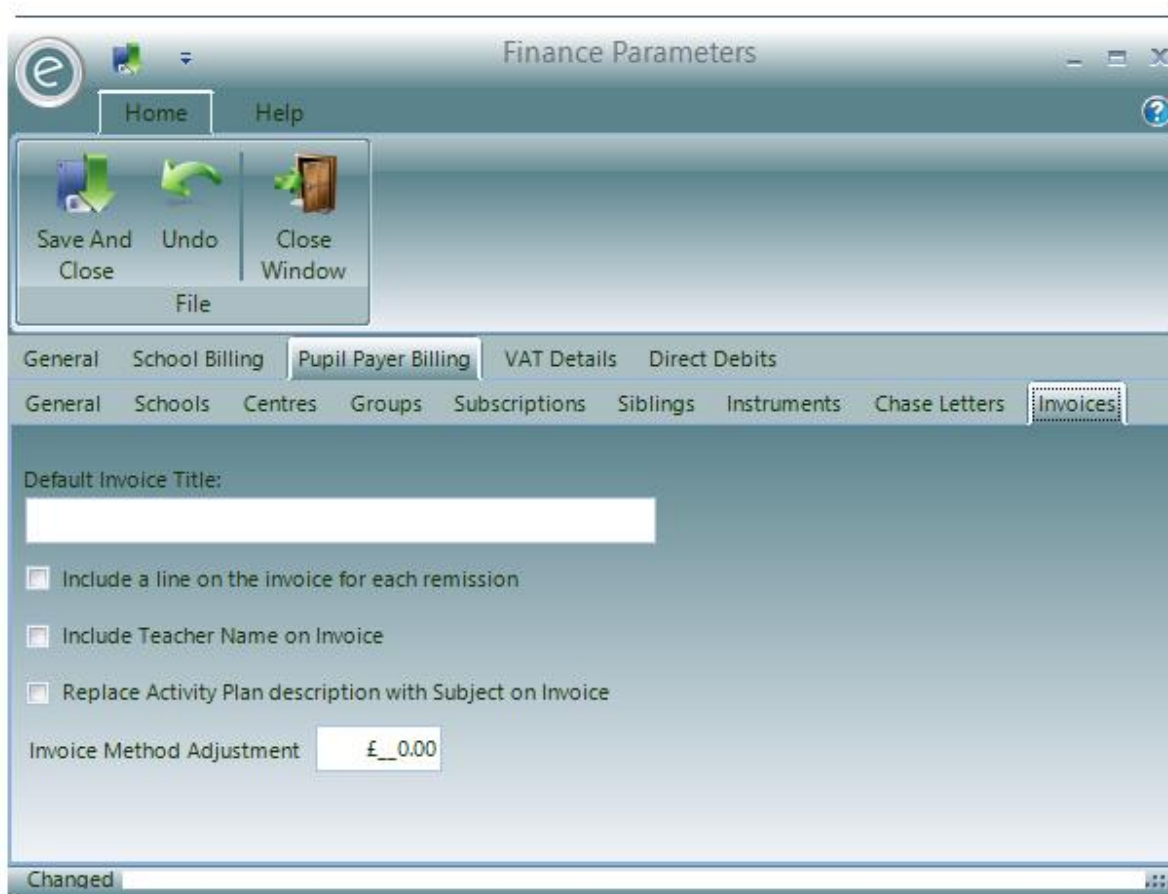
You will be able to select:

Default Invoice Title	Select a title for that will used as a default for all Invoices
Include a line on the Invoice for each remission	All Remissions will appear as individual lines in an Invoice
Include Teacher Name on Invoice	Names for Teacher's associated with the Activity Plan will appear on the Invoice
Replace Activity Plan description with Subject on Invoice	If a Pupil has a Subject selected within their Activity Plan, the Subject will appear instead
Invoice Method Adjustment	Enter the amount to charge or discount if the Invoices are sent out via post or email

When happy, click **Save and Close** to save the changes.

Resources

You will be able to specify how much information regarding a Resource is displayed on an Invoice. Within the Finance Parameters select:

Pupil Payer Billing > Instruments

This will now be displayed as below:

You will be able to tick the boxes to include the **Ref ID** and/or **Serial No** for the Resource on the Invoice.

Click **Save and Close** to save the changes.

Subscription Items on Invoices

As a default, items that are covered by Subscriptions won't be included in the Invoice document since they aren't charged individually. However if you want these to appear there is a setting in the *Subscriptions* tab in the Finance Parameters to do this. Within the Finance Parameters select:

Pupil Payer Billing > Subscriptions

This will display the window below:

You will then need to tick **Show items covered by subscription on invoice** and then **Save and Close**.

Applications

You will be able to specify whether to create Invoices once Applications have been made. Within the Finance Parameters select:

Pupil Payer Billing > General

This will now be displayed as below:
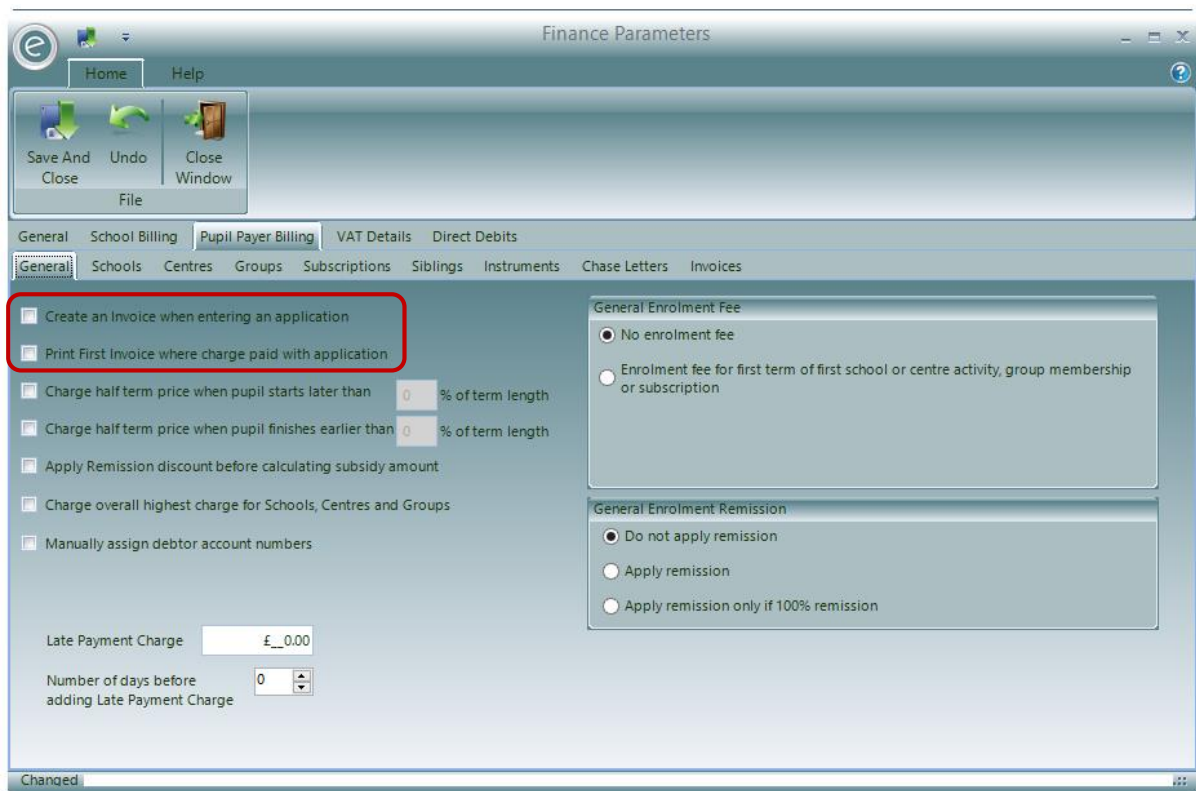
You will be able to:

Create an Invoice when entering an application	All Applications made will have an Invoice raised
Print first Invoice where charge paid with application	The first printed Invoices will be those with Charges on the Application

When happy, click **Save and Close**.

Note: For more information on Applications refer to **Applications** in the Chapter **Associating Pupils with Activities**.

School Invoices

You will be able to define general layouts for the Invoices sent to Schools here. To open the *Finance Parameters* click:

Tools (Ribbon Menu) > Parameters > Finance Parameters > School Billing

This will now be displayed as below:
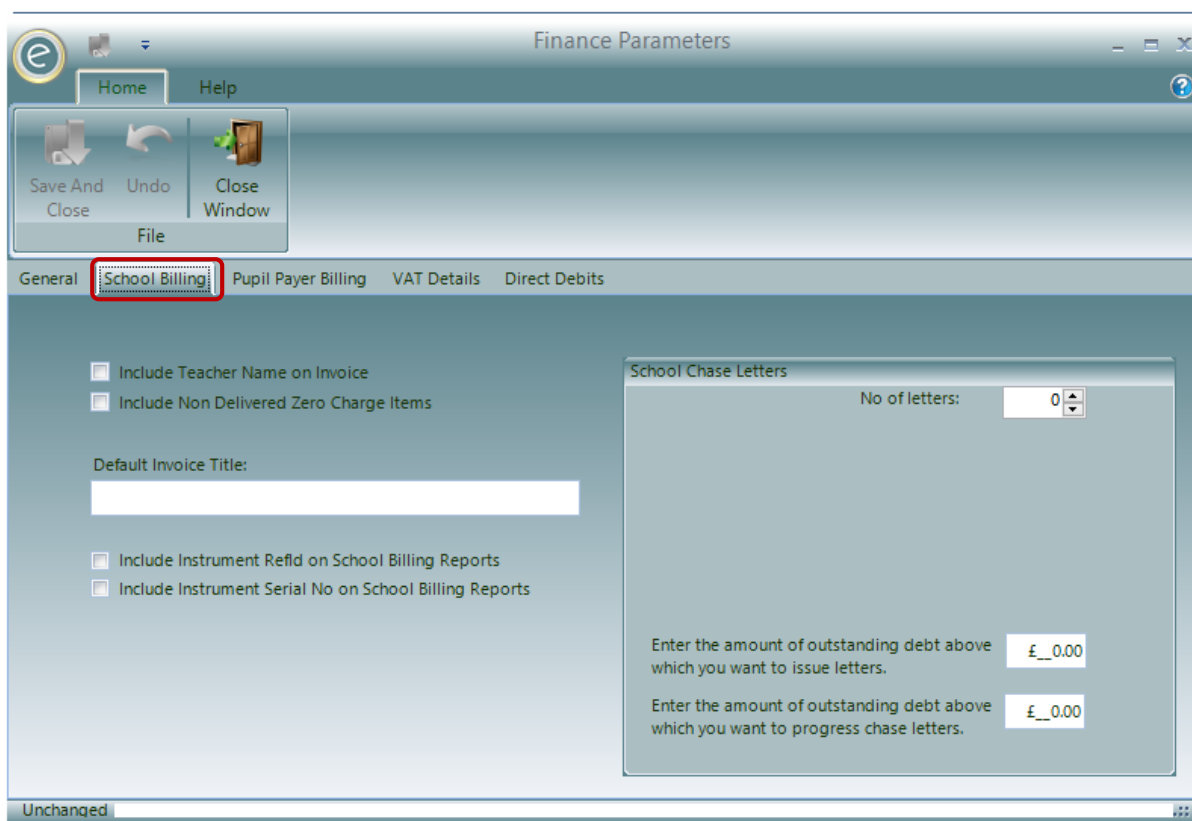
You will be able to select:

Include Teacher Name on Invoice	Names for Teacher's associated with the Activity Plan will appear on the Invoice
Include Non Delivered Zero Charge Items	Invoice will display zero amount Charges for Activities that did not take place
Default Invoice Title	The default title that is displayed for each School Invoice unless made otherwise
Include Instrument Ref ID on School Billing Reports	The Resource Ref ID will be displayed on the School Billing Report
Include Instrument Serial No on School Billing Reports	The Resource Serial No will be displayed on the School Billing Report

When happy, click **Save and Close** to save the changes.

17.   Automatic Generation of Invoices

Invoice Sets

An optional descriptive Record called an Invoice Set can be created to categorise the Invoices generated in a particular Invoice run. This is useful for debt management purposes as you will be able to compare different outstanding debt for Invoice Sets.

To create an Invoice Set, click:

Accounts (Menu Bar) > Invoice Sets > New Invoice Set

This will display the window below:
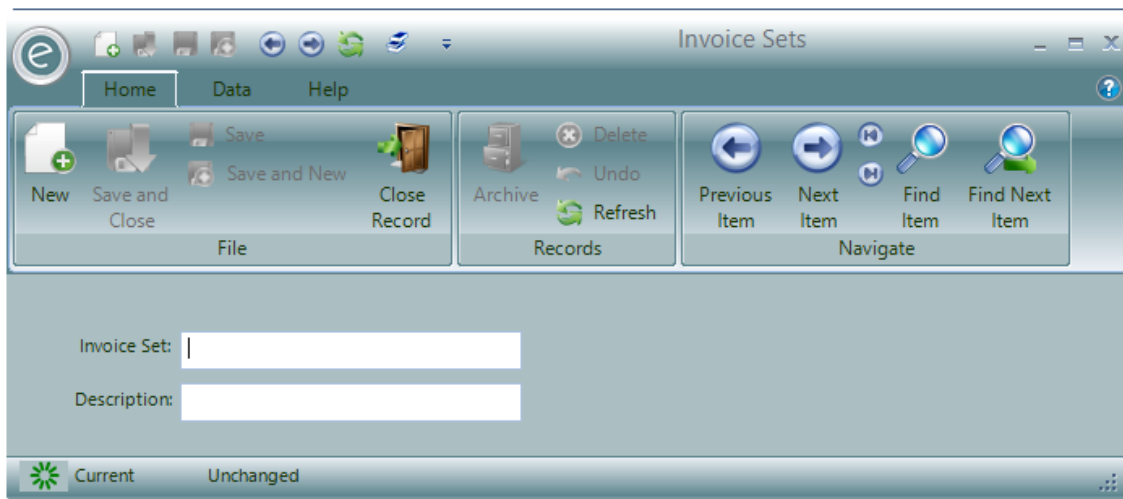
Insert a name in the **Invoice Set** field and a **Description** below.

Click **Save and Close** when finished.

Payer Invoice Procedure

 [Watch the Video Tutorial here](#)

The generation of Payer Invoices relating to the services you have provided is a simple process consisting of these three steps:

1. Calculate Payer Billing
2. Print Payer Billing
3. Raise Payer Invoices

The principle behind the process is for the billing to be calculated, checked via a printed report and finally when all checks are complete the actual Invoices are raised.

Should any issues requiring amendment be discovered while checking the billing report these can be made and the calculation process repeated again and again.

Important: Once Invoices have been raised *no more amendments can be made* for the Invoices Billing Period and any subsequent adjustments will require the posting of a manual Invoice or Credit to correct the Ledger.

To perform this procedure click:

Debtors (Ribbon Menu) > Payer Billing

A menu now appears where all steps above can be performed in turn.
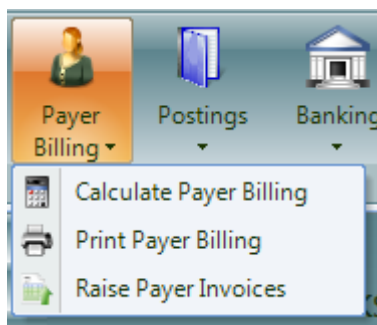
Each step will now be explained in further depth.

Calculate Payer Billing

Clicking **Calculate Payer Billing** will display the window below:

In order to perform the calculation, this window will require you to specify:

Billing Type	Select the Billing Type from the dropdown menu
Billing Year	Select the Billing Year from the dropdown menu
Billing Period	Select the Billing Period from the dropdown menu
Include Previously Invoiced Items in report	This will include all previously Invoiced items in the calculation for the specified Billing Year and Period. Useful if you want to reconcile the whole Billing Report for Period
Include Subscription Paid Items	This will include Subscriptions in the Billing Report

You will also be able to specify the *Report Type* to be a **Combined Report** or an **Individual Report**. A Combined Report will also you to calculate the billing for multiple services you provide (as above). Alternatively the Individual Report will just calculate the billing for a specific service. The options available to calculate are:

School Tuition	Select to include School Tuition
Music Centre Tuition	Select to include Music Centre Tuition
Group Membership	Select to include Group Memberships
Sponsorship	Select to include Sponsorships
Subscription	Select to include Subscriptions
Resource Hire	Select to include Resource Hires

Clicking on the **Preview** button will start the calculation and produce the *Billing Report,* as displayed below:

	Charge	Multi Discount	Sibling Discount	Payer Remission	Activity Remission	Subsidy	Enrolment	Goods	VAT	Total	Payer Invoice	Subsidy Invoice
01-Feb-10												Paritor Performing Arts
School Tuition Billing Report : Academic Terms 2009 Spring												
Borchester High School												
Activity: **Ballet Class**	Charge: **Pupil Group 30min**											
Clifton Addis — Mrs Lola Addis	£80.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£80.00	£0.00	£80.00		
Ballet Class	£80.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£80.00	£0.00	£80.00		
Total for Spring	£80.00	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00	£80.00	£0.00	£80.00		

The calculation process will check the data and *issue warnings* if information is *incorrect or missing*. Such cases may be the application of the same Remission to both the Payer and the pupil or perhaps the absence of a valid Payer when a pupil has been transferred from a school billed lesson (not requiring a Payer) to a Payer billed lesson.

Important: If any such warnings have been displayed you are prevented from viewing the Billing Report. Moreover you will be *unable to raise Invoices* before first correcting the situation and starting the calculation again. If you try to raise Invoices with errors still existing you will see the message below prompting you to go back and make the necessary corrections.
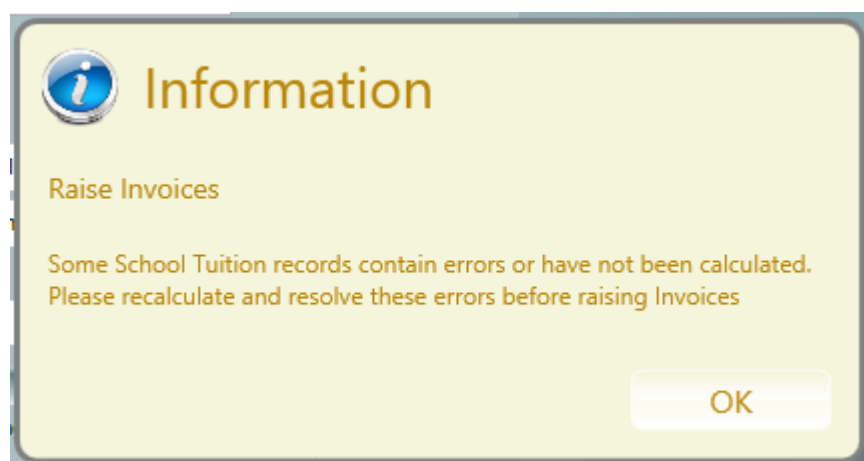
Print Payer Billing

Click **Print Payer Billing** to display the window below:

This is simply an option to print a Billing Report for items that have been calculated previously. All the options from Calculate Payer Billing are available, whereas here you will create an *individual or combined Billing Report* for either Tuition, Group Membership, Sponsorship, Subscriptions and Resource Hire.

Note: Remember you can *change* Billing Year and Period which will allow you to view any previous Billing Report, even if the Invoices have already been raised.

Click Preview to view the Report

An example is partially displayed below:

Raise Payer Invoices
Click Raise Payer Invoices to display the window below:

This window displays the options for raising the Invoices.

In the **red box** you can select which services to include by ticking the associated tick-boxes, the **Invoice Date**, and **Billing Year, Billing Type** and **Period**.

You can also allocate this run of Invoices to a defined **Invoice Set**.

Note: Selecting multiple services will cause them to all appear on a single Invoice per-payer.

The fields inside the **green box** allow you to specify the **Invoice Title** and the **Period Text** which gives options for how to display the term Invoiced. Selecting **User Specified** will produce a textbox allowing you specify this yourself.

Click **Start Process** to generate the Invoices.

Important: Once the process is run you *cannot re-run it for the same criteria*, it is therefore important to be sure that all the Billing Reports previously produced are correct, charges and remissions are all correctly defined.

Any subsequent adjustments will require either:

- A posting of a *Manual Invoice*
- A posting of a *Manual Credit*
- A correction to the *Ledger**

*This was discussed in the **Debtor Billing Adjustment** section in the manual.

Confirmation in Schedules

Once the Payer Invoices have been raised, the Pupils in the *Pupil View of a Schedule* will have an **Invoice Paper** icon next to them to confirm this. An example is displayed below:

School Invoice Procedure

▶ [Watch the Video Tutorial here](#)

Invoiced or Internal School Billing

The School Invoice procedure in Ensemble supports two types of School Billing:
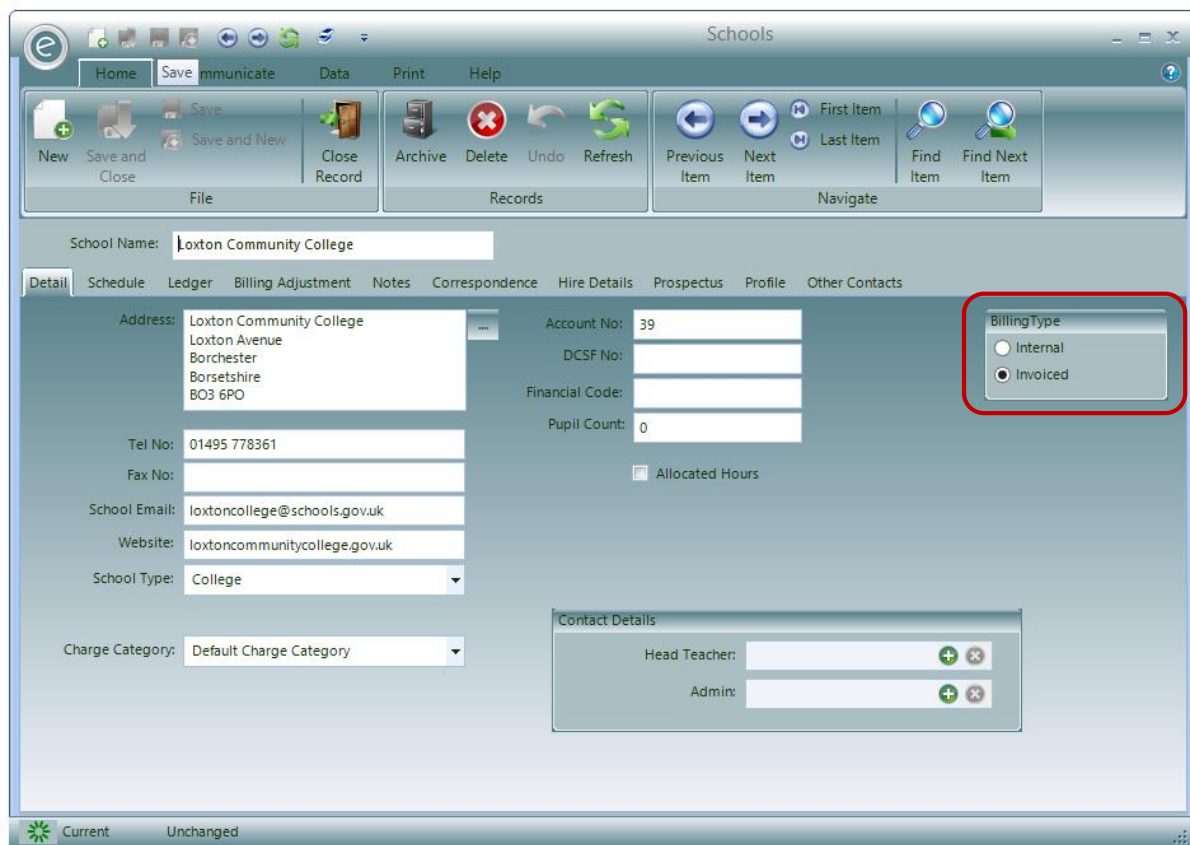
Invoiced   These Schools *are included* in the Raise School Invoices process with an Invoice being created and added to the Debtor's Ledger

Internal   These Schools *will not be included* in the Raise School Invoices process and will not have an Invoice added to their Debtor's Ledger

Each School must be set to one of these methods.

This can be done by:

Opening a School Record Card > Select Internal or Invoiced

This is displayed within the **red box** in the window below:

The raising of School Invoices is a very similar process to Payer Invoices, you calculate, print and then commit. The actual stages are as follows:

1. Calculate School Billing
2. Print School Billing Report
3. Print School Billing Advice
4. Raise School Invoices
5. Process Internal School Bills
6. Export Internal School Bills

After these stages are complete, you can:

- Print External Invoices
- Or Export details of Internal Invoices.

When processing your School Billing it is always for a specific Billing Type.

Important: Again, you can calculate and print the School Billing Report and Advice *as many times as required*, making as many changes as necessary but once you have gone beyond that stage *you cannot make any more amendments* without having to post adjustments in the form of Invoices and Credits to the Debtor's Ledger.

To access the School Invoice procedure, click:

Debtors (Ribbon Menu) > School Billing

A menu now appears where all steps above can be performed in turn.
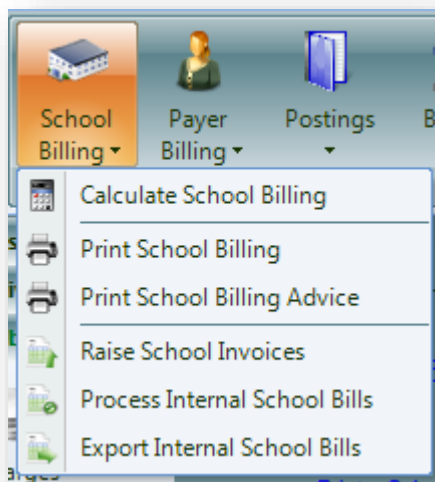
Each step will now be explained in further depth.

Calculate School Billing
After clicking on Calculate School Billing, this window will appear:
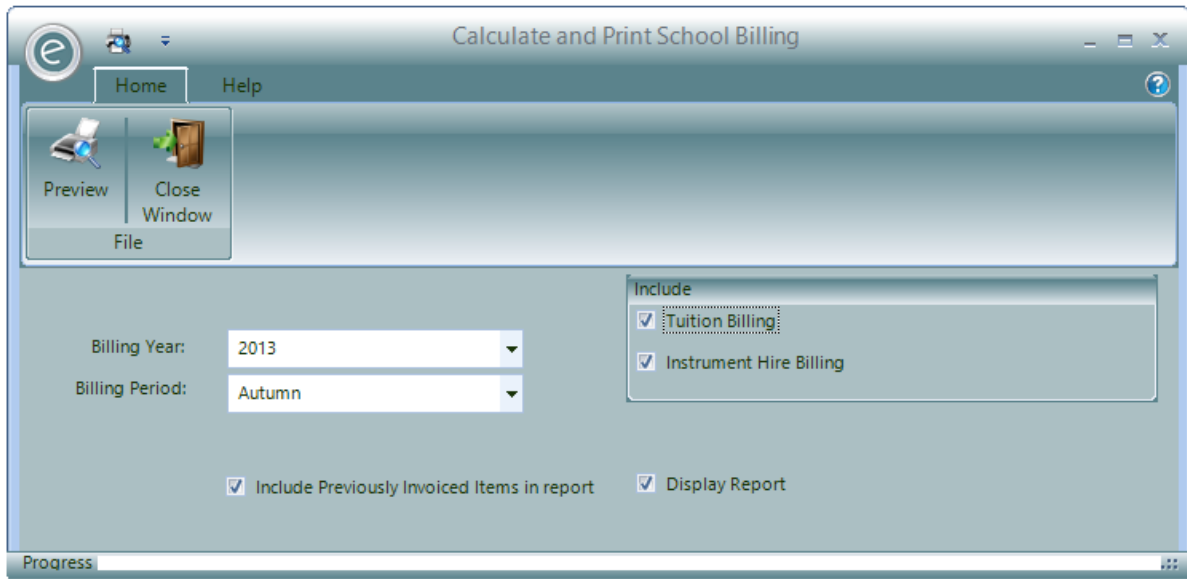
This process calculates charges for all Schools for a specified Billing Year and Period.

When calculating you can select to include Tuition Billing and or Instrument Hire Billing (Resources). Any School adjustments entered against the School and not previously processed will automatically be included.

If you would like the report to include any previously processed charges within the specified time frame, you can tick the Include Previously Invoiced Items in report check box. This is useful when you want to reconcile the Billing Report for the whole Biling Period.

Clicking on the Preview button will start the calculation and display the report if Display Report is ticked.

Print School Billing
Clicking on Print School Billing will display the window below:
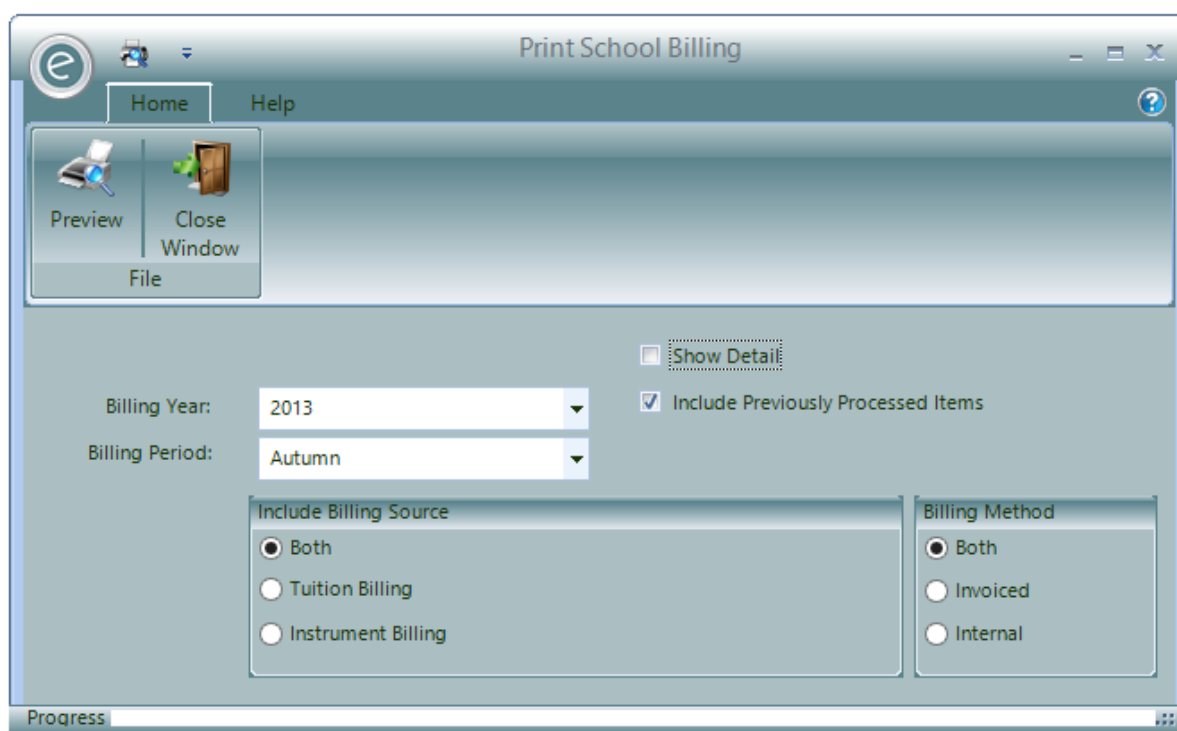
The Print School Billing function allows you to produce two different types of reports to *check the calculation*. These are a *Billing Report* and a *Detailed Billing Report* – This is a similar report to the Billing Report but shows the detail for each charge. You can view the Detailed Billing Report by ticking **Show Detail**

You can specify the **Billing Year** and **Period**, **Billing Source** and **Billing Method** of the Records to use in the Report.

Additionally tick **Include Previously Processed Items** to view every School billed within your criteria for the specified Billing Period.

Click **Preview** to view the Report.

An example is displayed below:

Print School Billing Advice

Clicking on Print School Billing Advice will display the window below:

This produces a Report *designed to be sent to each School* detailing the charges that have been calculated. This has very similar appearance to the Billing Report.

The *same fields* from the Print School Billing window are present on this window to specify the Report.

In addition, this will allow you to specify the Financial Controller and the format of the terms and dates on the Report by selecting one of the School Billing Advice fields.

Click Preview to view the Report.

An example is displayed below:

Raise School Invoices

Clicking on Raise School Invoices will display the window below:

The *Raise School Invoices* function gathers information calculated by the School Billing calculation and raises a single Invoice for each School defined as an *Invoice School*.

Note: Invoices for Schools defined as *Internal Schools* will be progessed in the next two sections.

In the red box, you can specify the Invoices to be raised by selecting the **Billing Year** and **Period** and whether to include **Tuition** and **Instrument Hire**. Furthermore you can select the **Invoice Date** and give the Invoice an **Invoice Title**.

In the green box, you can choose the format for the **Period Text**. Selecting **User Specified** will produce a textbox allowing you specify this yourself.

When you are ready, click **Start Process** to begin raising the Invoices.

Important: Once the process is run you *cannot re-run it for the same criteria*, it is therefore important to be sure that all the Billing Reports previously produced are correct, charges and remissions are all correctly defined.

Any subsequent adjustments will require either:

- A posting of a *Manual Invoice*
- A posting of a *Manual Credit*
- A correction to the *Ledger**

*This was discussed in the **Debtor Billing Adjustment** section in the manual.

Process Internal School Bills
Clicking on **Process Internal School Bills** will display the window below:

This process simply marks the Internal Schools as being charged for the specified Billing Year and Period. Furthermore select to include Tuition and or Instrument Hire and a Billing Reference.

To begin, click Start Process.

Export Internal School Bills

Clicking Export Internal School Bills will display the window below:

The final stage, *Export Internal School Bills* will select these schools and *produce a spreadsheet* containing information suitable to be passed onto services finance departments in order to perform inter department journals.

In the green box, you can specify which fields from the School Record Card to include in the data export by ticking the desired fields.

The **red box** contains the selected fields as columns and the *processed Schools will be displayed* as rows here (currently they are none since we haven't run the process). You also can select to export either **New Internal Billing** or **Previously Exported Internal Billing.**

Click **Start Process** to export as *Excel xls* files.
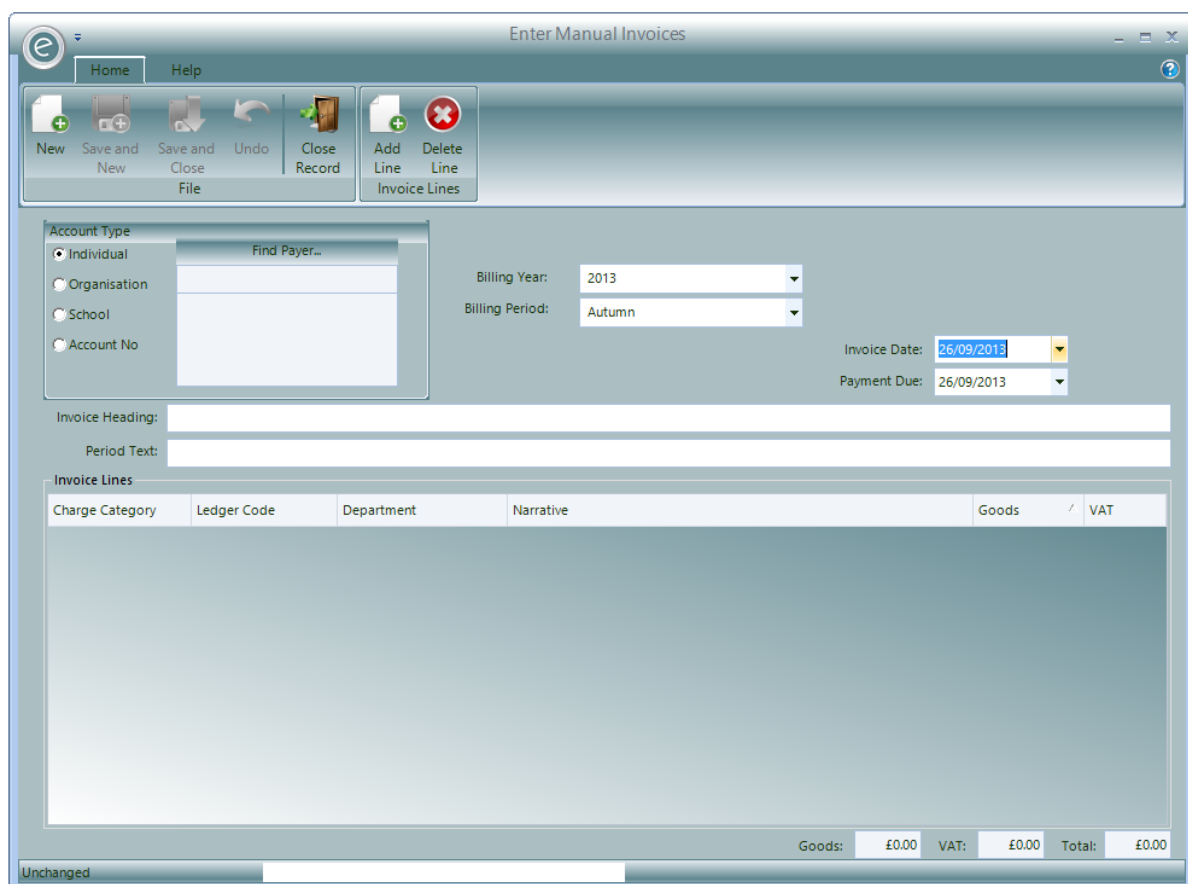
18.   Raising Manual Invoices

▶ [Watch the Video Tutorial here](#)

It may be necessary from time to time to manually raise an Invoice. To do this click:

Debtors (Ribbon Menu) > Postings > Enter Manual Invoices

The following screen will be displayed:

This window will allow you to specify all the details of the Invoice yourself.

You can raise Manual Invoices for **Individuals, Organisations**, or **Schools**. Once you have selected the **Invoice Date, Payment Date, Billing Period** and **Year**, you can enter the **Invoice Heading** and **Period Text**.

Finally add the lines to the Invoice by clicking **Add Line** and inserting the information.

When you have populated the Lines and are happy with the information you have created click **Save and Close** to create the Invoice.

You can print the Invoice using the standard Print Invoices tool.

19.   Print Invoices

Once Invoices are produced you will next need to print them. Furthermore in Ensemble they are marked as *unprinted*. Once they have been printed, Ensemble will internally update this to *printed* so they aren't printed again (Unless specified in the window below).

Note: It is the act of starting a print and viewing the Invoices *on the screen* that constitutes this, *not the printing to paper*.

To Print Invoices, go to:

Debtors (Ribbon Menu) > Documents > Print Invoices

This will display the window below:
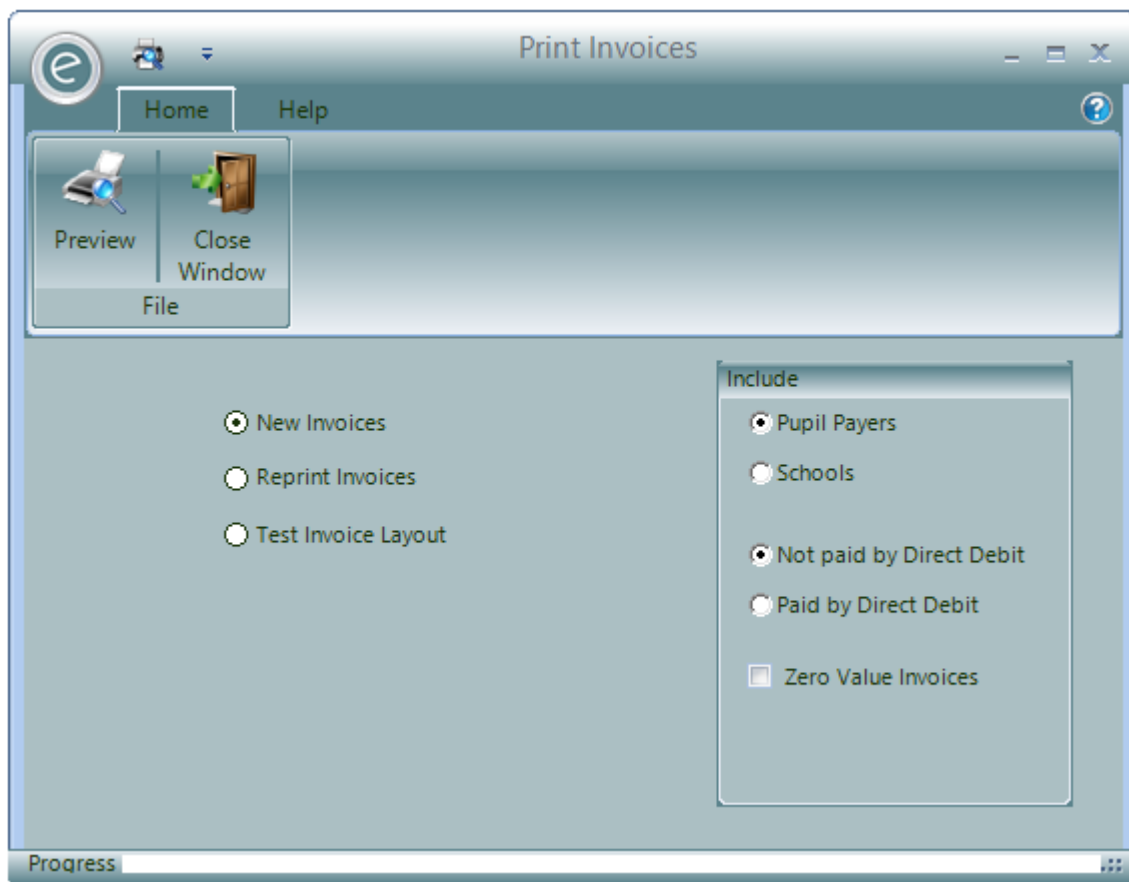
You have options to print:

New Invoices	Prints new Invoices for Pupil Payers or Schools.
Reprint Invoices	Reprint previously printed Invoices. When selecting to reprint you are asked for an Invoice Number range
Test Invoice Layout	Prints a Test Invoice for Pupil Payers or Schools

When printing *new Invoices*, you can select to print those **Not paid by Direct Debit** or those **Paid by Direct Debit**.

Zero Value Invoices are also excluded by default, ticking **Zero Value Invoices** will include these. You must also select the type of Payer and the Provision Type the Invoice belongs to.

473

Click **Preview** to view the Invoices.

An example is displayed below:

20.   Exporting Invoices to External Finance

If you are a service that uses other programs to produce Finance Reports such as Sage, you will be able to export batch files using Ensemble. This processed is run in Ensemble with the *External Synchronisation Manager.* To access this click:

Tools (Ribbon Menu) > External Sync Manager

This will open the window below:

The available batch types are displayed in the Build Batch section which are:

- **Record Card Batches**
- **Uninvoiced Income Batches**
- **Payer Invoice Batches**
- **School Invoice Batches**
- **Payer Credit Batches**

Since different services have different Financial Reports they wish to export, the options available to you will be made to your requirements. Once we have developed a batch option for your service it will become coloured and available to select.

Example Batch Creation and Submission

For example to export Payer Invoice batches you will need to click **Build Payer Invoice Batch**. Ensemble will then build the batch file and then export it to the shared location folder specified in the *Configuration Settings*.

Note: If you are unsure where the shared location is set to or how to set it, please search for **Allocating a Shared Location Folder** in this guide.

Once the batch has been successfully built and exported, the window will be displayed as below:

A new row will appear for the new batch file. It will display the type of batch, the batch number, when it was created and last exported, the number of items in the file and the status of the current batch. In our example, the current batch has been **Exported**.

If the batch needs to be exported again (i.e. shared location folder may be updated) you can click **Export Batch** in the Ribbon Menu.

If there are new items that need to be added to the batch so it needs to be built again, you can **click Build Payer Invoice Batch**. This is remove the previous batch, build a new one and then export to the shared location folder.

Once you are confident that the batch exported is correct, click **Confirm Batch** so it is ready for submission to your external finance system.

Important: Once a batch is confirmed, it *can't* be re-built. Please make sure that you are perfectly satisfied with the batch before confirming. However you will still be able to *export* the batch again.

Once you have confirmed the batch, its Status will change to **Confirmed:**

All of your confirmed batch will now be displayed in the External Synchronisation Manager. You can choose to filter the batches displayed by clicking **Exclude Confirmed** or **Include Confirmed** to exclude or include confirmed batches respectively.

21.   Receipts

There are two ways to *record payments* within Ensemble:

1. They can be *entered manually* as a batch of Receipts directly into the system.
2. They can be recorded by a *separate payments system* and the subsequent list of payments received exported to a simple text file and *imported* into Ensemble via an import process.

Manual Receipts

▶ [Watch the Video Tutorial here](#)

Entering *Manual Receipts* is a process whereby you *enter a batch of payments received*, these may be cheques, credit card payments or cash. The batch is normally a day's collection of Receipts but it can be any collection of Receipts.

To enter a Manual Receipt go to:

Debtors (Ribbon Menu) > Postings > Enter Receipts

This will display the window below:

When entering the batch of Receipt you must provide a reference in the Receipt Ref field and enter a Receipt Date. Receipt Ref is a free format alpha numeric reference provided by you to identify the batch. Most users create a reference from the date as YYMMDD and amend a suffix to this if they enter more than one batch in a day.

Once a batch is started you simple add a line for each Receipt by clicking New Line. This will display the window below:

When entering the details of the Receipt you need to *link it to the Debtor who has made the payment*. You can do this by searching for the Debtor under **Account Type** on the right. Alternatively you can enter the Invoice Number of the Invoice being paid in the **Invoice** field and click **Search**.

If you find the Debtor's account you will be shown a list of outstanding Invoices for the Debtor and in the **red box**. Select the one being paid. By identifying the Invoice, the system can mark it as being paid (or part paid). When the amount received is different from the Invoice value you simply change the amount in the paid **Amount** field on the left side of the screen.

Note: You may also have the case where a Debtor is paying for *more than one* outstanding Invoice with a *single cheque*. In which case select the first Invoice and add the posting then select the second Invoice and add the posting. The two individual postings will add up to the total of the receipt.

Alternatively if no Invoice can be found that *matches* the payment, or perhaps the payment has been *received in advance* of an Invoice being raised, you can enter the amount of the Receipt in the **Amount** box.

You can also give the Receipt a description in the **Narrative** field.

Once all the Receipt Lines have been added the batch can be saved by clicking **Create and Close.**

Paying Multiple Invoices with One Cheque

Payers may sometimes pay off *multiple Invoices* in one go, e.g in one cheque. To do this you will need to add a *Receipt Line for each Invoice* but keep the *Cheque Number the same*:

Underpaid Invoices and Writing Off Debt

If a Payer has *underpaid an Invoice* you will be given the option to:

1. **Leave** the remaining balance to be paid at a later date. The amount paid on the Receipt will be *unallocated* on their Ledger.
2. **Clear** it by *writing off* the remaining balance. A **Credit Reason** will also need to be given in this case.

Note: Only debt that is negligible and not worth chasing should be considered to be written off.

An example is displayed below:

For more information regarding debt allocation please refer to **Managing Debt** in this Chapter.

Import Payer Receipts

 [Watch the Video Tutorial here](#)

The *Import Payer Receipts/Payments* function looks in a folder within your Ensemble Shared Location for files produced by a payment processing system. These files can then be selected and processed which will post the Receipt to the Debtor's Ledger and allocate the original Invoice to the Receipt.

To enter the payment information you need to import the Payer details. The format of the file needed is an *Excel .CSV* file of *six columns* as displayed below:

Note: There can be as many rows as required *not just three* as per the example above. However please make the last row the row displayed on *row 4* in the example above.

The field details are:

Payment Date	Date of payment in DD/MM/YYYY format
Reference	Payment reference – Max length of 20 characters
Account No	Payer's Ensemble Account Number – Max length of 30 characters
Invoice No	Ensemble Invoice Number for the payment (integer)
Amount Paid	Amount paid in the format - #.## (e.g. 10.50)
Narrative	Narrative for the payment – Max length of 256 characters
Total Payment Count	Total number of payments to be imported

Example

Here is an example .CSV file to be imported:

	A	B	C	D	E	F
1	03/01/2014	1234	A1	1	100.00	Guitar Tuition
2	04/01/2014	1235	A2	2	150.50	Piano Hire
3	05/01/2014	1236	A3	3	100.00	Guitar Tuition
4	06/01/2014	1237	A4	4	200.50	Band Membership
5	07/01/2014	1238	A5	5	100.00	Guitar Tuition
6	TLR	5				
7						

Important: This .CSV file needs to be saved in your *DebtorPayments* folder of your Shared Location.

Import the .CSV File

To run the Import go to:

Debtors (Ribbon Menu) > Postings > Import Payer Billing

This will display the window below:

Click **Import** to pull the information from the .CSV file. The headers will be displayed on the left, as highlighted by the **red box**, and each individual line within each of these will be on the right, as highlighted by the **green box**.

Click **Process** to allocate the Payments to their corresponding Accounts.
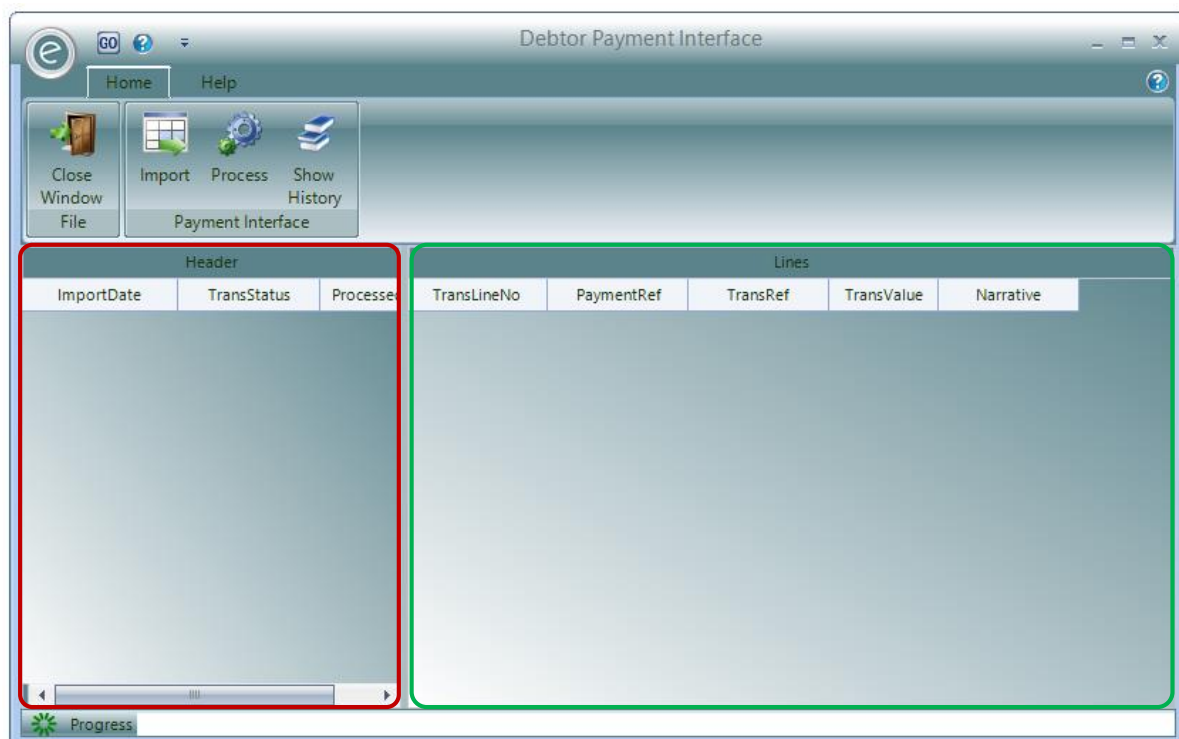
You will now have successfully imported your payments into Ensemble.

22.   Credits

Where a Debtor has been incorrectly charged (for example with Invoices raised in error) it may be necessary to apply a *Credit* to the Debtors account. Credit have to be *applied manually*. They are very much like Invoices in *reverse*, where in the recipient is given a credit. Like Invoices these can be printed and reprinted when required.

Whenever the amount of the adjustment is *larger than a small amount*, Credits should be used as this will correctly adjust your income reports. Clearly if you have over charged someone, your income will also be reported as inflated. Raising a Credit will reduce your income as well as correcting the debt shown on the Debtors account.

Credit Reasons

Credit Reasons simply give a reason for allocating a Credit to a Debtor. They are very useful for keeping track of why a Credit is given. They must be turned on first in the *Finance Parameters*.

This can be done by clicking:

Tools (Ribbon Menu) > Parameters > Finance Parameters > Tick Use Credit Reasons > Save and Close

This is displayed in the window below:
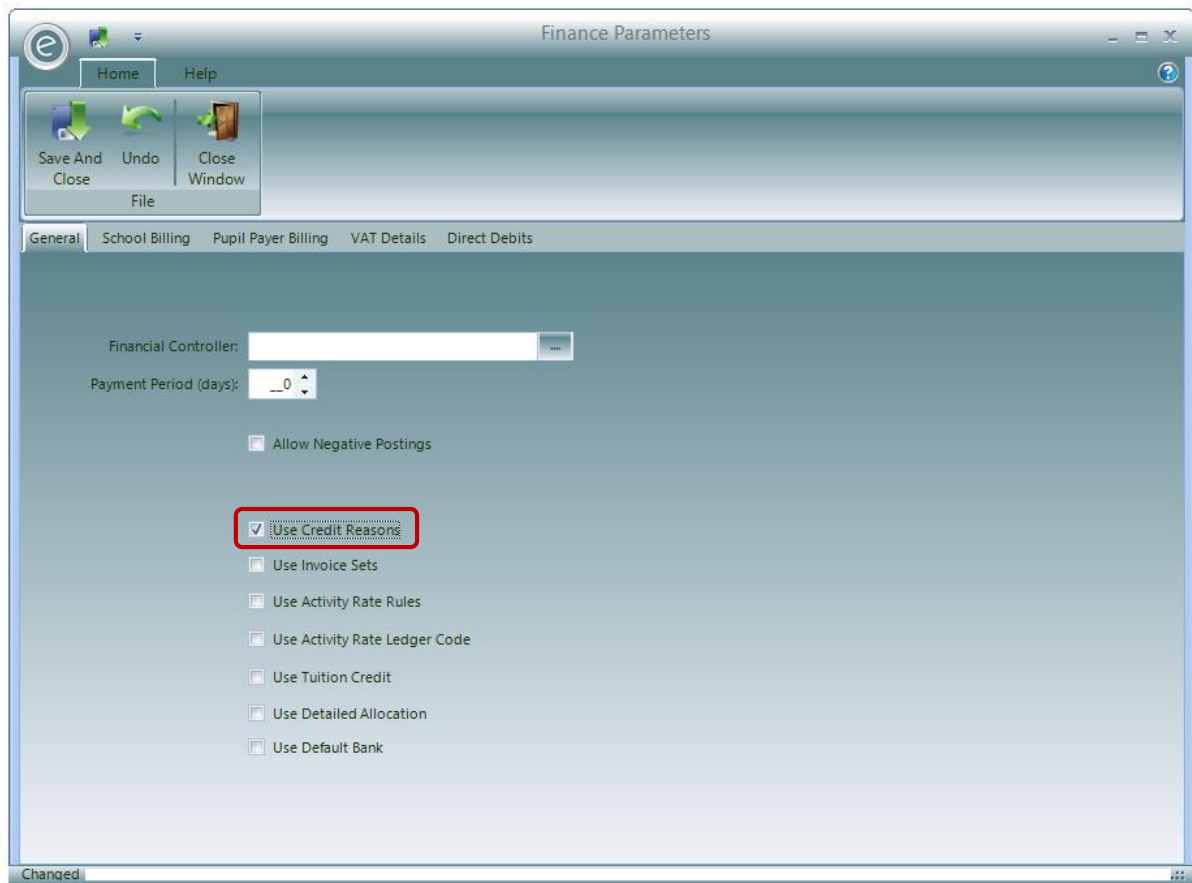
They are now available to use within the *Debtors* tab of the Menu Bar. They can be created by clicking:

Debtors (Menu Bar) > Credit Reasons > New Credit Reason

This is displayed in the window below:
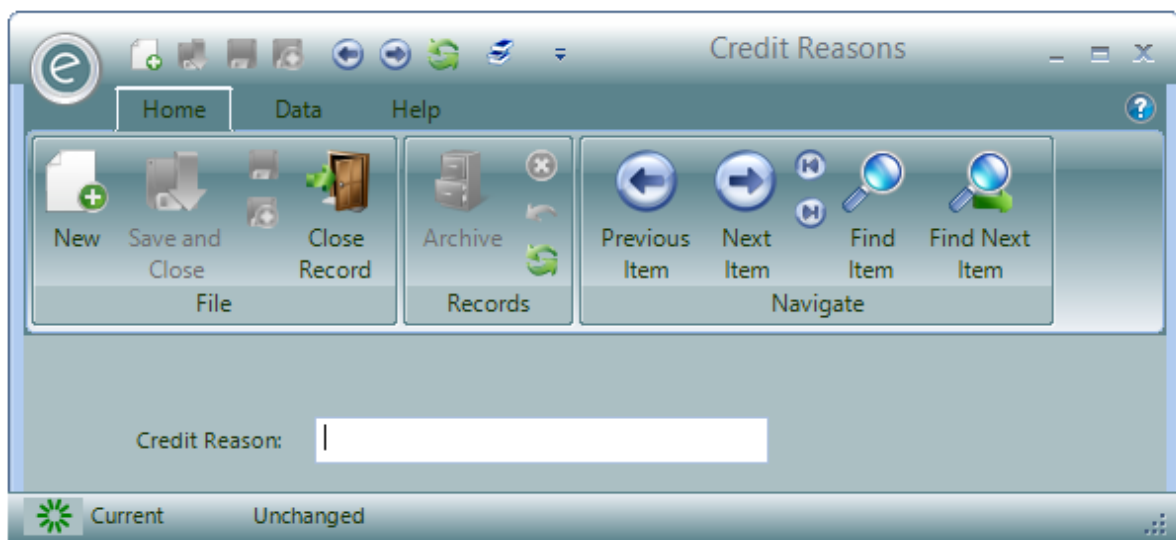
Simply type the **Credit Reason** in the textbox and click **Save and Close.**
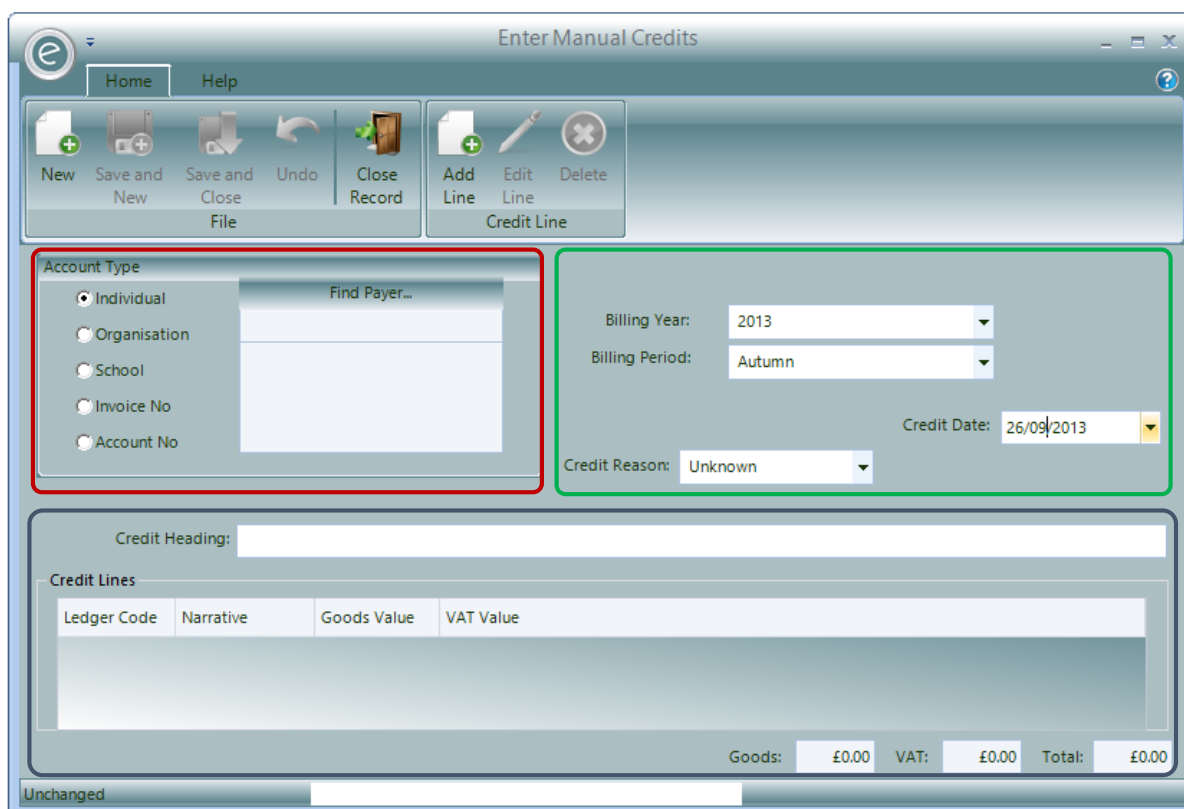
Manual Credits

 [Watch the Video Tutorial here](#)

To produce a Credit, click:

Debtors (Ribbon Menu) > Postings > Enter Manual Credits

This will display the window below:

In the **red box**, you can specify the type of Debtor and then the actual Debtor itself. Alternatively you can enter the specific **Invoice No** or **Account No**; In fact the *simplest way* to raise a Credit is to enter the original Invoice Number and allow the system to create the Credit from the Invoice.

The **green box** contains the **Billing Year, Period** and **Credit Date** so the Credit is raised at the right time. Predefined **Credit Reasons** can also be specified.

The **blue box** contains the **Credit Heading**, to give the Credit context on the *Credit Register*. The Credit Lines are also displayed here.

New Credit Line

If you wish to enter a new Line, you can do this by clicking **Add Line** at the top. This will open the window below:

You will be able to enter the value of the Credit in **Line Value** and a description in the **Narrative** field. You can also select the **Ledger Code**, **Department** and **Charge Category**.

Then click **Apply Changes** to save.

Edit a Credit Line

You can also edit a line on the Credit by clicking **Edit Line**. An example is displayed below:

In addition to making changes to the fields at the top, you can choose to *add or remove the allocation* of the Credit Line to an Invoice Line (if applicable).

The correlating Invoice Lines are displayed under **Invoice Lines** and those that have been allocated to this Credit Line are displayed under Allocations. You can add or remove allocations by clicking **Add Allocation** and **Remove Allocation** respectively.

Note: For more information regarding allocation of debt please refer to the **Managing Debt** section of this Chapter.

Click **Apply Changes** to save.

When you are happy, click **Save and Close** to create the Credit.

Credit Submissions

When a Credit needs to be raised but also needs to be authorised first another User, the Credit can be raised as a *Credit Submission*.

To do this click:

Debtors (Ribbon Menu) > Postings > Enter Credit Submissions

This will display the window below:

In the red box, you can specify the type of Debtor and then the actual Debtor itself. Alternatively you can enter the specific **Invoice No** or **Account No**; In fact the *simplest way* to raise a Credit Submission is to enter the original Invoice Number and allow the system to create the Credit Submission from the Invoice.

The green box contains the **Billing Year, Period** and **Credit Date** so the Credit is raised at the right time. Predefined **Credit Reasons** can also be specified.

The blue box contains the **Credit Heading**, to give the Credit context on the *Credit Register*. The Credit Lines are also displayed here.

You can enter a new Line, by clicking **Add Line** at the top. Enter the **Goods Value**, some more **Narrative** regarding the description for reference information, then finally a **Ledger Code.**

Save and Close to create the Credit.

Credit Authorisation

Once Credit Submissions have been made they will need to be either authorised or declined.

To do this click:

Debtors (Ribbon Menu) > Posting > Credit Authorisation

This will display the window below:
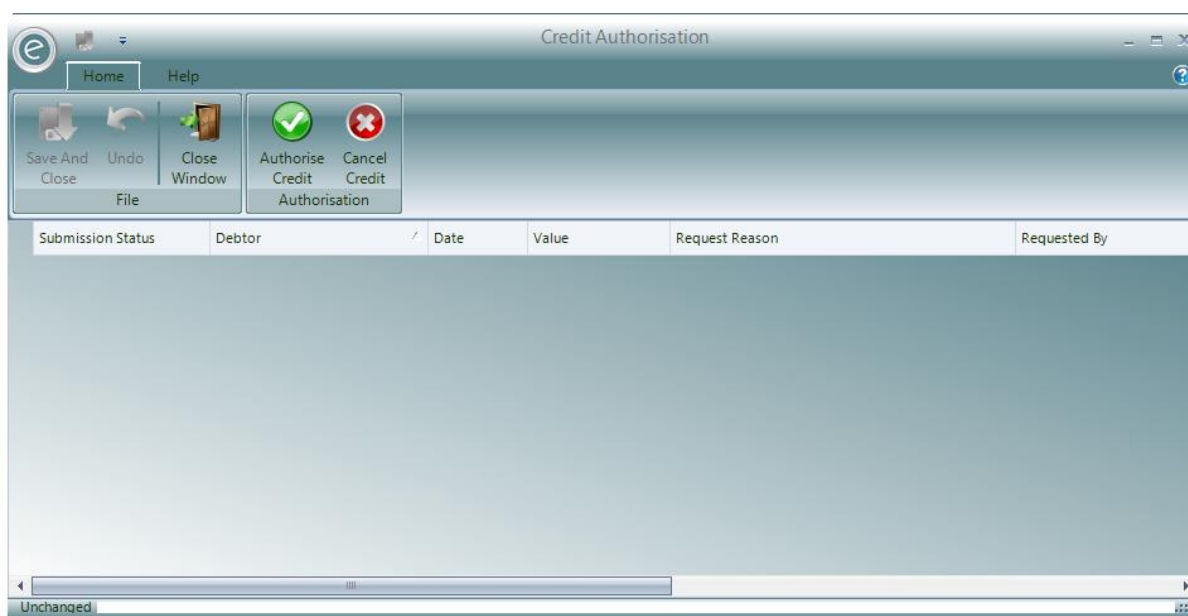
Credit Submissions that have been made will be displayed in the grid. Select one and click **Authorise Credit** to authorise it or **Cancel Credit** to cancel it.

Click **Save and Close** when complete.

Correcting Invoices Raised in Error

Any Invoice raised in error must be offset with a Credit for the same amount charged. The Credit will then need to be *allocated* to the Invoice in the Debtor's Ledger to clear the balance.

For more information regarding transactions allocations in the Debtor's Ledger please refer to the **Managing Debt** section within **Finance in Ensemble**.

Important: Never write off an Invoice as you must leave an audit trail of all of your financial transactions.

Correcting Credits Raised in Error

If a Credit has been raised with an incorrect amount or for the incorrect Billing Type, you should correct this by raising a corresponding *negative* Credit. This will debit the Debtor the same amount of the Credit, which effectively balances their account.

Allow Negative Postings

To do this, you will need to allow negative postings in the *Finance Parameters* first. To do this click:

Tools (Ribbon Menu) > Parameters > Finance Parameters > General tab

This will display the window below:
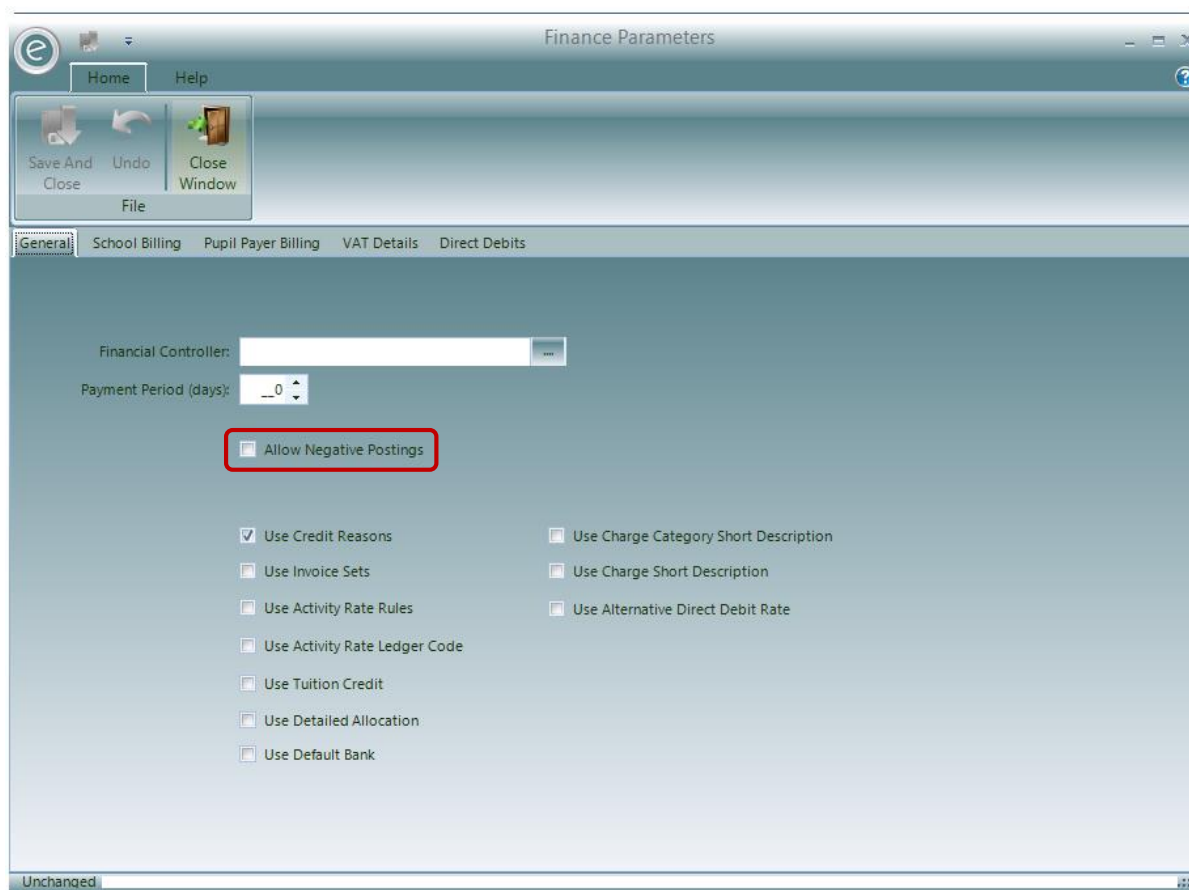
Tick **Allow Negative Postings** as highlighted above and then **Save and Close**.

Print Credits

To print the Credits issued, click:

Debtors (Ribbon Menu) > Documents > Print Credits

This will display the window below:
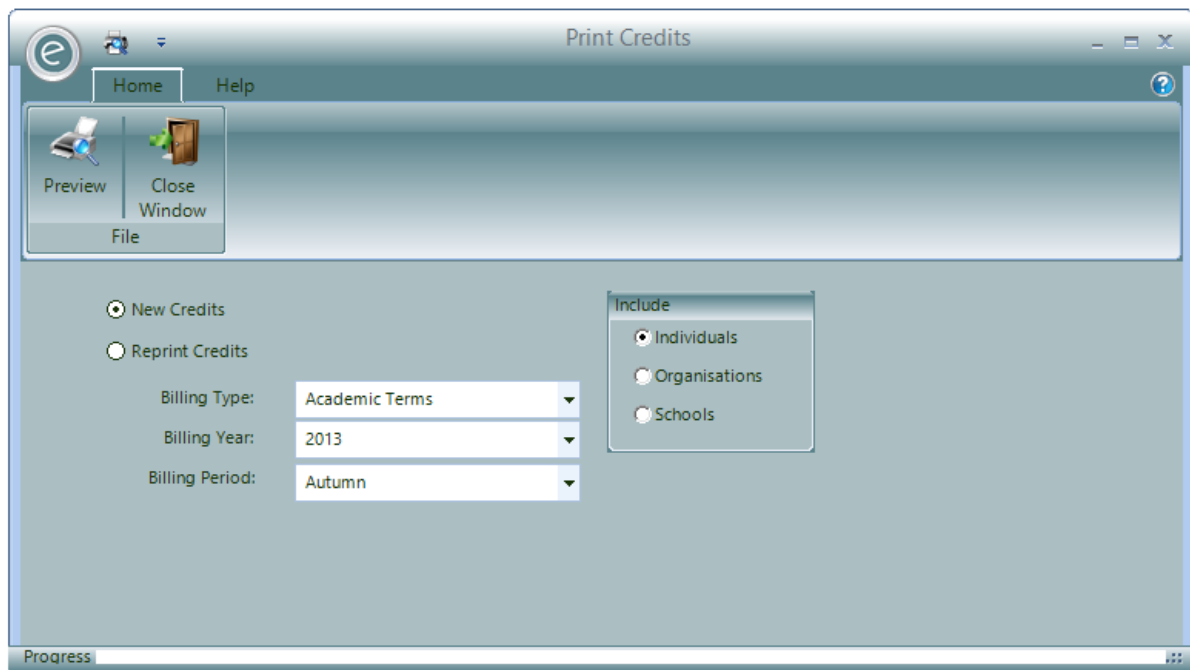
You will have the option to print **New Credits** or **Reprint Credits**. In the **Include** section you can choose which Debtors you want to view Credits for.

If you choose to *print new Credits* then you will need to specify the **Billing Type**, **Billing Year** and **Billing Period** for when they were issued.

Note: Once you view new Credits, you will then need to view them in the Reprint Credit option in future.

Alternatively if you choose to reprint Credits, the window will ask you to select the **Credits Number Range** to choose from. This is displayed below:

When happy with your choice, click **Preview** to view the Credit.

An example is displayed below:

Paritor Performing Arts

CREDIT

Test

Mr Kenton Archer
31 Downham Road
Downham Downs
Borchester
BO2 4RF

Date:	29-Oct-13
Credit Number:	5
Account No:	1

Description	Amount
Overcharged Payment	£190.00
	£190.00

23.   Refunds

Occasionally a Payer may will need to be *refunded.* To do this you will need to create *two corresponding transactions* in order to refund the payment and keep the Payer's Ledger balanced. You will need to:

1. **Raise a negative Receipt** for the amount to refund
2. **Raise a Credit** with the corresponding amount to reduce the Invoice charge.

The negative Receipt will be marked as a *black debit line* on their Ledger.

The Credit will be marked as a *red credit line* on their Ledger.

You will then need to allocate these transactions to clear the balance.

Note: For more information regarding Ledger allocations please search for **Managing and Allocating Transactions in the Debtor's Ledger.**

Creating a Negative Receipt

To enter a negative Receipt go to:

Debtors (Ribbon Menu) > Postings > Enter Receipts > New Line

This will open the *New Receipt Line* window.

You then need to search for the **Payer** and then enter a negative value in **Amount**.

An example is displayed below:

To edit the Receipt Lines click **Edit Line**. Once you happy, save the Receipt by clicking **Save and Close**.

Example Scenerio

An invoice is raised for £100 and the Payer has paid £100. However you then want to reduce this charge by £10 and then refund them £10. So to do this you need to raise a credit of £10 (to reduce the charge) and then raise a negative receipt of £10 (to debit the account to enact the refund).

Alternatively if a Payer has just *overpaid* their Invoice such as the example below:

An invoice is raised for £100 and someone has paid £120. This payer has now overpaid £20 and needs to be refunded £20 via a negative receipt.

Note: No Credit is needed for this example since they are *already in credit* of £20.

24.   Writing Off Debt

There may be occasions when the outstanding balance for a Debtor needs to be *written off*. In this case the debt is essentially deleted from their Ledger. For example, a Debtor may have underpaid their Invoice by a *very small* amount and you decide this lingering debt is no longer worth chasing.

A *Journal* transaction will then be automatically allocated against this to remove the transaction from the Ledger. For example if you wrote off a debt of £1, this will create a Journal transaction which credits the Debtor £1.

To *write off* a balance from the Ledger of a Debtor such as an individual Payer click:

Debtors (Menu Bar) > Payers – Individual > Open Payer Record Card > Ledger tab

This will display the window below:

As we can see this Payer has many outstanding debts in their Ledger. To write one of these off, select one and click Write Off as highlighted in the green box. This will display the window below:

Here you will need to specify the **Department**, a reason for the write off as indicated by the **Credit Reason** field and a **Ledger Code**.

Then click **Apply Changes** to write off the transaction.

25.   Banking Receipts

Ensemble provides a process for *tracking* those Receipts that have been banked i.e. actually paid into your bank account. It is not uncommon for several batches of Receipts to be entered before a number of batches are paid into the bank.

Create a Bank

To create a Bank Record, click:

Accounts (Menu Bar) > Banks > New Bank

This will display the window below:

Simply enter the name, contact details and account details.

Click **Save and Close** to create the Record.

Select a Default Bank

A default Bank Account can be added in the *Finance Parameters*. This is done by clicking:

Tools (Ribbon Bar) > Parameters > Finance Parameters > General tab > Tick 'Use Default Bank'

This is displayed in the window below:
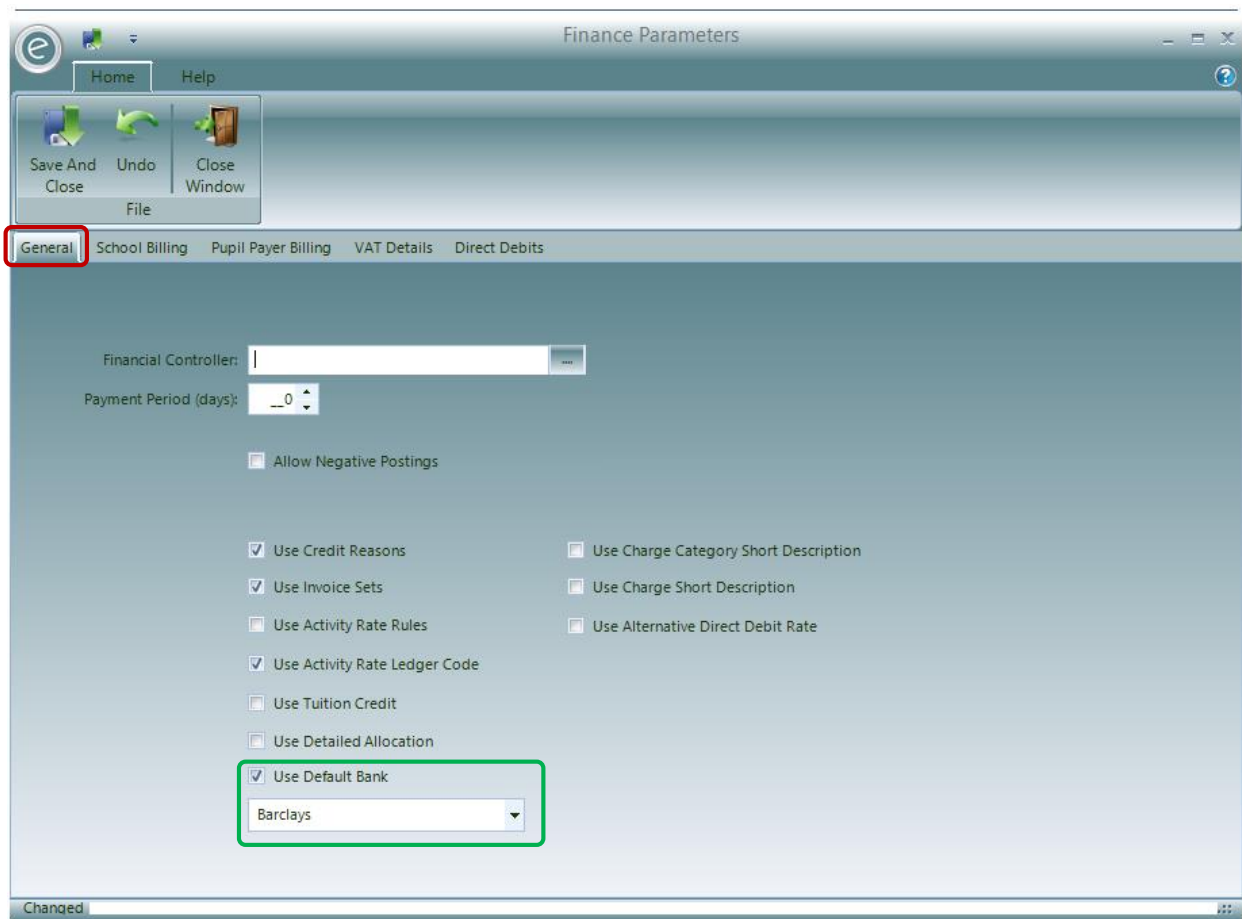
Select the Default Bank from the *dropdown menu*.

Click **Save and Close** to save.

Banking Receipts

In order to bank receipts, the process to be followed is:

1. Print Banking Pre-List
2. Allocate Bank Paying-In Slip
3. Print Banking List

This can be accessed from a dropdown menu by clicking:

Debtors (Ribbon Menu) > Banking

This is displayed in the screenshot displayed below:
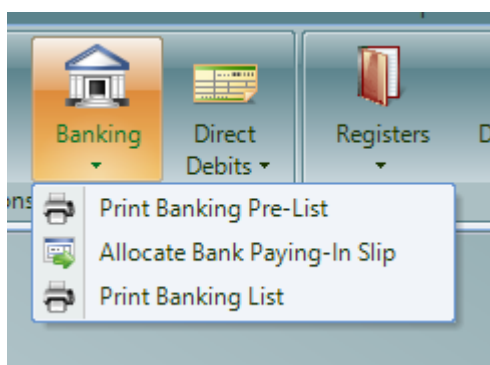
Each step will now be explained in further depth.

Print Banking Pre-List

Clicking **Print Banking Pre-List** will display the window below:
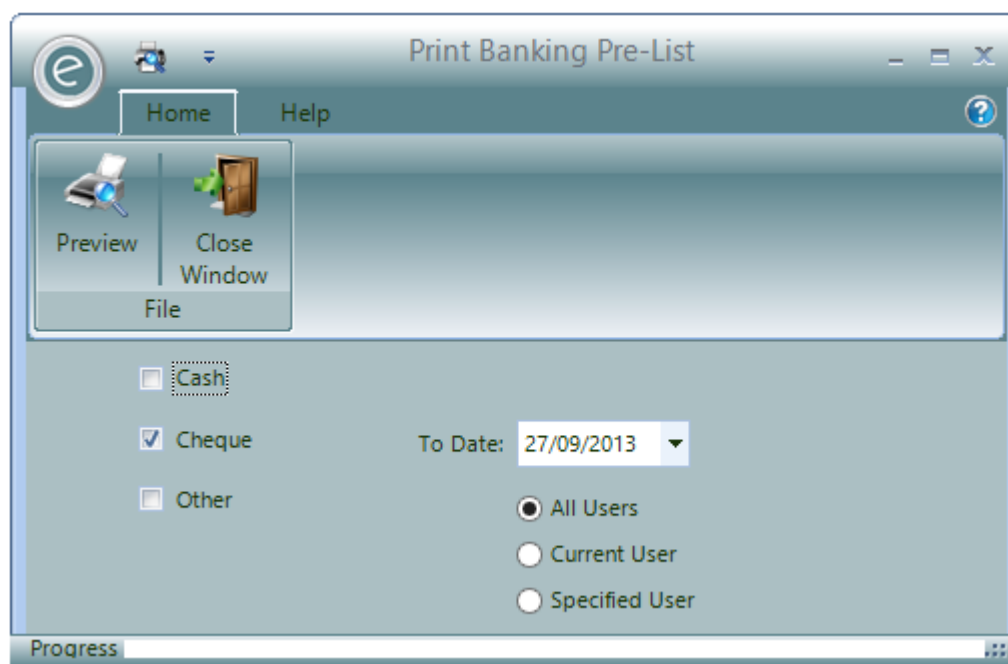
This will allow you to specify the *Banking Pre-List Report.* This will list all the Receipts entered but *not banked* and will show you the value of items to be paid into the bank and may be used as a Bank Listing.

The **To Date** will specify the date to run the Report to.

You can select which **Users** to bank Receipts for, as different Users may be in charge of different Receipts. Therefore by selecting one of these options, only the Receipts created by the chosen User which are yet to be banked will appear on the Report.

Should you select **Specified User**, the *Windows Login name* for the User must to be entered in order for Ensemble to identify them.

You can specify **Cash, Cheque** and **Other** in the tickboxes. These should be reconciled with the physical documents, and providing it is correct, paid into your bank.

The resultant bank Paying-In Reference should then be entered in to the *Allocate Bank Paying-In Slip* function.

Allocate Bank Paying-In Slip

Clicking on **Allocate Bank Paying-In Slip** will display the window below:
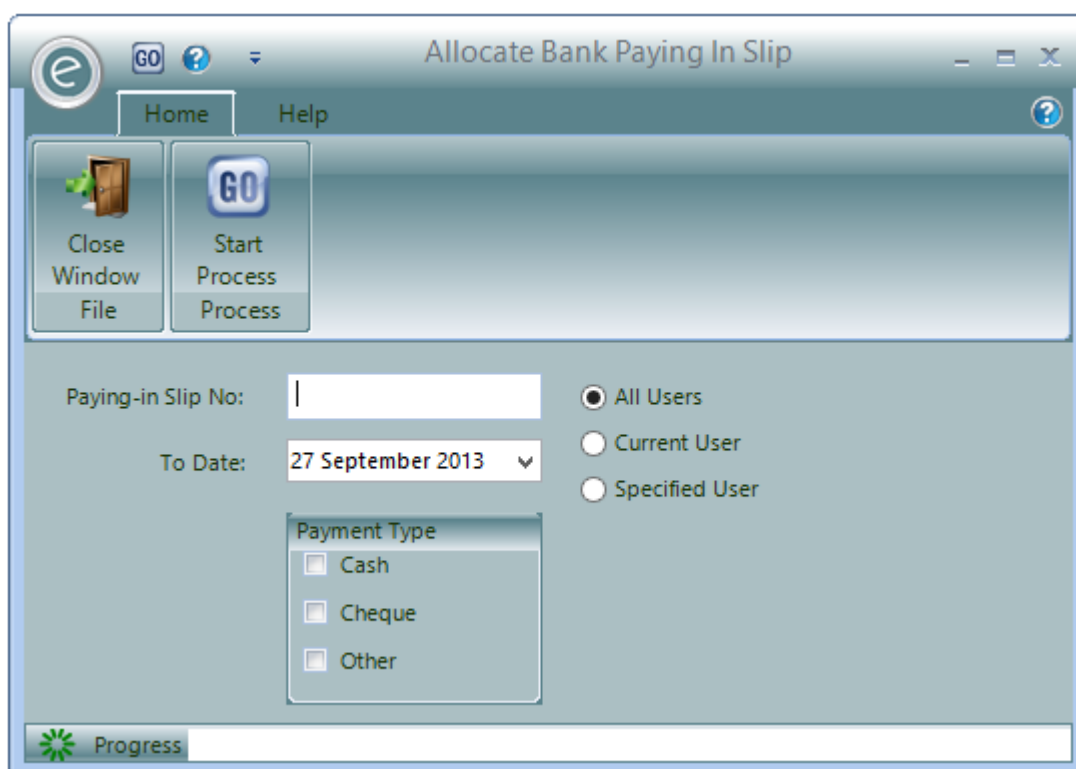
This will mark all the selected Receipts that are yet to be banked with the reference made in the **Paying-In Slip No** field. You can choose from all the available options from the *Print Banking Pre-List* window in order to produce the correct Bank Paying-In Slip.

For example if you only want to produce a Paying-In Slip for yourself, you will need to select **Current User**. Should you select **Specified User**, the *Windows Login name* for the User must to be entered in order for Ensemble to identify them.

Click **Start Process** to produce it.

Note: If there are receipts which haven't yet been banked but have *already been allocated* to a Pay Slip, then they won't be allocated again.

Print Banking List
Clicking **Print Banking List** will display the window below:
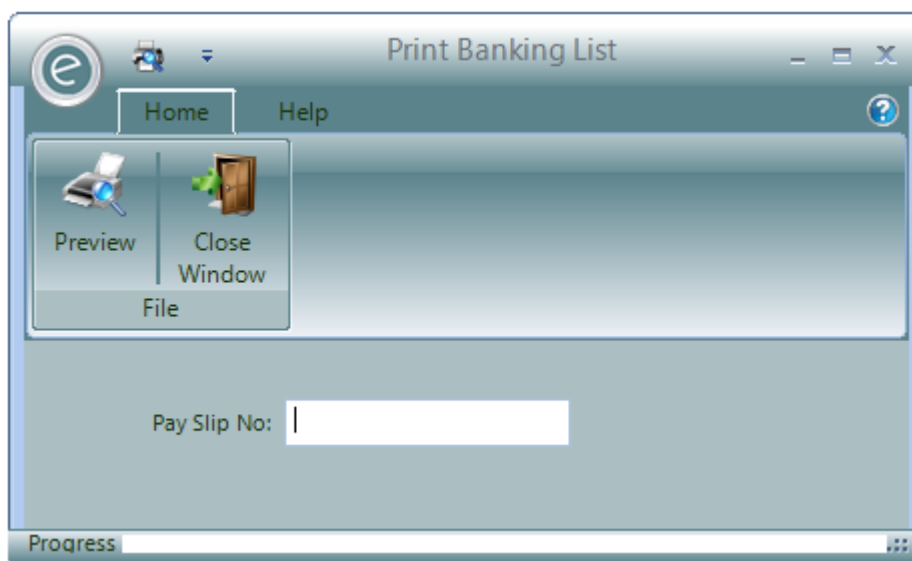
This will produce the *Banking List Report* that will list all the items for a given Paying in Slip reference. Simply enter this into the **Pay Slip No** field and click **Preview**.

You will still be able to view the Banking Lists for Pay Slip that have already been banked.

26.   Late Payment Charge

The *Late Payment Charge* function will examine each outstanding Invoice and if it is older than the the number days defined as being *late*, then it will charge the Debtor. This is displayed in the Debtor's Ledger.

Late Payment Charges can be activated within the *Finance Parameters*. Click:

Tools (Ribbon Menu) > Parameters > Finance Parameters > Pupil Payer Billing tab

This will display the window below:
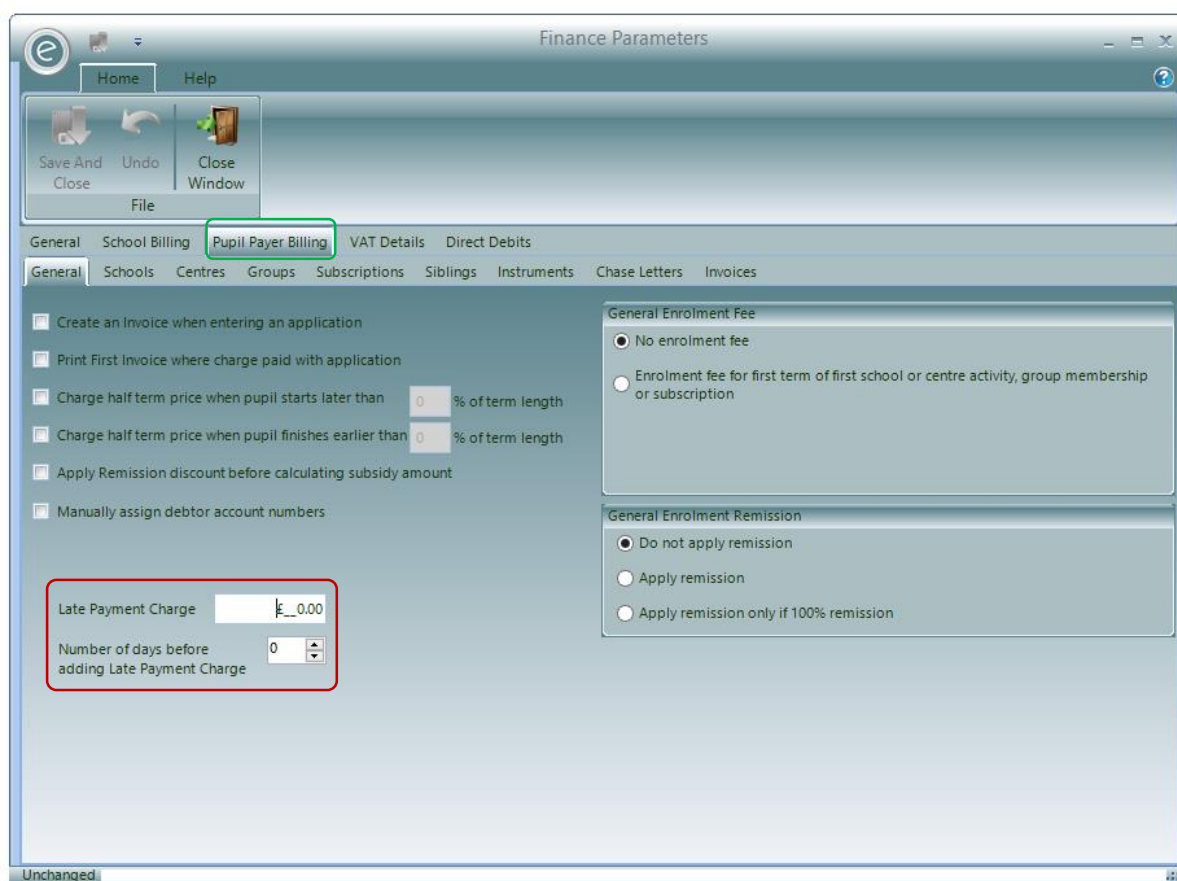
You will find this in the **red box** which allows you to specify the **Late Payment Charge** and the **Number of days before adding Late Payment Charge**.

27.   Direct Debits

Ensemble includes a facility to process *Direct Debits* against Payers. The process involves setting up Direct Debit information on each Payers Record Card and applying the Direct Debit amount each month.

Defining the Direct Debit Procedure

Define Direct Debits in the *Finance Parameters*. Click:

Tools (Ribbon Menu) > Parameters > Finance Parameters > Direct Debits tab

This is displayed in the window below:
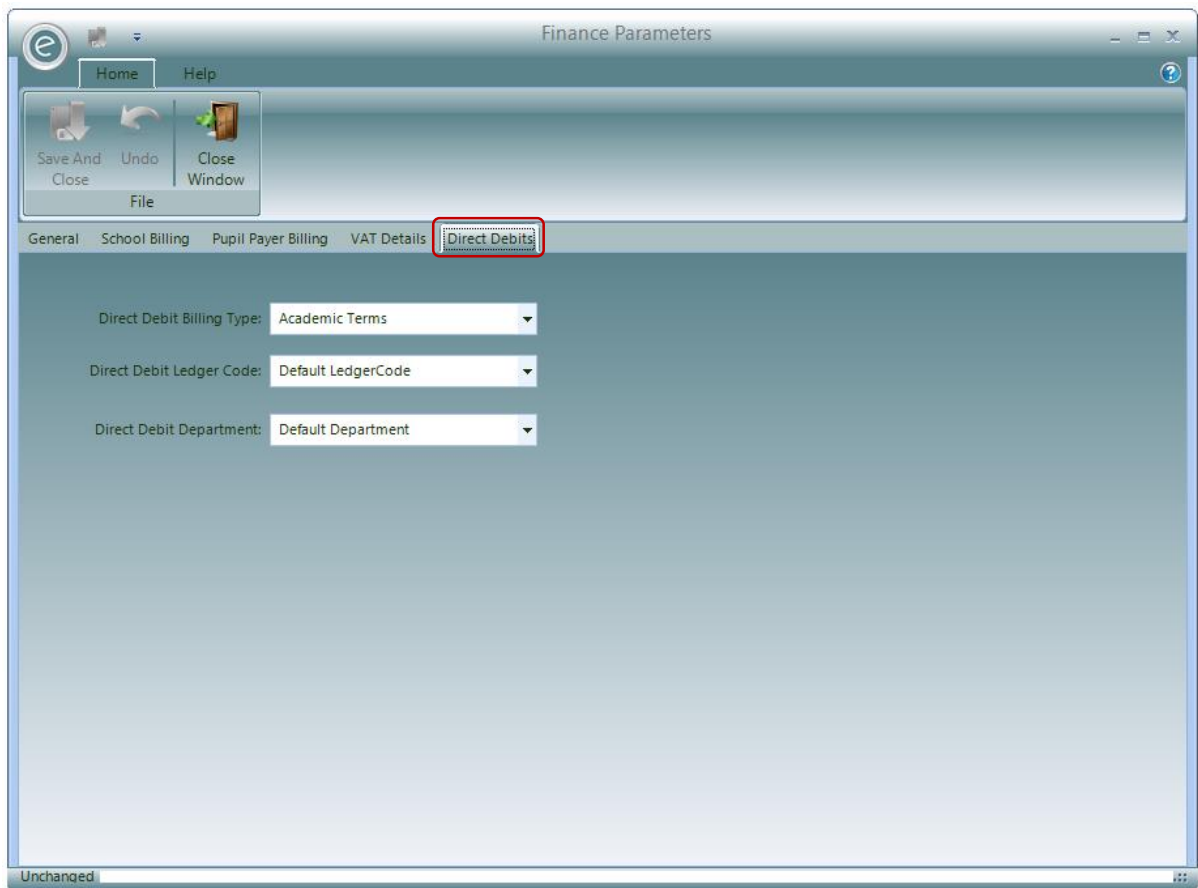
Here you can define the Billing Type, Ledger Code and Department to be used for Direct Debits.

Note: For more information on Departments, refer to Departments.

Setting up and Maintaining Direct Debits Details

▶ Watch the Video Tutorial here

You setup and maintain internal Direct Debits via the *Payers Record Card*. Click:

Debtors (Menu Bar) > Payers > Select Payer > Direct Debit tab > Tick Direct Debit Payer

This is displayed in the window below:

To activate the Direct Debit, you will first need to tick **Direct Debit Payer**. This is will also make the fields below appear into view.

The amount to be debited each time your service processes the Direct Debits must be specified in the **Amount** field.

You can also specify their bank account details and the date that you agreed to receive payment by Direct Debit for this Payer.

Note: The date of the actual payments isn't related the **Start** date field. This is specified when you process the Direct Debits as explained below.

Processing Direct Debits

   [Watch the Video Tutorial here](#)

The process Direct Debits, these steps need to be followed:

1. Print Direct Debit Listing
2. Process Direct Debit
3. Re-Produce Direct Debit Export File
4. Print List of Direct Debit Debtors

This can be accessed from a dropdown menu by clicking:

Debtors (Ribbon Menu) > Direct Debits

This is displayed in the screenshot below:
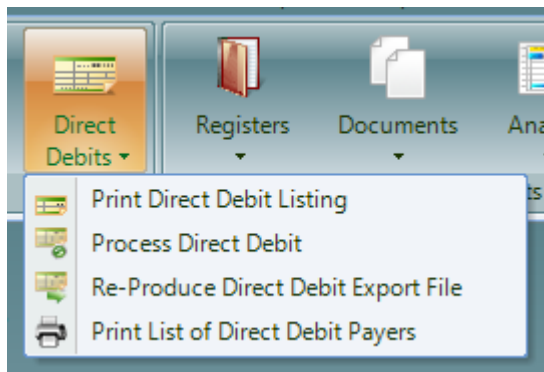
Each step will now be explained in further depth.

Print Direct Debit Listing

Clicking **Print Direct Debit Listing** will display the window below:
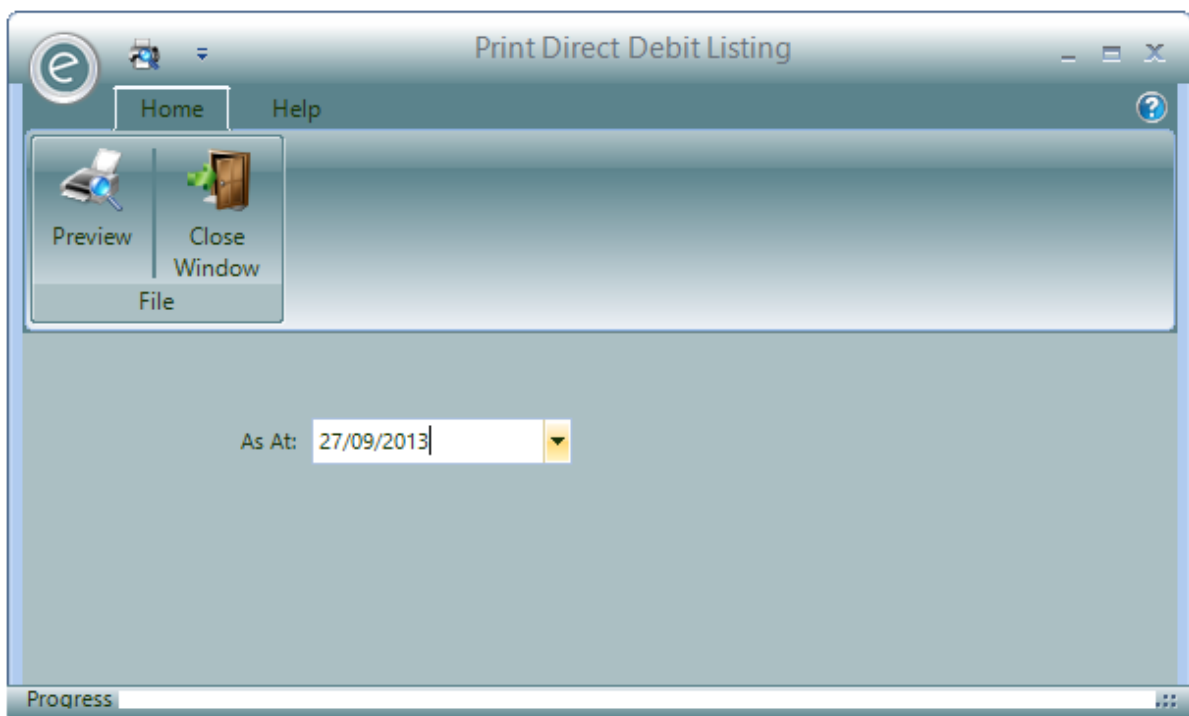
This simply produces a Report of all enabled Direct Debits that are *valid for the specified date* in the **As At** field.

Click **Preview** to view the Direct Debit Listing Report. An example is displayed below:

Process Direct Debits

Clicking **Process Direct Debit** will display the window below:

This process will run through all the Payers assigned as Direct Debit Payers. It takes the Direct Debit value and posts a *Journal* to the Payer's Ledger which reduces the debt.

Select the date you would like the Direct Debit postings to be made from the **Post Date** field.

Note: The system *will not duplicate postings* for any one month. It is therefore safe to run this process more than once in any month, should there be a need to process newly added Direct Debits.

Click **Start Process**. A list of the Direct Debit postings are displayed in the window and you are prompted for the *name and location of an Excel file* into which the Direct Debit details are saved. By default the file name will be "DD-yyyymmdd" and the location will be a folder called *Export* located within the Shared Location folder.

If you look at a Debtor's Ledger you will see a Journal posting for the value of the Direct Debit, which is the *red row* displayed in the window below:

Date	Type	Billing Type	Year	Period	No	Line	Debit	Credit	Outstanding	Due Date	Narrative
13/09/2013	Invoice	Academic Terms	2013	Autumn	32	0	£500.00	£0.00	£500.00	13/09/2013	Autumn 2013/20
27/09/2013	Journal	Academic Terms	2013	Autumn	2	1	£0.00	£20.00	-£20.00		DD-test-2709201

This will have had its value allocated against the oldest outstanding debit value on the account.

Re-Producing the Direct Debit Export File

Clicking **Re–Produce Direct Debit Export File** will display the window below:

This will display a form and allow you to enter the Journal number used when the Direct Debits were processed. You can find the journal number by looking at a Direct Debit paying Debtor's ledger and selecting the option to show all transactions. This will display the Direct Debit journal postings. When the journal number is entered the details are displayed and you are prompted for the file name and location where there are to be written.

Print List of Direct Debit Debtors

Clicking Print List of Direct Debit Debtors will display the window below:
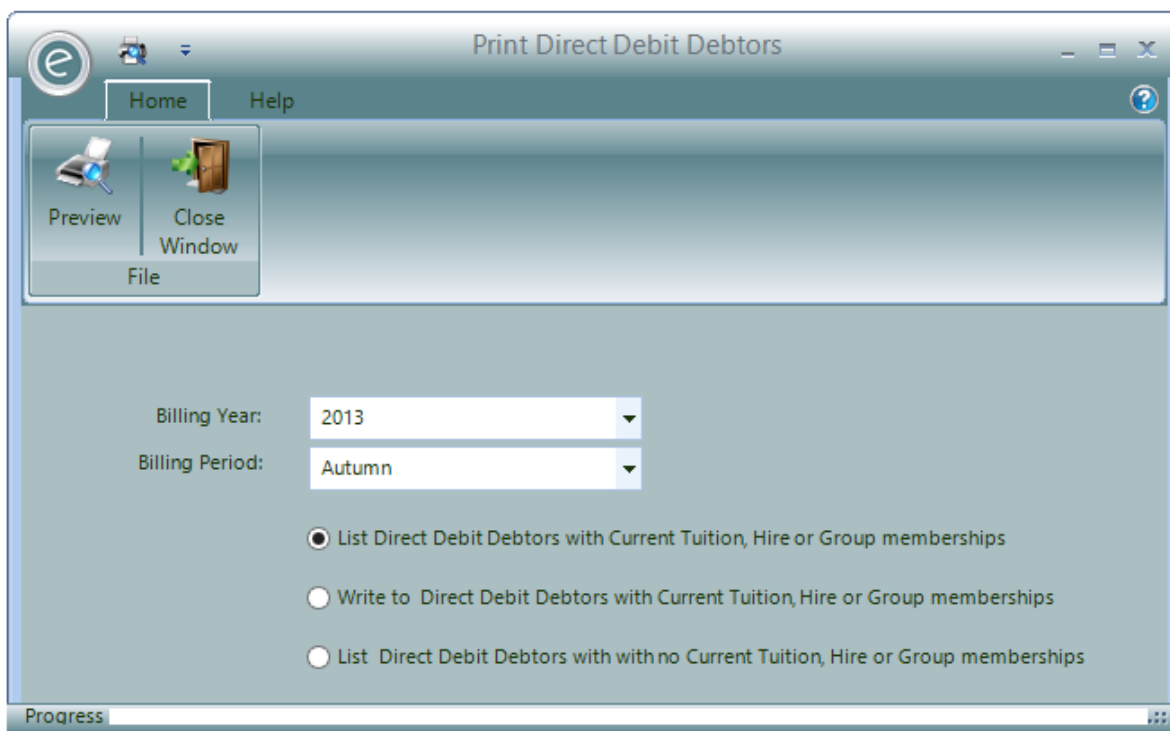
This allows you to list Debtors that have active Direct Debit details for a given **Billing Year** and **Type**. You can select to:

- List Debtors with current chargeable items, such a Current Tuition, associated with them
- Send a letter to Debtors with chareable items.
- Lists Debtors for whom there are no chargeable items associated.

This allows you to compare lists of Payers set up to pay by Direct Debit against those taking current or not taking current services from you

28. Managing Debt

Managing debt is one of the most important functions of any business. To manage debt effectively you should ensure all your documents are *clear and informative* and clearly state your terms and the action that will be taken should your terms not be adhered to.

The design and layout of the Invoice is also defined via a report template and different templates are used for School and Payer Invoices. In order to assist the customer and make it easy to pay, Invoices should be very clear and contain detailed information on how the Charge is made up and how it should be paid.

It is also possible to include a mini statement to an Invoice showing other outstanding Invoices a client may have, although this is not good practice as it can often confuse a client and provide reasons why they should not pay. Studies show that a clear Invoice simply showing the amount to pay for the goods supplied is far more effective in managing debt. Ensemble provides a Statement Facility and a Chase Letter function which will be explained later. Both of which are far more affective at chasing unpaid Invoices.

Ensemble includes a number of functions and facilities to manage debt.

Viewing Transaction Details in the Debtors Ledger

All transactions posted to a Debtor can be viewed from the *Debtors Ledger*. This can be accessed by:

Opening a Payer or School Record Card > Ledger tab

An example is displayed below for an individual Payer:

It can be seen from this example that the Payer had an Invoice for £250 but subsequently paid since the Receipt has been included.

All transaction rows in the Debtor's Ledger can be expanded by *double-clicking* on them.

Invoices

Double clicking on an Invoice transaction will display the *read-only* window below:

This will display all the necessary information regarding the Invoice.

The **Detail** tab will display the Invoice lines.

The **Delivery** tab will display the address of the Payer for the Pupil.

The **Notes** tab will display any additional notes.

Credits

Double clicking on a Credit transaction will display the *read-only* window below:

This will display all the necessary information regarding the Credit.

Receipts

Double clicking on a Receipt transaction will display the *read-only* window below:

This will display information regarding the Receipt Details and Receipt Lines.

Journals

Double clicking on a Journal transaction will display the *read-only* window below:
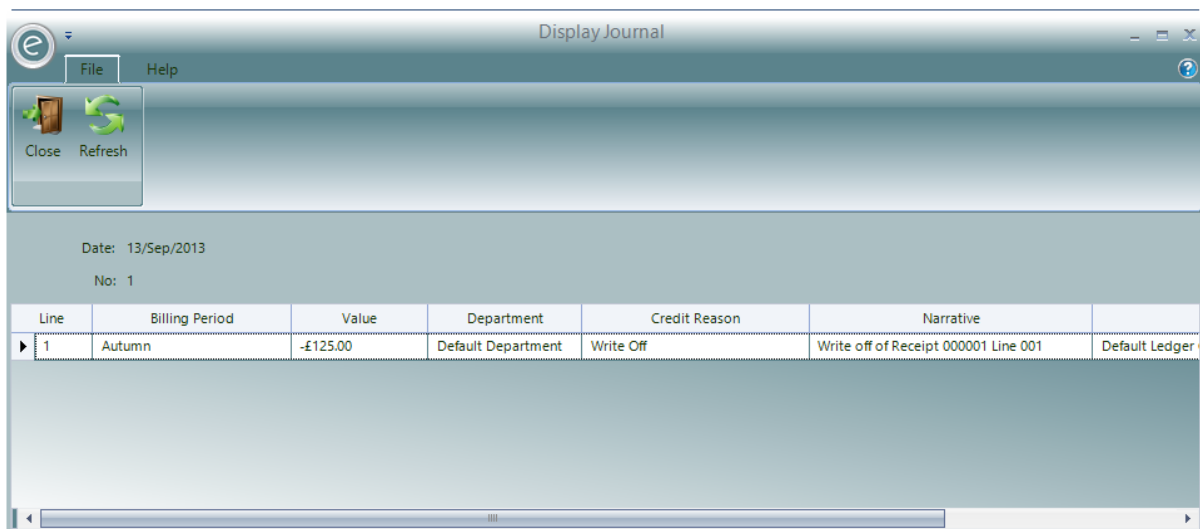
This will display information regarding the Journal.

Managing and Allocating Transactions in the Debtor's Ledger

▶ Watch the Video Tutorial here

All the transactions in a Debtor's Account can be managed in the Debtor's Ledger.

There is a process of *Allocation* to match up Credit items with Debit items. For example you would allocate payments received in Receipts against Invoices. When the full balance of an item is matched the item is classed as allocated and the *transactions will no longer appear.*

In many cases this process of allocation is *completed automatically*. An example of this is when you post a Receipt from a Debtor. If you take the option to enter the Invoice Number of the Invoice being paid by the Debtor, the system will automatically allocate the payment to the Invoice.

There are times when the system *cannot allocate automatically*, perhaps the Debtor is paying in advance of receiving an Invoice for example. You will therefore on occasions need to allocate items *manually*.

These options are highlighted in the screenshot below:
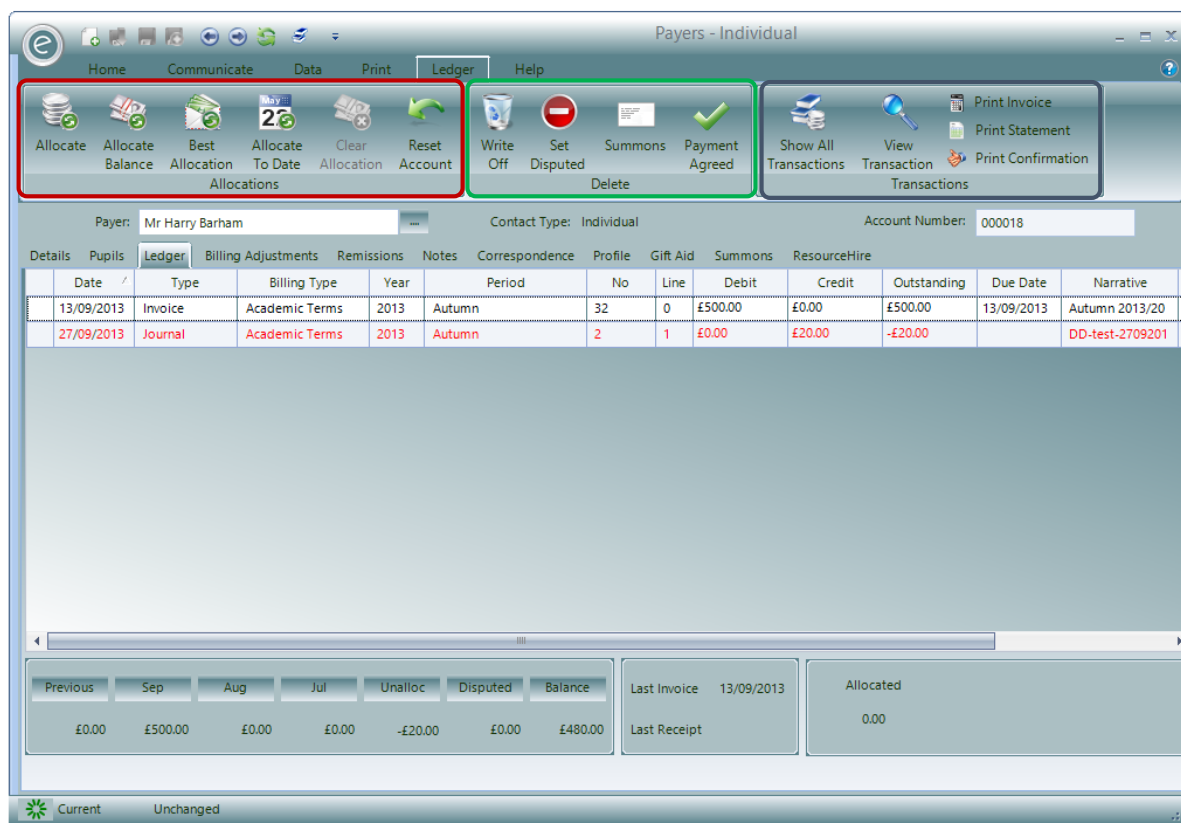
The Ledger page provides the following options to manage the allocation process in the Ribbon Menu highlighted in the red box:

Allocate   Manually allocate the balance

Allocate Balance   Allocates as much of the balance as possible

Best Allocation   Matches up the oldest Invoice to the most recent Receipt

Allocate to Date   Select when you want the payment allocated

Clear Allocation   Clears the allocation where possible

Reset Account   Unallocated all payments

Where you find small balances remaining on an account, perhaps the Debtor has under paid by a few pence, you have the option to Write Off the balance. This is highlighted in the green box. This simply creates a Journal for the opposite value and allocates it to the remaining balance.

Note: If a Credit has been raised in error, the Write Off option will simply delete it.

You may also have occasions where a Debtor disputes an Invoice. While you are investigating the situation you can mark the Invoice as disputed by clicking Set Disputed in the green box which will mark this by leaving an indicator on the transaction row. This will prevent the Invoice from firing off any *Chase Letters* and also adds it to a Report listing all disputed Invoices. Once the situation has been resolved you can remove the disputed indicator by clicking Clear Disputed.

By default *only unpaid and unallocated transactions are shown* but clicking on the Show all Transactions button in the blue box will result in the complete history of transactions being displayed.

Should you wish to look at any transaction in detail you can select the View Transaction option.

Furthermore you can press Print Invoice, Print Statement and Print Confirmation to print these reports for the Debtor directly from the Ledger.

Highlight Pupils with Debt in Schedules

In the Education Parameters, you can set the Pupils to be displayed in red text in schedules if their Payer still has outstanding invoices. This will highlight how many Payers or Pupils in a lesson still owe money to your music service.

An example is displayed below:

Enable Availability in Education Parameters

Allocated Hours can be turned on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Highlight pupils with debt on schedule' > Save and Close

Aged Debt Analysis

The *Aged Debt Analysis Report* will list all the Debtors with an *outstanding debt* providing a total of each individual debt and a breakdown of the debt *by its age*. It also shows the value of Credit transactions unallocated. In most cases this value should be zero except where a debtor has paid in advance for something not invoiced.

This can be produced by clicking:

Debtors (Ribbon Menu) > Analysis > Aged Debt Analysis

This is displayed in the window below:
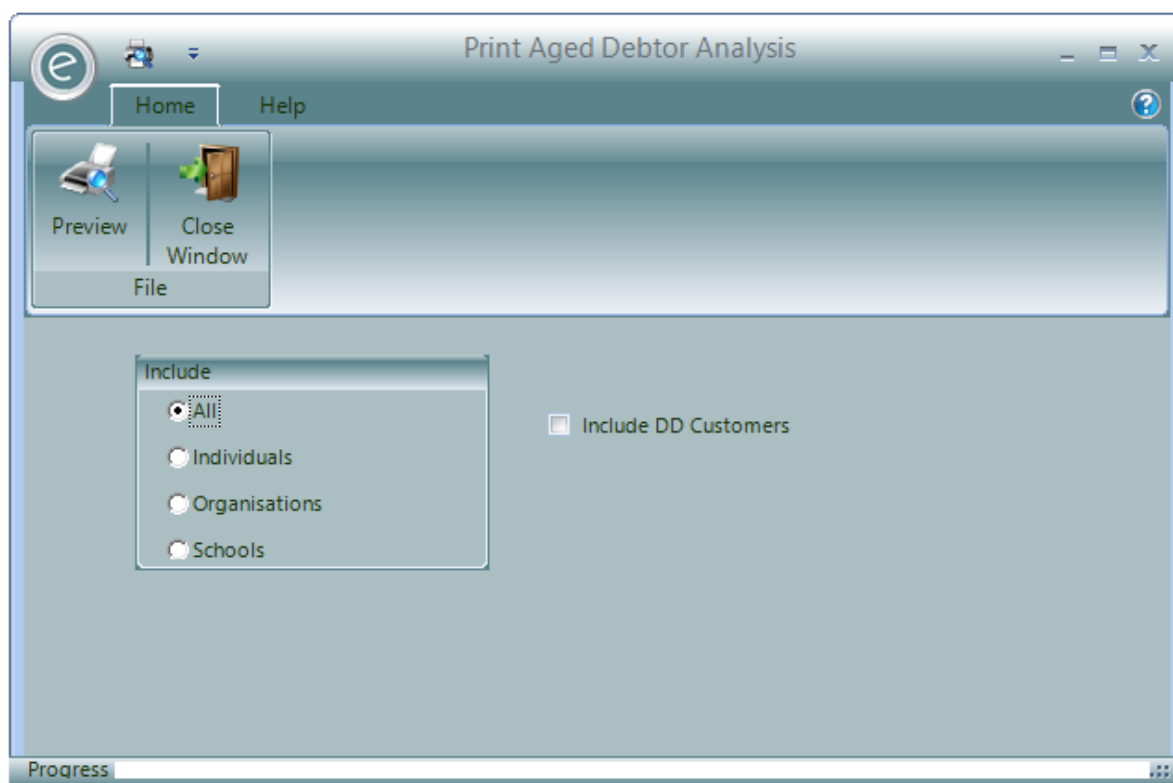
Simply select the Debtors you wish to view and tick **Include DD Customers** to view Payers with outstanding Direct Debits. Click **Preview** to view the Report.

Debtors Statements

▶ [Watch the Video Tutorial here](#)

The *Debtor Statement* facility will *produce an Account Statement* for a debtor. This will display all the transactions (e.g. Invoice/Receipt/Credit) on the Debtor's Ledger for a chosen date range.

This can be produced by clicking:

Debtors (Ribbon Menu) > Documents > Print Debtor Statement

Alternatively, you can *print the Report for a specific Payer* directly from their Record Card by:

Opening a Payer Record Card > Print tab > Print Statement

Either option will display the window below:
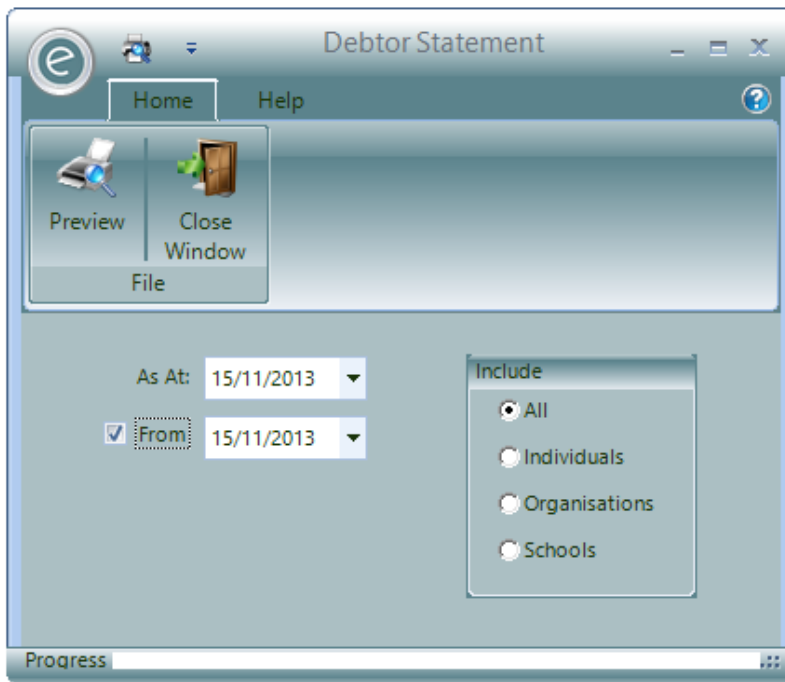
Specify the Debtors and select the dates between the **As At** and **From** fields to run the statement in.

Click **Preview** to view the Statements.

Chase Letters

 [Watch the Video Tutorial here](#)

Ensemble provides a facility to produce Chase Letters for outstanding debt. This can be accessed from the *Finance Parameters*:

Tools (Ribbon Menu) > Parameters > Finance Parameters > Pupil Payer Billing tab **> Chase Letters**

This is displayed in the window below:
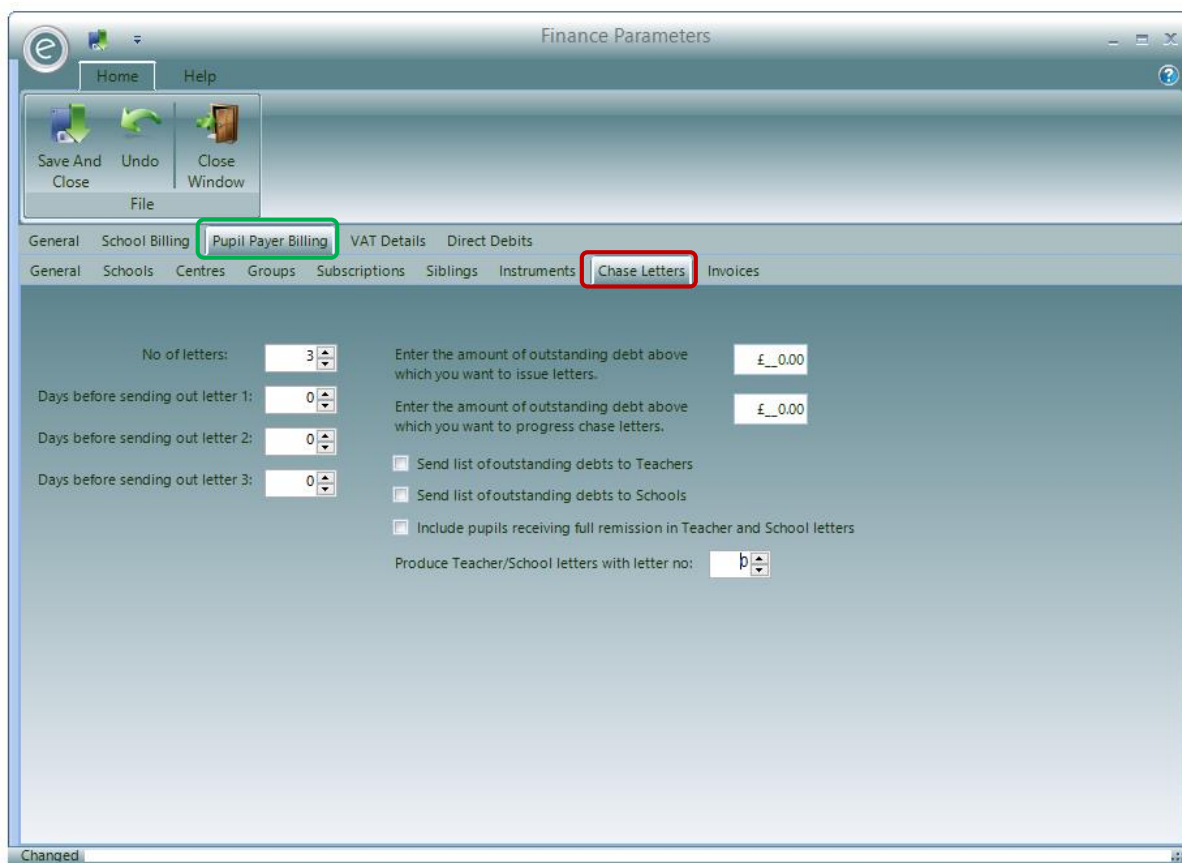
You can set up the rules for the system to follow when producing these letters.

The following is an explanation of the settings.

No of Letters	In here you can put the number of letters that you have for chasing Debtors. For example: Letter 1 may be a polite reminder, Letter 2 might be a firmer reminder explaining the consequences of any further delay and Letter 3 would be the notification of enforcement of those consequences.
Days before sending out letter	You can set the number of days *before* sending out each letter. The number of days starts from when the previous letter was sent.
Amount of outstanding debt above which you want to issue letters	In here you enter the amount of debt that is required to generate a letter. For example, if the Payer is overdue by a couple of pence you may not wish to push them for payment, so you could set your level as £10.
Amount of outstanding Debt above which you want to progress chase letters	In the same way, if a Payer had a debt of £5, you may not wish them to send Letter 2 and simply keep them on Letter 1; however any debt over £25 is considered substantial enough to progress the letter. Once a letter has progressed to Letter 2 it will continue to Letter 3 if another month is missed. And so on depending on how you configure your system.

Send list of outstanding debts to Teachers	This will send a list of pupils with outstanding debts to Teachers.
Send list of outstanding debts to Schools	This will send a list of pupils with outstanding debts to Schools.
Include pupils receiving full remission in Teacher and School letters	This is needed in a case when a pupil may have full remissions (free of charge) for one lesson and partial/no remissions for another. Hence not paying for the lesson agreed to pay for.
Produce Teacher/School Letters with Letter No	You may not want to inform Teachers or Schools of any Letter 1's that go out, but only when Letter 2 or 3 has been generated.

Once set up, the function to produce Chase Letters should be run weekly. Using the parameters the system will automatically decide which letter in your sequence of letters should be sent out for each Debtor.

Note: You can set up different rules for School-Debtors and Payer-Debtors.

Print Letters
You can print the Overdue Letters by clicking:

Debtors (Ribbon Menu) > Documents > Print Overdue Letters

This will display the window below:
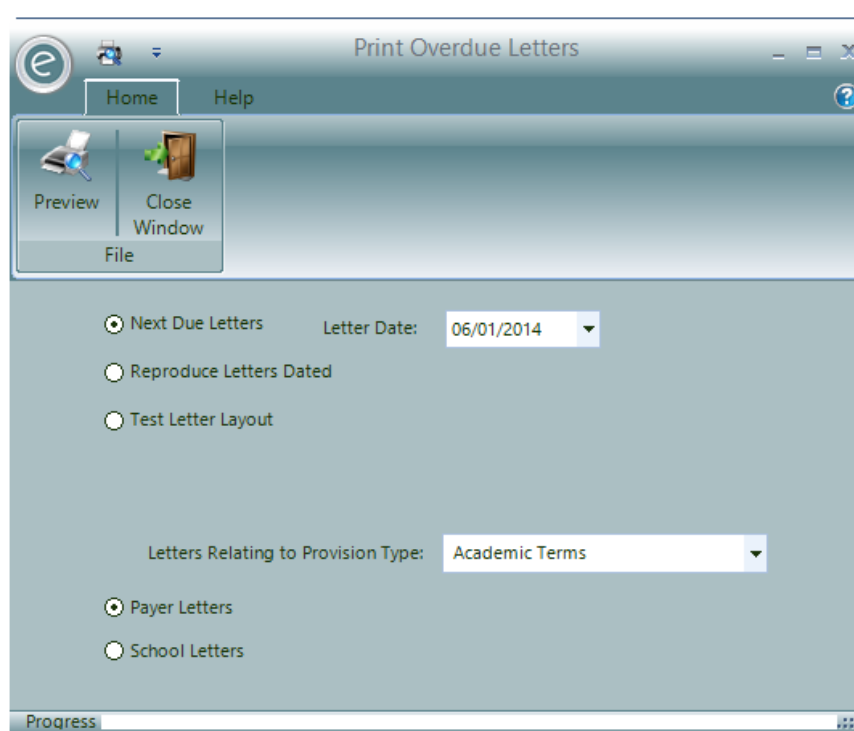
You will be able to select a date in which to run the Chase Letters by selecting Next Due Letters. This will run all the Chase Letters defined. You can reproduce a batch by clicking Reproduce Letters Dated and you can select one of the previous dates and there is also a Test Letter Layout that can be printed.

You will also be able to select the **Provision Type** for which the lessons are defined and if the letters are **Payer Letters** or **School Letters**.

Click **Preview** to view the letters.

Example Scenario

The following is an example how Chase Letters can be set up to work:

In September a Payer doesn't pay a due Invoice, as a result they are sent Letter 1 in October.

In October a new Invoice for that month's tuition is also raised, say they didn't pay either of these Invoices and the amounts were substantial enough to progress to Letter 2. When the process is run in October, they are sent Letter 2 for the full amount *of both outstanding Invoices*.

November comes round and Letter 3 is sent, and the Payer sends the amount to clear the September Invoice. The system instead of starting at Letter 1 again, will see that the outstanding amount in October was also substantial enough to progress and would have in its own right been a Letter 2.

Again, if in December the October Invoice is still unpaid it will generate another Letter 3 and so on. However if the amount in October was not substantial enough to progress the letters then it would have returned to Letter 1 and while the amount stayed under only Letter 1's would have been sent.

Note: Invoices marked as disputed are *not included* in the Chase Letter process.

Debt Allowance

There may be times when a Debtor has been having difficulty paying but an agreement has been made for them to make the payments (i.e. the debt has been agreed to be paid off weekly for the next 4 weeks) this can be recorded in Ensemble with a *Debt Allowance*.

Note: When this is activated they will stop receiving Chase Letters.

To do this, click:

Debtors (Menu Bar) > Payers > Open Payer Record Card > Details tab **>** Tick Debt Allowance

This is displayed in the window below:

The **green box** highlights this feature. Simply enter the **Date** that this agreed was made and the Debt Allowance can be recorded in the **Notes**.

Print Debtor Allowance Letters

When a Debtor has a confirmed debt allowance, then you can print a *Debtor Allowance Letter* to notify them.

To print this click **Print** from inside the **green box** above.

Alternatively this can be printed from the Home Screen by clicking:

Debtors (Ribbon Menu) > Documents > Print Debtor Allowance Letters

Either option will display the screen below:
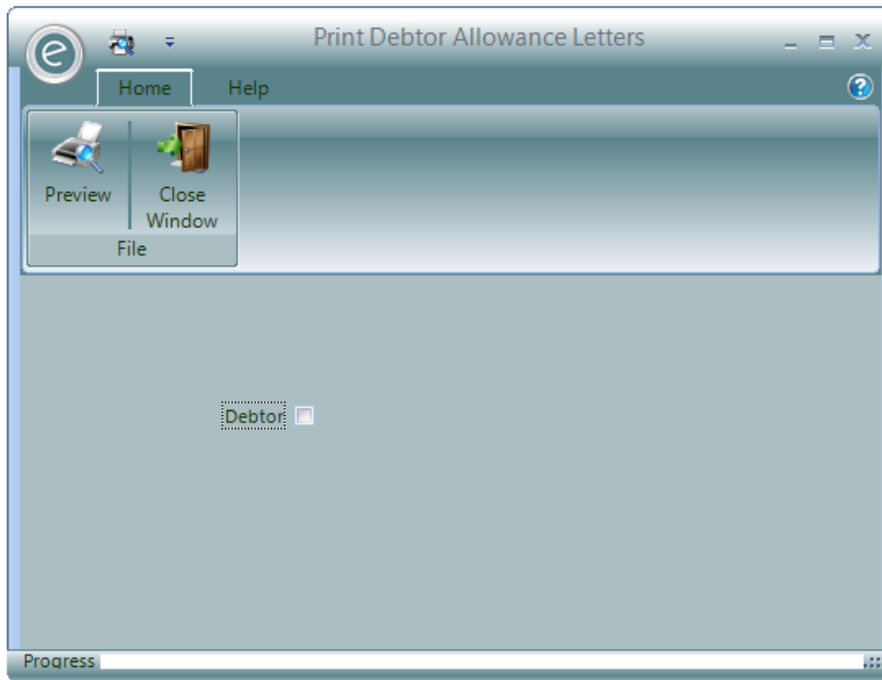
Select the **Debtor** and then click **Preview** to view the letter.

Note: If opened from the Debtor Record Card then the Debtor will already be selected.

An example of the letter is displayed below:

ALLOWANCE

Account No: 21
Brian Aldridge
278 Little Lane
Edgeley
Borsetshire
BO2 9QL

Dear Mr Brian Aldridge

You have been given a temporary debt allowance. Please find further details below:

Date	Description
15/11/13	Agreement has been made to honour the payment over the next 3 weeks.

Payer Account Status

When a Payer does not pay their account even after reminders you can change their Account Status. This can be accessed in the Payers Record Card:

Debtors (Menu Bar) > Payers > Select Payer > Details tab

This is highlighted in the red box in the window below:

The options are:

Normal   Default setting. Accounts are paid as normal.

Held   This will *prevent you from adding any more services* for this payer until their
                account is paid and you remove the Held status.

Closed   If you wish to *permanently* stop the Payer from any further activity you can set the
                status to *Closed*.

Summons   If you have summoned the Payer to a court to finish the payment, you can set the
                status to *Summons.*

Summons and Appeals

If circumstances arise whereby a Payer is summoned to a court in order to pay their debts this can
recorded via *Summons* in the Payer Record Card.

To create a new Summons:

Open a Payer Record Card > Summons tab > New Summons

This is displayed in the window below:

You will need to enter:

Judgement Date   Date of court hearing

Judgement Cost   Total cost of court proceedings

Reference   Reference for the Summons

Notes   Enter notes

Invoice No   Enter the Invoice(s) which have remain unpaid

Note: You can only enter Invoices for this Payer

Click **Save and Close** to save the Summons.

The Summons will be displayed as a row under the Summons tab:
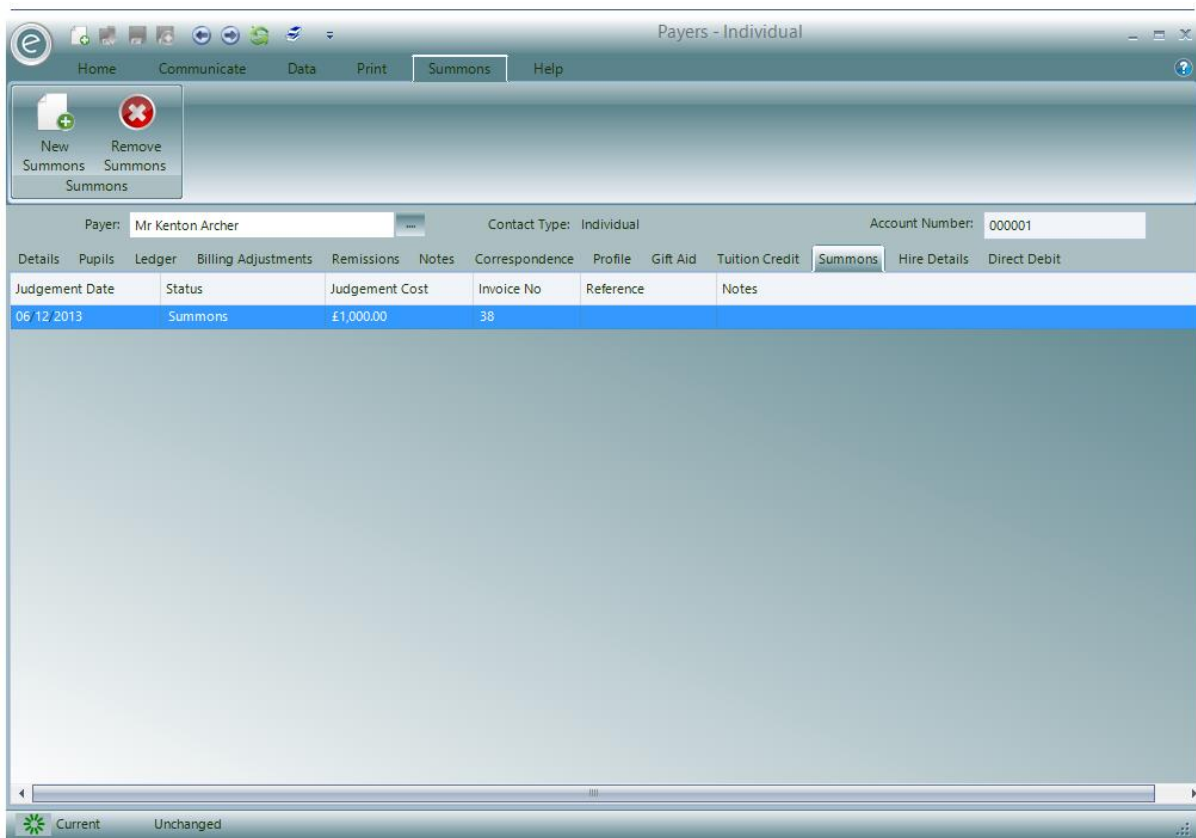
If the Payer then *appeals* the court decision, this can be recorded by changing the Status of the Summons to Appeal:

29.   Reconciling the Debtors Ledger

On a regular basis, normally *once a month* you should reconcile your Debtors Ledger. This is a simple process of taking a b/fwd. balance, adding the value of the various transactions applied in the period and checking it matches the c/fwd. balance.

The easiest way to take balance of the Ledger is to produce an *Aged Debtors Analysis Report*. This will display a total balance for your Debtor's Ledger.

At the end of the next period you should run off the following Registers:

- Invoice Register
- Credit Register
- Receipt Register
- Journal Register

These are all accessed from:

Debtors (Ribbon Menu) > Registers

This is displayed in the screenshot below:
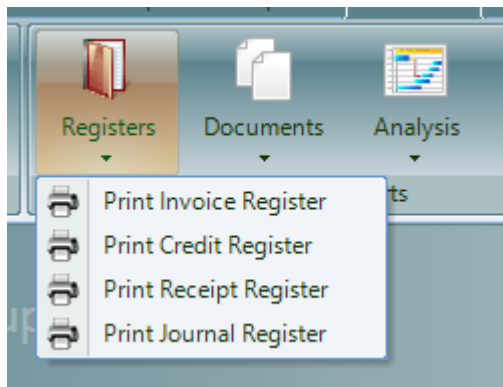
These Registers will list each transaction posted to the Debtor's Ledger. By taking the original Aged Debtors balance, adding Invoices, subtracting Credits and Receipts and adding Journals you will end up with a *new balance* for the Debtor's Ledger. If you run a new Aged Debtors Analysis, the balance shown should match your calculation.

30.   Debtor Reports

There are several reports in the *Debtors* tab of the Ribbon Menu that give you overviews and analyses of your *Invoices, Payments and Credits*. Used together, these reports will give you a full overview of your service's finances. The reports are as follows:

Finance Registers

Often known as a 'Day Book', a Finance Register will provide you with the:

- List of financial transactions
- Details of the transactions
- Date the Register is run from

The available Registers are:

Invoice Register

The Invoice Register will produce a Report listing the Invoices for specified Debtors.

To access the Invoice Register click:

Debtors (Ribbon Menu) > Registers > Print Invoice Register

This will display the window below:
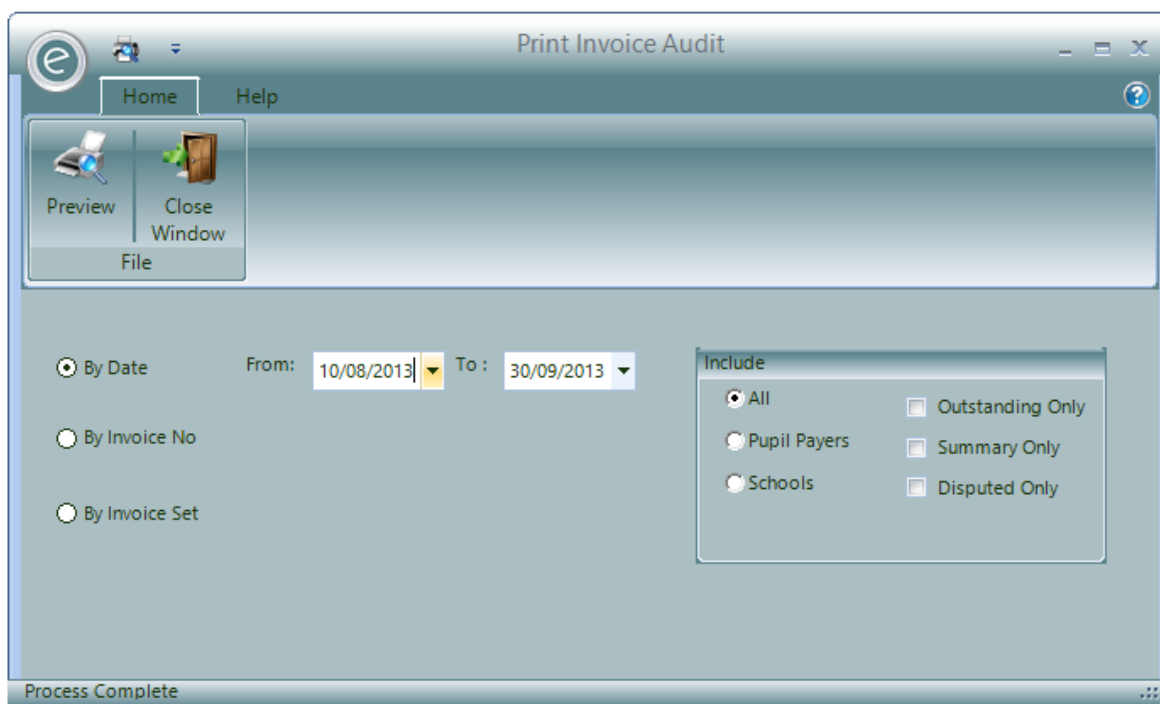
Here you can list Invoices within a specified date range and Invoice Number range by selecting **By Date**, **By Invoice No** or **By Invoice Set** respectively.

Once this has been chosen you can choose which Invoices you would like to view in the Register. These options are in the **Include** section and they are:

All	Invoices for all Debtors will be displayed
Pupil Payers	Only Invoices for Pupil Payers will be displayed
Schools	Only Invoices for Schools will be displayed
Outstanding Only	Only outstanding Invoices will be displayed
Summary Only	This will summarise the Register, individual transactions within the Invoices will not be displayed
Disputed Only	Only disputed Invoices will be displayed

Click **Preview** to view the Invoice Register. An example is displayed below:

Invoice N	Invoice Set	Ledger Code	Date	Account No	Name	Value	VAT	Total
9	Default	Default	13-Sep-13	36	Elizabeth Primary			
				1 x Hire Of Drum Machine		£400.00	£0.00	£400.00
						£400.00	£0.00	£400.00
10	Default	Default	13-Sep-13	40	Ambridge Grammar School			
				1 x Pupil Tuition: Guitar		£125.00	£0.00	£125.00
				1 x Pupil Tuition: Viola		£125.00	£0.00	£125.00
				1 x Pupil Tuition: Piano		£125.00	£0.00	£125.00
				1 x Pupil Tuition: Viola		£125.00	£0.00	£125.00
				1 x Pupil Tuition: Piano		£125.00	£0.00	£125.00
				1 x Pupil Tuition: Piano		£125.00	£0.00	£125.00
				1 x Pupil Tuition: Piano		£125.00	£0.00	£125.00
				1 x Hire Of 5 x Amplifiers		£400.00	£0.00	£400.00
				1 x Pupil Tuition: Clarinet		£125.00	£0.00	£125.00
				1 x Hire Of Bassoon		£400.00	£0.00	£400.00
				1 x Pupil Tuition: Clarinet		£125.00	£0.00	£125.00
				1 x Pupil Tuition: Guitar		£125.00	£0.00	£125.00
				1 x Pupil Tuition: Guitar		£125.00	£0.00	£125.00
						£2,175.00	£0.00	£2,175.00

Credit Register

The Credit Register will produce a Report listing the Credits for specified Debtors.

To access the Credit Register click:

Debtors (Ribbon Menu) > Registers > Print Credit Register

This will display the window below:

Here you can specify to list Credits within a specified Date range and Reference Number range by selecting **By Date** or **By Ref** respectively.

Once this has been chosen you can choose which Credits you would like to view in the Register. These options are in the Include section and they are:

All   Credits for all Debtors will be displayed

Pupil Payers   Only Credits for Pupil Payers will be displayed

Schools   Only Credits for Schools will be displayed

Group by Invoice Sets   Groups the Credits by their associated Invoice Sets

Click Preview to view the Credit Register. An example is displayed below:

29-Oct-13   Paritor Performing Arts
                              Credit Register Summary

Credit No	Date	Invoice Set	Account No	Name	Amount	PaidValue	Outstanding	Credit Reason
1	13-Sep-13	Default Invoice Set	8	Mrs Wood	£150.00	£150.00	£0.00	Write Off
2	15-Sep-13	Default Invoice Set	21	Mr Brian Aldridge	£1.00	£1.00	£0.00	Write Off
4	30-Sep-13	Default Invoice Set	12	Mr Michael Shen	£250.00	£0.00	£250.00	Overcharged
5	29-Oct-13	Default Invoice Set	1	Mr Kenton Archer	£190.00	£190.00	£0.00	Overcharged
6	29-Oct-13	Default Invoice Set	18	Mr Harry Barham	£480.00	£0.00	£480.00	Full Refund
11	29-Oct-13	Default Invoice Set	24	Mr Matt Crawford	£250.00	£0.00	£250.00	Write Off
					£1,321.00	£341.00	£980.00	

Receipt Register

The Receipt Register will produce a Report listing Receipts.

To access the Receipt Register click:

Debtors (Ribbon Menu) > Registers > Print Receipt Register

This will display the window below:

Here you specify the Date range to include Receipts in the From Date / To dropdown windows.

You can choose to group the Receipts by Trans No, the Receipt Ref or the Invoice Set.

Choose whether to include Receipts for all Users, the current User or a specified User by selecting All Users, Current User and Specified User respectively.

Click Preview to view the Receipt Register. An example is displayed below:

Journal Register

The Journal Register will produce a Report listing the Journals for specified Debtors.

To access the Journal Register click:

Debtors (Ribbon Menu) > Registers > Print Journal Register

This will display the window below:
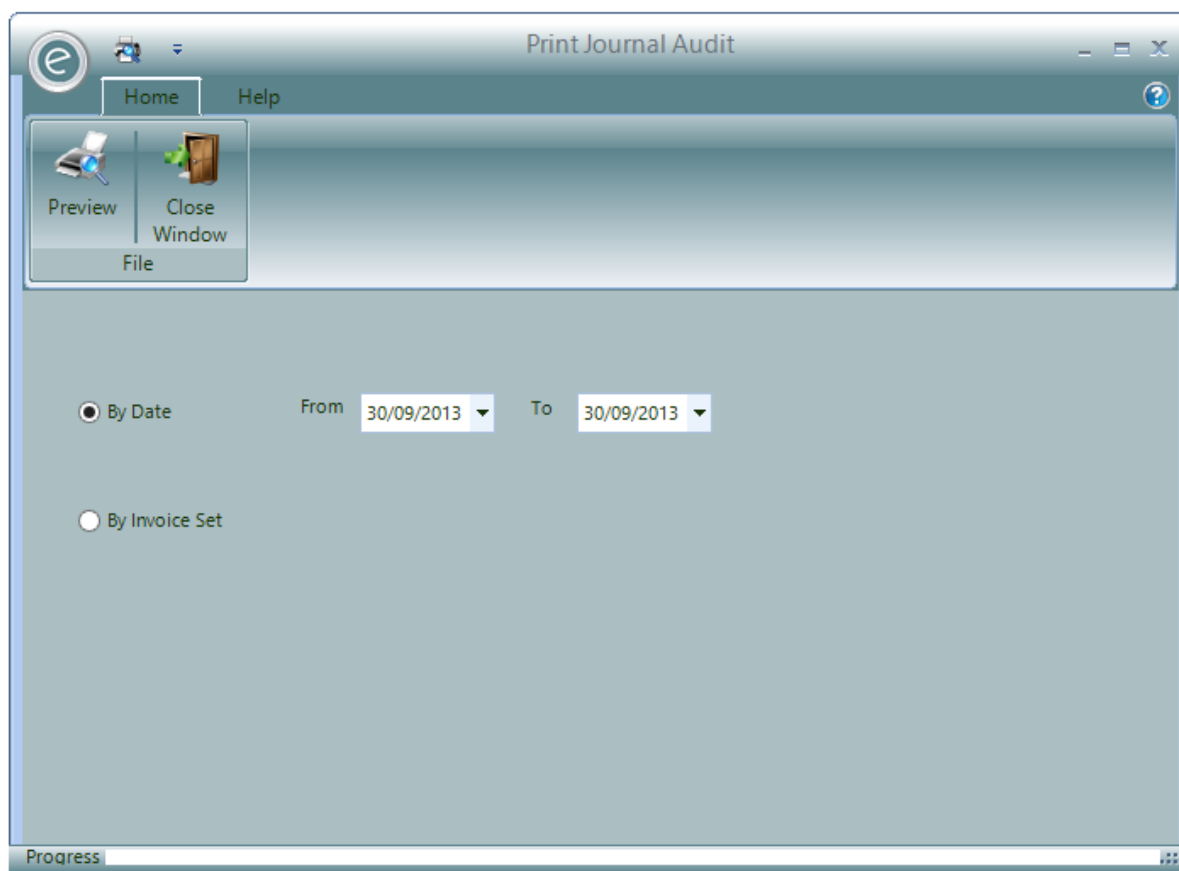
Simply choose to specify a date range to list the Journals for within **By Date** or Invoice Sets by clicking **By Invoice Set** and click **Preview** to view the Journal Register. An example is displayed below:

Analysis Reports

Analysis Reports will show you summarised values of your transactions, these totals can be grouped by various factors such as Area and Activity Group. The Analysis Reports are:

Aged Debt Analysis

The *Aged Debt Analysis Report* will list all the Debtors with an *outstanding debt* providing a total of each individual debt and a breakdown of the debt *by its age*. It also shows the value of unallocated Credit transactions

Note: In most cases this value should be zero except where a Debtor has paid in advance for something not invoiced.

This can be accessed by clicking:

Debtors (Ribbon Menu) > Analysis > Aged Debt Analysis

This is displayed in the window below:

Simply select the Debtors you wish to view and tick **Include DD Customers** to view Payers with outstanding Direct Debits. Click **Preview** to view the Report. An example is displayed below:

Name	Address	TelNo	Total	Current	August	July	June	Unallocated
Mr Brian Aldridge	278 Little Lane		£239.00	£250.00	£0.00	£0.00	£0.00	-£11.00
Mr Kenton Archer	31 Downham Road	01495 365457	£3,590.00	£3,590.00	£0.00	£0.00	£0.00	£0.00
Mr Richard Attlee	286 Leafy Glade		£250.00	£250.00	£0.00	£0.00	£0.00	£0.00
Mr Harry Barham	64 High Grove		£480.00	£500.00	£0.00	£0.00	£0.00	-£20.00
Mr Richard Bellamy	83 Walkers Road		£250.00	£250.00	£0.00	£0.00	£0.00	£0.00
Mrs Blackburn	7 High Street,	01495728321	£210.00	£210.00	£0.00	£0.00	£0.00	£0.00
Mr Alex Bronton	14 Gravefield Avenue		£1,000.00	£1,000.00	£0.00	£0.00	£0.00	£0.00
Mrs Lucy Carter	90 Upper Lane		£1,000.00	£1,000.00	£0.00	£0.00	£0.00	£0.00
Mrs Dorris Craig	90 Swift Grove		£250.00	£250.00	£0.00	£0.00	£0.00	£0.00
Mr Matt Crawford	28 Rice Street		£250.00	£250.00	£0.00	£0.00	£0.00	£0.00
Mr Matthew Crawford	12 Westbury Way	01495 687429	£1,250.00	£1,250.00	£0.00	£0.00	£0.00	£0.00
Mr Wallace Curfew	13 Dairy Lane		£500.00	£375.00	£0.00	£0.00	£0.00	£125.00
Mrs Julia Daniels	28 Oak Road		£250.00	£250.00	£0.00	£0.00	£0.00	£0.00
Miss Buffy Davis	21 Jackson Road		£250.00	£250.00	£0.00	£0.00	£0.00	£0.00
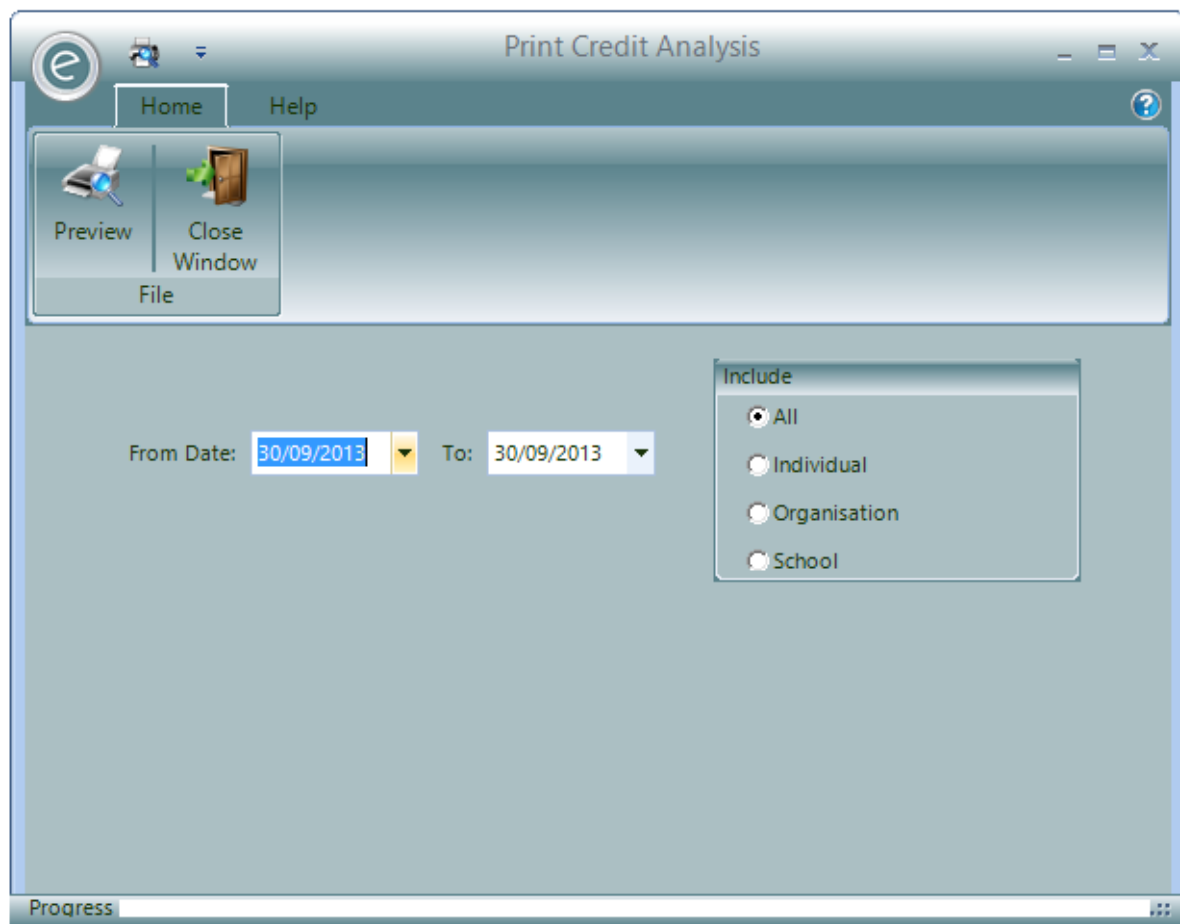
Credit Analysis

The Credit Analysis will order Credits made by their *Credit Reason*. This will show you a total value of Credits for the Credit Reasons given allowing you to evaluate them effectively.

To access this, click:

Debtors (Ribbon Menu) > Analysis > Print Credit Analysis

This will display the window below:

Here you can specify the date range within **From Date / To** and whether to include Credits for all Debtors or specific Payers by selecting the **All, Individual, Organisation** or **School** fields respectively.

Click **Preview** to view the Report. An example is displayed below:

Credit Analysis From 20-Sep-2013 To 06-Dec-2013

Full Refund

Credit No/Line No	Date	Account Name	Narrative	Amount
6 / 1	29-Oct-13	Mr Harry Barham	Full refund given	£480.00
			Full Refund Total	£480.00

Overcharged

Credit No/Line No	Date	Account Name	Narrative	Amount
4 / 1	30-Sep-13	Mr Michael Shen	10 of 30 mins @ £50.00 per hour,	£250.00
5 / 1	29-Oct-13	Mr Kenton Archer	Overcharged Payment	£190.00
			Overcharged Total	£440.00

Write Off

Credit No/Line No	Date	Account Name	Narrative	Amount
11 / 1	29-Oct-13	Mr Matt Crawford	Written off due to special circumstance	£250.00
			Write Off Total	£250.00
			Grand Total	£1,170.00

Journal Analysis

The *Journal Analysis* will produce a Report that analyses the Journals posted.

To access this, click:

Debtors (Ribbon Menu) > Analysis > Print Journal Analysis

This will display the window below:

Here you can specify the date range within **From Date / To**

Specify whether to **Analyse By Credit Reason** or **Analyse By Activity Group.**

Select to include Journals posted to Debtor Ledgers for **All, Individual, Organisation** or **School** Payers respectively.

Click **Preview** to view the Report. An example is displayed below:
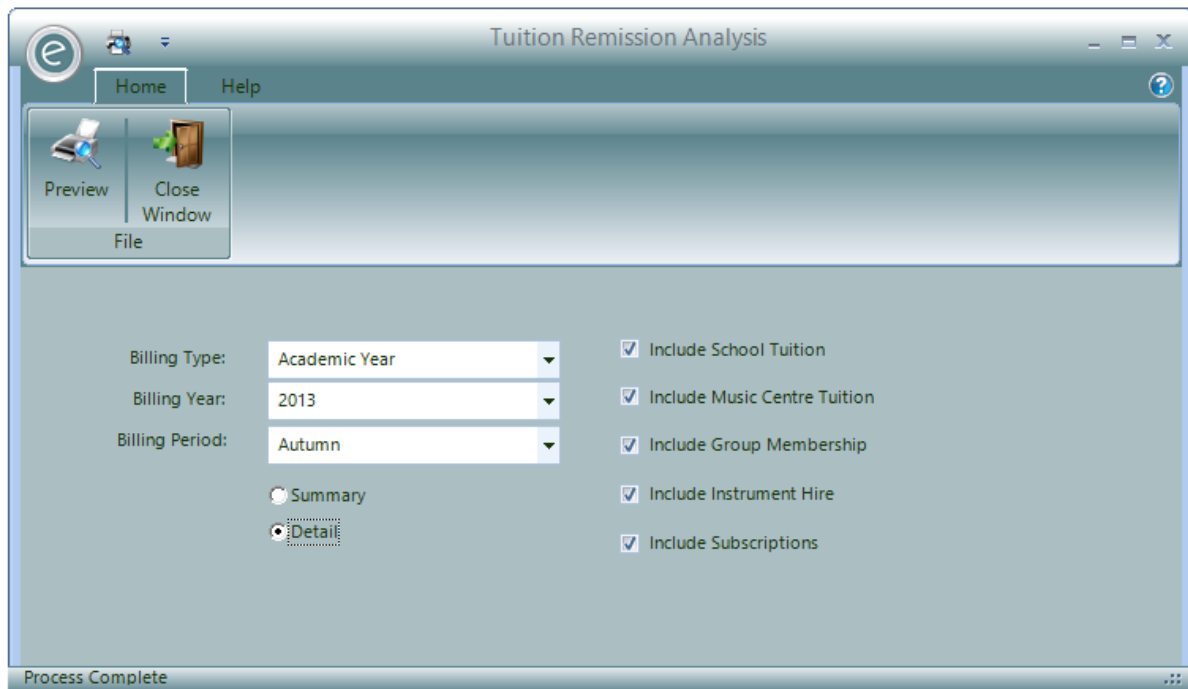
Remission Analysis

The system includes a *Remission Analysis Report* that produces a breakdown of the Remissions you have provided over a period of time. The breakdown shows the value of each Remission.

To access this, click:

Debtors (Ribbon Menu) > Analysis > Print Remission Analysis

This will display the window below:

You will need to specify the **Billing Type, Year** and **Period** for which to display the Remissions.

Tick the **Include** boxes to choose the different services that shall be used in the analysis.

You can also choose between displaying the Report in **Summary** or **Detail**.

Click **Preview** to view the Report. An example is displayed below:

Receipt Analysis

The *Receipt Analysis* will produce a Report analysing Receipts primarily by the defined Ledger Codes and methods of payment (i.e. cheque and cash) for a specific date range.

To access this, click:

Debtors (Ribbon Menu) > Analysis > Print Receipt Analysis

This will display the window below:
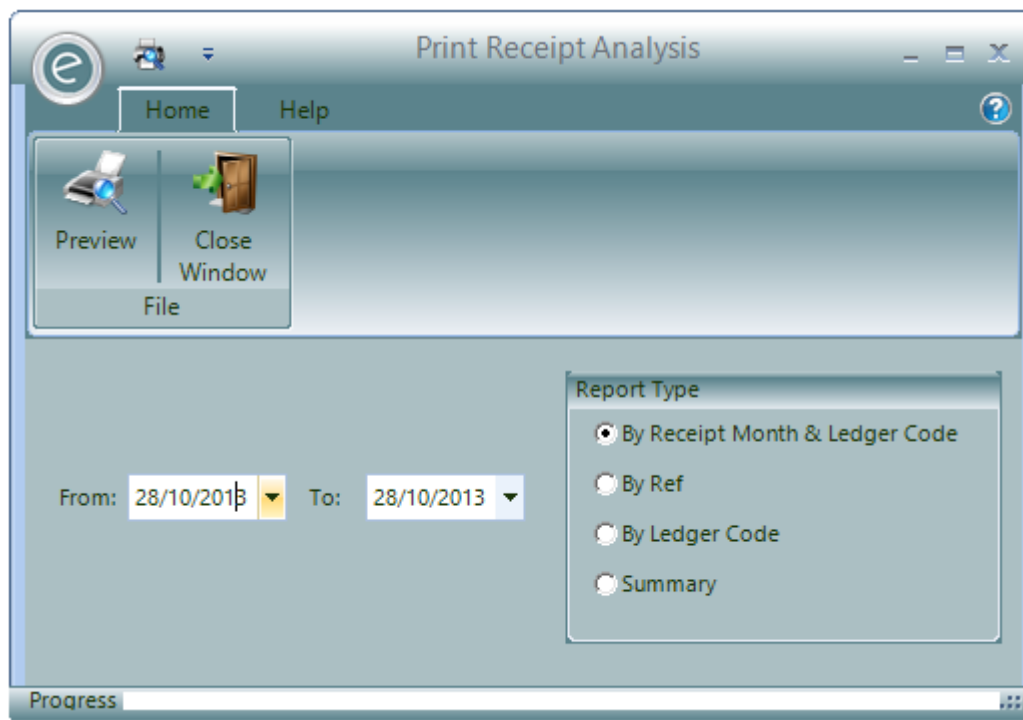
Here you can specify the date range within From Date / To.

Furthermore you can categorise the Report in the Report Type section. These options are:

By Receipt Month & Ledger Code	The Report will categorise the Receipts by the month and Ledger Code
By Ref	The Report will categorise the Receipts by Receipt References
By Ledger Code	The Report will categorise the Receipts by the Ledger Code
Summary	The Report will produce a flat summary

Click Preview to view the Report. An example is displayed below:

Receipt Analysis by Activity

For the Period 01 July 2013 to 28 October 2013

Default Ledger Code

Receipt Date and Ref		Debtor Name	Cheque No	Narrative	Allocated Value
Cheques					
13-Sep-13	1 /1	Mrs Alice Pope	1	Tuition Invoice	£125.00
13-Sep-13	1 /2	Mr Brian Aldridge	2	Tuition Invoice	£125.00
13-Sep-13	1 /3	Mr Alex Bronton	3	Tuition Invoice	£125.00
13-Sep-13	1 /4	Mr Kenton Archer	5	Tuition Invoice & Instrument Hire	£125.00
13-Sep-13	1 /4	Mr Kenton Archer	5	Tuition Invoice & Instrument Hire	£120.00
13-Sep-13	1 /5	Mr Wallace Curfew	6	Tuition Invoice	£125.00
13-Sep-13	1 /6	Mr Richard Bellamy	7	Tuition Invoice	£31.25
				Cheques	£776.25
				Default Ledger Code	£776.25
				Grand Total	£776.25

Income Analysis

The Income Analysis Report will produce an analysis of how your service has generated its income over a given Billing Year and Billing Period.

Note: This analysis looks at your Billing Report to calculate the income, not the raised Invoices.

To access this, click:

Debtors (Ribbon Menu) > Analysis > Print Income Analysis

This will display the window below:

Specify the **Billing Type**, **Year** and **Period** for the Report to run.

In the **Include** section, you can specify which particular revenue stream to analyse. Select either revenue from **Payer Income**, **School Income** or **both**.

In the **Income By** section, you can categorise the income selected by **Ledger Code**, **Account Type** or **Area**.

Note: When **School Income** is selected, an option to **Include Customer** will appear. This will allow you to view the income generated from each School. See below:

Click **Preview** to view the Report. An example is displayed below for revenue generated by *Payer Income* and categorised by *Account Type*:

Miscellaneous Reports

The *Reports* list contains miscellanious finance Reports which cannot be categorised as Analysis or Registers. These are:

Debtor Balances

This Report will display details for the outstanding Debtors and their associated Pupils.

To access this, click:

Debtors (Ribbon Menu) > Reports > Print Debtor Balances

This will display the window below:
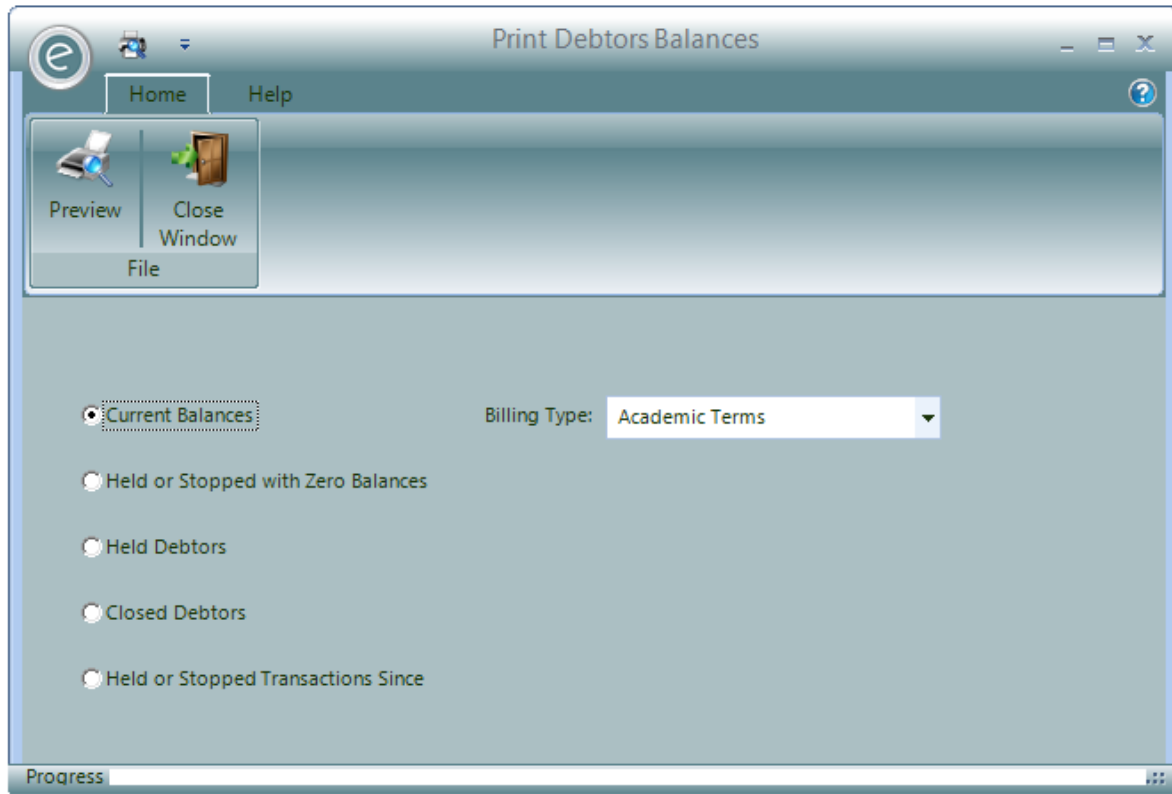
The options to select for this Report are:

Current Balances	Displays all Debtors and their current balance for the selected Billing Type
Held or Stopped With Zero Balances	Displays Debtors with *Held* account status' and zero balances, indicating the *debts are paid*. Useful to use as a list to evaluate which Debtors can be allowed to resume active accounts
Held Debtors	Displays Debtors with Held account status'
Closed Debtors	Displays Debtors with Closed account status'
Held or Stopped Transactions Since	Displays Debtors with Held accounts since a specified date

Click **Preview** to view the Report. An example is displayed below for *Current Balances*:

28-Oct-13   **Debtors Balances**   Paritor Performing Arts

Individual

Debtor		Pupil(s)		
Mr Matthew Crawford	£1,250.00	Simon Crawford	Orchestra	Chantelle Darlings
12 Westbury Way, Borchester , Borsetshire, BO12 5KS 01495 6			Bochester Music Centre	
		Simon Crawford	Bassoon	Michael Birchfield
			Ambridge Grammar School	
		Simon Crawford	Drums	Rachel Levison
			Ambridge Grammar School	
Mr Wallace Curfew	£500.00	Jessica Curfew	Bassoon	Michael Birchfield
13 Dairy Lane, Waterley Cross, Borsetshire, BO8 3TY			Ambridge Grammar School	
Mr Tom Jones	£250.00	Jack Jones	Voice	Nigel Cambell
189 Summer Avenue , Websterbridge, Borsetshire, BO2 8EK			St Marys Academy	
Mr Alex Bronton	£1,000.00	Charlie Bronton	Orchestra	Chantelle Darlings
14 Gravefield Avenue, Ramehead, Borsetshire, BO3 4ER			Bochester Music Centre	

Debt Allowance Listing (if applicable)

If there are Debtors with an agreed Debt Allowance then a Report can be printed that will list these Debtors. This Report is the *Debt Allowance Listing*.

To access this click:

Debtors (Ribbon Menu) > Reports > Print Debt Allowance Listing

This will display the window below:
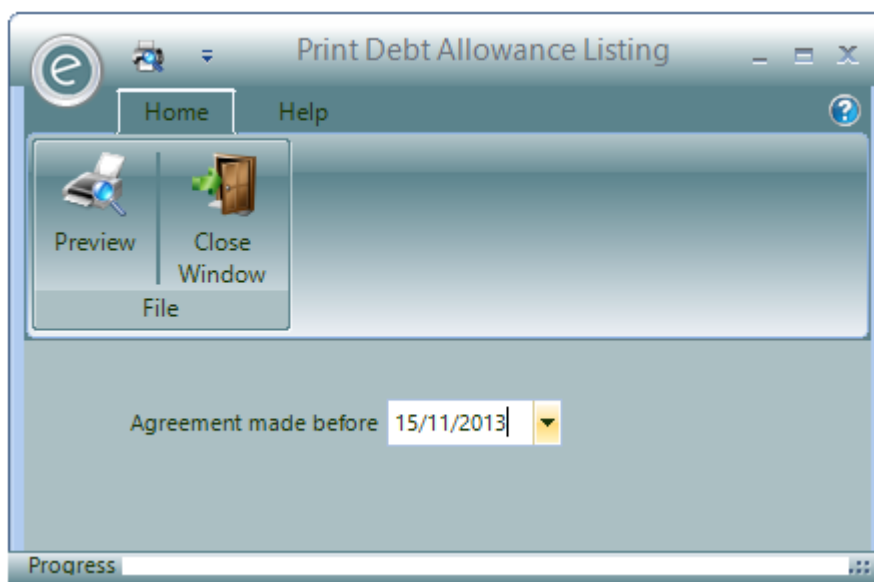
In the **Agreement made before** field select the date for which the Report will run from.

Click **Preview** to view the Report.

An example is displayed below:

Receipt Summary

The *Receipt Summary Report* is similar to the Receipt Register however it summarises the information by not disclosing the individual lines in the Receipt.

To view this Report click:

Debtors (Ribbon Menu) > Reports > Print Receipts Summary

This will display the window below:
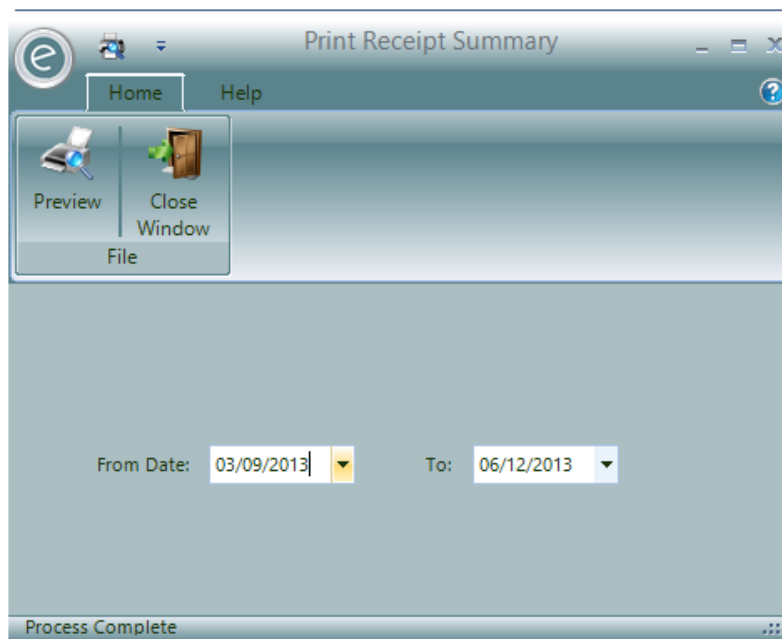
Simply choose a date range and then click **Preview** to view the Report.

An example is displayed below:

06-Dec-13   Paritor Performing Arts

Receipt Summary

Receipt Reference No   Date   Total Amount

                            13-Sep-13   £776.25
-                           12-Nov-13   £20.00
-                           20-Nov-13   £250.00
-                           03-Dec-13   £30.00
                                                            Total   £1,076.25

Payer Remissions

The *Payer Remissions Report* will list all the active payers with remissions and the number of pupils that receive the remissions.

To view this report, click:

Debtors (Ribbon Menu) > Reports > Print Payer Remissions

This will display the window below:

You will need to specify:

Last Verified Before   All Payers with *Remissions verified before this date* will be displayed

Active Payers As At   Payers with *Normal* account status' on this date will be displayed

Click **Preview** to view the Report.

An example is displayed below:

Ledger Charges

The *Ledger Charges Report* can be produced which breaks down outstanding debt by Ledger Codes, Charge Categories and Invoice Sets.

To view this Report click:

Debtors (Ribbon Menu) > Reports > Print Ledger Charges

This will display the window below:
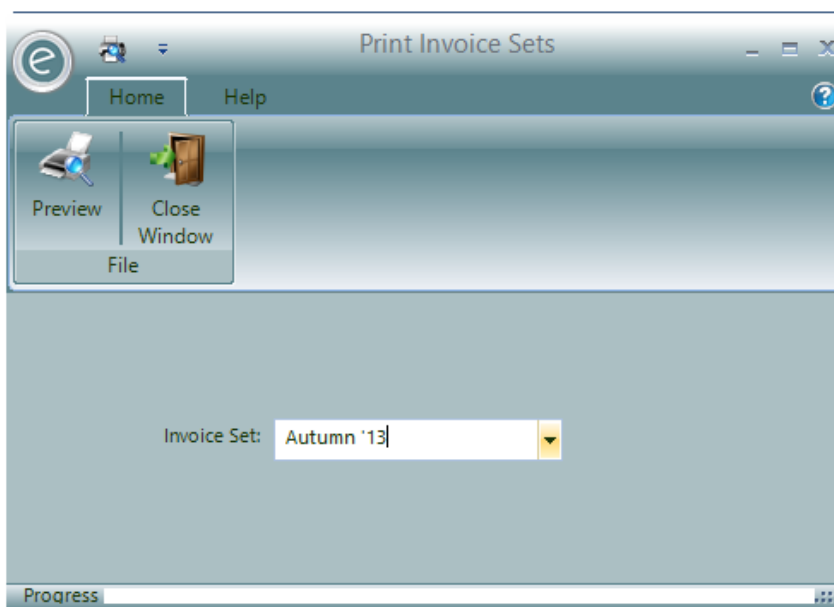
Select the **Invoice Set** and click **Preview**.

An example of the Report is displayed below:

Ledger Charges

Autumn '13

Funding	Ledger Code	Amount
All Charges	Default Ledger Code	£975,476.25
	Total	£975,476.25

Appeals and Summons

A Report can be produced to list any *Appeals and Summons* recorded in Ensemble.

To print the Report click:

Debtors (Ribbon Menu) > Reports > Print Appeals and Summons

This will display the window below:

Simply select a date range and click Preview.

An example of the Report is displayed below:

Appeals and Summons

Appeals/Summons	Payment Type	Subtotal Amount	Set Total	% Reconciled	ID
Autumn '13	SUMMONS	£1,000.00	£45,126.25	.022	Autumn '13
		£1,000.00			

Teacher Pay

1. Overview

The system supports the management of Teachers employed in the following ways:

Contracted	The Teacher is provided with a *teaching contract* that defines the hours they should work during a year and in return is paid a salary.
Claim	The Teacher is provided with work for which they must *claim their hours.* Time claimed is then paid.
Sub Contracted	The Teacher is provided with work for which they *submit an Invoice*.

Each Teacher Record Card contains an indicator within the *Pay Details* tab showing if the Teacher is on a Contract or is paid for work done on a claim basis.

Note: Teachers employed on a contracted basis can also undergo work that is *not subject to their contract* and instead is subject to a claim.

It is Diary Entries for these types of Teachers and the related pay that can be managed by Ensemble. Diary Entries for contracted Teachers which have been marked as outside of their contract can also be managed by Ensemble.

Each Teacher has a set of Diary Entries, these are created from their Schedule and detail any Activity they are involved in. Each Diary Entry is assumed to have been completed at its specified time but by applying Task Results the Diary Entries can be marked as not being completed. If there is no Task Result, it will indicate that the Teacher should still be paid for the work.

Note: For more information regarding Task Results, please refer to **Task Results** in the **Schedule Management** Chapter.

In addition to diarised Activities, Teachers can also be paid for additional items. Details of any of these additional payments are entered on the Teacher's Record Card within the *Payments* tab.

2. Setting up Teacher Payments

Pay Details

▶ [Watch the Video Tutorial here](#)

The Teacher Record Card includes a tab called *Pay Details* which contains information relating to how the Teacher should be paid together with other pay related information such as their *Pay Reference* and *NI Number.*

To access this click:

Teachers (Menu Bar) > Pay Details tab

This will display the window below:

The fields highlighted in the green box are:

Date Started	Enter date that Teacher began working for your service
Date Finished	Enter the date that the Teacher finished working for your service
Pay Reference	Enter the Pay Reference for the Teacher
NI Number	Enter the Teacher's National Insurance number
DCSF No	Enter the Teacher's DCSF Number
Travel Base	The location from where the Teacher will travel from each day
Minimum Hours	Enter the minimum hours that the Teacher can for each week. This only applies to Teachers on Claim basis.
Maximum Hours	Enter the maximum hours that the Teacher can for each week. This only applies to Teachers on Claim basis.
Date of Birth	Enter the Date of Birth
DBS Check Submitted	Tick once this has been submitted and enter the date of submission
DBS Check Completed	Tick once this has been completed and enter the date of completion
DBS Check Reference	Enter the reference
Qualified Teacher	Tick once qualified

The **Pay Codes** section provides an opportunity to optionally specify a set of financial sub codes for each pay category.

Note: When used, the *Claims Report* and the *Claims Export* will list items with a different Pay Code separately. These are used in the procedure for calculating the correct payment to be distributed to Teachers paid on a claims basis. This is discussed further in this Chapter

These Pay Codes are for:

- Standard Pay
- Back Pay
- Sick Pay
- Expenses

The blue box highlights the Teacher's bank details:

- Bank Account Number
- Bank Account Sort Code
- Bank Account Name

Employment Status

The orange box highlights the Employment Status section which defines the way the Teacher will be paid. There are three options:

- **Claim** – All the Activities carried out by this type of Teacher need to be claimed by the Teacher. Each completed and claimed for Activity can be processed by the claims process and ultimately paid.

- **Sub-Contract** – This type of Teacher submits an Invoice for the work they carry out.

- **Contract** – This type of Teacher is on a contract and is paid a salary. By default any Activity they carry out is assumed to be undertaken as part of this contract. Activities can be assigned to such a Teacher marked as not being part of their contract. These activities need to be claimed by the Teacher and processed via the claims process. When selected the section will be displayed as below:

Pay Scales

▶ [Watch the Video Tutorial here](#)

The Teacher Record Card also contains a tab called *Pay Scales*. This area is used to define the Pay Scale and *point on that scale* the Teacher's pay is calculated from. Therefore making the wage of the Teacher progressive as it increases on the scale.

Enable Availability in Education Parameters
When you first setup your database, it *will not show* the Pay Scale option. You will therefore need to switch these on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Pay Scales' > Save and Close

This is displayed in the window below, with Use Pay Scales highlighted in the red box:
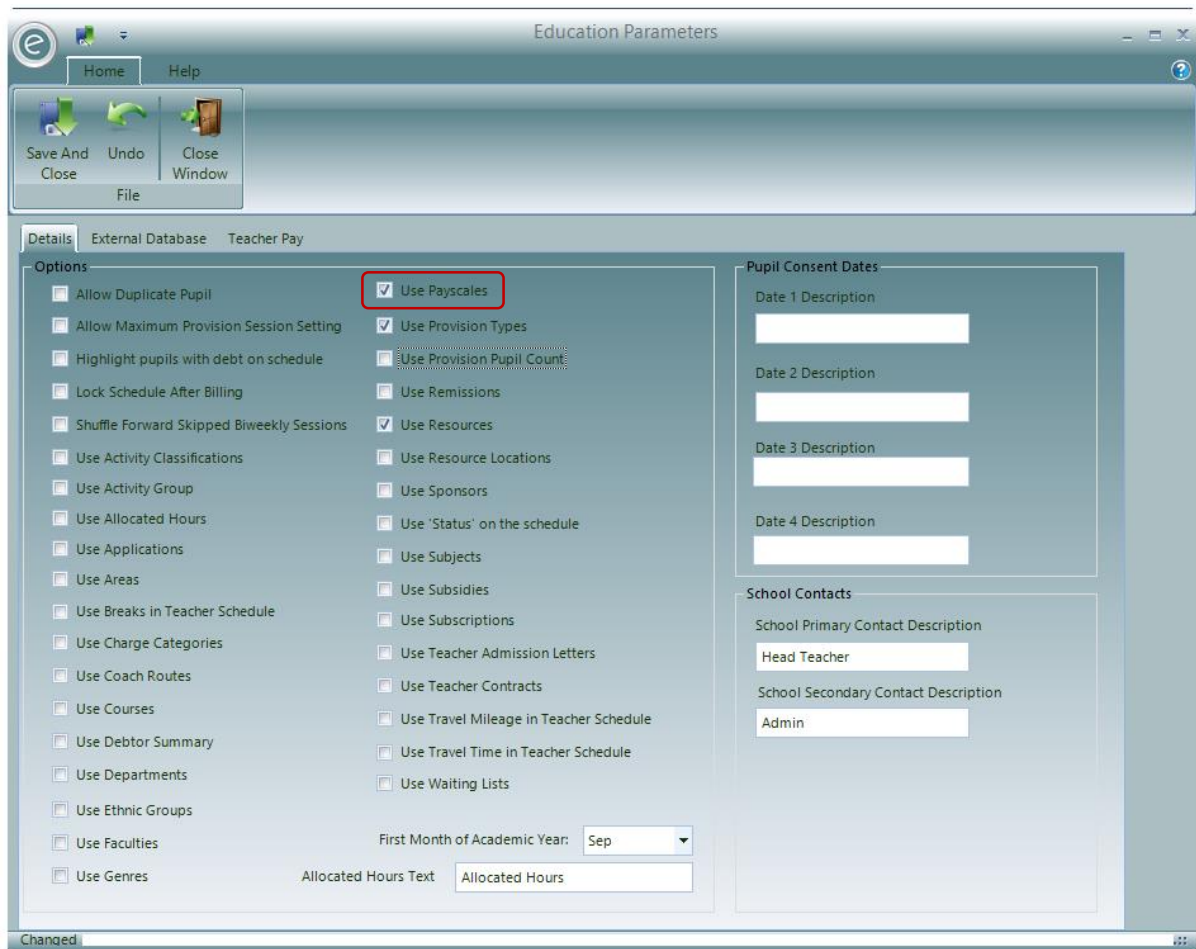
This will add the Pay Scales option to the **System** tab in the Menu Bar.

Create a Pay Scale

To create a Pay Scale click:

System (Menu Bar) > Pay Scales > New Pay Scale

This will display the window below:

Type in the name of the Pay Scale in **Pay Scale**.

In the **Payment Type** section you can define the Pay Scale to be a **Salary** or **Hourly Rate**.

To add a Rate in the Pay Scale click **Add Rate** in the Ribbon, which is highlighted by the red box. This will add a line to the **Pay Scale Points** grid which holds *up to twelve points of pay*.

The Teacher's pay scale specifies the point of pay to use. For example if the Pay Scale is for a Salary, then Point 1 will be the beginning wage, Point 2 shall be the next wage and so on.

Rates can be removed by clicking **Remove Rate**. If there are two or more Rates defined in the grid, then the one with the most recent *Effective Date* shall be used.

Click **Save and Close** to create the Pay Scale.

Applying a Pay Scale
Defined Pay Scales are applied in the Pay Scale tab of a Teacher Record Card. Therefore click:

Tuition (Menu Bar) > Teachers > Open/Create a Teacher Record Card > Pay Scales tab

This is displayed in the window below:
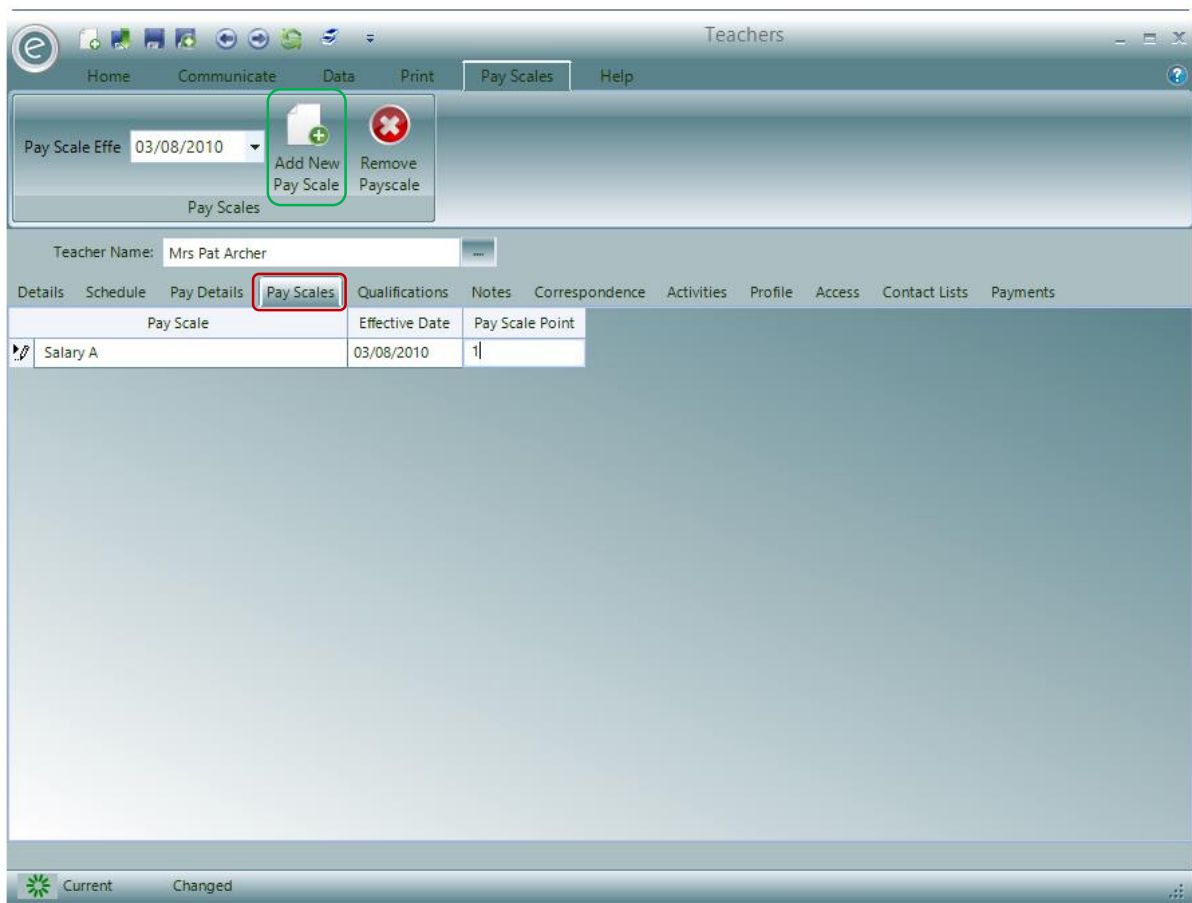
To add a new Pay Scale click **Add New Pay Scale**, highlighted in the green box. This will enter a new line into the grid.

You will be able to select:

- The Pay Scale to use for the Teacher
- The date it is effective from
- The Pay Scale Point they are to be paid at

Note: A history of different Pay Scales can be defined each with an *Effective Date*. The *Teacher Claims Procedure* will use the scale with the relevant Effective Date.

Click **Save** on the Teacher's Record Card to save.

Entering Details of Additional Payments

▶ [Watch the Video Tutorial here](#)

From time to time a Teacher may be due *additional payments* other than those associated with a diarised Activity. These payments may relate to:

Additional Payment Adjustment	Pay for standard work that does not appear in the diary
Back Pay	Pay relating to work done in a previous period that was not paid or retrospective pay for any increase in the hourly rate back dated to a previous period.
Sick Pay	Pay due while off sick
Expenses	Any expenses due, the system will also calculate the VAT element.
Sundry Pay	Any other payment not included above.

The Teachers Record Card contains a tab called *Payments*. This can be used to enter details of additional payments to be processed in a future pay claim process. Therefore to access:

Tuition (Menu Bar) > Open Teacher Record Card > Payments tab

This will display the window below:

To add a new payment click New Pay Item as highlighted in the green box. This will appear as a new row. When adding a new payment you will specify the following:

Pay Due   The date when the payment is due

Payment Type   Select one of the defined Payment Types

Activity Group   Select the Activity Group that relates to the payment.

Amount   Enter the amount of the payment

Notes   Any notes regarding the payment

The *Pay Claim Process* will include any of these payments with a *Payment Due* within the Claim Process Date. Once the additional payment has been processed it will disappear from this display.

3. Claims Teachers

Claim Teachers work on an hourly rate which can be set up in the Pay Scales. Pay scales can be applied to a teacher to cover their entire teaching or on a lesson by lesson basis to allow different hourly rates to be applied to different types of teaching.

Note: Claims Teachers can also be paid using a Pay Scale with a defined Salary. However when the correct payment to be made is calculated, Ensemble will award payment by the proportion of hours they have completed. Typically Teachers are expected to work for 1265 hours so for example if a Teacher did exactly 1265 hours then they paid the rate specified.

Teacher Claims Procedure

For correct claims to be paid to Teachers, these steps need to be followed:

1. Prepare Claims
2. Print Claims Pre List
3. Process Claims
4. Print Claim Report
5. Print Claim Advice
6. Print Claim Summary
7. Export Claim Details

This procedure can be accessed from a dropdown menu by clicking:

Teachers (Ribbon Menu) > Process Claims

This is displayed in the screenshot below:
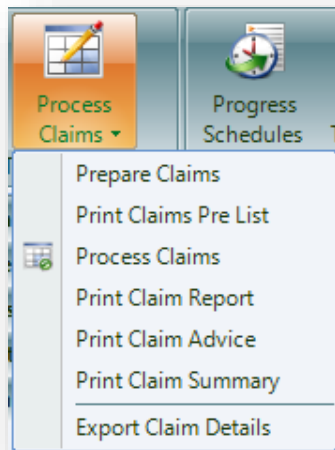
Each step will now be discussed in turn.

Prepare Pay Claims

Clicking **Prepare Claims** will display the window below:
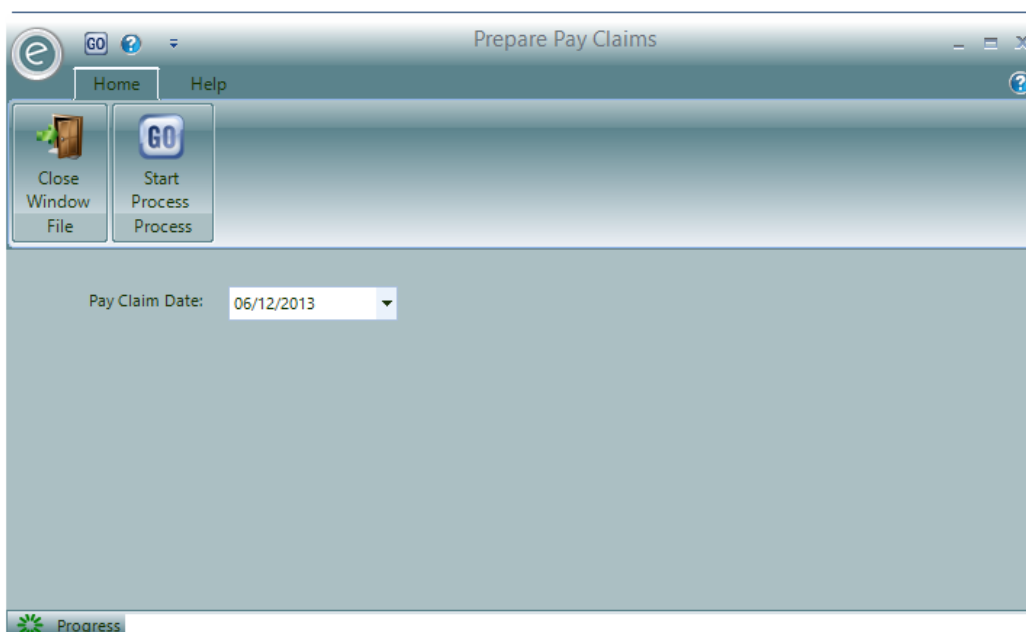
The *Prepare Claims* function will remove any previously prepared (but not processed*)* pay information and create a new dataset which will include:

- All *unpaid Diary Activities* due for payment
- Any *additional payment entries* for dates on or before the entered Pay Claim Date.

Therefore select a **Pay Claim Date** and click **Start Process** to begin.

Print Claims Pre List

Clicking **Print Claims Pre List** will display the window below:
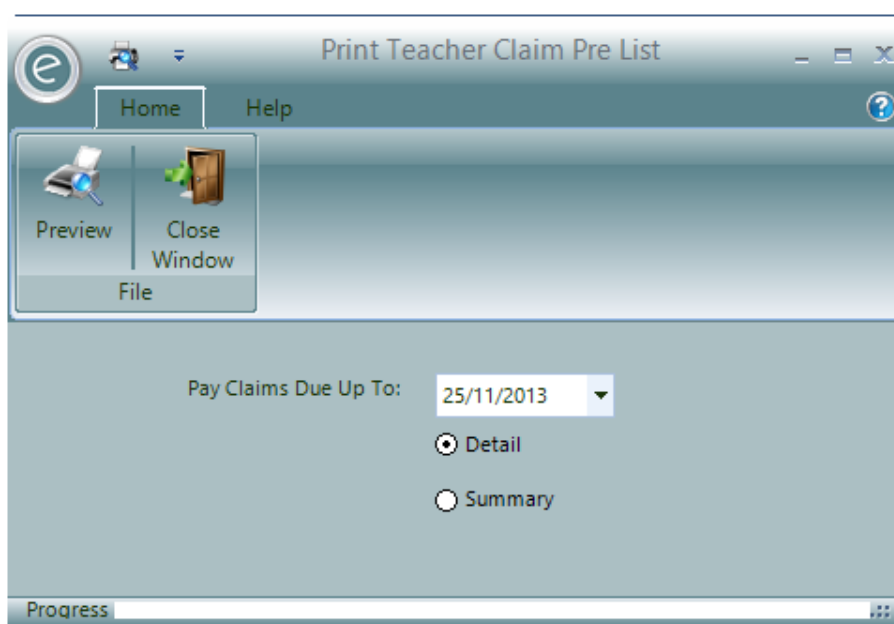
The *Print Claim Pre-List* function is used to produce either a Report of items due to be paid. From the first step, Ensemble marked each Diary Entry and additional payment Record with a *processed date*.

It's therefore possible, using the *Claim Pre-List* , to list all payments up to a specified date that have not been previously paid, thereby showing the items due to be paid in the next payment run. By examination of this Pre-List, necessary amendments can be applied and the Pre-List re-produced.

Select the Date for which claims are due up to and whether it will be a Detailed or Summary Report.

The *Detail* option lists each item to be paid showing the date, description of work and type of payment.

Click Preview to view the Report.

An example of a *detailed Report* is displayed below:

27 May 2012   Paritor Performing Arts Service

Pay Claim Pre-List

	Duration	Description	STD Pay	Sundry Pay	Back Pay	Sick Pay	Expenses	VAT
Kimberley Adams								
Diary Entries								
02-Nov-11	01:00	Newtown High School - Bassoon Lesson	£9.88	£0.00	£0.00	£0.00	£0.00	£0.00
	01:30	Borchester Boys Grammar School - Oboe Lesson	£14.82	£0.00	£0.00	£0.00	£0.00	£0.00
03-Nov-11	01:00	Newtown C of E Primary School - Oboe Lesson	£9.88	£0.00	£0.00	£0.00	£0.00	£0.00
	01:30	Newtown High School - Oboe Lesson	£14.82	£0.00	£0.00	£0.00	£0.00	£0.00
04-Nov-11	01:30	Borchester College - Oboe Lesson	£14.82	£0.00	£0.00	£0.00	£0.00	£0.00
09-Nov-11	01:00	Newtown High School - Bassoon Lesson	£9.88	£0.00	£0.00	£0.00	£0.00	£0.00
	01:30	Borchester Boys Grammar School - Oboe Lesson	£14.82	£0.00	£0.00	£0.00	£0.00	£0.00
10-Nov-11	01:00	Newtown C of E Primary School - Oboe Lesson	£9.88	£0.00	£0.00	£0.00	£0.00	£0.00
	01:30	Newtown High School - Oboe Lesson	£14.82	£0.00	£0.00	£0.00	£0.00	£0.00
11-Nov-11	01:30	Borchester College - Oboe Lesson	£14.82	£0.00	£0.00	£0.00	£0.00	£0.00

The example Summary Report shows the total for each Teacher:

	STD Pay	Sundry Pay	Back Pay	Sick Pay	Expenses	VAT
Kimberley Adams	£1,199.84	£12.00	£0.00	£0.00	£0.00	£0.00
John Blockley	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Marco Corleston	£3,577.77	£0.00	£0.00	£0.00	£0.00	£0.00
Tracey Edwards	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Joe Hall	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Julian Monroe	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Nicola Oliver	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
Lisa Raleigh	£0.00	£0.00	£0.00	£0.00	£0.00	£0.00
	£1,199.84	£12.00	£0.00	£0.00	£0.00	£0.00

Process Claims

The *Process Claims* function will mark all the items shown on the Pre-List as *processed*. This prevents them from being included and any later claims payment process.

All the items processed are batched together and marked with the *Process Date*.

Therefore select a Pay Claim Date and click Start Process to begin.

Print Claim Report

Clicking Print Claim Report will display the window below:
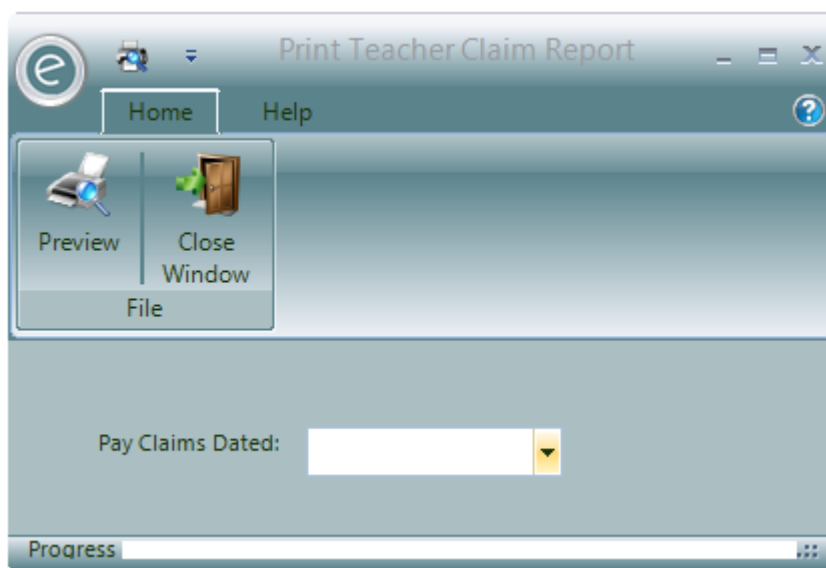
The *Pay Claim Report* will provide information on any Pay Claim Process.

The Date of the Pay Claim Process is selected from a drop down list of all the previous Pay Claim Process runs.

The Report will show payments for each Teacher. The payments are broken down by *Financial Code* and by *Pay Code* type.

Note: It is not necessary to use either Financial Codes or Pay Codes. Where this is the case a single line will be produced for each Teacher.

Click Preview to view the Report.

An example is displayed below:

Teacher	Pay Reference	NI Number	Financial Code	Pay Code	Pay Due	VAT
Kimberley Adams					£46.00	£0.00
			0008		£1,165.84	£0.00
Marco Corleston	00002	JH408655K	0002	PPA-001	£68.76	£0.00
			0008	PPA-001	£3,440.25	£0.00
			1110	PPA-001	£68.76	£0.00

(Pay Claim Report — 27 May 2012 — Paritor Performing Arts Service)

Claims Summary

	Pay Due	VAT
Standard & Sundry Pay	£4,789.61	
Back Pay	£0.00	
Sick Pay	£0.00	
Expenses	£0.00	£0.00

Print Claim Advice

Click **Print Claim Report**.

Alternatively, you can *print the Report for a specific Teacher* directly from their Record Card by:

Opening Teacher Record Card > Print tab > Print Pay Claim Advice

Either of these options will display the window below:
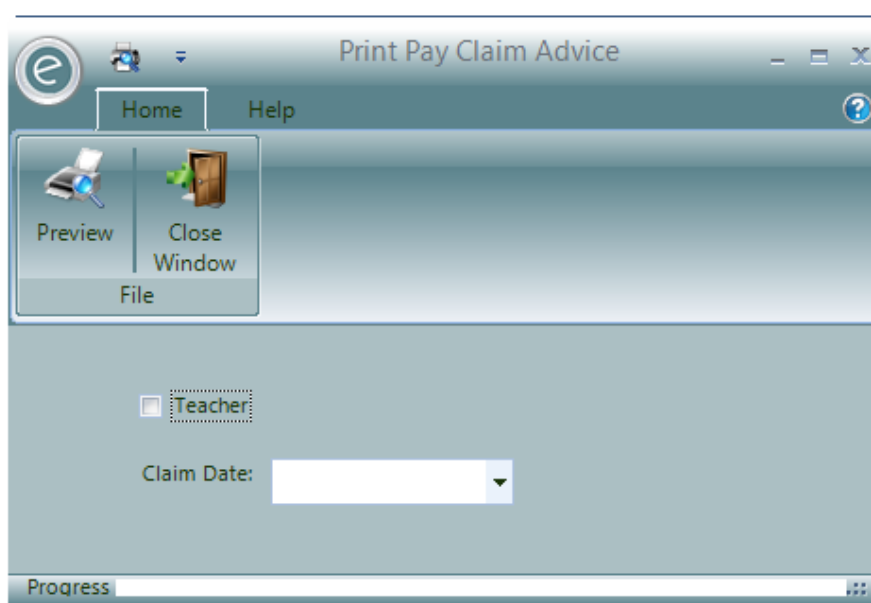
This will produce a *Pay Claim Advice* detailing the items paid for each Teacher.

Select the **Claim Date**, and a particular **Teacher** if required.

Click **Preview** to view the Report.

An example is displayed below:

Pay Advice

Claims paid 31-Aug-11

Paritor Performing Arts Service

18 High Street
Budleigh Salterton
Devon
EX9 6LQ

Kimberley Adams

	Duration	Description	STD Pay	Sundry Pay	Back Pay	Sick Pay	Expenses	VAT
Diary Entries								
	01:30	Borchester Boys Grammar School - Oboe Lesson	£14.82	£0.00	£0.00	£0.00	£0.00	£0.00
10-Feb-11	01:00	Newtown C of E Primary School - Oboe Lesson	£9.88	£0.00	£0.00	£0.00	£0.00	£0.00
	01:30	Newtown High School - Oboe Lesson	£14.82	£0.00	£0.00	£0.00	£0.00	£0.00
11-Feb-11	01:30	Borchester College - Oboe Lesson	£14.82	£0.00	£0.00	£0.00	£0.00	£0.00
23-Feb-11	01:00	Newtown High School - Bassoon Lesson	£9.88	£0.00	£0.00	£0.00	£0.00	£0.00
	01:30	Borchester Boys Grammar School - Oboe Lesson	£14.82	£0.00	£0.00	£0.00	£0.00	£0.00
24-Feb-11	01:00	Newtown C of E Primary School - Oboe Lesson	£9.88	£0.00	£0.00	£0.00	£0.00	£0.00
	01:30	Newtown High School - Oboe Lesson	£14.82	£0.00	£0.00	£0.00	£0.00	£0.00
25-Feb-11	01:30	Borchester College - Oboe Lesson	£14.82	£0.00	£0.00	£0.00	£0.00	£0.00
02-Mar-11	01:00	Newtown High School - Bassoon Lesson	£9.88	£0.00	£0.00	£0.00	£0.00	£0.00

Print Claim Summary

Click Print Claim Summary.

Alternatively, you can *print the Report for a specific Teacher* directly from their Record Card by:

Opening Teacher Record Card > Print tab > Print Pay Claim Summary

Either of these options will display the window below:

The *Pay Claim Summary Report* will list summary values for all claims processed between two given dates for a specific Teacher or all Teachers.

Once these options have been chosen, click Preview to view the Report.

An example of the Report is displayed below:

Pay Claim Summary

for pay claims dated 27/05/2010 to 27/05/2012

Paritor Performing Arts Service

18 High Street
Budleigh Salterton
Devon
EX9 6LQ

Kimberley Adams
5 Poplar Road
Borchester
Borchestershire
EX9 6AL

NI Number

Pay Reference

Pay Date	STD Pay	Sundry Pay	Back Pay	Sick Pay	Expenses	VAT
31-Aug-11	£5,883.54	£0.00	£0.00	£0.00	£0.00	£0.00
31-Oct-11	£464.36	£0.00	£0.00	£0.00	£0.00	£0.00
27-May-12	£1,199.84	£12.00	£0.00	£0.00	£0.00	£0.00
	£7,547.74	£12.00	£0.00	£0.00	£0.00	£0.00

Export Claim Details

The *Export Claim Details* option will save the detail of a claims process to a *.CSV file* for further processing by an external Payroll system.

Select the Date and click Start Process to begin.

4. Teacher Contracts

Any number of Teacher Contracts can be defined to cover the various terms under which contracted Teachers are employed. For example, all your full time Teachers may be expected to work the same number of hours during a year, but the mix between programmed/directed time and un-programmed time may be different for various Teachers. Those with a more managerial role may have less programmed time.

Enable Availability in Education Parameters

When you first setup your database, it *will not show* the Teacher Contracts option. You will therefore need to switch these on in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Teacher Contracts' > Save and Close

This is displayed in the window below, with **Use Teacher Contracts** highlighted in the **red box**:
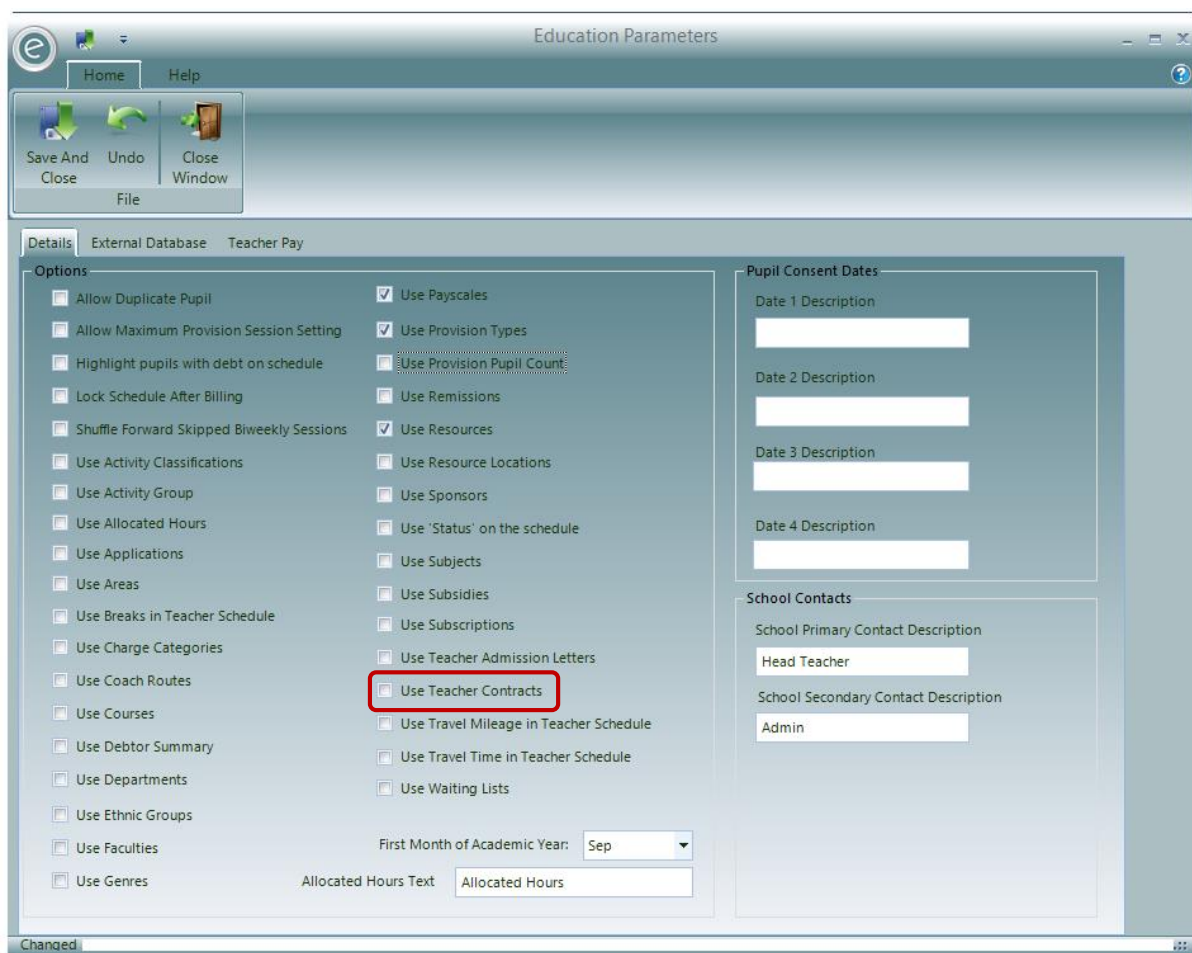
This will add the Teacher Contracts option to the **System** tab in the Menu Bar.

Setting up Teacher Contracts

 [Watch the Video Tutorial here](#)

To create a Teacher Contract click:

System (Menu Bar) > Teacher Contracts > New Teacher Contracts

This will display the window below:

In the red box is the field to enter the name of the Contract and summary information regarding the hours to complete:

- Contracted Weeks
- Programmed Contact Hours
- Other Programmed Hours
- Total Programmed Hours – Automatic calculation
- Unprogrammed Hours
- Total Hours – Automatic calculation

An example is displayed below:

In this Teacher Contract the *Total Hours* a Teacher works is 1265 hours and is broken down into its various elements:

A Teacher associated with this Contract is allocated 165 hours in the year for *Unprogrammed Hours,* i.e. time that is not scheduled in any way such as training days. This leaves 1100 hours of *Programmed Hours* split between *Contact and Non-Contact time*.

With this information you can ensure that a Teacher is provided with as much scheduled work as necessary to fulfil their contract.

The 165 hours of Un-programmed time is divided up into various Allowance Activities in the **Unprogrammed Time Breakdown** section highlighted in the green box. To add and/or remove an Allowance Activity click **Add Allowance** and/or **Remove Allowance** in the Ribbon Menu. You will then need to enter the:

Allowance	Choose a defined Allowance Activity
Minutes Per Year	Enter the number of minutes per year to be spent on this Activity. The Minutes Per Year for each Allowance Activity will be automatically summed in the *Breakdown of Unprogrammed Hours Total* field
Minimum Minutes	Use Minimum Minutes to define *a minimum duration* a Teacher is expected to allocate to the activity *regardless of their FTE*.

This information is shown on each Teachers agreement so that they can see how this time should be spent throughout the year.

An example of the *Unprogrammed Time Breakdown* section is displayed below:

The **Programmed Hours Breakdown per Week of the Year** section contains a table with a week-by-week breakdown of the Programmed Hours for the Contract. This highlighted by the blue box.

Since Teachers' pattern of hours is not uniform throughout the year the calculation of the number of hours a Teacher should have to work from the start of the year to any point in the year can be complicated. Therefore the breakdown simplifies this by adding up the hours per week to the required point. This is particularly useful when calculating the total actual hours for a Teacher where their FTE has changed within the year. The total hours are automatically displayed in the **Total Programmed Hours** field.

Note: The first week is defined in the Academic Year.

An example is displayed below:

Programmed Hours Breakdown per Week of the Year

Wk1	Wk2	Wk3	Wk4	Wk5	Wk6	Wk7	Wk8	Wk9	Wk10	Wk11	Wk12	Wk13	Wk14	Wk15	Wk16	Wk17	Wk18	Wk19	Wk20	Wk21	Wk22	Wk23	Wk24	Wk25	Wk26
25	25	25	25	35	25	0	35	25	25	35	25	25	0	0	25	35	25	25	35	0	25	35	25	25	35

Wk27	Wk28	Wk29	Wk30	Wk31	Wk32	Wk33	Wk34	Wk35	Wk36	Wk37	Wk38	Wk39	Wk40	Wk41	Wk42	Wk43	Wk44	Wk45	Wk46	Wk47	Wk48	Wk49	Wk50	Wk51	Wk52	Wk53
25	0	0	25	35	25	35	25	35	0	25	25	25	25	25	25	0	25	25	25	25	25	0	0	0	0	0

Total Programmed Hours : 1100

All the values entered into a Teacher Contract relate to a *full time person* i.e. a Teacher with an FTE of 1.

When calculating actual values such as those printed on a Teacher agreement the contract values are multiplied by the Teachers FTE. So where a Teacher is working half time then will have an FTE of 0.5 and so in this instance their Total Programmed Hours will show as 1100 * 0.5 = 550 hours.

Once the Contract is complete, click Save and Close.

Important: The two *Total Programmed Hours* fields and two *Total Unprogrammed Hours* fields need to match. If there is a discrepancy, then Ensemble will notify you before you continue saving.
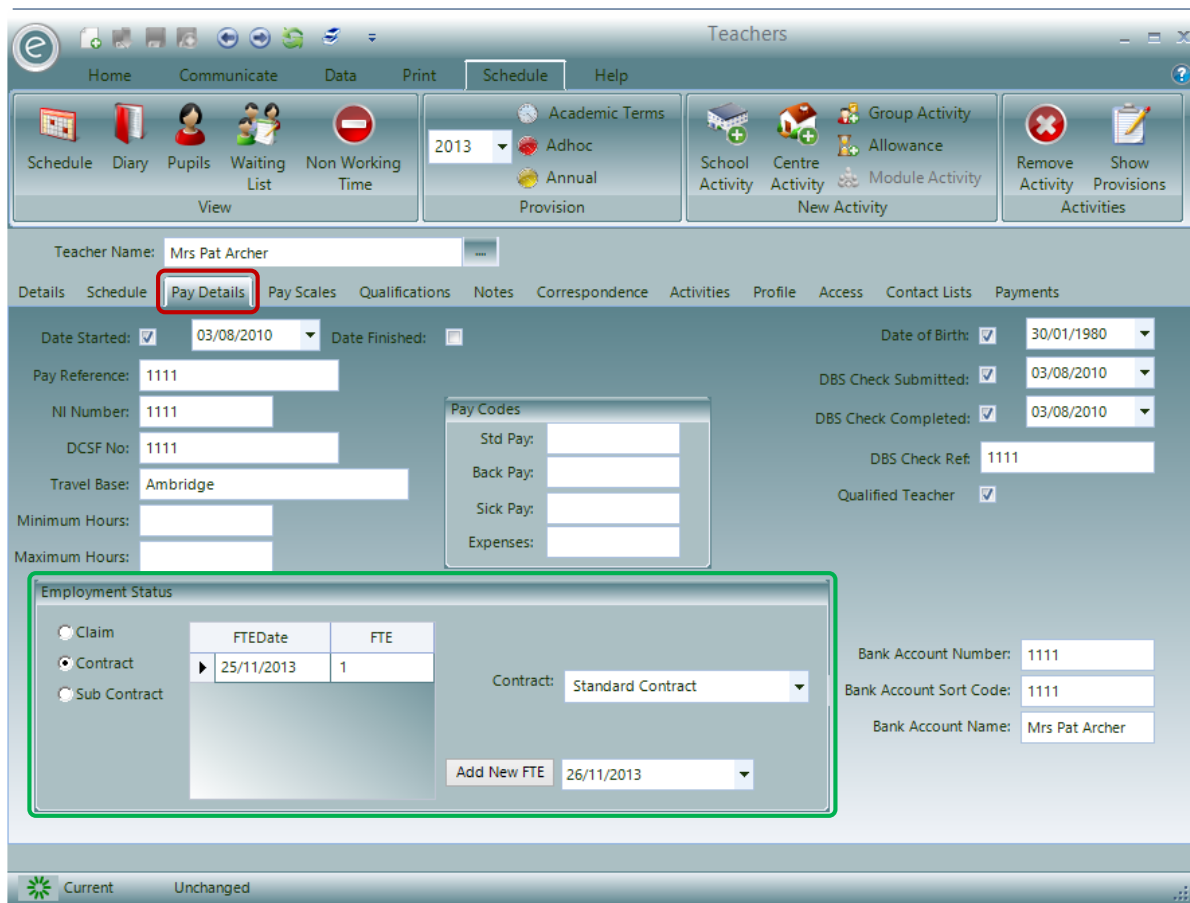
Allocating a Teacher Contract to a Teacher

▶ [Watch the Video Tutorial here](#)

Contracts are allocated to a Teacher on their Record Card within Pay Details. Therefore click:

Tuition (Menu Bar) > Teachers > Open a Teacher Record Card > Pay Details

This will display the window below:

You will then need to select **Contract** within the **Employment Status** section, as highlighted by the **green box**.

Select the **Contract** in the dropdown box and assign the Teacher's FTE by clicking **Add New FTE**. Enter the FTE in the grid. FTE's are applied at specified dates and so you can assign a new of FTE's to a Teacher each time their FTE changes, specifying the date it becomes active.

Marking a Contract Teachers Activity as Claimable

On occasions a contracted Teacher may be allocated work that is *outside their normal contract*.

In order to receive payment for this, the Activity must be specified as *outside of their contract*. This this is done by specifying the payment type within the schedule entry.

To do this:

Open a Teacher Record Card > Schedule tab > Select Activity Plan > Show Provisions

You will then need to update the Payment field within the *Teacher Schedule Requirement* as displayed below:

As show above the Payment type can be changed from *Contract, Payscale* or *Adhoc* using a *dropdown box*.

If it is changed to:

Adhoc	This prompts for an amount of money the Teacher can claim for the whole Provision (term) for the Activity.
Pay Scale	This prompts for a *Pay Scale and Pay Scale Point* that is applied when the Teacher claims for the Activity.

Producing a Teacher Agreement

▶ [Watch the Video Tutorial here](#)

At the beginning of a year, or whenever a Teacher's situation changes (e.g. their FTE or Activities), you can produce a new *Teacher Agreement*.

The Teacher agreement shows all the work assigned to the Teacher for a given Academic Year. Agreements can be produced for both *Contracted* and *Non Contracted Teachers*. Where the Teacher is contracted it also includes an analysis of their scheduled time against the contracted time.

To produce the Report, click:

Teachers (Ribbon Menu) > Schedule Report > Print Teacher Agreement

Alternatively, you can *print the Report for a specific Teacher* directly from their Record Card by:

Opening a Teacher Record Card > Print tab > Print Teacher Agreement

Either of these options will display the window below:
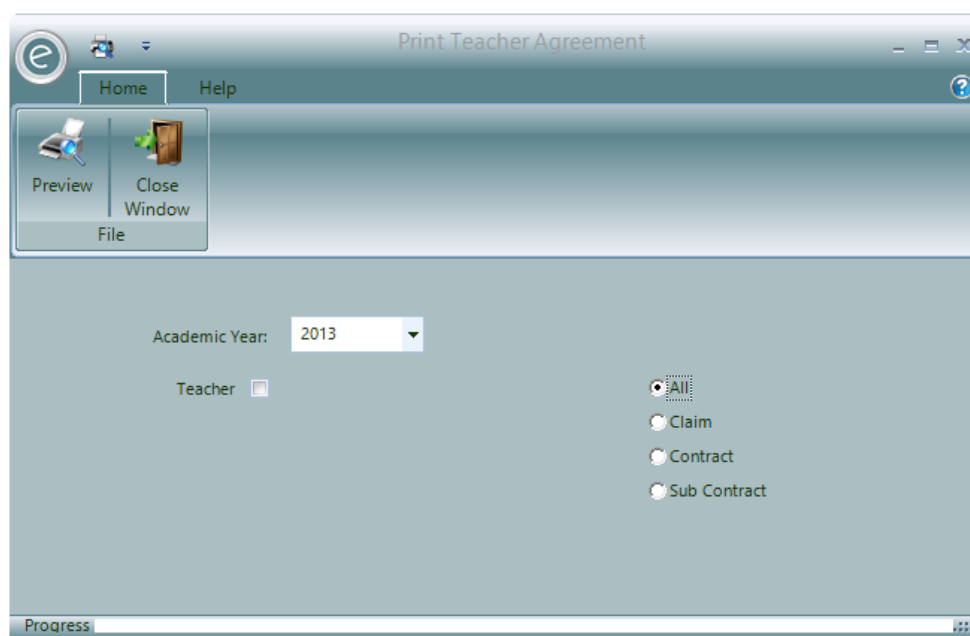
You will need to select the **Academic Year** and the type of pay agreement a Teacher has.

A particular **Teacher** can be optionally selected.

Click **Preview** to view the Report.

An example is displayed below:

Teacher Agreement For Academic Year 2010/2011

Mr John Blockley
Meadow View
2 Millside
Upper Tunne
Borchestershire
EX9 6AL

Sector: City
Area: East
Faculty: Woodwind

Status: Contract
Contract: Teacher
Contracted Weeks: 36

Contracted Programmed Contact Time

	Activity	Fq	Occurrence	Day	Time	Duration	Travel	Break	Total Hours	Mil'g
Tuition Activities										
All Saints School	Double Bass Lesson	W	24 of 24	Fri	10:20 AM	00:20	00:00	00:00	08:00	
Borchester City Music School	Cello Lesson	W	36 of 36	Sun	04:00 PM	02:00	00:00	00:00	72:00	
Borchester City Music School	Clarinet Lesson (S)	W	4 of 36	Wed	11:00 AM	01:00	00:10	00:15	05:40	
		W	32 of 36	Thu	12:00 PM	02:00	00:10	00:00	68:20	
Borchester Girls Grammar School	Cello Lesson	W	36 of 36	Thu	11:00 AM	03:00	00:00	00:00	108:00	
Borchestershire County Music Centre	Violin Lesson	W	36 of 36	Wed	10:00 AM	02:00	00:00	00:00	72:00	
The Garrick Centre for Performing Arts	Cello Lesson	W	36 of 36	Sat	06:00 PM	03:00	00:00	00:00	108:00	
The Garrick Centre for Performing Arts	Violin Lesson	W	36 of 36	Wed	07:00 PM	03:00	00:00	00:00	108:00	
						Total Tuition Activities			551.00	
Group Activities										
Borchester Steel Band	Conductor	W	36 of 36		05:00 PM	01:00	00:00	00:00	36:00	
						Total Group Activities			36.00	
					Total Contracted Programmed Contact Time				587.00	

Contracted Programmed Non Contact Time

	Activity	Fq	Occurrence	Day	Time	Duration	Travel	Break	Total Hours	Mil'g
Allowances										
Trumpet Lesson	PPA	W	36 of 36	Mon		00:45	00:00	00:00	27:00	
Trumpet Lesson	Travel	W	36 of 36	Mon		01:30	00:00	00:00	54:00	
						Total Allowances			81:00	
				Total Contracted Programmed Non Contact Time					81:00	
					Total Contracted Time				668:00	

Non Contracted Programmed Contact Time

	Activity	Fq	Occurrence	Day	Time	Duration	Travel	Break	Total Hours	Mil'g
Tuition Activities										
All Saints School	Computers in Music	W	24 of 36	Thu	02:20 PM	00:20	00:00	00:00	08:00	£20.00 per hour
		W	12 of 36	Fri	02:20 PM	00:20	00:00	00:00	04:00	£20.00 per hour
All Saints School	Double Bass Lesson	W	12 of 12	Fri	10:20 AM	00:20	00:00	00:00	04:00	15 Qualified point 2
						Total Tuition Activities			16:00	
				Total Non Contracted Programmed Contact Time					16:00	
					Total Non Contracted Time				16:00	

1116	<----Programmed Time---->					
	Contact	Other	Total	FTE	Weekly	
Scheduled	587:00	81:00	668:00	.569	18:33	
Contracted From 01-Sep-10		201:30	.500			
03-Jan-11		534:45	.750			
Contracted Hours for the Year		736:15	.660	20:27		

These hours are part of the annual contracted commitment

Inset Day	56:25
Parent Meetings	23:45
Professional Development	19:05

In this example you will see that the Teacher has Activities that are both Contracted and Non-Contracted (work outside of their contract). The first two terms of the Double Bass Lesson at All Saints School are marked as Contracted, and the last term is marked as being outside the Contract, subject to a payment defined in the Pay Scales as Qualified Point 2. You will also see that there is another Activity that is outside of the Contract, and this is subject to a payment of £20 per hour.

The total contracted time works out to be 668 hours - this takes into account the change to the Clarinet lesson at Borchester City Music School. This Activity was originally scheduled for 1 hour per week but after week 4 this was increased to 2 hours.

The analysis at the bottom of the page shows the 668 hours split between Contract and Non Contract hours.

Below the Scheduled hours the agreement shows the FTE's that apply to the Teacher for the year. In this example the Teacher was on an FTE of .5 at the beginning of the year and was changed to a .75 at the beginning of January.

By referring to the weekly hours defined in the associated Teacher Contract, the system calculates the number of hours a full time Teacher should be allocated for each of the periods covered by the different FTE's, applies the FTE and displays the actual time this Teacher should have for the period. By adding up the various FTE hours the system derives the total hours for the year that the Teacher should be scheduled, while taking into account any changes to FTE's and the dates these changes are applied. Using this total it then calculates a true FTE. A weekly equivalent is also shown.

To the right of this analysis, the system prints the breakdown of the Un-Programmed time as defined in the associated Teacher Contract.

5. Projected Salary Analysis

▶ [Watch the Video Tutorial here](#)

You will be able to produce a Report which shows a projection of a Teacher's pay called a *Projected Salary Analysis*.

To access this, click:

Debtors (Ribbon Menu) > Analysis > Print Projected Salary Analysis

This will display the window below:

You will need to specify if you want to produce the Report for **Claim** and/or **Contracted Staff**. Furthermore you can select a specific **Teacher**.

You can group the sections in the Report by **Area** or **Activity Group**.

Select a **date range** and if to **Include Detail**.

Click **Preview** to view the Report.

Resource Management

Ensemble includes functionality to:

- Manage your stock of Resources and other assets
- Record who you loan and hire them out to
- Record what repairs have been necessary throughout the lifetime of each item.

1. Enable Availability in Education Parameters

Resources can be turned on and off in the *Education Parameters*.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Resources' > Save and Close

This is displayed in the window below, with **Use Resources** highlighted in the **red box**:
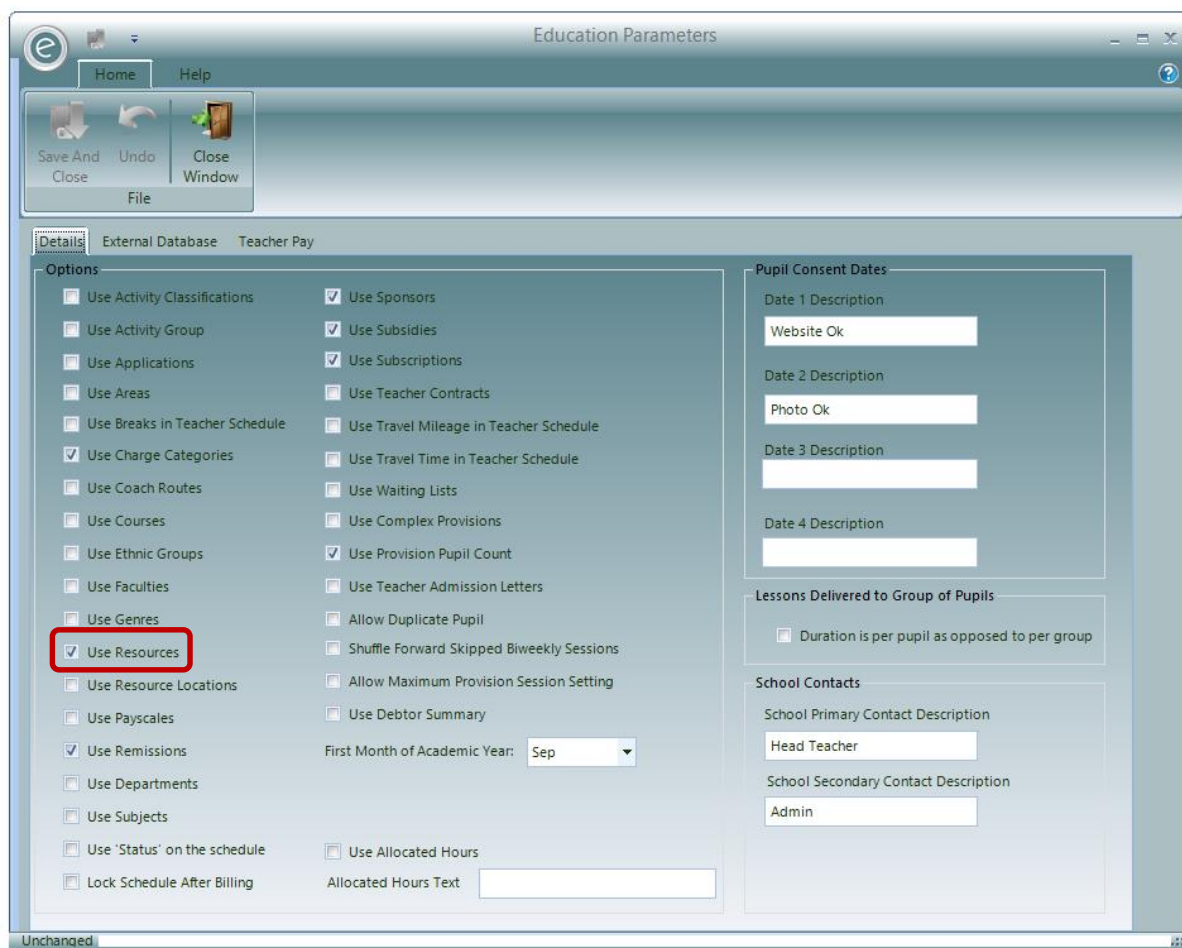
Click **Save and Close** and now Resources are available to use in Ensemble.

2. Resource Hierarchy

▶ [Watch the Video Tutorial here](#)

Each Resource has its details specified however for a large service with many types of instruments and resources, organising this can become hard to manage and cumbersome.

Therefore the management of Resources can be optionally expanded into the *Resource Hierarchy*. This is very useful for effectively organising and structuring a large range of Resources.

The hierarchy from top to bottom is:

Resource Categories   The top of the tree. These are very broad E.g Percussion or Strings

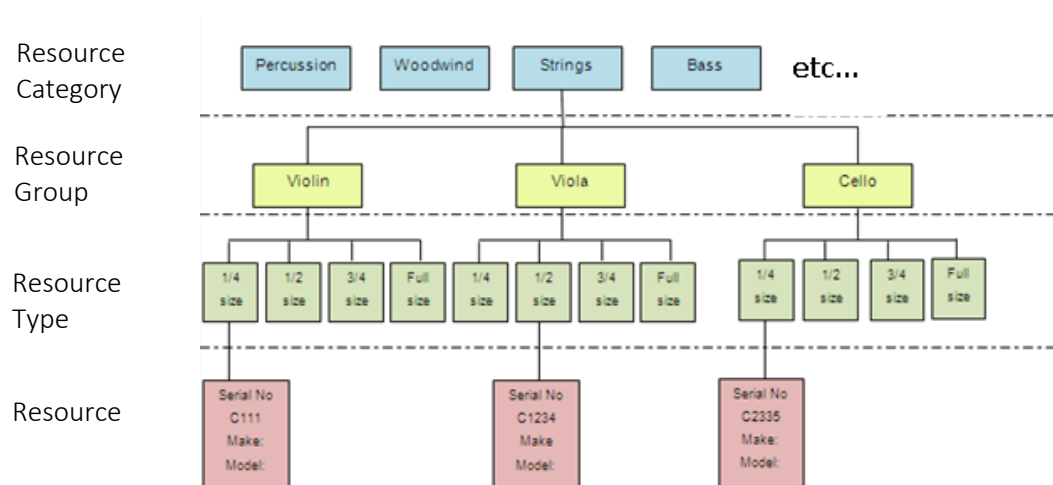|	
Resource Groups	Resource Groups are defined within a Resource Category. E.g Violin and Cello within Strings
Resource Types	Defined within Resource Groups. E.g Acoustic Guitar and Electric Guitar within Guitar.
Resources	These define your specific Resources via the Resource Type, and Serial/Reference Numbers

The Resource Hierarchy is illustrated below:

Note: This is for display purposes only; it is not possible to recreate this chart within the software

You can use a very broad definition as to what a Resource is and therefore what you add as items. For example you can also add electronic equipment such as amplifiers or recording equipment and then track where they are and who has them.

Resource Categories

To define a *Resource Category*, click:

Resources (Menu Bar) > Resource Categories > New Resource Category

This will display the window below:
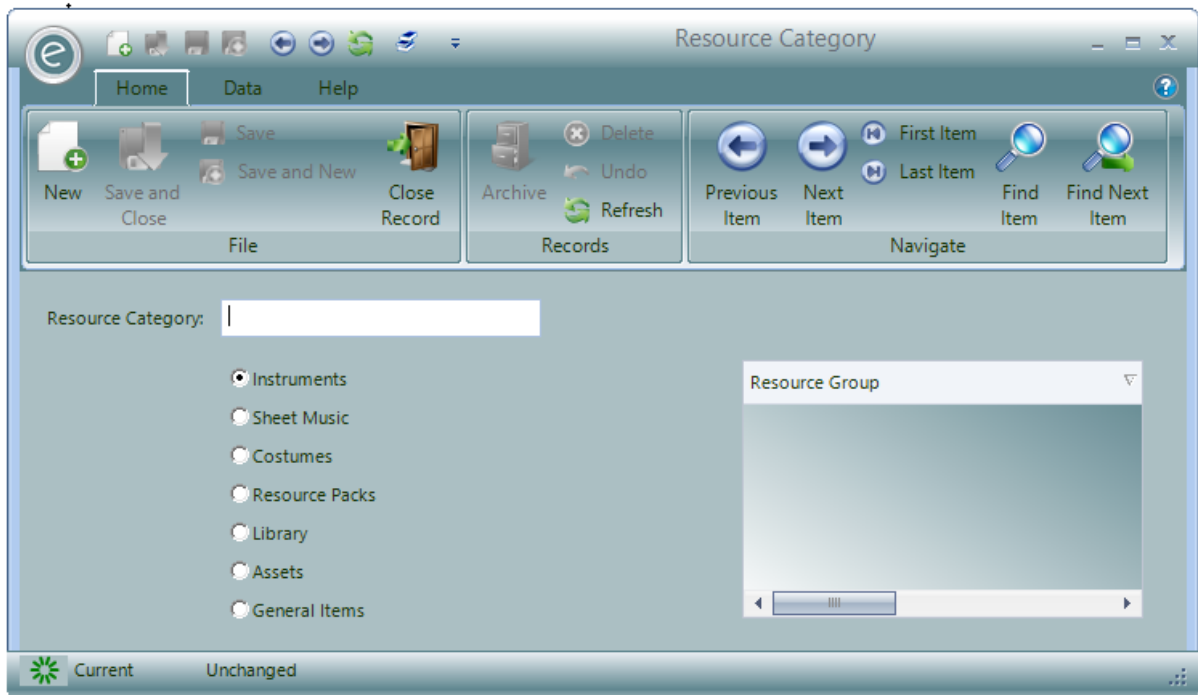
You can name **Resource Category** and furthermore define what the category is using the options in the **radio buttons**.

Once Resource Groups have been created within this, they will be displayed within the **Resource Group** section.
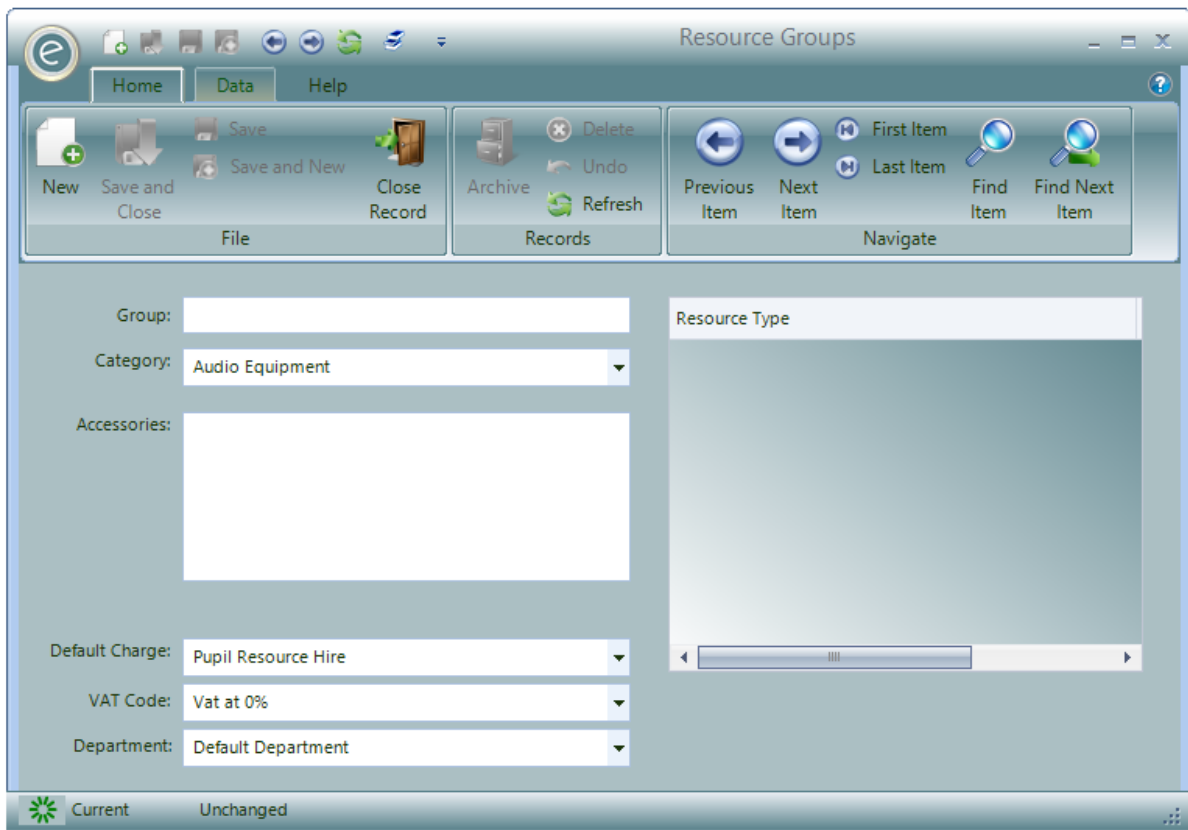
Click **Save and Close** to save.

Resource Groups

To create a *Resource Group*, click:

Resources (Menu Bar) > Resource Groups > New Resource Group

This will display the window below:

You can name the **Resource Group** and select the **Resource Category** it is within.

Furthermore you can note down **Accessories** and specify the **Default Charge** to be used for a Resource within this.

The pre-defined **VAT Code** can also be selected.

Once the Resource Group has been created, the Resource Types within this will be displayed under the **Resource Type** section.

Click **Save and Close** to save.

Optional: If *Departments* are activated in the *Education Parameters*, a Department can be assigned here.
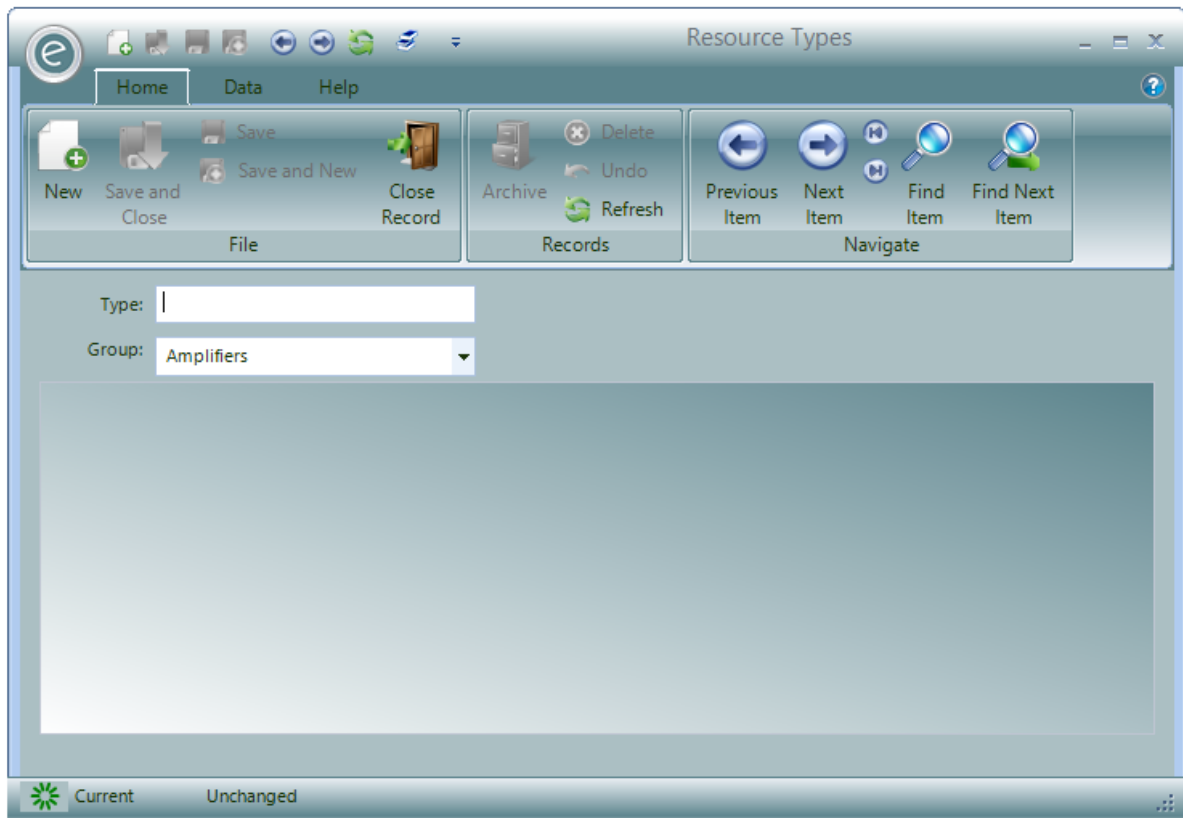
Resource Types

To define a Resource Type, click:

Resources (Menu Bar) > Resource Types > New Resource Type

This will display the window below:

Simply name the **Resource Type**, select its **Resource Group** and click **Save and Close**.

3. Creating Resources

You can create Resources either individually or as a batch. Each Resource must be allocated its own *unique reference number*. This can be its serial number but as many Resources do not have a serial number it is recommended that you use your own sequence of reference numbers. In addition to this reference you can hold the Resources serial number where one exists.

Create an Individual Resource

To create an individual Resource click:

Resources (Menu Bar) > Resources > New Resource

This will display the window below:

You will need to specify a **Ref ID** and/or **Serial No** to create the Resource.

Additionally you can select the **Resource Type** from the drop down and fill in the rest of the information.

The **Current Status** of the Resource is displayed next to Serial No. This will tell you if the Resource is available, on hire/loan or in repair.

Click **Save and Close** to create the Resource.

## Enable Resource Location in Education Parameters

If you store Resources in *more than one physical location* you can select to use *Resource Locations.* This is an option you will find within *Education Parameters*. With this option turned on you can set up a list of physical Resource stores or locations. When adding a new Resource you can specify the location at which the Resource is stored.

To do this click:

Tools (Ribbon Menu) > Parameters > Education Parameters > Tick 'Use Resource Locations' > Save and Close

This is displayed in the window below, with **Use Resource Locations** highlighted in the **red box**:
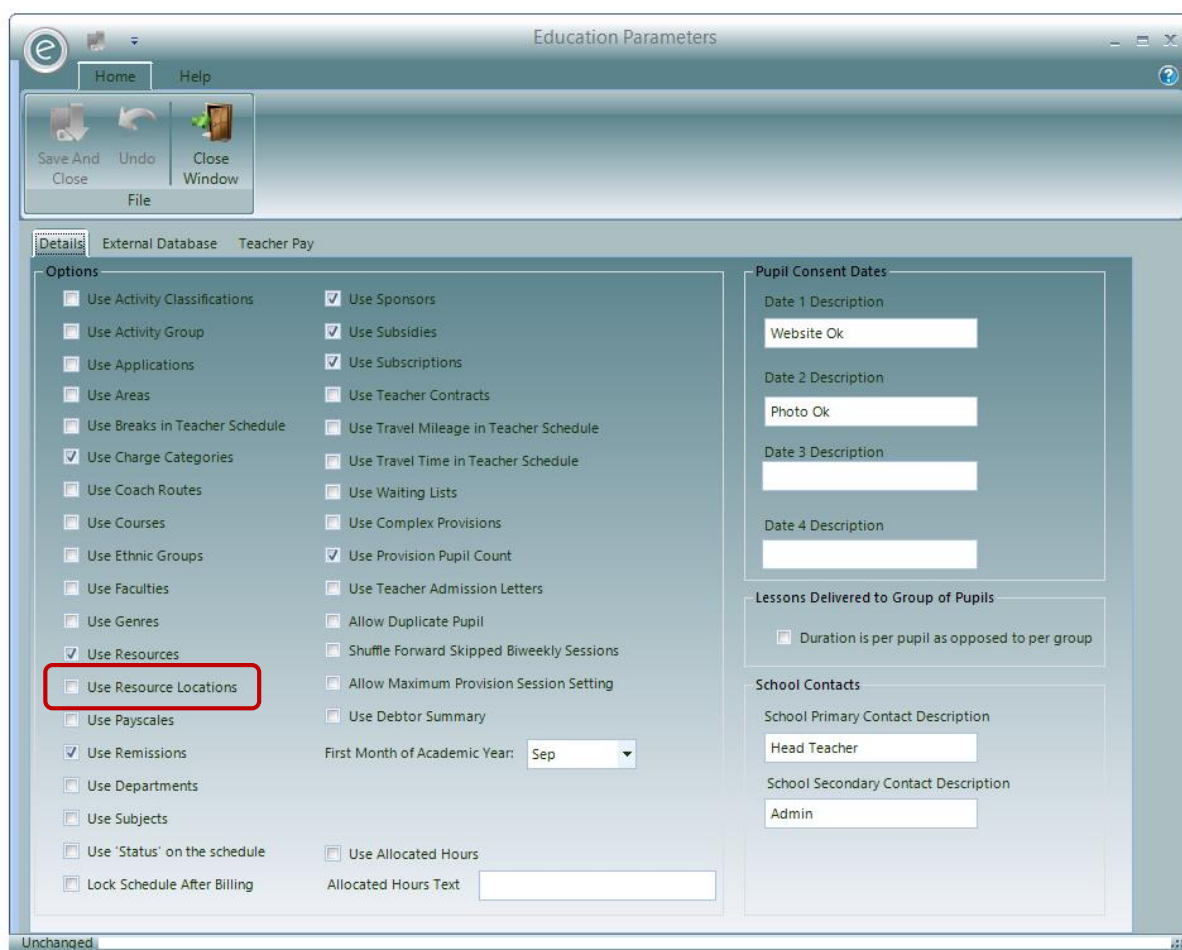
Click **Save and Close** and now Resources are available to use in Ensemble.

4. Add a Batch of Resources

▶ [Watch the Video Tutorial here](#)

If you have a large batch of *similar Resources* to add to stock you can select:

Resources (Ribbon Menu) > Insert Resource Batch

This will display the window below:

This provides you will the ability to enter common information about the Resources and then to create a set of duplicate entries all with different reference and possible serial numbers. Therefore the administrator does not have to enter each individual Resource into the system.

When all the common information has been entered you can click on Generate Batch to switch to the Generate Batch screen.

Note: Click Resource Details to switch back to entering the details.

This is displayed below:

You can select to automatically Generate Reference Numbers or Generate Serial Numbers. Whichever one you select you *must enter a* Start Ref ID. The number should contain a numeric element but may

start with letters. The system will increment the numeric element for each Resource. The following table explains how the reference is allocated to each Resource:

Start Reference ID	Valid	Example	Note
ABC	Invalid	-	-
ABC123XYZ	Invalid	-	-
ABC001	Valid	ABC001, ABC002 etc.	Maximum number in batch 999
000001	Valid	000001,000002 etc.	Maximum number in batch 999999

You next need to enter the number of Resources to add.

There are a *maximum number of Resources you can enter* which is set by the Start Reference ID and its numeric part. The number may be further limited if any of the generated numbers are already in use by an existing Resource.

To create the Resource details click on the Generate button. This will display all the Resources in a grid.

This is displayed below:

If necessary you can amend any of the Resource information by clicking Resource Details. For example if you have automatically generated Reference ID's for each Resource you may want to enter the actual serial numbers.

5. Search Shortcuts

Ensemble has built in shortcuts to make searching for individual Resources by the *Reference ID* or *Serial No* easy.

By placing a * in the query you can search by:

Starting with _____*   (Enter text before the *)

Contains *_____*   (Enter text inside both *)

Ends with *_____   (Enter text after *)

For example to search for a Ref ID containing 123, type *123* into the search box as displayed below:

6. Hiring or Loaning a Resource

Any Resource currently held in stock can be either hired or loaned out.

- If a Hirer will be *charged* for using the Resource then this must be set up as a Hire.
- Alternatively if they will be using it *free of charge* for a period of time then this must be created as a Loan.

Resource Hires

To hire Resource click

Resources (Ribbon Menu) > New Resource Hire

This will display the window below:

Now on the Ribbon Menu you can select:

New Pupil Resource Hire	Hire directly to a Pupil. This requires you to enter a Pupil's and Payer's details. When it is a hire, the charge for the Resource is generated through the Payer billing.
New School Resource Hire	Hire to a School who then allocate them to Pupils unknown to you. *Hire Charges* are generated as part of the School billing.
New School Resource Hire For Pupil	Hire to a Pupil but paid for by a School, you therefore are required to select a School and a Pupil. *Hire Charges* are generated as part of the School billing and they include details of the Pupil.

Note: The same options will also be available from the Hire/Loan tab of the Resource record card

Resource Loans

Alternatively to begin loaning a Resource(s) free of charge you can click:

Resources (Ribbon Menu) > New Resource Loan

This will display the window below:

Now on the Ribbon Menu you can select:

New Pupil Resource Loan Loan directly to a Pupil. This requires you to enter a Pupil's details.

New School Resource Loan Loan to a School who then allocate them to Pupils unknown to you.

New School Resource Loan For Pupil Loan to a School and record which Pupil this is allocated to, you therefore are required to select a School and a Pupil.

New Centre Resource Loan Loan to a Centre who will then allocate them to Pupils unknown to you.

New Group Resource Loan Loan to a Group

New Teacher Resource Loan Loan to a Teacher. This requires you to enter the Teacher's details

Note: The same options will also be available from the Hire/Loan tab of the Resource record card.

Example Pupil Hire

Upon selecting any of the Hire or Loan options you will be required to choose your appropriate hirer. Once you have been chosen the hirer, the window below will be displayed in which additional information for the hire can be entered such as date of agreement and entering additional resources into the agreement.

The process for entering a hire is identical for all hirers and this example will demonstrate how to create a Pupil Hire.

Select Resource
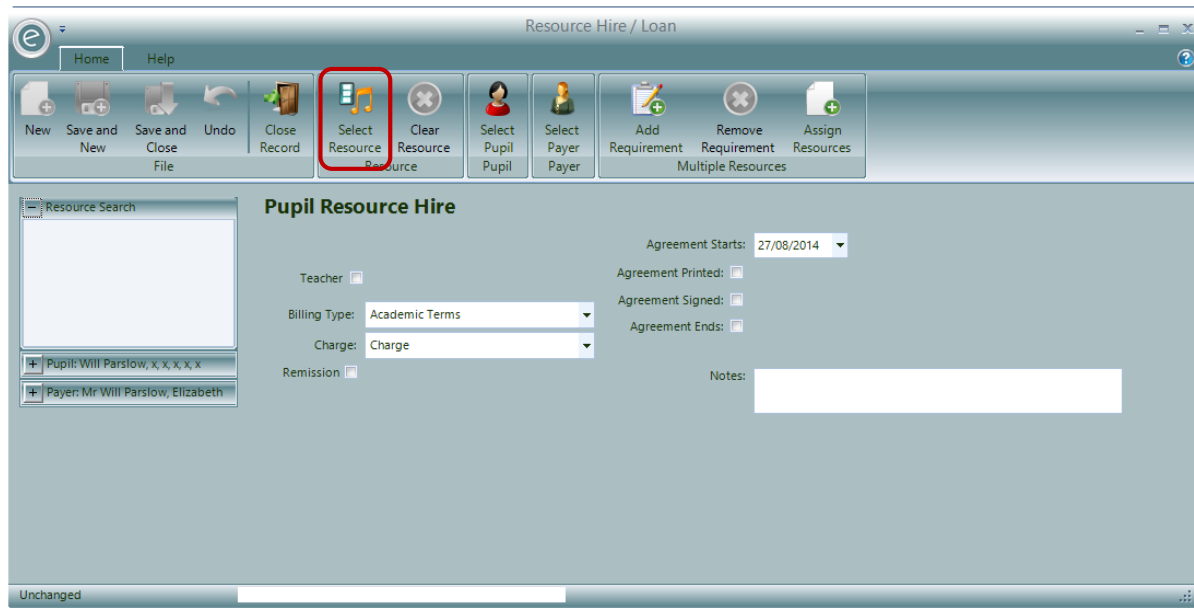
To begin a Resource must first be selected to be given to the hirer. To do click **Select Resource** as highlighted by the red box.

This will display the window below to search for a Resource:

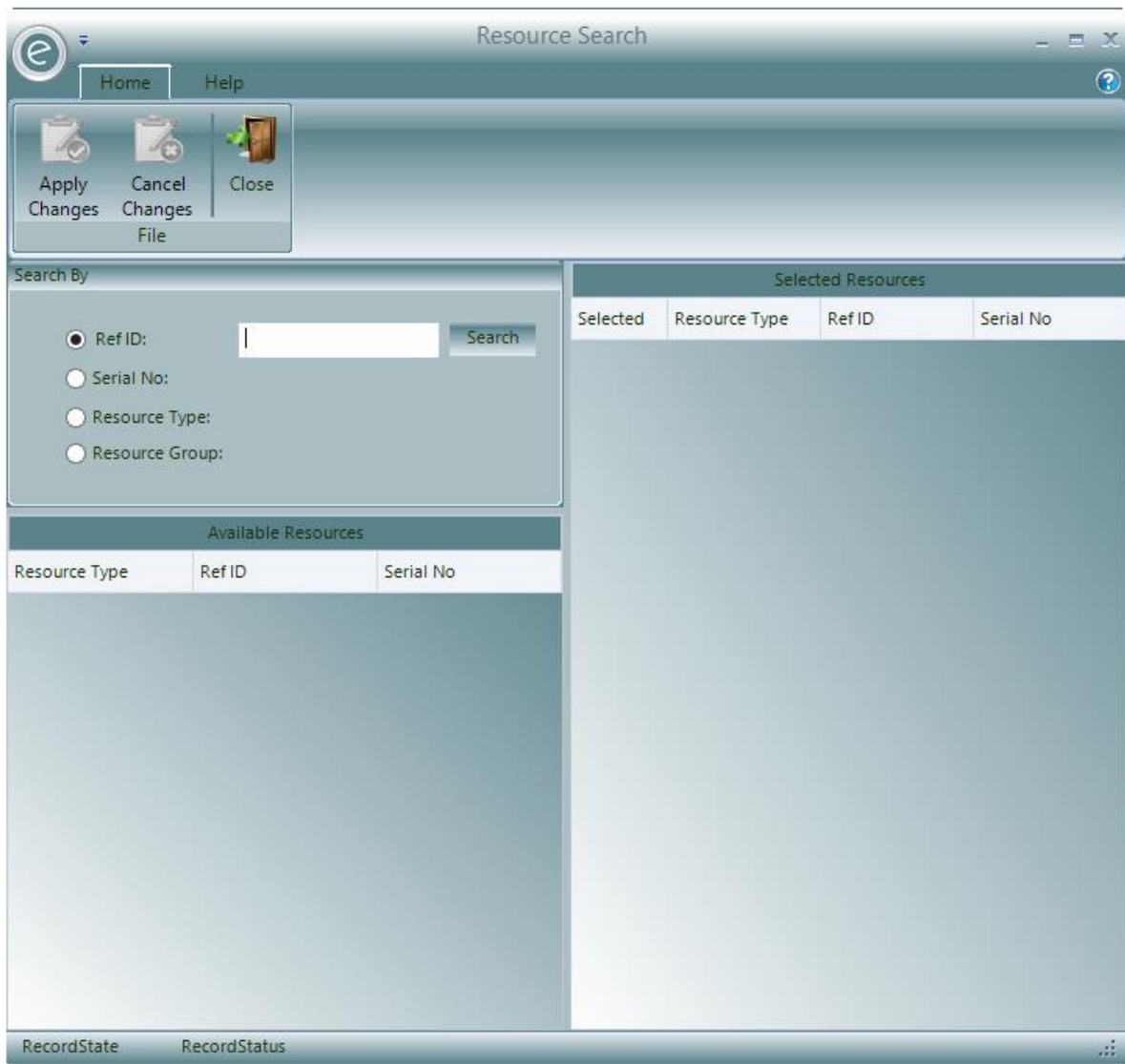You will be able to search precisely by the **Ref ID** or **Serial No**, or alternatively search for a range of available Resources by their **Resource Type** or **Resource Group**.

All **Available Resources** will be displayed on the bottom left and once a Resource or multiple Resources have been selected they will be displayed on the right within **Selected Resource**.

Once you have chosen your selection click **Apply Changes**.

The Resource will now be displayed in the Hire window as highlighted by the red box:
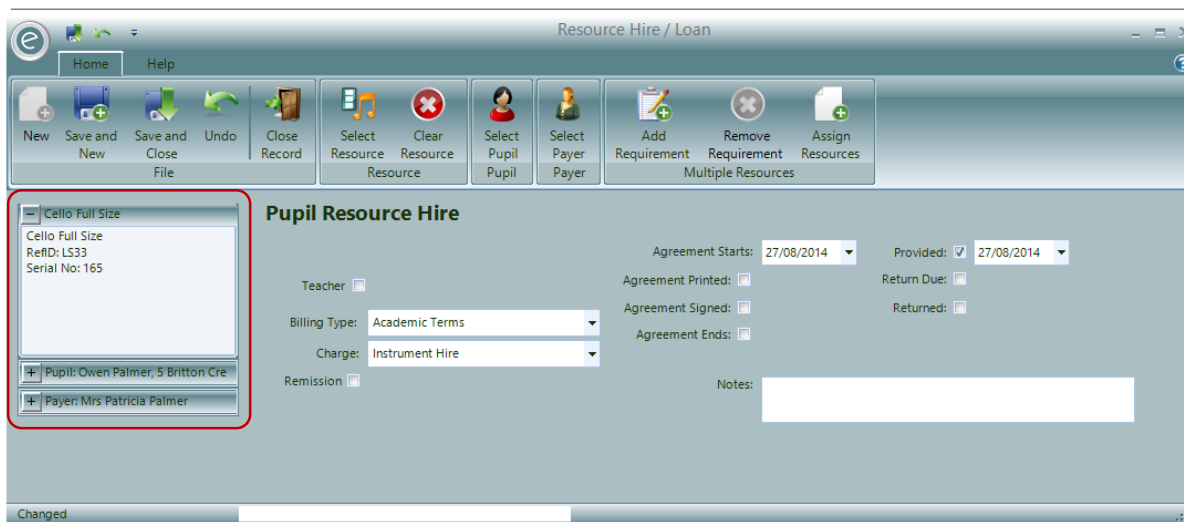
You can also choose another Resource to hire by clicking **Select Resource** which will overwrite your existing choice. You can also remove it completely by clicking **Clear Resource**:

Change Hirers

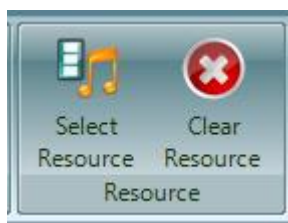You can also choose another Pupil and Payer by clicking **Select Pupil** and **Select Payer** respectively from the top in the Ribbon Menu:

Note: These options will change depending the type of hire or loan you are creating. E.g. You will need to select a School for School Hire or Loan.

Enter Hire Information

When creating a Hire or Loan you need to enter the date the Hire / Loan Agreement begins in **Agreement Starts** and then select when the Resource is given to the Hirer in **Provided**.

Important: The billing for this hire will run from the **Agreement Starts** date.

If you know the date when the hire should terminate and the Resource returned you can also enter a **Return Due** date. You can also enter the date that the **Agreement was Printed** and when it was **signed** if applicable.

For all hires you will also need to select a **Billing Type** and **Charge**. A Remission can be applied if necessary.

For this particular example, the Pupil's **Teacher** can also be assigned to the hire of this Resource.

When a hire comes to an end you will need to enter the **Returned** date which will bring the resource back into stock and also the **Agreement Ends** date which will finish the hire agreement and end all subsequent billing.
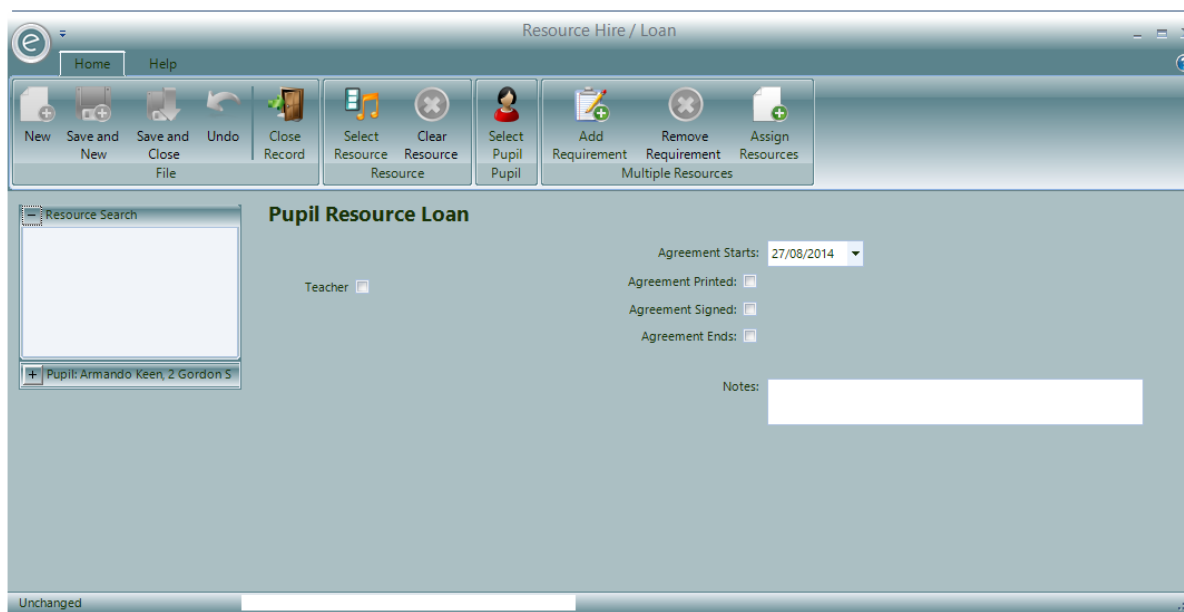
Important: The billing for this hire will finish as at **Agreement Ends** date.

Any additional notes can be entered into **Notes**.

Once you are happy click **Save and Close** or **Save and New** to save the agreement.

Example Pupil Loan

If you select to choose a Loan option you will need to select the hirer first before the Hire / Loan window below is displayed. For this example a Pupil Loan has been used:

As can be seen the formatting is very similar to the Pupil Hire window. Since no charges will be made, no Payers are required and no billing information needs to be entered.

You will be able to proceed in carrying out the hire as per the previous example.

7. Hiring or Loaning Multiple Resources

You will now have more freedom to hire or loan multiple resources of various types to a Hirer.

To do this you will need to select to create a new hire or loan from Resources at the top and then select to **Add Requirement** in the Hire/Loan window. This is displayed below:

The added Requirement will expand the Hire/Loan window to allow for multiple Resources to be assigned:

On the bottom left in the red box you will need to select the:

- **Resource Type**
- **Charge**
- **Quantity of Resources**

This will specify how many resources of that type need to be hired and the charge to be applied.

To select the individual resources to be assigned to the hire click **Assign Resources**. This will display the Resource Search window and you will be able to select the resources from the chosen Resource Type.

Once you have done this you will need to enter the Date that they were provided and optional enter a return due and returned date.

Click **Apply Changes** to save this choice. They will now be displayed in the green box on the bottom right.

Edit Resources Selected

To edit information regarding your chosen resources and remove the resources from the hire you need to select at least one by clicking the tickboxes on the left as highlighted in the red box (click the tickbox in the column header to select all):

Once a resource has been selected the following options will become available at the top in the Ribbon Menu:
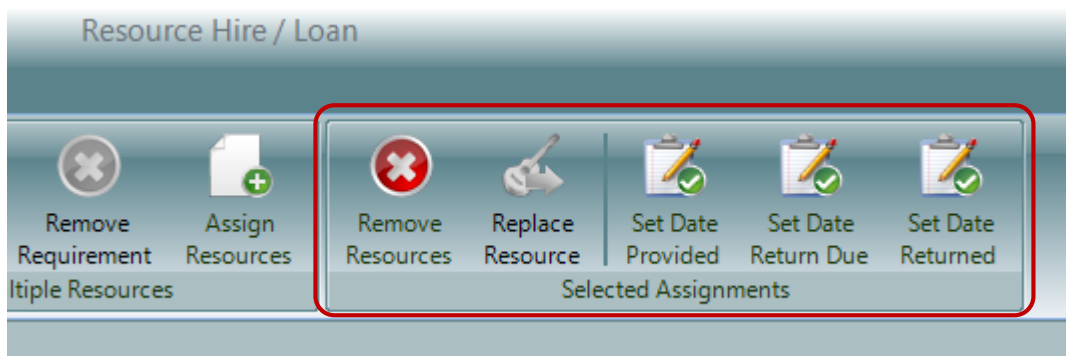
You will be able to delete your chosen resources from this hire by clicking **Remove Resources**.

Note: You will need to edit the Quantity given in the Hire Requirements to match the new number of resources of that type.

If one Resource has just been selected you will be able to replace the resource by clicking Replace Resource.

Note: To find out how to use this please refer to **Replacing Resources**.

You will also be able to edit the **Date Provided**, **Date Return Due** and **Date Returned** for the selection.

Multiple Resource Types

If your hirer requires more than one type of resource, for example a Flute and a Bassoon, you will need to add an additional Requirement to the Agreement by clicking **Add Requirement**. This will add another row in the Requirements section as displayed below:

You will then need to assign the appropriate resources again by clicking **Assign Resources**

Remove a Resource Type

To remove an unwanted selection of resources for a particular Resource Type you can click **Remove Requirement** in the Ribbon Menu to delete them from the hire.

Enter Hire Information

Once you have selected all the resources you need to include in the Hire or Loan you will need to enter the relevant information regarding the hire agreement.

You will need to enter the **Billing Type** and **Remission** (Hire only) and the **Agreement Starts** date.

Important: The billing for this hire will run from the **Agreement Starts** date.

You can also enter the date that the **Agreement was Printed** and when it was **signed** if applicable.

For this particular example, the Pupil's **Teacher** can also be assigned to the hire of this Resource.

When a hire comes to an end you will need to enter the **Agreement Ends** date which will finish the hire agreement and end all subsequent billing.

Important: The billing for this hire will finish as at **Agreement Ends** date.

The Last Return Due date will display the latest date that has been given for a single resource in this hire agreement to be returned by.

Note: In this example there are one or more resources without this information and so the relevant message is displayed.

Any additional notes can be entered into **Notes**.

Once you are happy click **Save and Close** or **Save and New** to save the agreement.

8. View and Edit an Existing Hire or Loan Agreement

To view an existing Hire or Loan Agreement you will need to open the record card for the hirer or open the record card for the particular resource itself and then select the **Hire/Loan** tab:
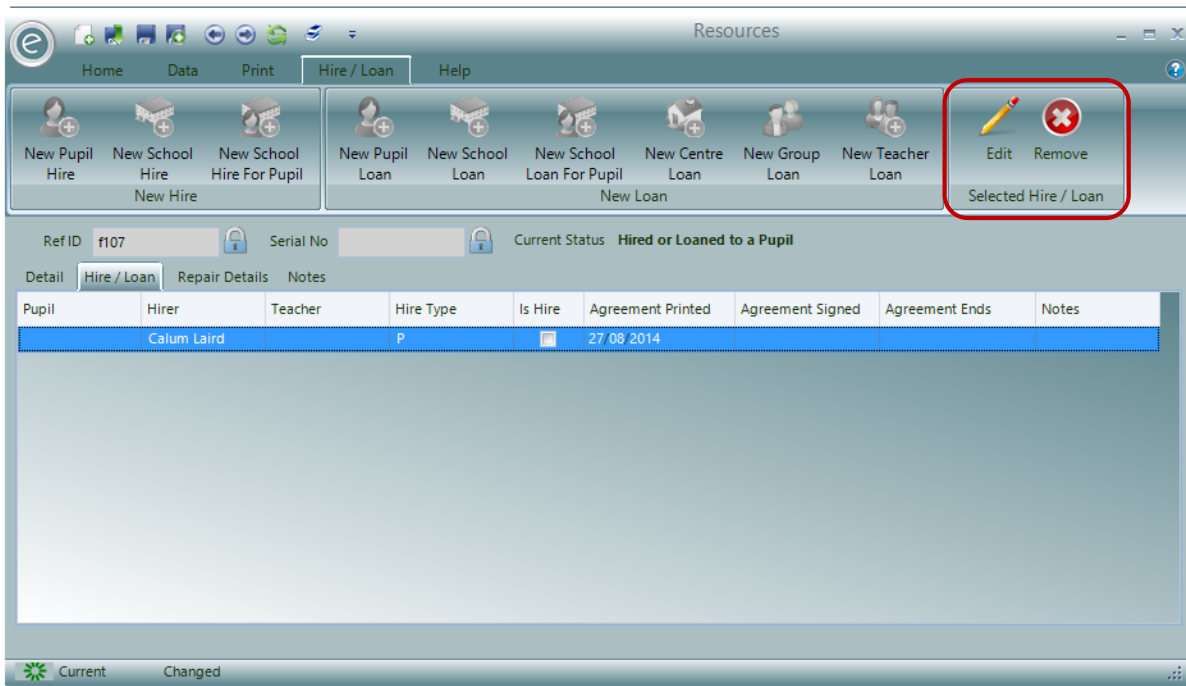
You will then need to choose a hire or loan agreement and click **Edit** to re-open the Hire / Loan Agreement window:
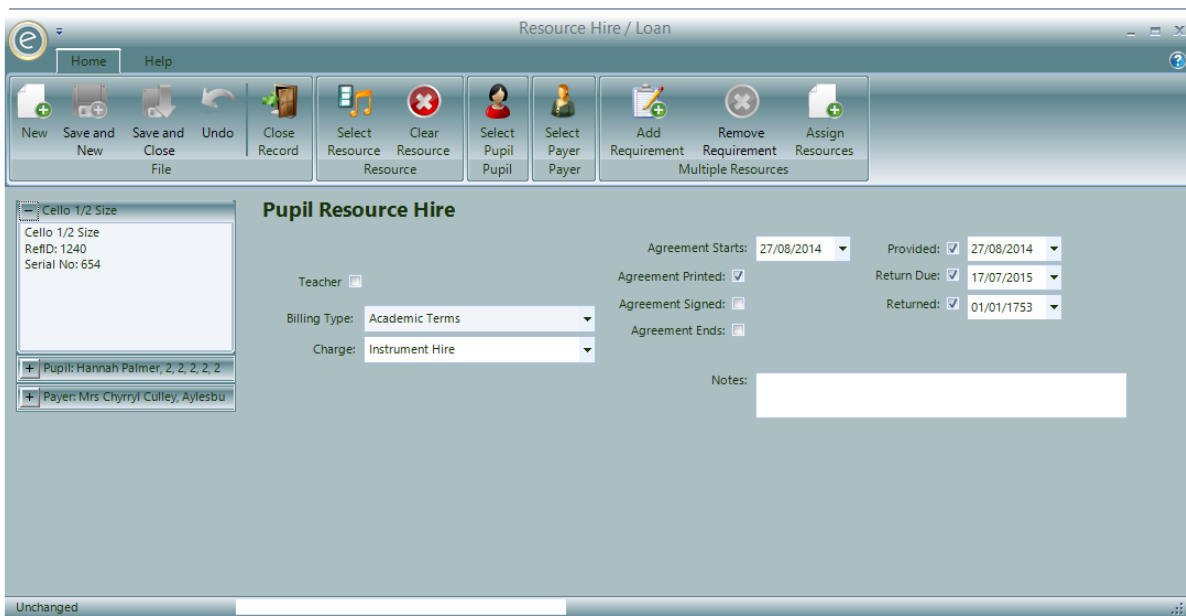
You will be able to edit all aspects of the Agreement such as the Pupil, Payer, Charge, enter return dates on Resources and enter an additional dates for the Agreement such as Agreement Ends.

Display the Billing for a Hire Agreement

To display the billing history for a Hire Agreement you will need to select to **Add Requirement**.

The Billing Periods will then be displayed on the bottom right as highlighted in the red box.

9. Allocate a Resource to Tuition

 Watch the Video Tutorial here

Once Pupils already have Resources on hire, often they will use these Resources during their lessons. This can be optionally recorded in Ensemble. To do this:

Open a Pupil Record Card > Hire > Select Resource hired > Allocate Resource to Tuition

Note: This option *isn't available* if the Pupil doesn't have a Resource hired or loaned.

This will display the window below:

You will be instructed to select from the list the Activity for which the Resource will be used.

10.   Recording the Return of a Resource

When a resource is returned you must update the Hire Detail with the date of return. This books the Resource back into stock and makes it available to be hired or loaned out again.
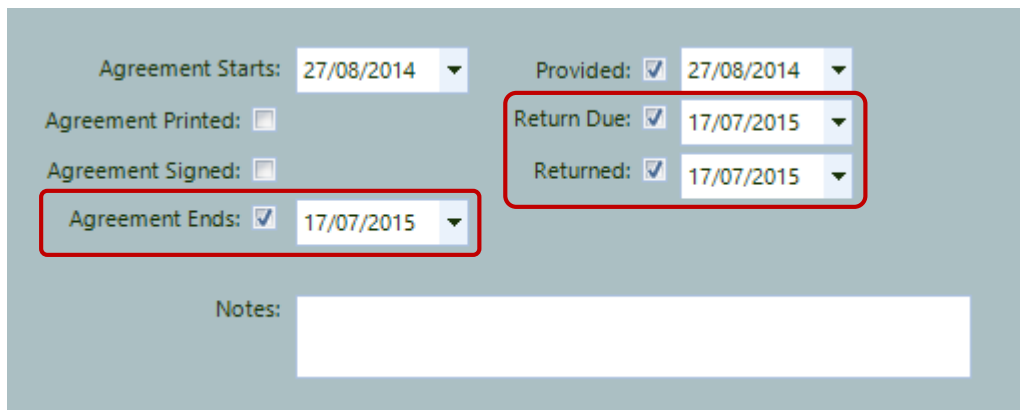
Note: Entering this date alone will not end the hire agreement itself.

To enter this information you will need to open the hire agreement via the Resource record card or the Hirer's record card.

Single Resource Agreement

For an agreement with a single resource hired you will need to end the agreement at the same time as entering the resource back into stock.

To do this you will need to enter the **Return Due**, **Returned** and **Agreement Ends** date:

Multi-Resource Agreements

For an agreement with multiple resources hired you will need to:

Open the hire or loan > Select the Resources to be returned **>** Set Date Returned

This is displayed below:
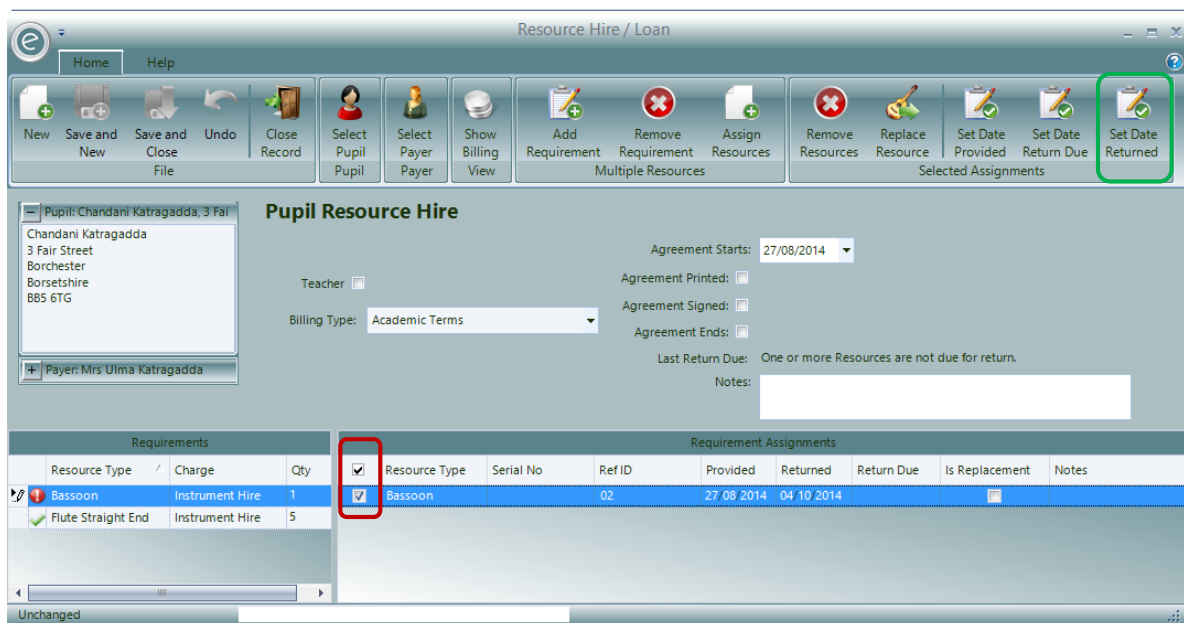
This will then return those resources to the available stock while the hire agreement will continue.

11. Replacing Resources

To replace a Resource in an agreement with another Resource you will need to:

Open the Hirer's or Resource's record card > Open the Hire or Loan Agreement > Add Requirement >
Select a Resource > Replace Resource

This is highlighted in the screenshot below:
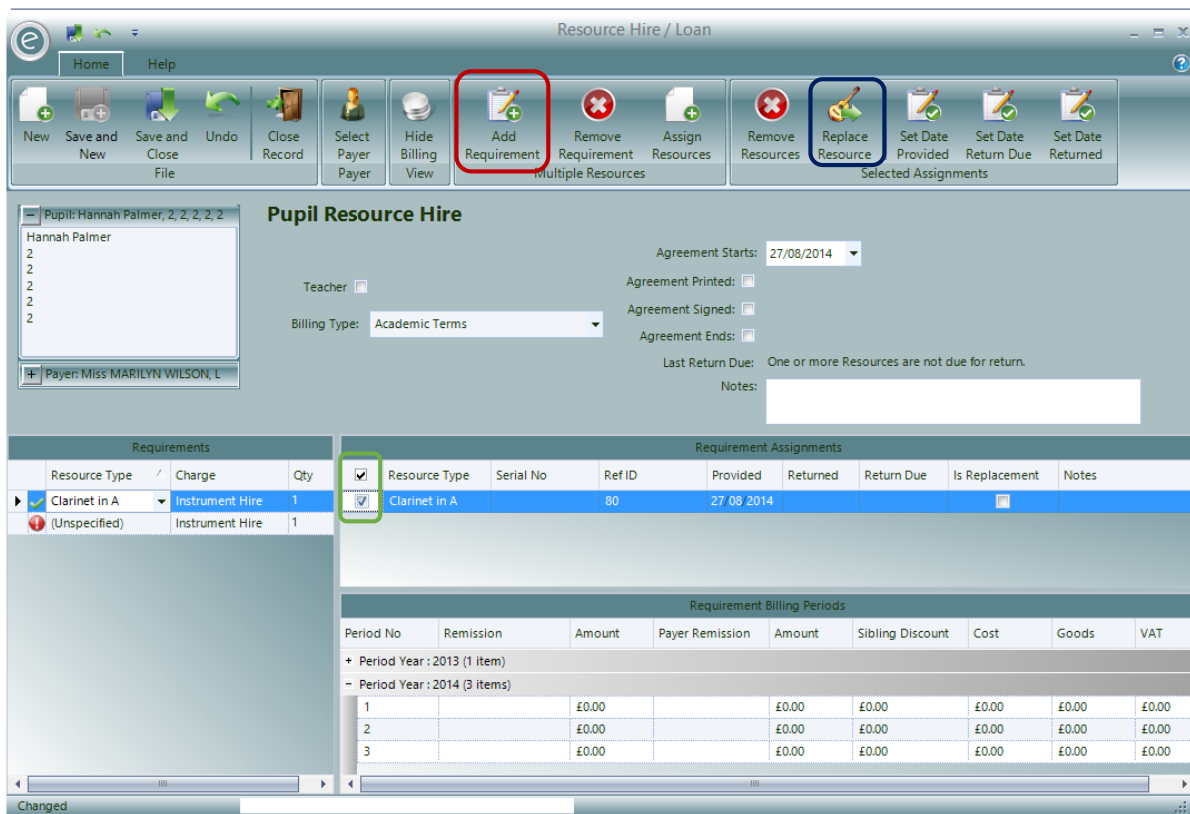
Note: This option is only available when one Resource has been selected.

Once **Replace Resources** is selected the following window below will be displayed:

The resource to be replaced is in the **Original Resource** box and you can choose the replacement resource to go in the **Replacement Resource** box.

You will need to enter the **Date Replaced** and you can also enter the **Return Due** date for the replacement Resource.

Once you have chosen your options click **Apply Changes**.

The original resource will now have a **Returned** date entered and the replacement resource will be provided on the same date and have **Is Replacement** ticked to indicate this.

Click **Save and Close** to save the changes

12.   Setting a Hire Agreement End Date

When you hire out a Resource to a Hirer, there will be date in the contract at which the hire agreement will finish and the Resource will need to be handed back to your service. This date can entered in Ensemble in a field called the **Agreement Ends**. It is important that this date is entered because it will also allow Ensemble to *remove all subsequent Billing Periods* after this date. This ensures that the Hirer will not be billed for longer than their use of the Resource.

For example if a hire of a Resource has been agreed to end in March, then the summer term will be removed from the billing.

13. Recording Resources as Being Repaired

▶ [Watch the Video Tutorial here](#)
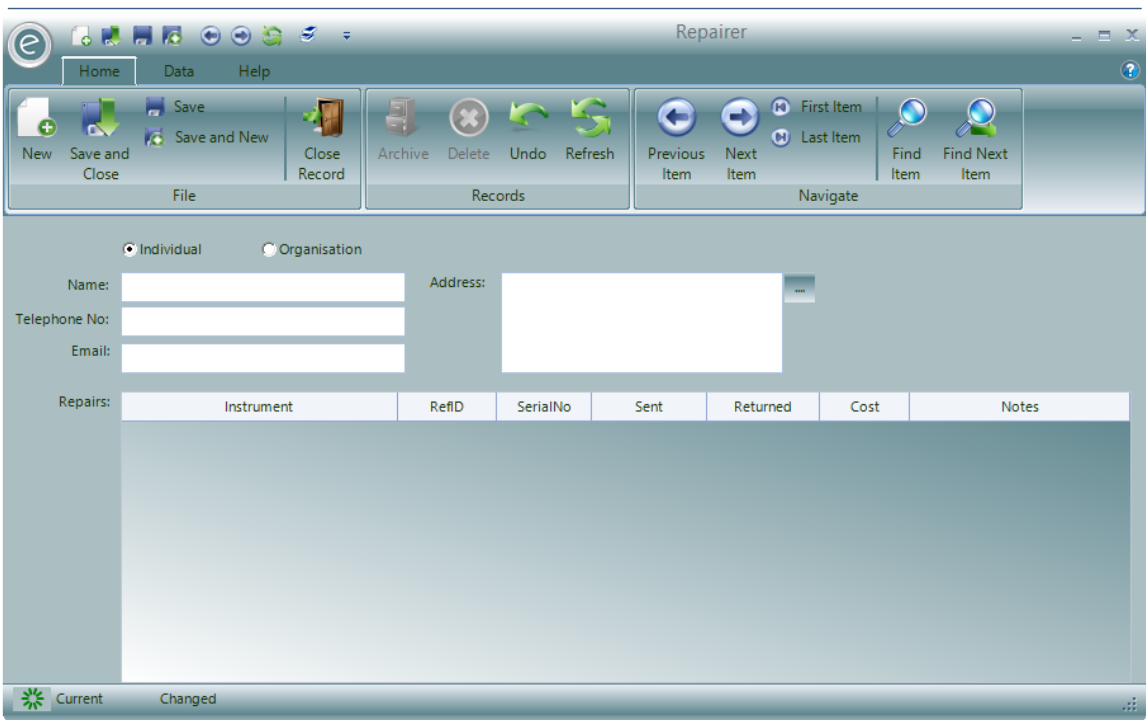
From time to time you may need to have a Resource repaired. First you will need to create the Repairers and then the Resource can be set as repaired from the Resource Record Card.

Create a Repairer

To create a Repairer, click:

Resources (Menu Bar) > Repairers > New Repairer

This will display the window below:

Enter the contact details and select if this Repairer is an Individual or an Organisation.

The table below the contact details will display all their current and completed repairs.

Click **Save and Close** to create the Repairer. They will be saved as a new *Contact.*

New Repairs

To record a Resource as being repaired, click:

Resources (Menu Bar) > Resources > Open Resource Record Card > Repair Details tab

This will display the window below:

This displays the list of repairs where each repair is a line.

Note: The Resource must have an Available current status for the repair to be carried out. If it still marked as hired/loaned it will need to be returned to stock. Please refer to **Recording the Return of a Resource** in this Chapter if you are unsure how to do this.

Now click **New Repair** to put this Resource into repair:

Assign the **Repairer** and the **Cost** of the repair.

The repair date (**Sent**) is automatically set as the current date. You can change this if required.

You can also enter any **Notes** about the repair. Placing a Resource into repair will prevent it being loaned or hired out.

Once the Resource has been successfully repaired you need to fill in the **Returned** date to make it available again.

Note: A Resource must be *available* (i.e. not loaned or hired out) for it to be recorded as in repair.

Remove Repairs

If the repair needs to be deleted, select the repair and click **Remove Repair**. This is highlighted below:
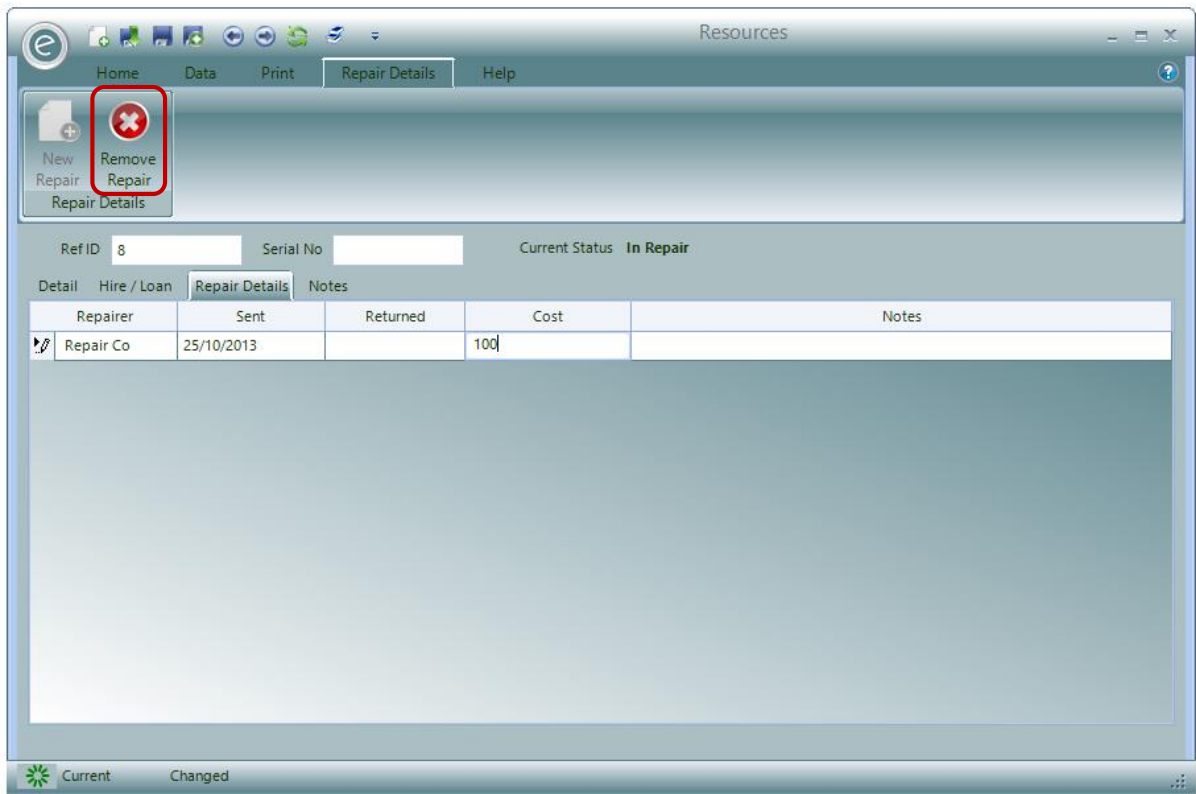
Resource Repair Report

You can use the *Resource Stock Report* above to list any Resources in repair.

To do this click:

Resources (Ribbon Menu) > Print Resource Stock Report

This will display the window below:
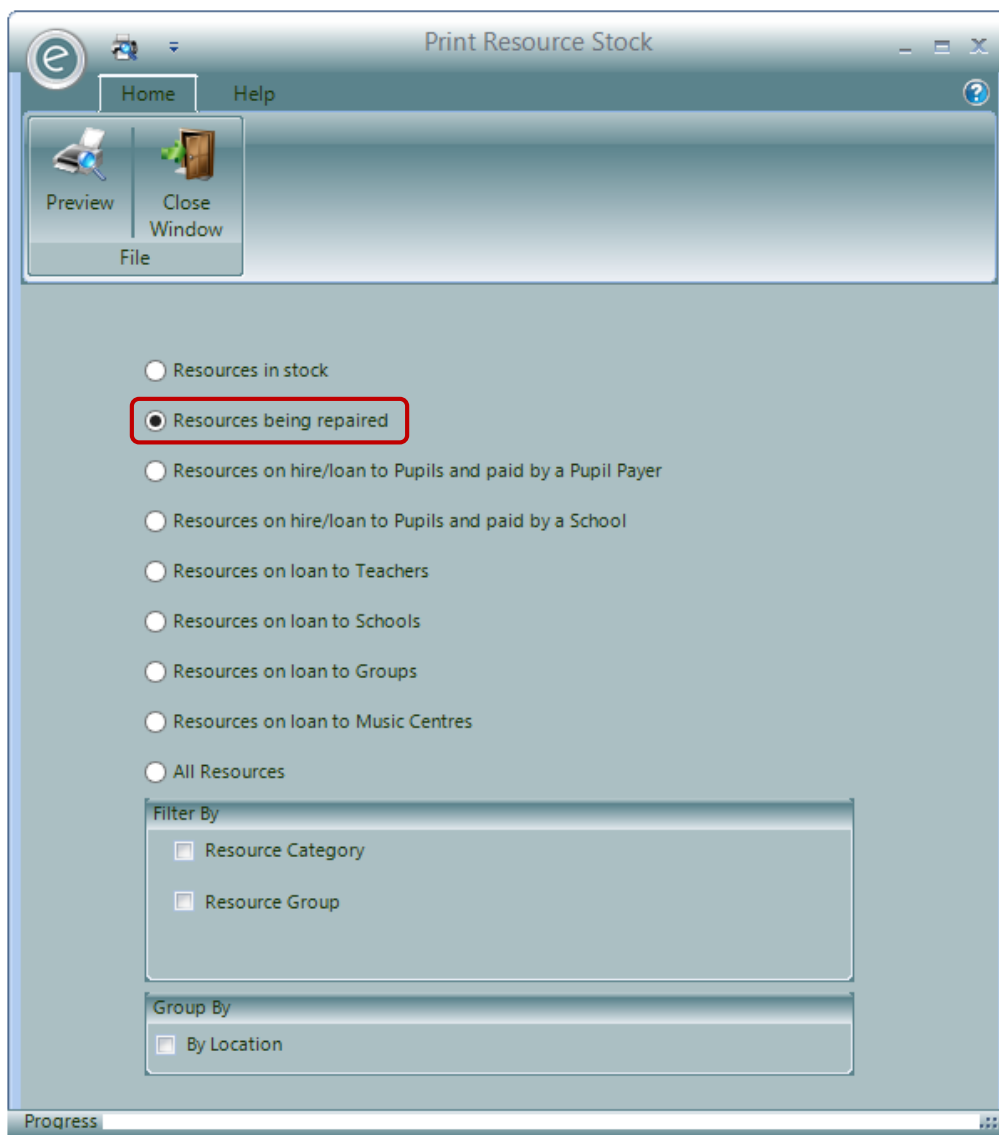
Now select **Resources being repaired** which is highlighted in the **red box** and click **Preview** to view the Report.

An example is displayed below:

14.   Resource Disposal

▶   Watch the Video Tutorial here

When a Resource comes to the end of its life or its lost etc, you can mark the Resource as *No Longer Held*. This keeps all the history of the Resource but removes it from the list of available Resources, therefore *archiving* the Record.

To mark a Resource in such a way click:

Resources (Menu Bar) > Resources > Open Resource Record Card > Tick No Longer Held

This will display the window below:

Select the **Reason For Disposal** and the **Disposal Date**. The **Current Status** will now display as *Disposed*.

Click **Save and Close**.

Note: You can only dispose of Resources that are available in stock.

Resource Disposal Report

You can get a listing of Resources disposed of by going to:

Resources (Ribbon Menu) > Print Resource Disposals

This will display the window below:

Simply select the date range and click **Preview** to view the Report.

An example is displayed below:

15.   Reports

Resource Stock Report

There is a *Resource Stock Report* that can be found in:

Resources (Ribbon Menu) > Print Resource Stock Report

This will display the window below:
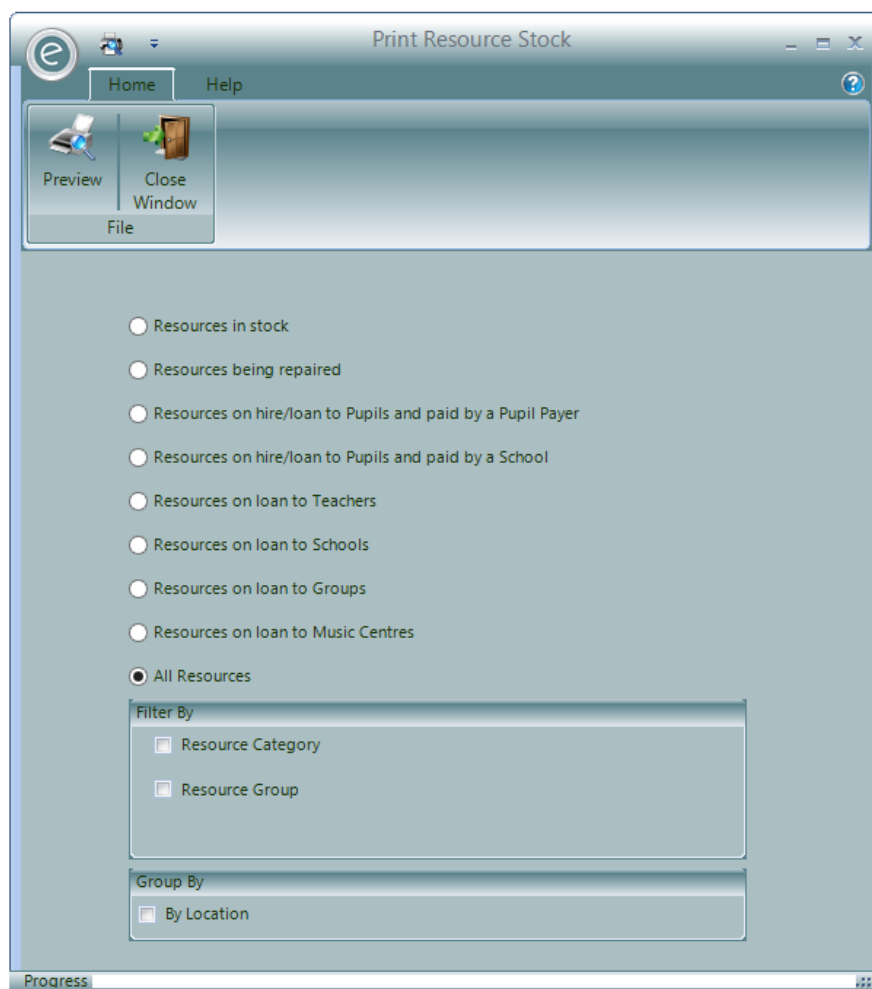
This includes a number of options to list Resources in various states for example **Resources being repaired** or **Resources loaned to Teachers**

You can report on all types of Resources or select those of a specified **Category** and or **Group**. You can also select those associated with a specified **Location**.

Click **Preview** to view the Report.

Instrument Stock Report

Audio Equipment
   Amplifiers
      Acoustic Amp

Ref	Serial No	Make	Model	Pupil Payer	Pupil	Teacher	School	Value
Amp1	1237	Marsall	PMP01					£130.00
							Acoustic Amp	£130.00
							Amplifiers	£130.00

   Guitar Accessories
      Effects Pedal

Ref	Serial No	Make	Model	Pupil Payer	Pupil	Teacher	School	Value
EP0560	03615	BOSS	CH1					£89.00
EP361600	06061	Marshall	PEDL-10023 ED-1					£45.00
EP351581	07491	Marshall	PEDL-10026 BB-2					£45.00
EP65400	0912	BOSS	AW3					£75.00
EP38136	36813	BOSS	BF3					£79.00
							Effects Pedal	£333.00
							Guitar Accessories	£333.00

   Microphones
      Microphone (Instrumental)

Ref	Serial No	Make	Model	Pupil Payer	Pupil	Teacher	School	Value
MIC0602	08610	Shure	PG57	Borchester City Music				£74.00
MIC9811	89163	Shure	PGDMK6	Borchester City Music				£675.00
							Microphone (Instrumental)	£749.00

      Microphone (Vocal)

Ref	Serial No	Make	Model	Pupil Payer	Pupil	Teacher	School	Value
MIC356515	3513651	Shure	PG58					£74.00
MIC35618	618951	Shure	PG58	Borchester City Music				£74.00
MIC69845	8165	Sennheiser	EW135-G2					£400.00
							Microphone (Vocal)	£548.00
							Microphones	£1,267.00

Recording Equipment

Resources on Hire/Loan Report

There is also a Report that lists the Resources on Hire/Loan that can be found in:

Resources (Ribbon Menu) > Print Resources On Hire

This will display the window below:
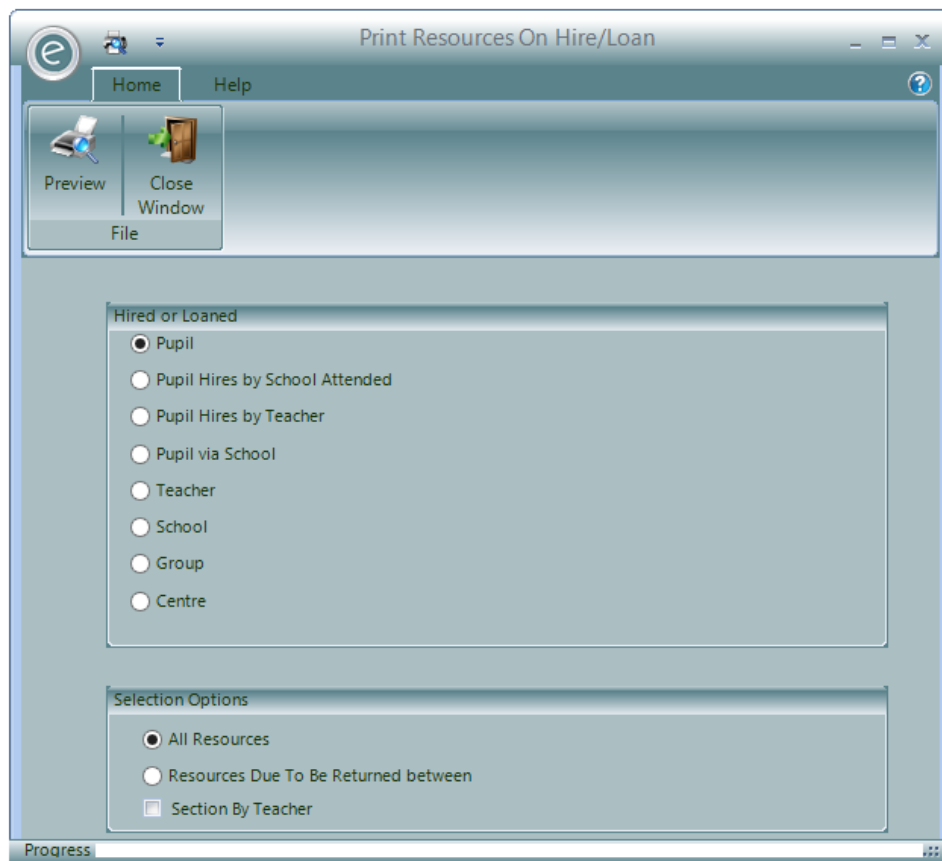
Select to view Resources on hire to people such Pupils, Teachers and Schools.

You can also select to view all Resources or those to be returned for a specified date range.

Click **Preview** to view the Report.

An example is displayed below:

Hire Agreement Report

If you require a printed Hire Agreement Report for a *specific Resource*, you can print this by clicking on the **Print Hire Agreement** button on the Resource Record Card:

Resources (Menu Bar) > Resources > Open Resource Record Card > Print > Print Hire Agreement

This is displayed below:

Alternately you can print these for a batch of Resources in:

Resources (Ribbon Menu) > Print Hire Agreements

This will display the window below:
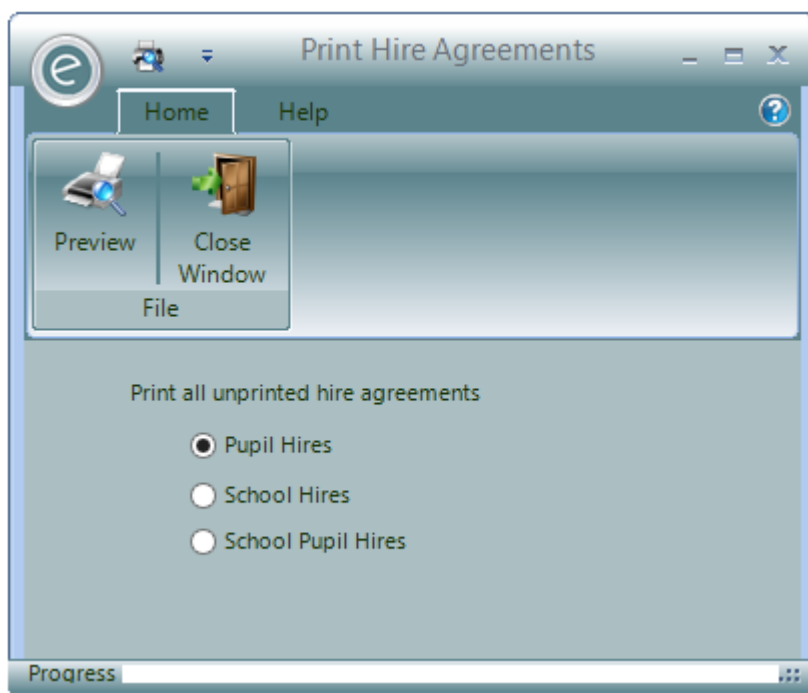
Simply select the type of Resource hire and click **Preview** to view the Report.

An example is displayed below:

You can record the signing of a Hire Agreement by entering the date on the Hire/Loan details of the Resource Record Card:

Unsigned Hire Agreement Report

You can print a list of hires that *do not have a signed Hire Agreement* by clicking:

Resources (Ribbon Menu) > Print Unsigned Hire Agreements

This will display the window below:

Simply select the date range for when the Hire Agreement was printed and click **Preview** to view the Report.

An example is displayed below:

Unsigned Hire Agreements

Ambridge Grammar School (1 pupils)

Last Name	First Name	DOB	Course Title	Intrumental Teacher(s)	Date Range	
Archer	Billy	04-Jul-02			13-Sep-13 —	01-Jan-14

16.   Barcodes

If your service uses the Resource PDA Scanner to log changes in your Resources, *Barcodes* will need to be produced.

Note: You will firstly need the font **Code 39** installed. It can downloaded for free by searching 'Code 39' in Google.

To produce and print the Bar Codes click:

Resources (Ribbon Menu) > Print Resource Bar Code Labels

This will display the window below:

Select the beginning label number in the **First Label Number** field and then the **Number of Labels** to print.

Click **Preview** to view the Barcodes.

A Label Wizard will then open for you to specify the format of the Barcodes to print.

You will also be able to change the page dimensions to fit the standard printing paper for labels, 65x25mm. To do this click:

Edit Definition Design > Design > Page Size > Label 65x25

This is displayed below:
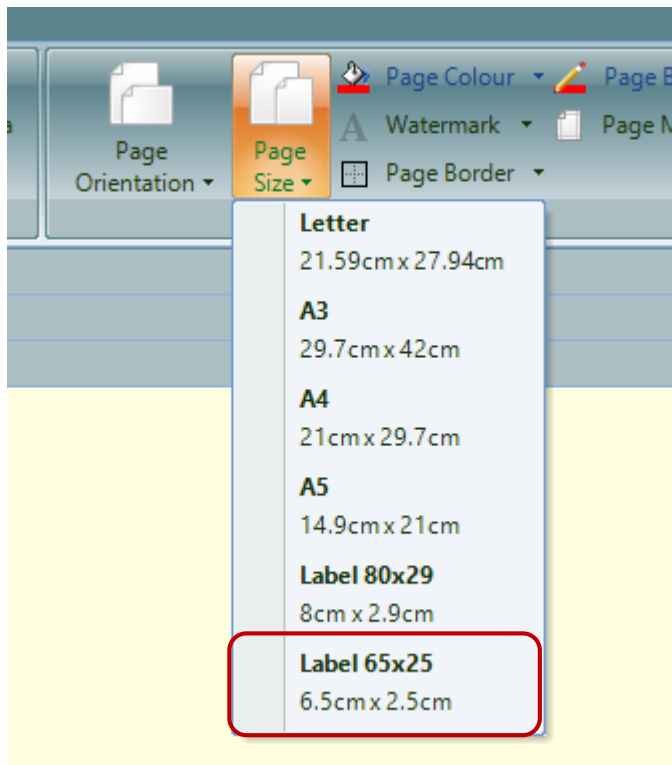
Resource PDA Scanner

This Chapter will discuss how to install and use the PDA Scanner, and synchronise it with Ensemble.

1. Installation

When you first connect the PDA Scanner to your computer, you will required to install *Windows Mobile Device Center.*

Click on Set up your device
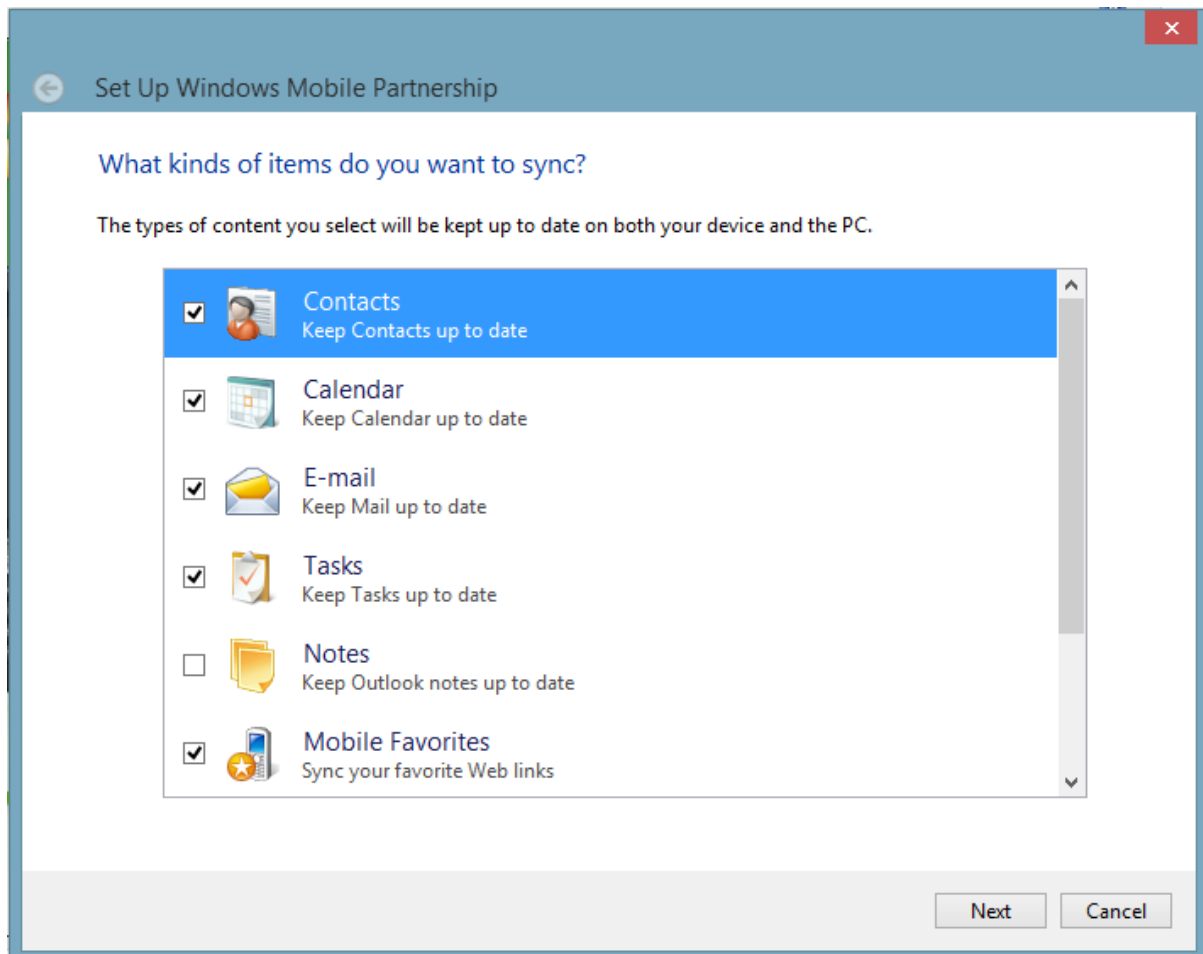
Untick select these and then click next.

Skip this.

Your device is now connected

2. Using the Device

The device has a touch screen and a key pad for user interface.

There is a SCAN button on the left and right faces of the device, which is used to activate the laser to scan the barcodes.

The red POWER button is on the top face.

The *Home Screen* has three sections available. These are:

Resource   Create, search and allocate Resources to a warehouse

Create New Loan   Create loans for your available Resources

Service Resources   Manage Resource repairs

Each section will now be expanded on below.

Resource

Click on *Resource* from the Home Screen. This section contains these options:

Resource search

1. Search for resources by Barcode, Ref ID, Serial No and Resource Type
2. Once Resource is found, you can update the Barcode, add notes and view the History of the Resource (e.g. previous Loans and Repairs)

Create New Resource

A wizard will help you define a new Resource by:

1. Barcode/Ref ID/ Serial No
2. Select Resource Type
3. Select the Warehouse
4. Enter the specified Barcode/Ref ID/Serial No
5. Add any additional notes
6. Then Confirm

Set Warehouse

A wizard you help you assign a Resource to a Warehouse:

1. Select Warehouse
2. Scan Barcode of the resource to assign.

Create New Loan

Click on *Create New Loan* from the Home Screen. This section contains these options:

New Centre Loan

A wizard you help you loan a Resource to a Centre:

1. Select Centre
2. Select Resource Group
3. Select Quantity (with options to review previous two selections)

New School Loan

A wizard you help you loan a Resource to a School:

1. Select School
2. Select Resource Group
3. Select Quantity (with options to review previous two selections)

New Teacher Loan

A wizard you help you loan a Resource to a Teacher:

1. Select Teacher
2. Select Resource Group
3. Select Quantity (with options to review previous two selections)

Service Resources

Click on *Service Resources* from the Home Screen. This section contains these options:

Create New Repair

A wizard you help you assign a Resource to a Repairer:

1. Select Repairer
2. Select Barcode/Ref ID/Serial No/Resource Type as search criteria
3. Enter Barcode/Ref ID/Serial No/Resource Type
4. Enter notes, then confirm

3. Synchronising the PDA Scanner

When you have recorded changes to Resources with the PDA Scanner they will need to be regularly synchronised with the Records in Ensemble to ensure the database is kept up to date.

To do this connect the PDA Scanner to the computer and then within Ensemble click:

Resources (Ribbon Menu) > Resource Sync

This will display the window below:
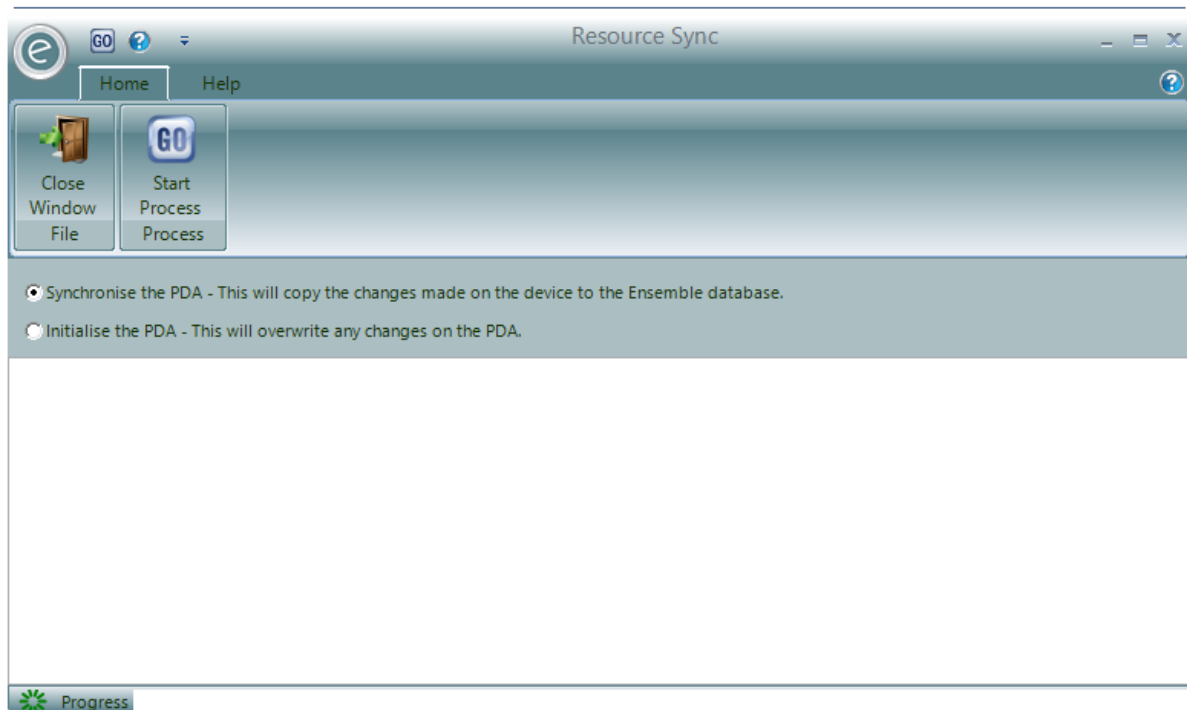
The two options are:

Initialise the PDA	This pushes Resource Records in Ensemble on to the PDA Scanner. This should be done when to set up the PDA with Resources. This option will overwrite all changes on the PDA so only use this for first time set up or if errors have been made on the PDA Scanner
Synchronise the PDA	This copies the changes made to Resource Records on the device to the database in Ensemble. Use this option to regularly update the changes made. It is selected as a default.

When you have made your selection click **Start Process** to begin.

Importing Data

1. Importing Debtor Numbers

 Watch the Video Tutorial here

On many occasions you may need to *import Debtor information* into Ensemble. First the imported data must be from a *.CSV* file.

CSV files are *2 column files*, where the two columns of data are *separated by commas*, effectively scaled down Excel documents, as per the example below:
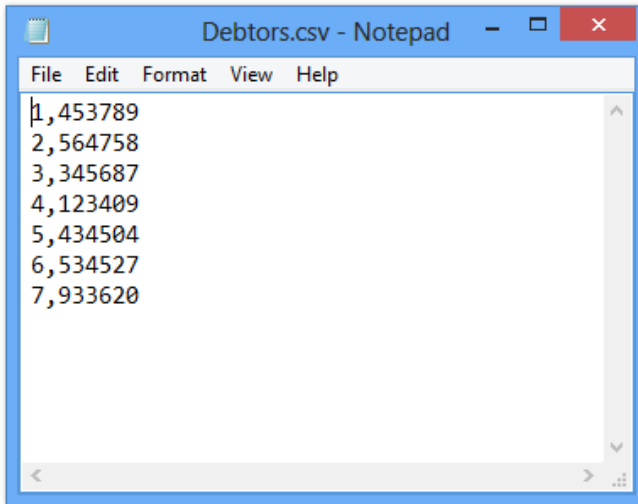
If your data is already in this format, you can bring the file into the system.
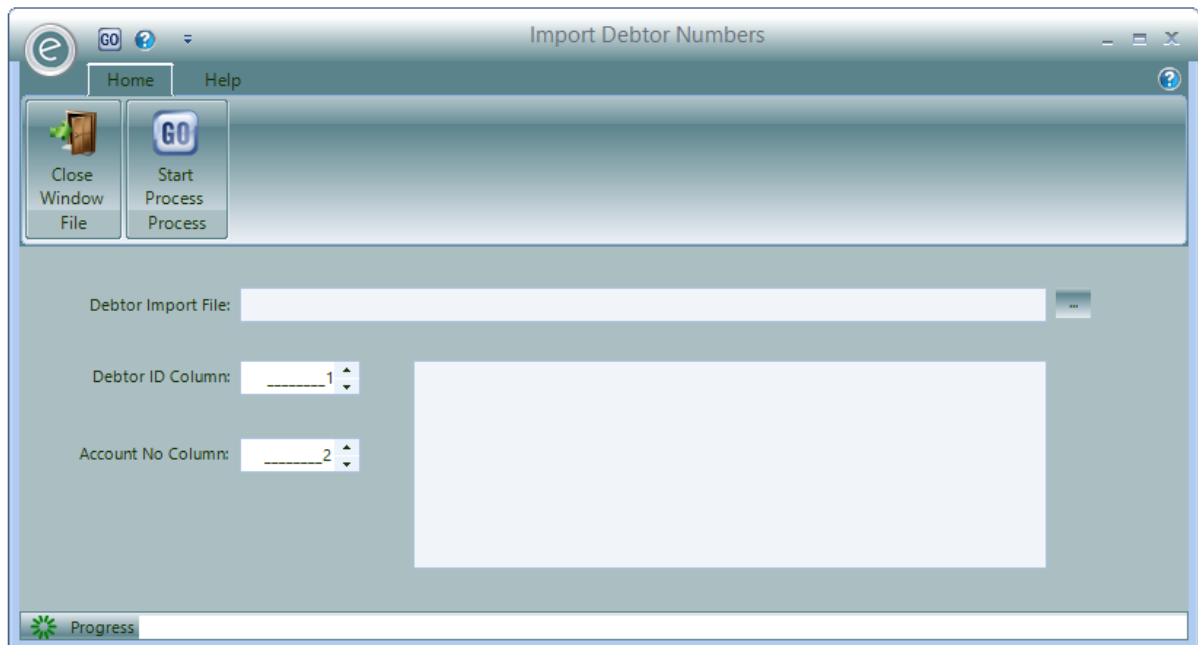
Otherwise, if the data is in an Excel spreadsheet in two columns, select **Save As** from the file menu and save it as a .CSV:
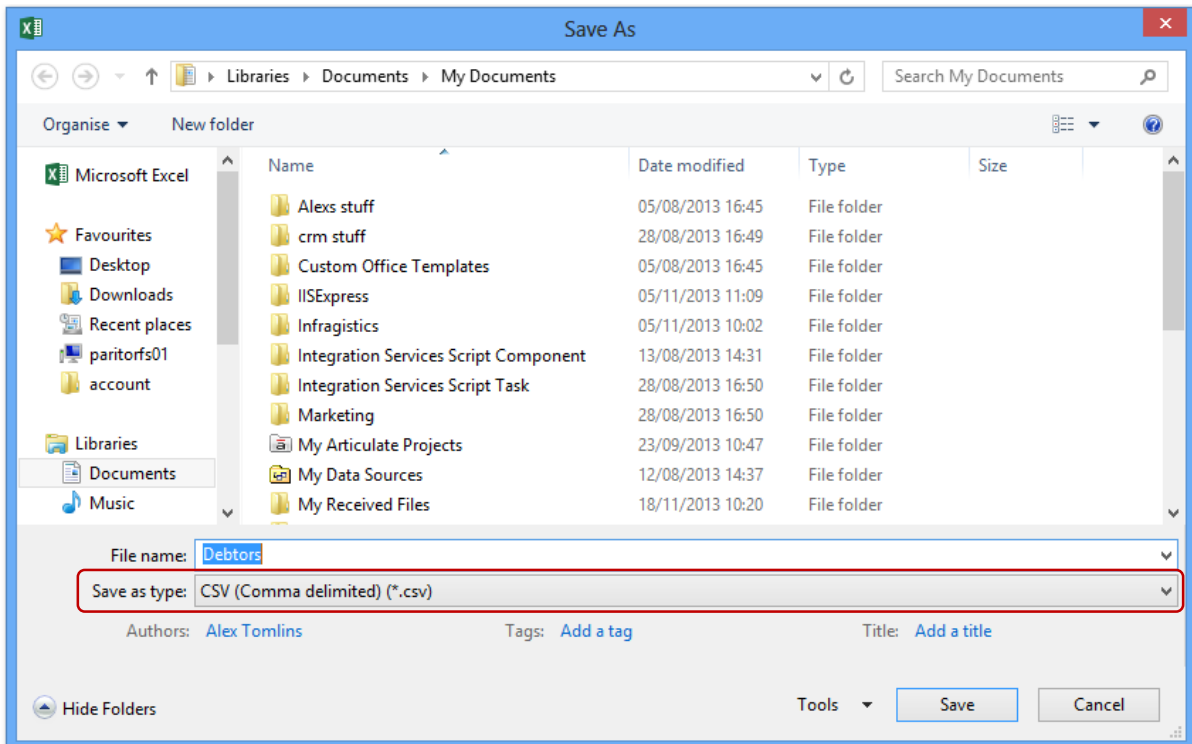
Once your .CSV file is saved the most effective way to import this is to use a function called *Import Debtor Numbers*, which can be found in:

Tools (Ribbon Menu) > Housekeeping > Import Debtor Account Numbers

This will display the window below:

Use the **Browse Icon** next to **Debtor Import File** field to select the .CSV file. It will be displayed here.

Select the columns in the Excel Spreadsheet that contain the Debtor ID and Account Number in the **Debtor ID Column** and **Account No Column** fields.

Once this is all done, press the **Start Process** button to complete the import.

2. Importing Payments

▶ <u>Watch the Video Tutorial here</u>

To enter the payment information you need to import the Payer details. The format of the file needed is an *Excel .CSV* file of *six columns* as displayed below:

	A	B	C	D	E	F
1	{PaymentDate}	{Reference}	{AccountNo}	{InvoiceNo}	{AmountPaid}	{Narrative}
2	{PaymentDate}	{Reference}	{AccountNo}	{InvoiceNo}	{AmountPaid}	{Narrative}
3	{PaymentDate}	{Reference}	{AccountNo}	{InvoiceNo}	{AmountPaid}	{Narrative}
4	TLR	{TotalPaymentCount}				

Note: There can be as many rows as required *not just three* as per the example above. However please make the last row the row displayed on *row 4* in the example above.

The field details are:

Payment Date	Date of payment in DD/MM/YYYY format
Reference	Payment reference – Max length of 20 characters
Account No	Payer's Ensemble Account Number – Max length of 30 characters
Invoice No	Ensemble Invoice Number for the payment (integer)
Amount Paid	Amount paid in the format - #.## (e.g. 10.50)
Narrative	Narrative for the payment – Max length of 256 characters
Total Payment Count	Total number of payments to be imported

Example

Here is an example .CSV file to be imported:

	A	B	C	D	E	F
1	03/01/2014	1234	A1	1	100.00	Guitar Tuition
2	04/01/2014	1235	A2	2	150.50	Piano Hire
3	05/01/2014	1236	A3	3	100.00	Guitar Tuition
4	06/01/2014	1237	A4	4	200.50	Band Membership
5	07/01/2014	1238	A5	5	100.00	Guitar Tuition
6	TLR	5				

Important: This .CSV file needs to be saved in your *DebtorPayments* folder of your Shared Location.

Import the .CSV File

To run the Import go to:

Debtors (Ribbon Menu) > Postings > Import Payer Billing

This will display the window below:

Click **Import** to pull the information from the .CSV file. The headers will be displayed on the left, as highlighted by the red box, and each individual line within each of these will be on the right, as highlighted by the green box.

Click **Process** to allocate the Payments to their corresponding Accounts.
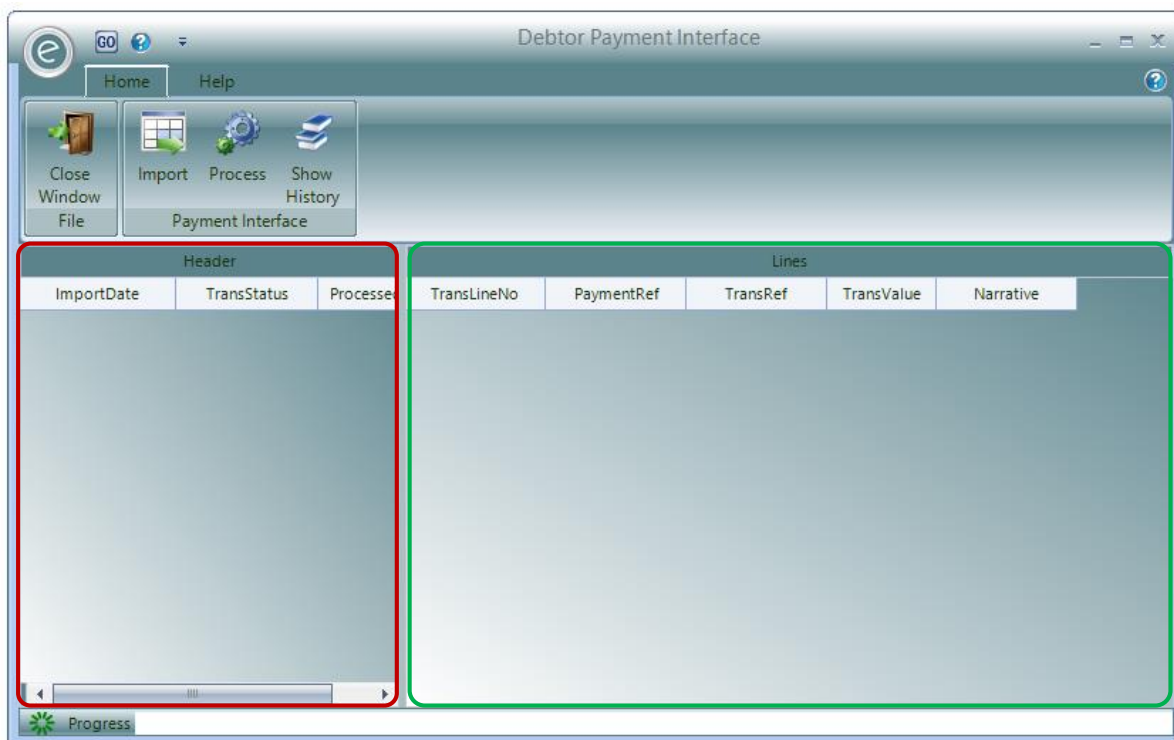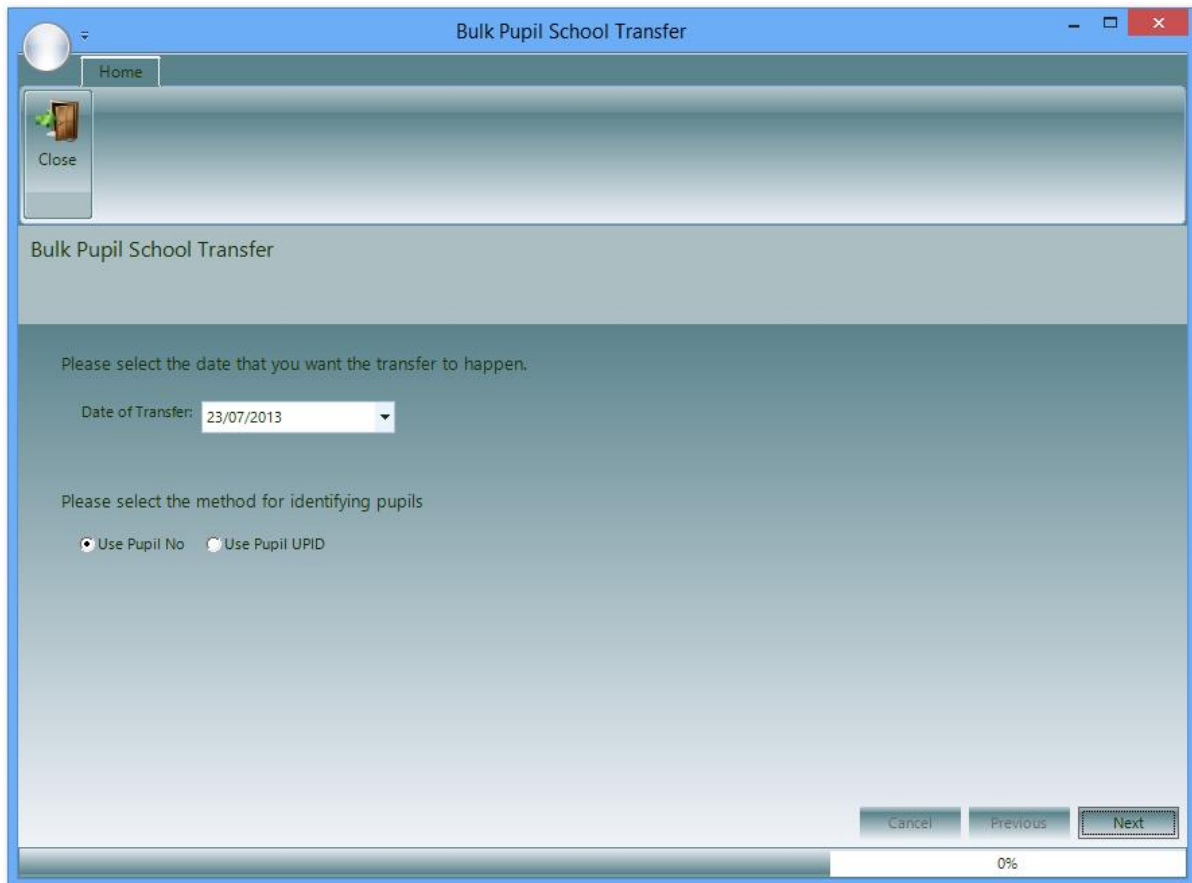
You will now have successfully imported your payments into Ensemble.

3. Pupil School Transfer

At the end of the Academic Year there will be many pupils which need transferring School, such as progression from Primary to Secondary education or moving to College. This information can be changed in bulk by clicking:

Tools (Ribbon Menu) > Housekeeping > Pupil School Transfer

This will display the window below:

You will able to select the date that the Pupils transfer schools in the Date of Transfer field.

You can then select to identify Pupils by their unique Pupil number or UPID (if Ensemble is connected to a central pupil database).

For more information regarding connections to a central pupil database refer to the **Connecting to a Central Database** Chapter.

Once happy click Next:
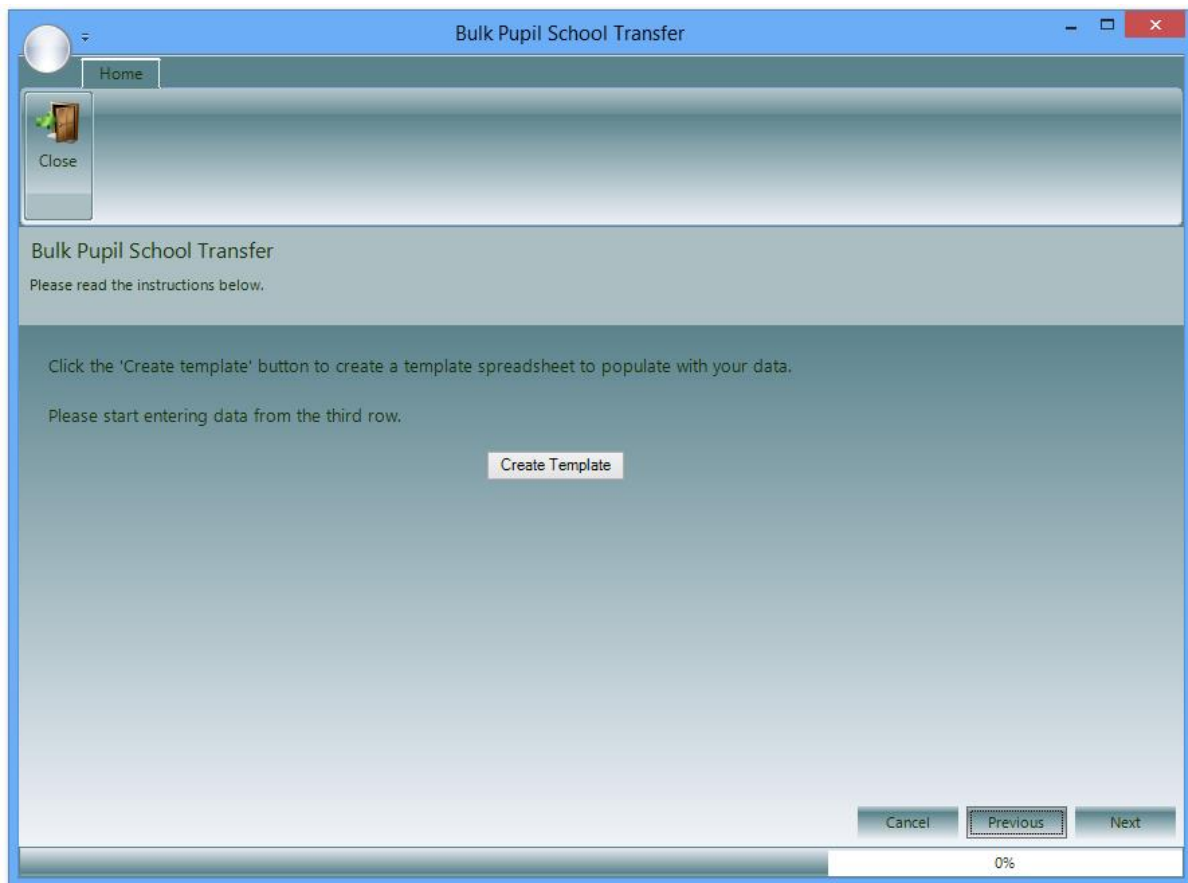
Click Create Template to open the Excel Spreadsheet. In here you can populate the change of school for the pupils.

Click Next:
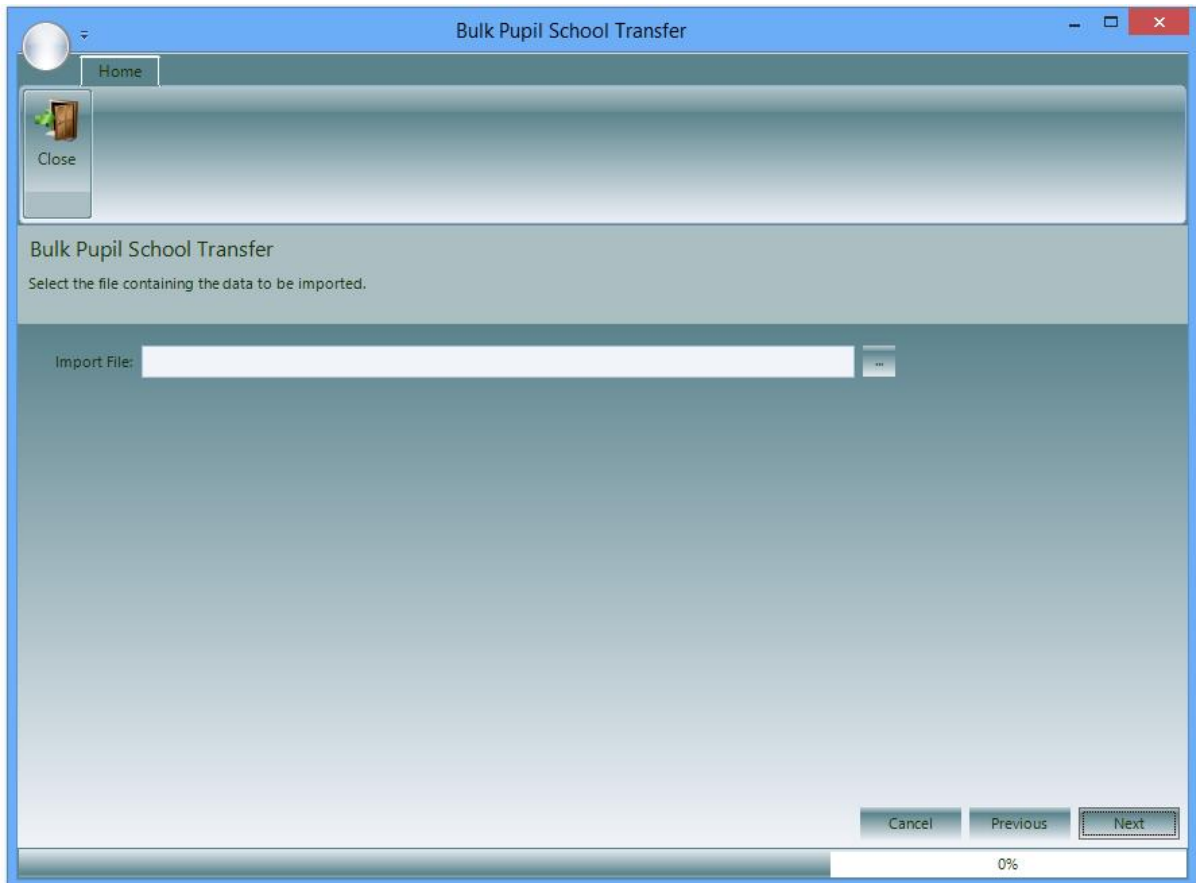
Once the Spreadsheet has populated, you can import the file here by clicking the **...** button.

Click **Next** to complete the import.

Data Extraction

 [Watch the Video Tutorial here](#)

Very often you may need to query the data. For example you may to know how many Pupils attend a particular School or the average age of Pupils in a School. Ensemble has built in *Extract Wizards* which ask you step-by-step the data you want to analyse. Once the raw data is extracted it is displayed in *Paritor Insight*.

1. Extract Teacher Records
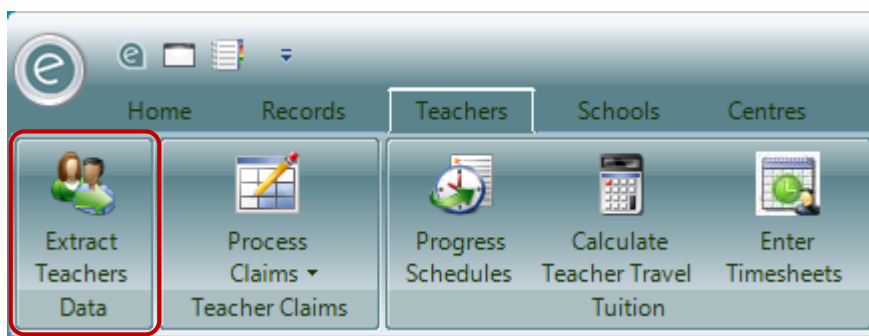
To extract Teacher Records click:

Teachers (Ribbon Menu) > Extract Teachers

This will display the *Teacher Extract Wizard* below:

Start tab
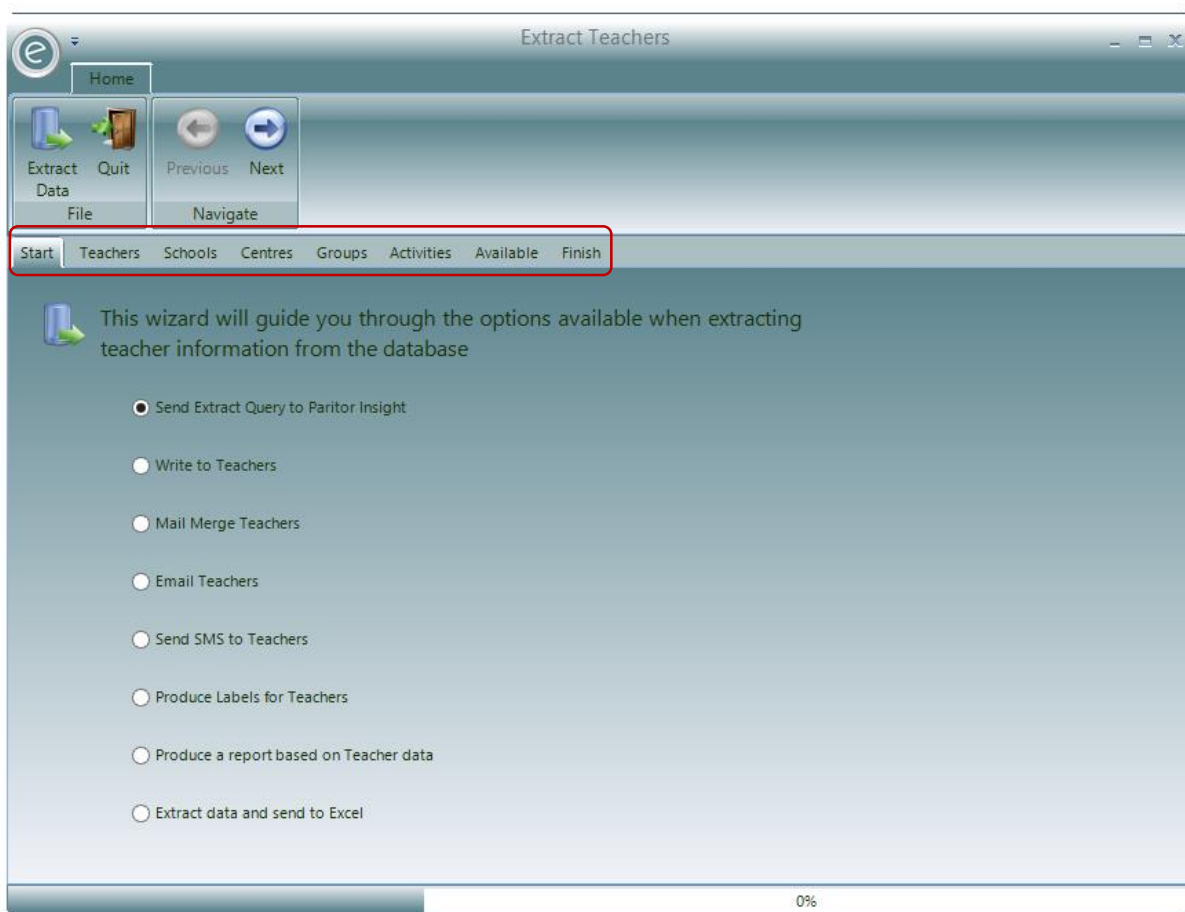
The red box highlights the tabs which allow you specify which types of Teacher Records to extract. The Extract works using 'and' filters rather than 'or' filters. Therefore you can filter the data to see which Teachers teach at a particular School and for a particular Activity; not those that teach at a particular School or for a particular Activity.

The first tab is Start. Any other can be selected by clicking it.

Note: For the purposes of this guide, we will recommend to always click Next when you have finished selections for a particular tab.

To begin, select where you want to extract the data to. The default selection is to extract to Paritor Insight.

When you have selected your choice click Next:

Teachers tab

This is the **Teachers** tab. You will be to specify the **Status** of the Teachers you are interested in.

Within the **Employment Status** section you can select the type of payment that the Teacher receives.

Within the **Active** section you can specify if the Teacher has left or not.

Within **Qualified** you can specify if the Teacher is qualified or not.

At the bottom you can choose to select the **Payscale Type** for the Teacher.

Note: Information regarding these options are initially defined within the *Pay Details* tab of a Teacher Record Card.

Once you have made you selection click **Next**:

Schools tab
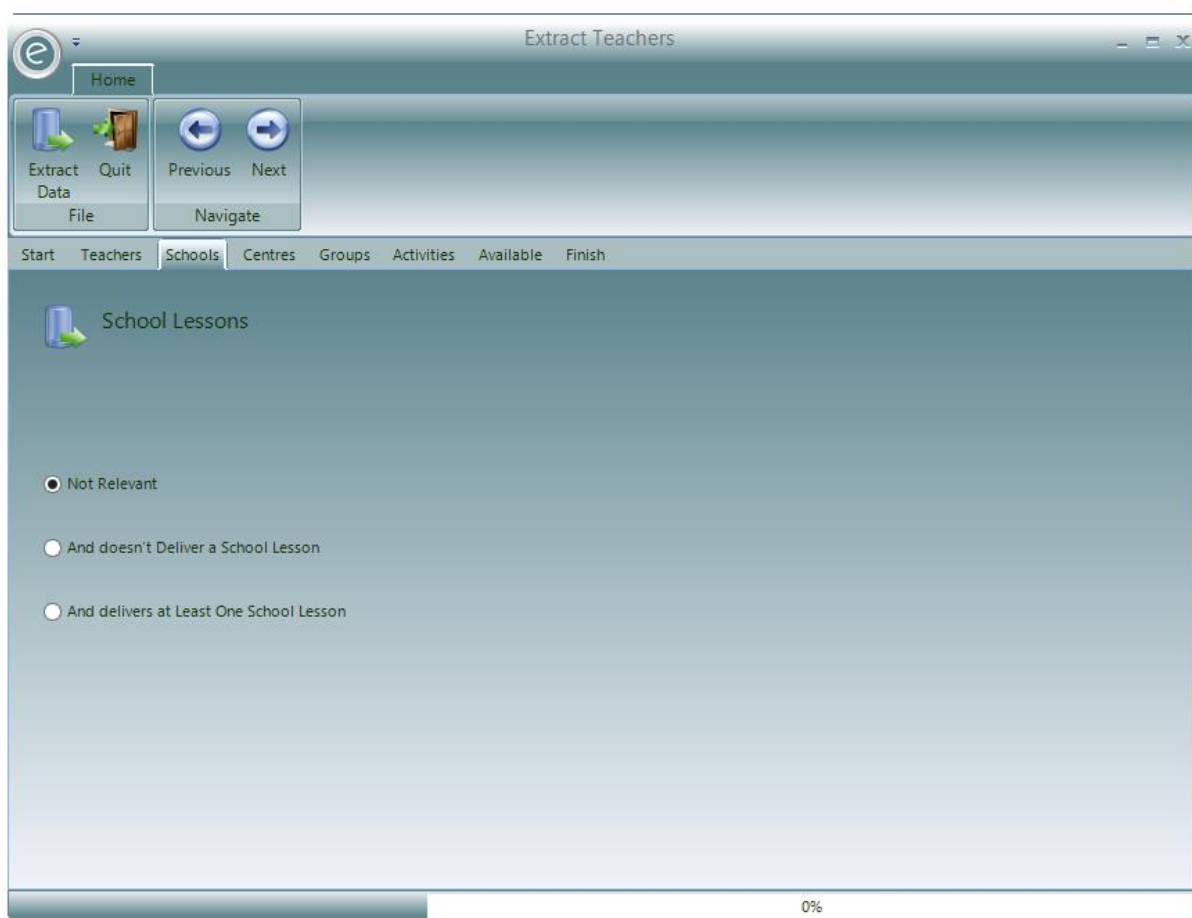
This is the Schools tab. You will be to specify if the Teachers you are interested in deliver any School lessons. Not Relevant is selected as a default.

1. If you select And doesn't Deliver a School Lesson, the window will allow you choose from these options:

You can select any of the following date range options:

Select Teachers Not delivering lessons during a Specified Period	Select a Provision Type, Academic Year and a Provision Period. The extract will include all Teacher Records without School tuition between the start and finish of the Provision.
Select Teachers Not delivering lessons during a Specified Date Range	Enter a From and To date. The extract will include all Teacher Records without School tuition between the two dates
Select Teachers Not delivering lessons on a Specific Date	Enter a specific date in As At Date. The extract will include all Teacher Records without School tuition for the entered date

2. If you select And doesn't Deliver a School Lesson, the window will allow you choose from these options:

You can select any of the following date range options:

Select Teachers delivering lessons during a Specified Period	Select a Provision Type, Academic Year and a Provision Period. The extract will include all Teacher Records with School tuition between the start and finish of the Provision.
Select Teachers delivering lessons during a Specified Date Range	Enter a From and To date. The extract will include all Teacher Records with School tuition between the two dates
Select Teachers delivering lessons on a Specific Date	Enter a specific date in As At Date. The extract will include all Teacher Records with School tuition for the entered date

You will also be able to specify the School, Activity and Area that the Teachers teach for. They are tick boxes so multiple selections can be made.

Once you have made you selection click Next:

Centres tab

This is the **Centres** tab. You will be to specify if the Teachers you are interested in deliver any Centre lessons. **Not Relevant** is selected as a default.

1. If you select **And doesn't Deliver a Centre Lesson**, the window will allow you choose from these options:

You can select any of the following date range options:

Select Teachers Not delivering lessons during a Specified Period	Select a Provision Type, Academic Year and a Provision Period. The extract will include all Teacher Records without Centre tuition between the start and finish of the Provision.
Select Teachers Not delivering lessons during a Specified Date Range	Enter a From and To date. The extract will include all Teacher Records without Centre tuition between the two dates
Select Teachers Not delivering lessons on a Specific Date	Enter a specific date in As At Date. The extract will include all Teacher Records without Centre tuition for the entered date

2. If you select And doesn't Deliver a Centre Lesson, the window will allow you choose from these options:

You can select any of the following date range options:

Select Teachers delivering lessons during a Specified Period	Select a Provision Type, Academic Year and a Provision Period. The extract will include all Teacher Records with Centre tuition between the start and finish of the Provision.
Select Teachers delivering lessons during a Specified Date Range	Enter a From and To date. The extract will include all Teacher Records with Centre tuition between the two dates
Select Teachers delivering lessons on a Specific Date	Enter a specific date in As At Date. The extract will include all Teacher Records with Centre tuition for the entered date

You will also be able to specify the Centre and Activity that the Teachers teach for. They are tick boxes so multiple selections can be made.

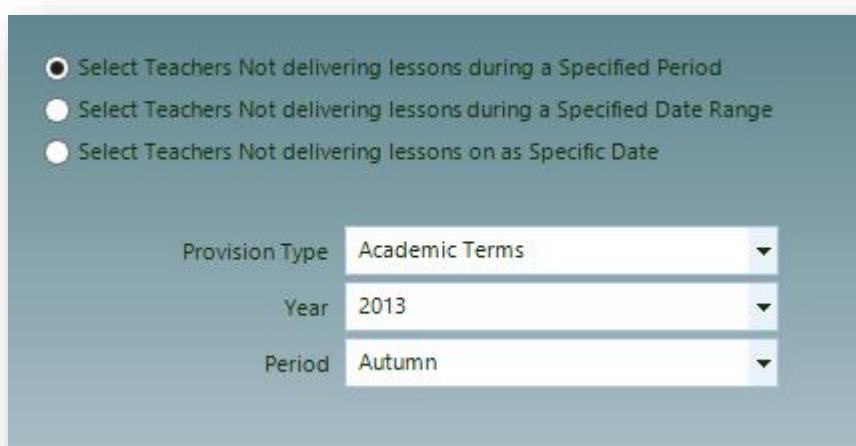Once you have made you selection click Next:

Groups tab

This is the **Groups** tab. You will be to specify if the Teachers you are interested in deliver any lessons. **Not Relevant** is selected as a default.

1. If you select **And doesn't Attend a Group**, the window will allow you choose from these options:

You can select any of the following date range options:

Select Teachers Not delivering Groups during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Teacher Records without Group tuition between the start and finish of the Provision.

Select Teachers Not delivering Groups during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Teacher Records without Group tuition between the two dates
Select Teachers Not delivering Groups on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Teacher Records without Group tuition for the entered date

2. If you select **And Attends at Least One Group**, the window will allow you choose from these options:

You can select any of the following date range options:

Select Teachers delivering Groups during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Teacher Records with Group tuition between the start and finish of the Provision.
Select Teachers delivering Groups during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Teacher Records with Group tuition between the two dates
Select Teachers delivering Groups on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Teacher Records with Group tuition for the entered date

3. If you select **And Attends**, the window will allow you choose from these options:

You can select any of the following date range options:

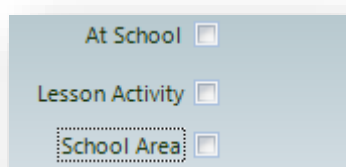|	
Select Teachers delivering Groups during a Specified Period	Select a Provision Type, Academic Year and a Provision Period. The extract will include all Teacher Records with Group tuition between the start and finish of the Provision.
Select Teachers delivering Groups during a Specified Date Range	Enter a From and To date. The extract will include all Teacher Records with Group tuition between the two dates
Select Teachers delivering Groups on a Specific Date	Enter a specific date in As At Date. The extract will include all Teacher Records with Group tuition for the entered date

Additionally you can *select the specific Groups* that the Teacher attends. All available Groups are listed on the left. Select the Group(s) and click **>** to transfer to the right. Click **>>** to select all. To remove a selected Group click **<** to transfer back. Click **<<** to remove all.

Note: Selecting the Groups will not extract the Groups themselves, only the Teachers associated with them.

When you have selected your options click Next:
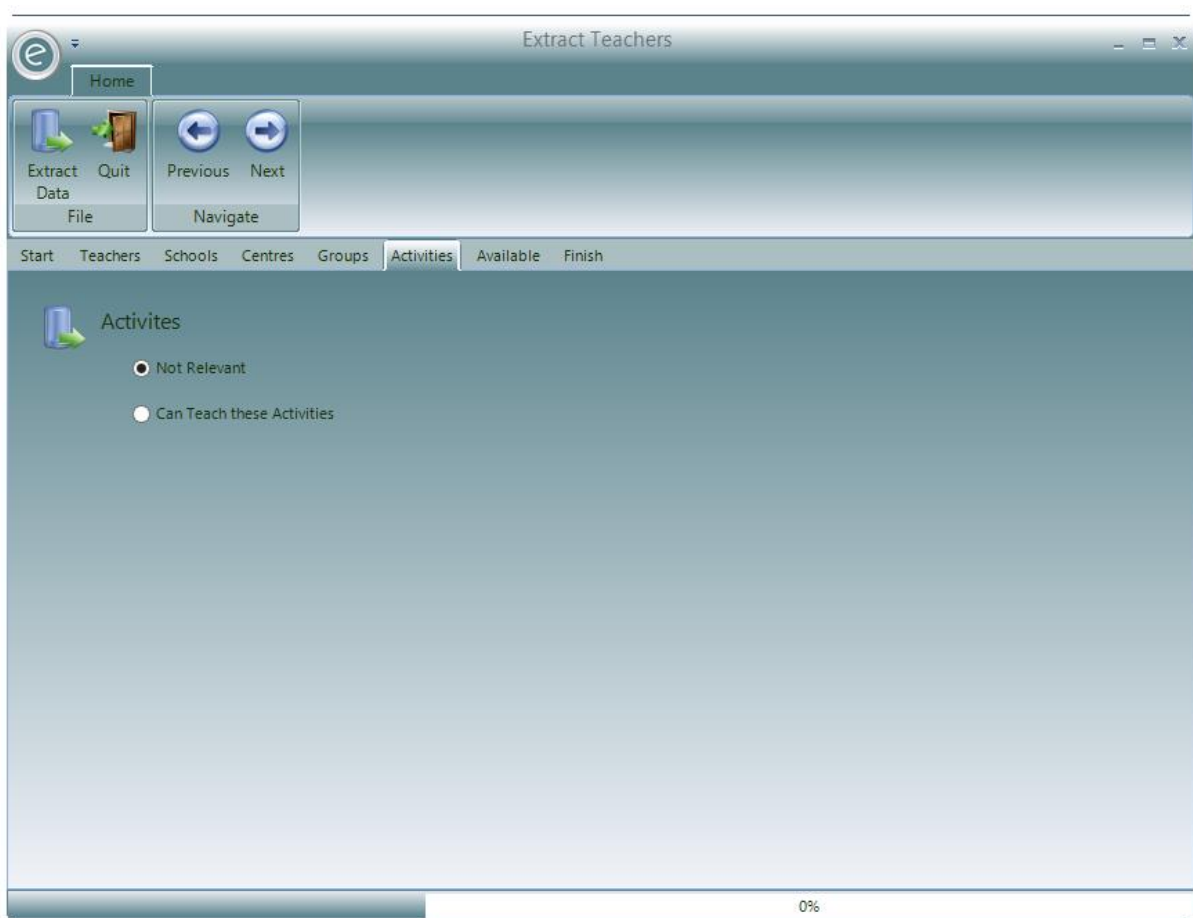
Activities tab

This is the **Activities** tab. You will be to specify particular Activities that the Teachers conduct tuition for. **Not Relevant** is selected as a default.

If you select **Can Teach these Activities**, the table below becomes available:

All available Activities are listed on the left. Select the Activity and click **>** to transfer to the right. Click **>>** to select all. To remove a selected Activity click **<** to transfer back. Click **<<** to remove all.

Note: The extract will look into the *Activity List* in a Teachers Record Card for matches *not* the Activity Plans on their Schedule.

When you have selected your options click Next:

Available tab
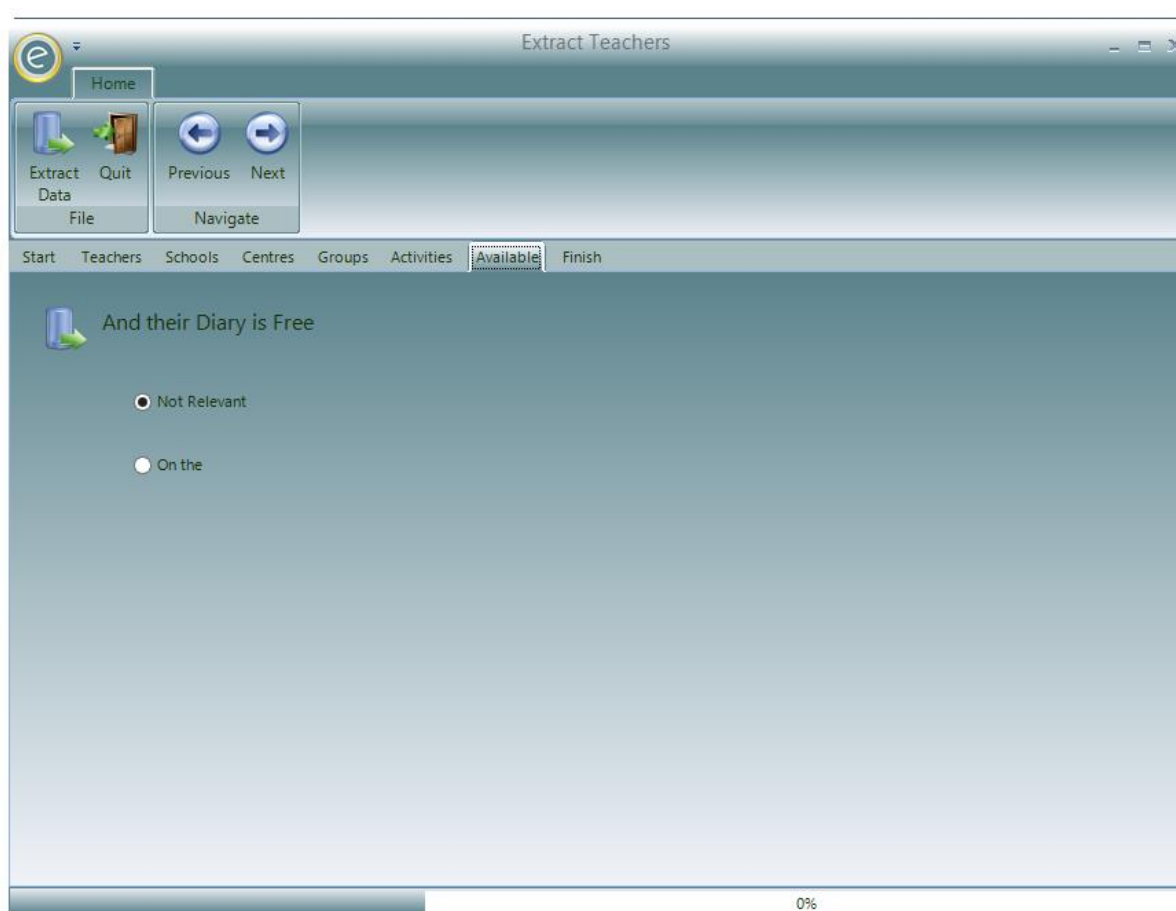
This is the Available tab. You will be to specify the Teachers with a period of free time in the Diary. Not Relevant is selected as default.

If you select On the, these options become available:

Select the date, time and duration of the desired free period of time. Ensemble will search through the information in the Teachers' schedules in order to extract the correct Records.

When you have selected your options click Next:
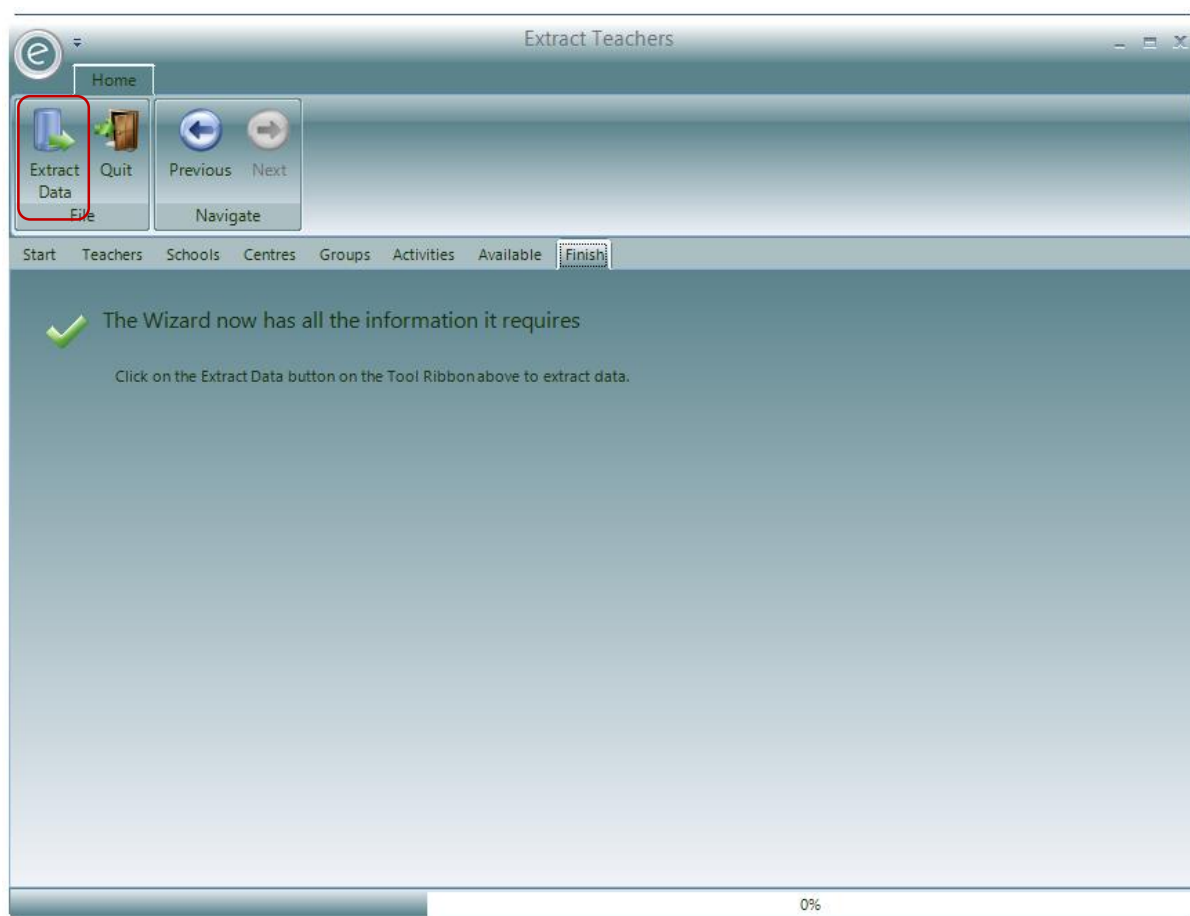
Finish tab

This is the **Finish** tab. The Wizard has finished and you may extract the data by clicking **Extract Data**.

Note: The **Extract Data** button is available to press at any point in this window. It is not necessary to strictly follow the wizard.

An example Teacher extract in Paritor Insight is displayed below:

Paritor Insight

Home | Data Collection | Tools | Help

Page Setup | Refresh Data | Hide Grouping | Create New Dataset | Produce Labels | SMS text
Print Preview | Reset Dataset | Clear Group | Pivot Dataset | Produce Letters | New Chart
Print Section | Change Datasource | Filter | Produce New Report | Email | Save as Excel

Show SQL | Select Columns | Create Summary Dataset

Print | Data Source | Data

Drag a column header here to group by that column.

Title	FirstName	MiddleName	LastName	KnownAs	Email	LandLine1	LandLine2	Mobile1	Mobile2	Addre
Mr	Lincoln		Andrews		lincolnandrews...		165465162165	07555821364		17 Co
Miss	Daisy		Freeman		daisyfreeman@...			07489223366		13 Wr
Mr	Nigel		Cambell		nigelcambell@...	01495649782		07892365124		20 We
Miss	Hattie		Thomas		hattiethomas@...			07856302015		91 Jer
Mrs	Jodie		Foster		jodiefoster@mu...			07148962578		101 H
Miss	Jenny		Smith		jennysmith@m...	01495778899		07410258963		59 Lower L
Mrs	Sarah		Gilligan		sarahgilligan@...			07954123620		29 Ord
Rev	Jason		Richards		richards@music...	01495012536		07456123988		127 Je
Mrs	Rachel		Levison		rachellevison@...	01495789456		07123654789		7 Lam
Mr	Walter		White		walterwhite@m...			07999653621		19 Jill
Mrs	Pat		Archer		alextomlins@pa...	01495448833		07159263578		30 Ing
Mr	Victor		Kendle		victorkendle@...			07115635241		89 Far
Mrs	Zoe		Mitchell		zoemitchell@m...			07100236547		38 Sq
Mr	Matt		Redwood		mattredwood@...			07123665544		78 Fri
Mr	Michael		Birchfield		michael@music...	01495411561		07951620351		1 Dov
Miss	Charley		Smith		charleysmith@...			07522362514		45 Kay
Mrs	Dora		Lawrence		doralawrence@...			07632152896		11 Up
Miss	Jessica		Langley		jessicalangley@...			07895651364		87 Fre
Miss	Natalie		Fairhead		nataliefairhead...		01495566560	07148592623		78 Pre

Completed

634

2. Extract School Records
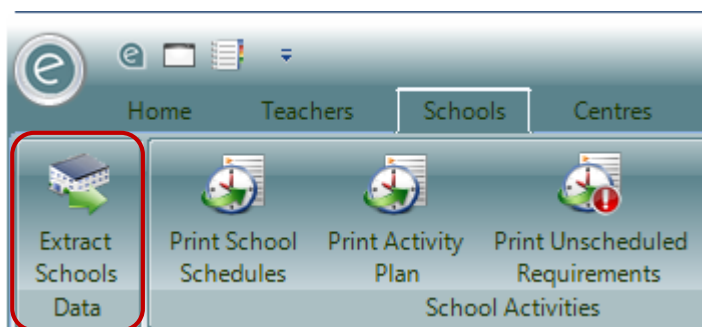
To extract School Records click:

Schools (Ribbon Menu) > Extract Schools

This will display the *School Extract Wizard* below:

Start tab
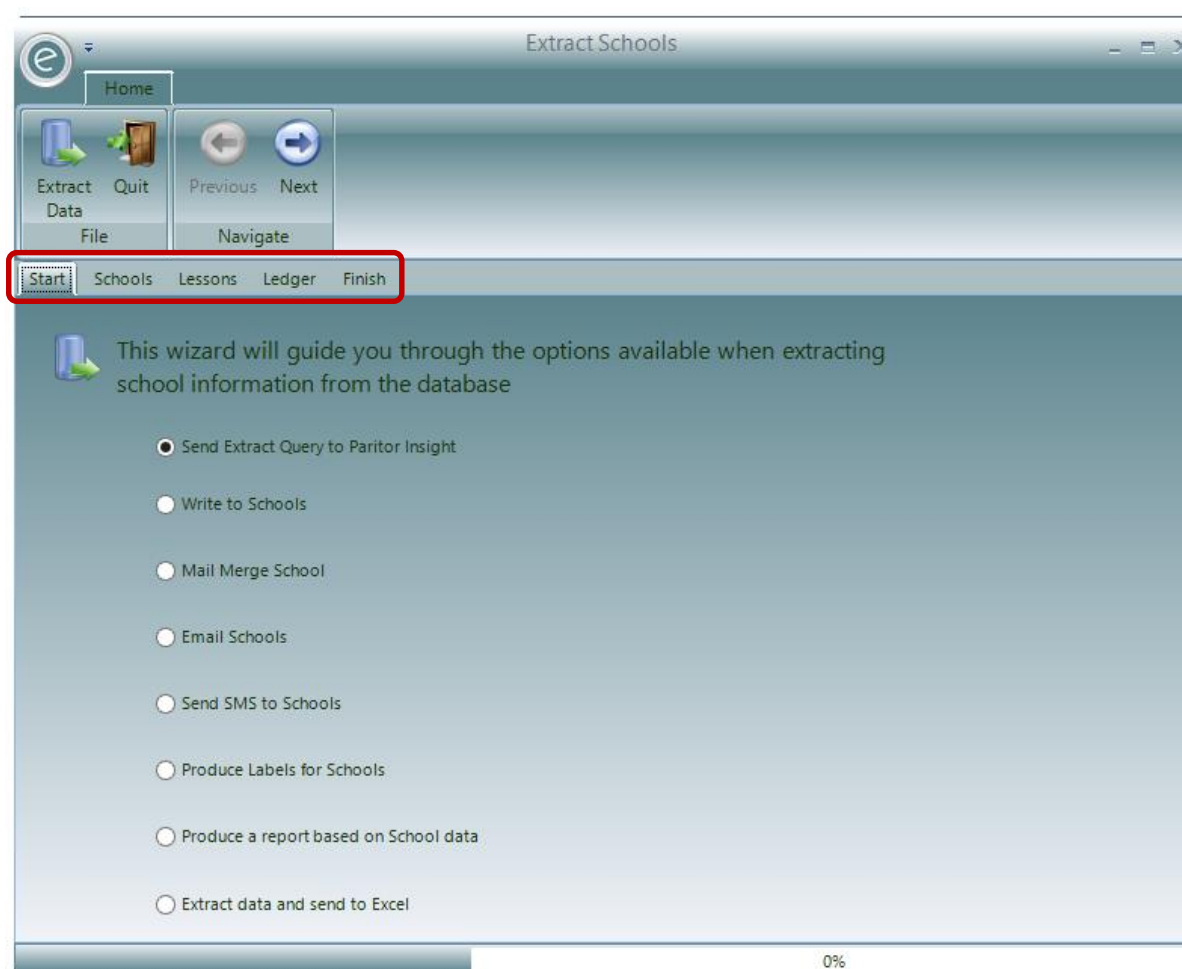
The red box highlights the tabs which allow you specify which types of School Records to extract. The Extract works using '*and*' filters rather than '*or*' filters. Therefore you can filter the data to see which Schools have tuition *and* outstanding debt; not Schools with tuition *or* outstanding debt.

The first tab is Start. Any other can be selected by clicking it.

Note: For the purposes of this guide, we will recommend to always click Next when you have finished selections for a particular tab.

To begin, select where you want to extract the data to. The default selection is to extract to Paritor Insight.

When you have selected your choice click Next:

Schools tab
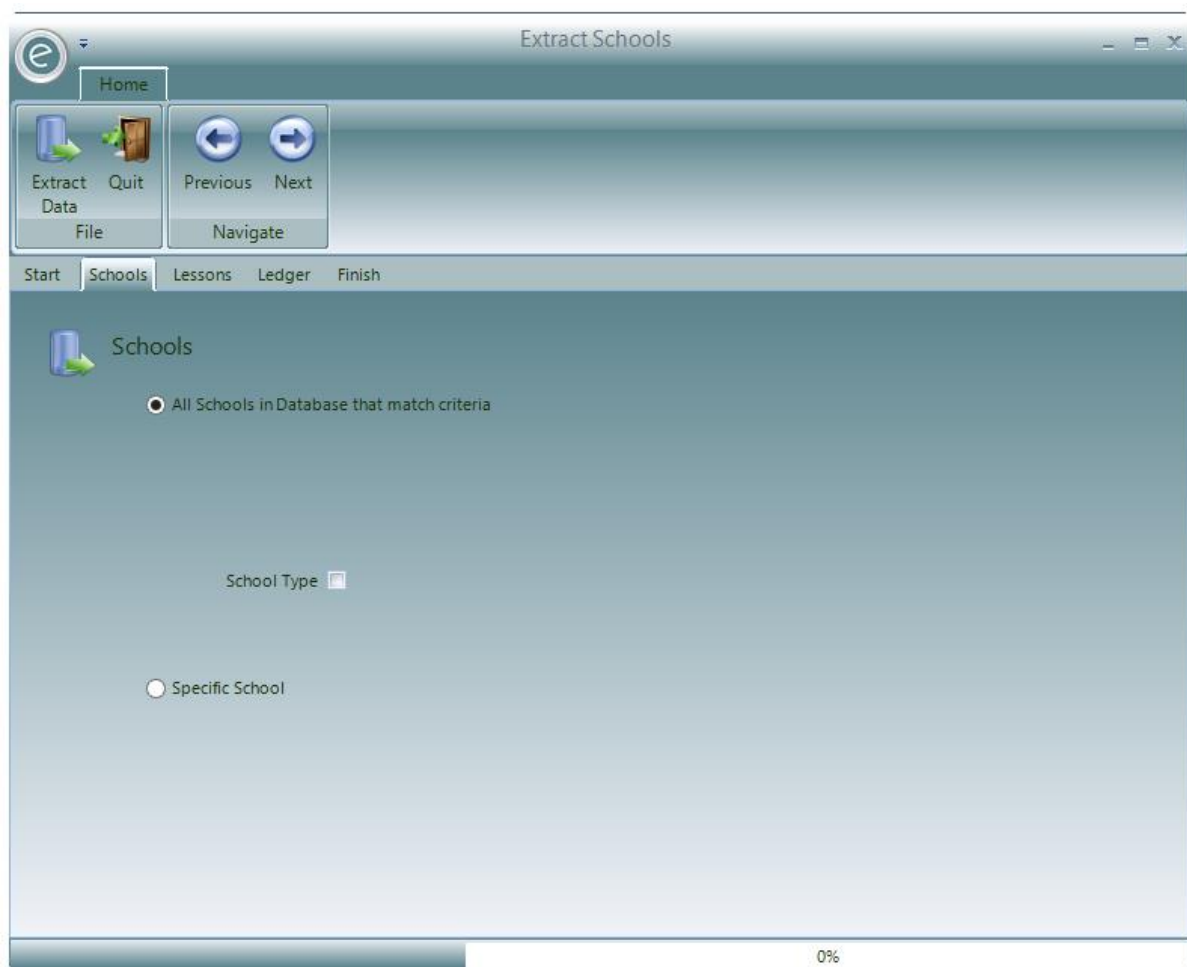
This is the Schools tab. You will be able to specify a School Type or a particular School.

All Schools in Database match criteria is selected as a default with no School Type selected.

Alternatively click Specific School to select the School.

Once you have made you selection click Next:

Lessons tab
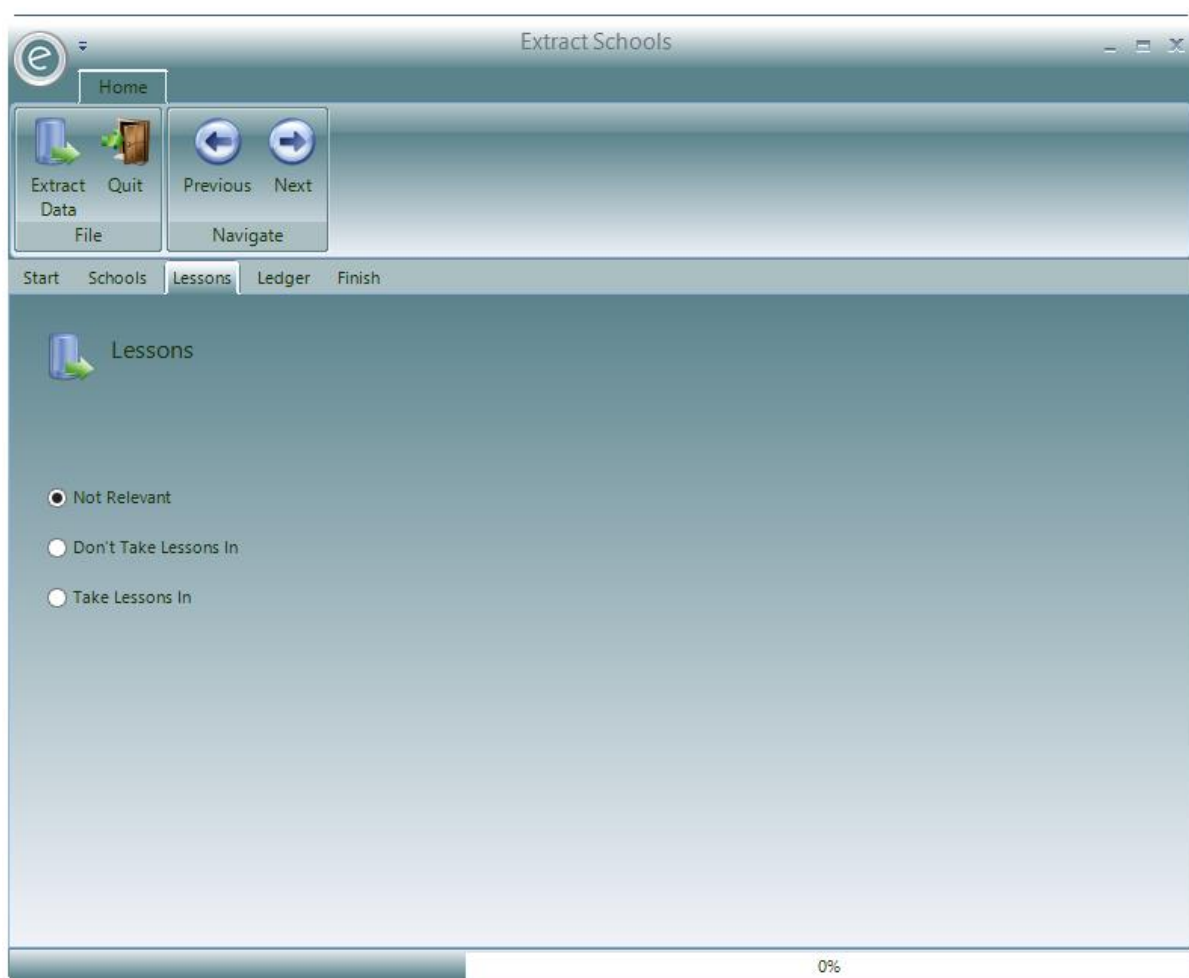
This is the **Lessons** tab. You will be able to specify if the Schools have any Activity Plans scheduled. **Not Relevant** is selected as a default.

1. If you select **Don't Take Lessons In**, the window will allow you choose from these options:

You can select any of the following date range options:

Select Schools Not Taking Lessons during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all School Records without Activity Plans between the start and finish of the Provision.
Select Schools Not Taking Lessons during a Specified Date Range	Enter a **From** and **To date**. The extract will include all School Records without Activity Plans between the two dates
Select Schools Not Taking Lessons on a Specific Date	Enter a specific date in **As At Date**. The extract will include all School Records without Activity Plans for the entered date

2. If you select **Take Lessons In**, the window will allow you choose from these options:

You can select any of the following date range options:

Select Schools Taking Lessons during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all School Records with Activity Plans between the start and finish of the Provision.
Select Schools Taking Lessons during a Specified Date Range	Enter a **From** and **To date**. The extract will include all School Records with Activity Plans between the two dates
Select Schools Taking Lessons on a Specific Date	Enter a specific date in **As At Date**. The extract will include all School Records with Activity Plans for the entered date

Here you can select to include lesson detail or not.

Once you have made you selection click **Next**:

Activities tab
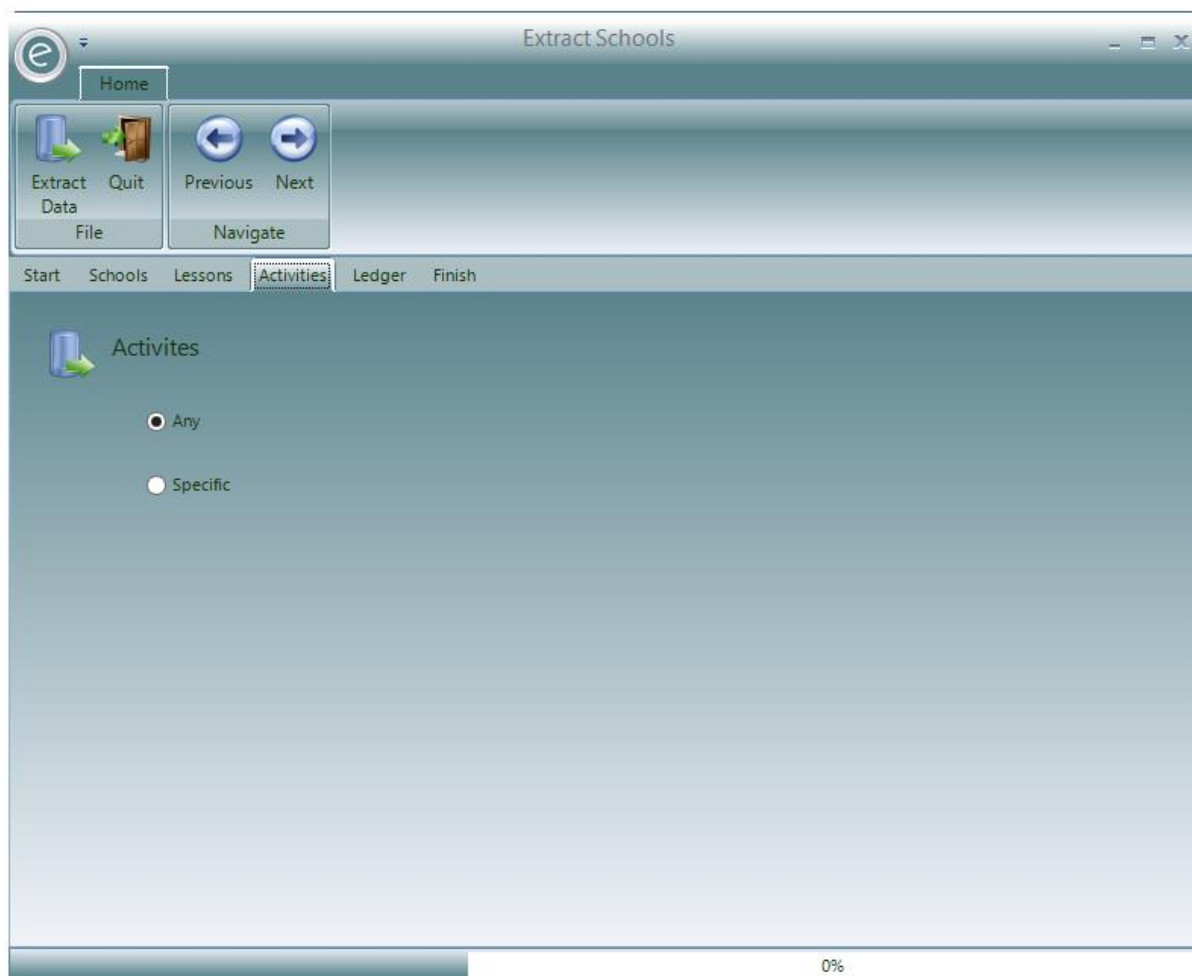
If you selected **Take Lessons In,** the **Activities** tab will become available. You will be able to specify the tuition Activities that a School hosts. **Any** is selected as a default.

If you click **Specific**, the table below becomes available:
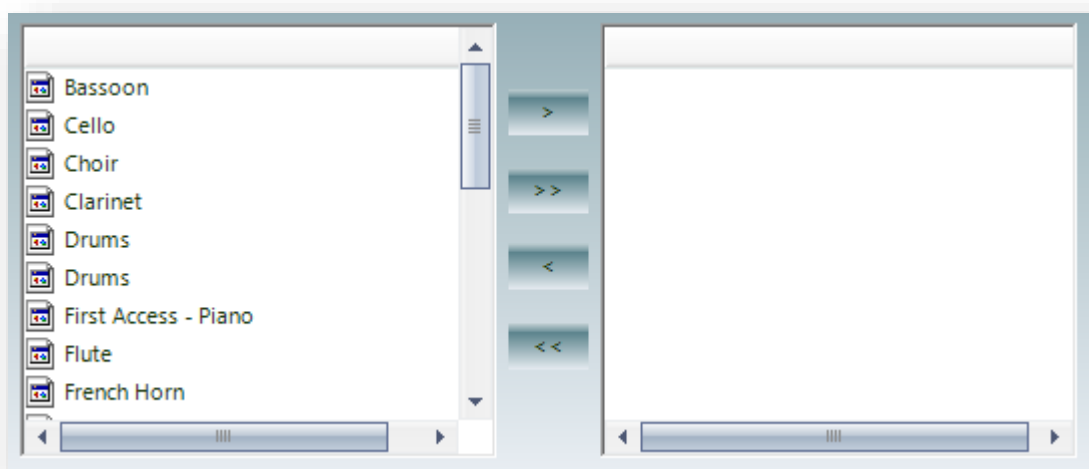
All available Activities are listed on the left. Select the Activity and click **>** to transfer to the right. Click **>>** to select all. To remove a selected Activity click **<** to transfer back. Click **<<** to remove all.

When you have selected your options click **Next**:

Ledger tab
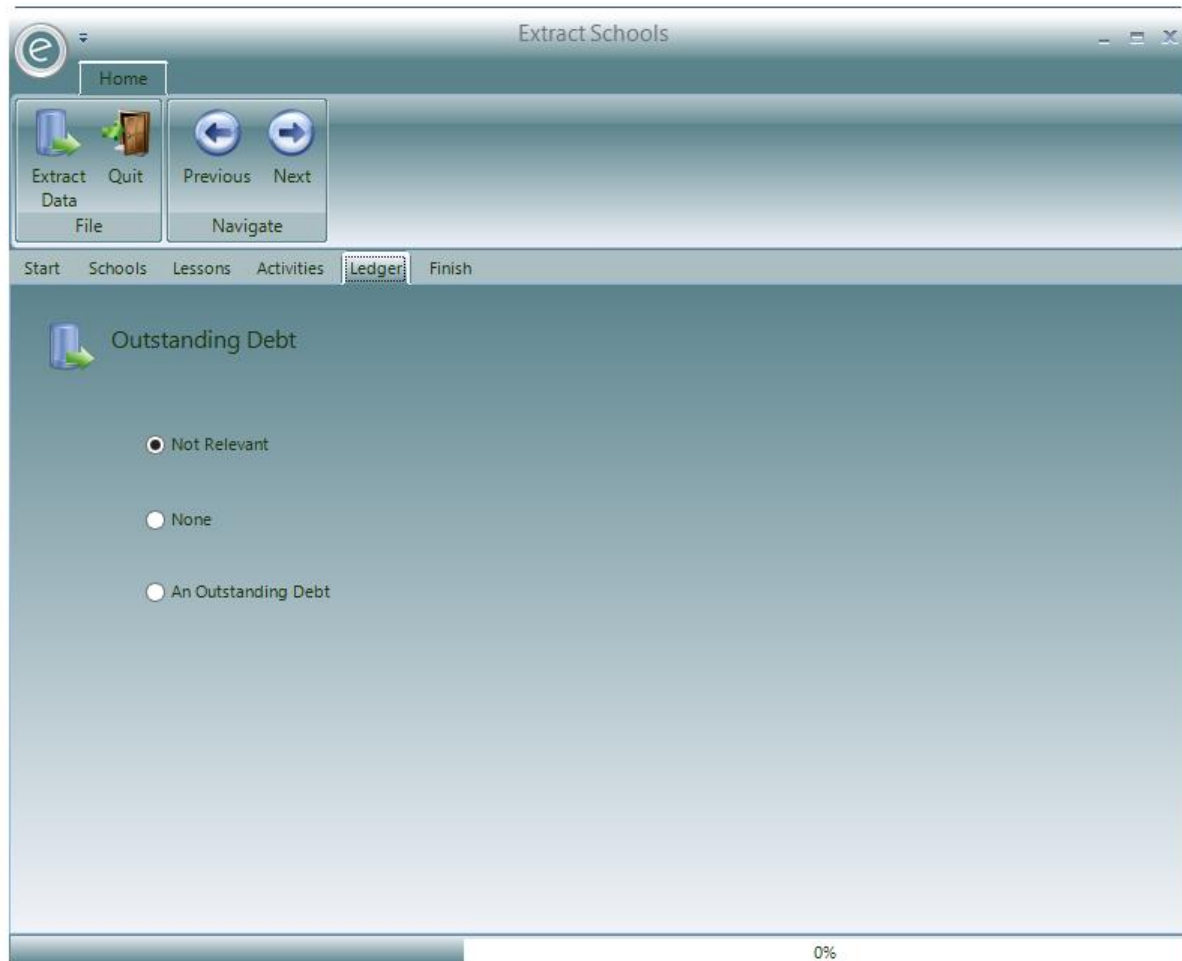
This is the **Ledger** tab. You will be able to specify if the Schools have any outstanding debt. **Not Relevant** is selected as a default.

1. If you select **None**, then only Schools with no outstanding debt will be extracted.

2. If you select **An Outstanding Debt** then only Schools with an outstanding debt will be extracted.

When you have selected your options click **Next**:
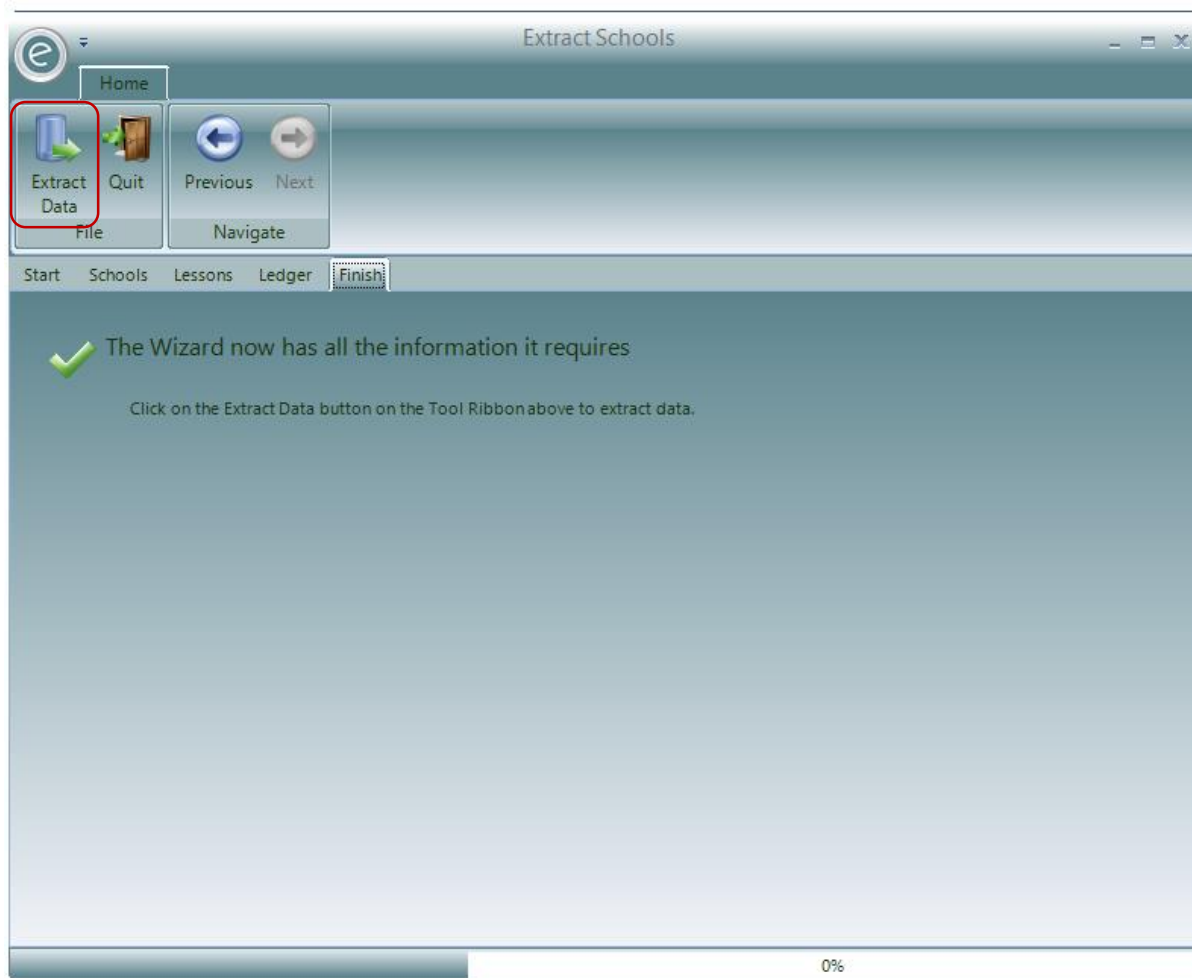
Finish tab

This is the **Finish** tab. The Wizard has finished and you may extract the data by clicking **Extract Data**.

Note: The **Extract Data** button is available to press at any point in this window. It is not necessary to strictly follow the wizard.

An example School extract in Paritor Insight is displayed below:

DFENumber	Σ	FinancialCode	Σ	BillingMethod	Σ	PupilCount	Σ	ContactName	Σ	Email	Σ	WebSiteURL	Σ	LandLine1	Σ	LandLine2	Σ	Mobile1	Σ	Mobile2	Σ	FaxNo	Σ	AddressLine1	Σ
				E		0		Darrington Infant...		darringtoninfan...				01495789423										Darrington Infan...	
				I		233		Elizabeth Primary		elizabethprimar...		www.elizabethp...		01495 886652										91 Braddons Roa...	
				E		0		Copeley Music Sc...		copeleymusic@...				01495632598										Copeley Music S...	
				E		0		Darrington Secon...		darringtonseco...				01495362031										Darrington Seco...	
				E		0		Lakey Green Gra...		lakeygrammargi...				01495362514										Lakey Green Gra...	
				E		0		St Marys Academy		stmarysacadem...		www.stmarysac...		01495 336542										12 Ploughman R...	
				E		0		St Johns Nursery...		stjohnsnursery...				01495201236										St Johns Nursery...	
				E		0		Herrick Junior Sc...		herrickjunior@s...				014952615489										Herrick Junior Sc...	
				E		0		Lartington College		lartington@sch...				01495421536										Lartington College	
				E		0		Herrick Secondar...		herricksecondar...				01495794613										Herrick Secondar...	
				E		0		Westbury Compr...		westburycomp...				0149574125										Westbury Compr...	
				E		159		Darrington Prima...		darringtonprim...				01495362514										Darrington Prima...	
				E		0		Tenbury High Sc...		tenburyhigh@s...		www.tenburyhi...		01495 214759										7 Tenbury Road	
				E		0		Herrick Compreh...		herrickcompreh...				01495302698										Herrick Compreh...	
				E		0		Faircastle Nurser...		faircastlenursery...				01495632514										Faircastle Nurser...	
				E		0		Bright Sparks Mu...		brightsparks@s...				01495314697										Bright Sparks Mu...	
				E		0		Westbury Primar...		westburyprimar...				01495123652										Westbury Primar...	
				E		0		Atherton Academy		athertonacade...				01495179512										Atherton Academy	
				E		0		Websterbridge S...		wesbterbridges...				01495784512										Websterbridge S...	
				E		0		Loxton Communi...		loxtoncollege@...		loxtoncommuni...		01495 778361										Loxton Communi...	
				E		462		Matcham Primary		mathamprimary...				01495856923										Matcham Primar...	
				E		0		St Johns Parva Ca...		stjohnscatholic...				01495785623										St Parva Catholic...	
				E		0		Lower Pendon Ju...		lowerpendonju...				01495253641										Lower Pendon Ju...	
				E		0		Churcham Music...		churchammusic...				01495326251										Churcham Music...	
				E		0		Matcham Gramm...		matchamgram...				01495122345										Matcham Gram...	
				E		0		Faircastle Infant S...		faircastleinfant...				01495147963										Faircastle Infant...	
				E		10000		Ambridge Gram...		ambridgegram...		www.ambridge...		01495 667891										Flepersham House	
				E		0		Faircastle Junior...		faircastlejunior...				01495895645										Faircastle Junior...	
				E		102		Lakey Green Prim...		lakeyprimary@s...				01495362017										Lakey Green Pri...	
				E		0		Lakey Green Gra...		lakeygrammarb...				01495632589										Lakey Green Gra...	
				E		0		Faircastle Second...		faircastlesecond...				01495030201										Faircastle Secon...	
				E		0		Swanton Second...		swanton@scho...				01495001122										Swanton Second...	
				E		137		Websterbridge Pr...		websterbridgep...				01495032615										Websterbrdige P...	
				E		0		Royal Thomas Gr...		royalthomas@s...				01495646567										Royal Thomas Sc...	
				E		0		Small Wings Infa...		littlewings@sch...				01495859623										Small Wings Infa...	
				E		0		Copeley Academy		copeleyacadem...				01495784512										Copeley Academy	
				E		0		Lartington Junior...		lartingtonjunior...				01495784523										Lartington Junior...	

3. Extract Centre Records



To extract Centre Records click:

Centres (Ribbon Menu) > Extract Centres

This will display the *Centre Extract Wizard* below:

Start tab
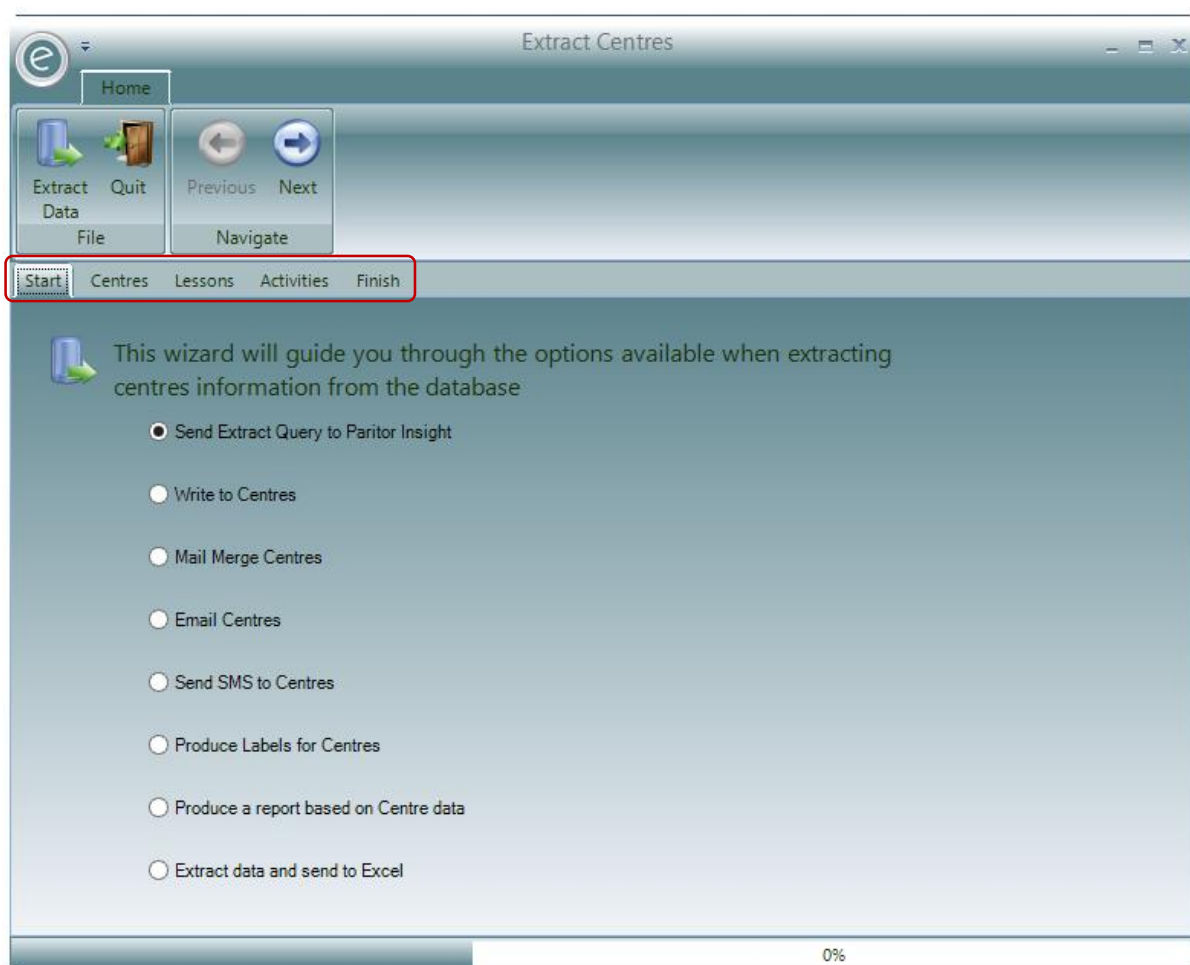
The **red box** highlights the tabs which allow you specify which types of Centre Records to extract. The Extract works using '*and*' filters rather than '*or*' filters. Therefore you can filter the data to see a specific Centres *and* has tuition; not a specific Centre *or* it has tuition.

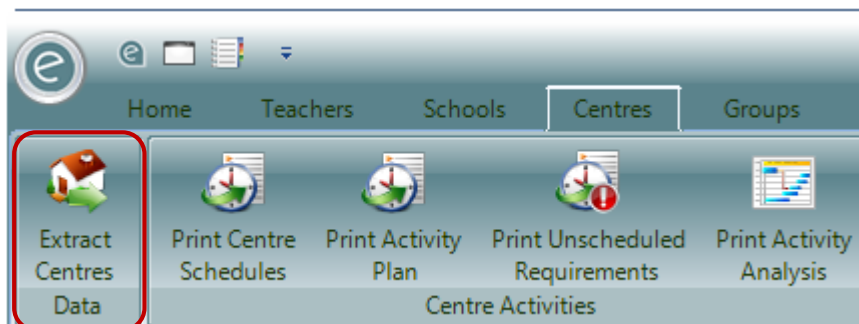The first tab is **Start**. Any other can be selected by clicking it.

Note: For the purposes of this guide, we will recommend to always click **Next** when you have finished selections for a particular tab.

To begin, select where you want to extract the data to. The default selection is to extract to Paritor Insight.

When you have selected your choice click **Next**:

Centres tab
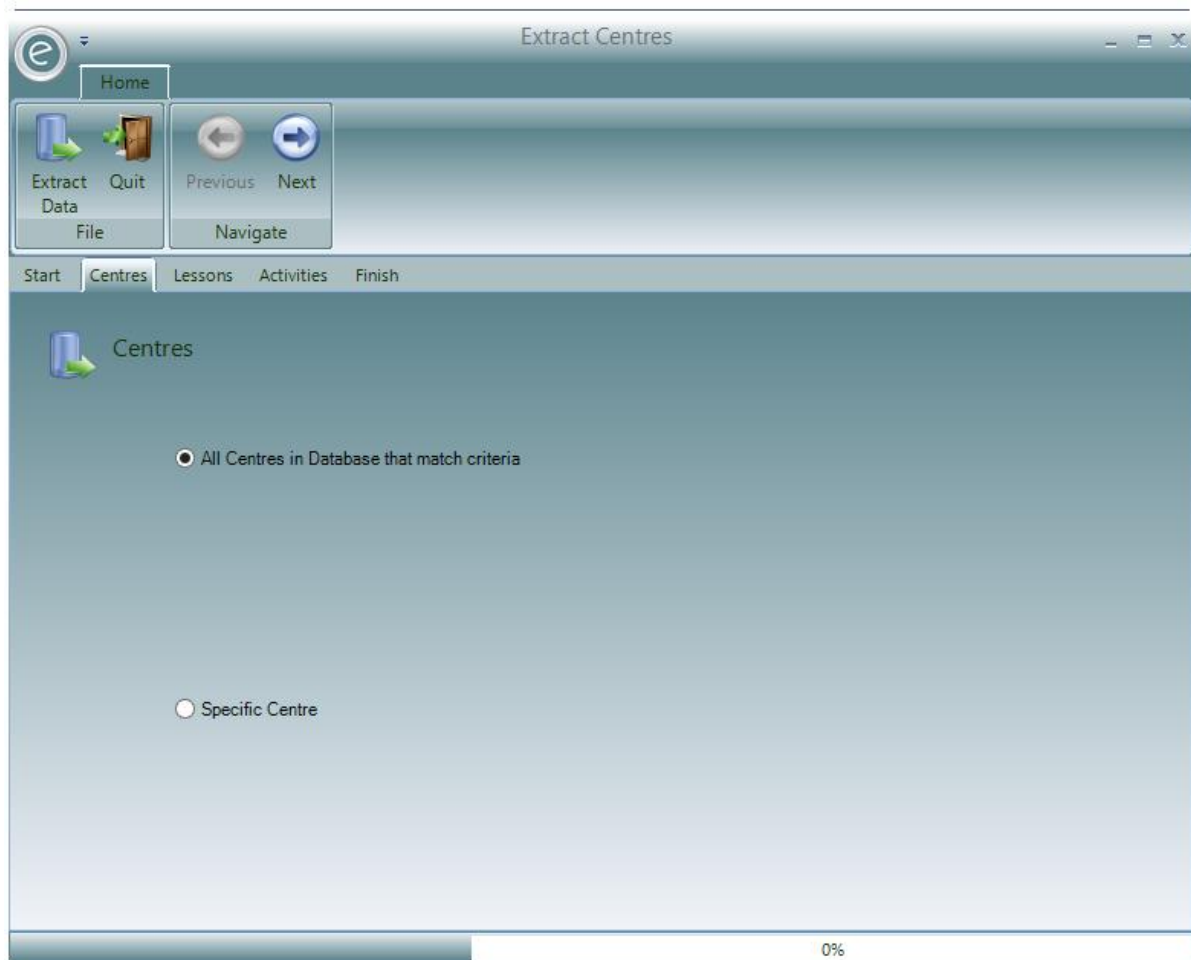
This is the **Centres** tab. You will be able to specify a particular Centre to be extracted. **All Centres in Database match criteria** is selected as a default.

If you select **Specific Centre** you will need to select a Centre.

When you have selected your options click **Next**:

Lessons tab
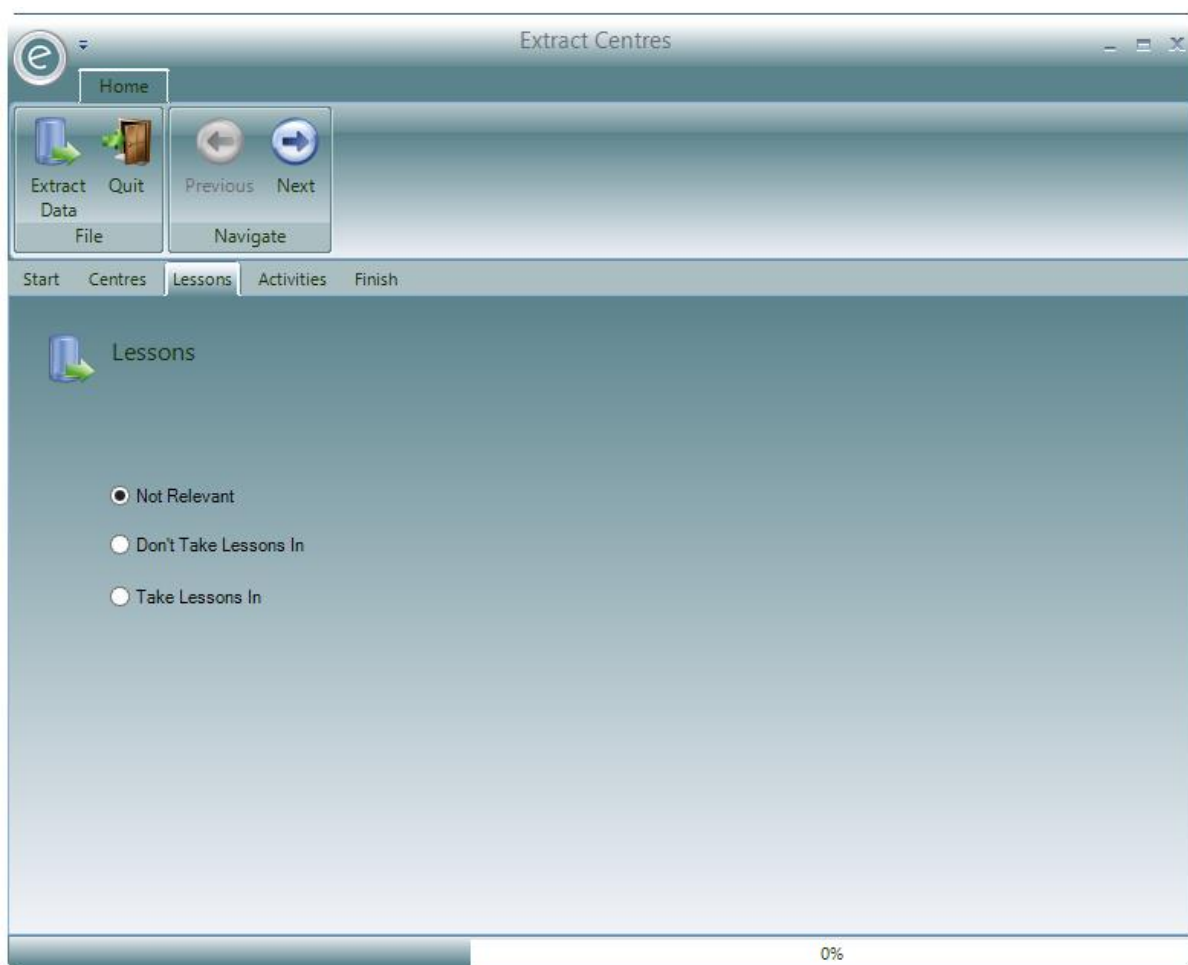
This is the **Lessons** tab. You will be able to specify if the Centres have any Activity Plans scheduled. **Not Relevant** is selected as a default.

1. If you select **Don't Take Lessons In**, the window will allow you choose from these options:

You can select any of the following date range options:

Select Centres Not Taking Lessons during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Centre Records without Activity Plans between the start and finish of the Provision.
Select Centres Not Taking Lessons during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Centre Records without Activity Plans between the two dates
Select Centres Not Taking Lessons on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Centre Records without Activity Plans for the entered date

2. If you select **Take Lessons In**, the window will allow you choose from these options:

You can select any of the following date range options:

Select Centres Taking Lessons during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Centre Records with Activity Plans between the start and finish of the Provision.
Select Centres Taking Lessons during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Centre Records with Activity Plans between the two dates
Select Centres Taking Lessons on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Centre Records with Activity Plans for the entered date

You will also have the option to extract details from the lessons.

When you have selected your options click Next:
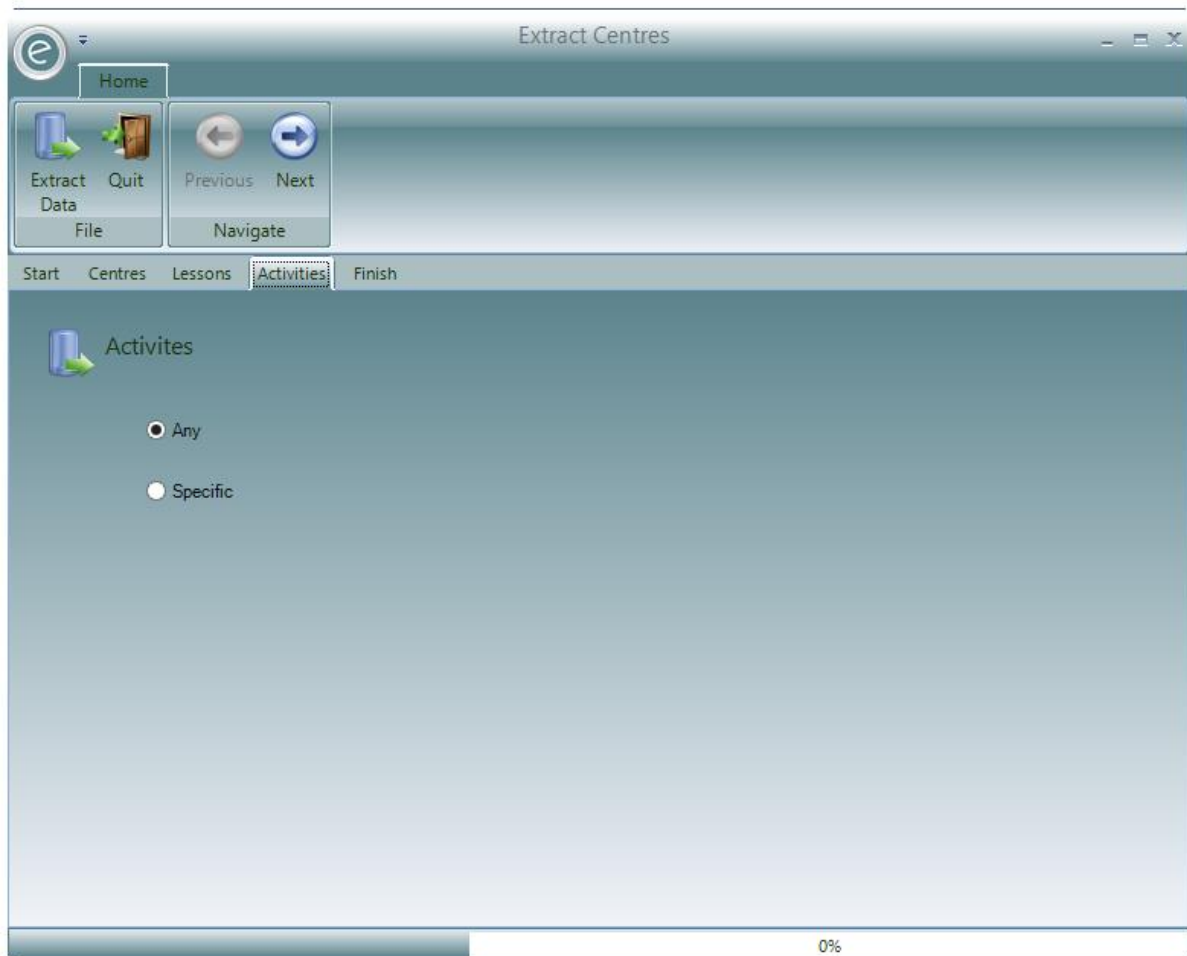
Activities tab

This is **Activities** tab. You will be able to specify the tuition Activities that a Centre hosts. **Any** is selected as a default.

If you selected **Take Lessons In** from the previous tab then you will be able to click **Specific**. If you select this then the table below becomes available:

All available Activities are listed on the left. Select the Activity and click **>** to transfer to the right. Click **>>** to select all. To remove a selected Activity click **<** to transfer back. Click **<<** to remove all.

When you have selected your options click **Next**:

Finish tab

This is the **Finish** tab. The Wizard has finished and you may extract the data by clicking **Extract Data**.

Note: The **Extract Data** button is available to press at any point in this window. It is not necessary to strictly follow the wizard.

An example Centre extract in Paritor Insight is displayed below:

4. Extract Group Records

To extract Group Records click:

Group (Ribbon Menu) > Extract Groups

This will display the *Group Extract Wizard* below:
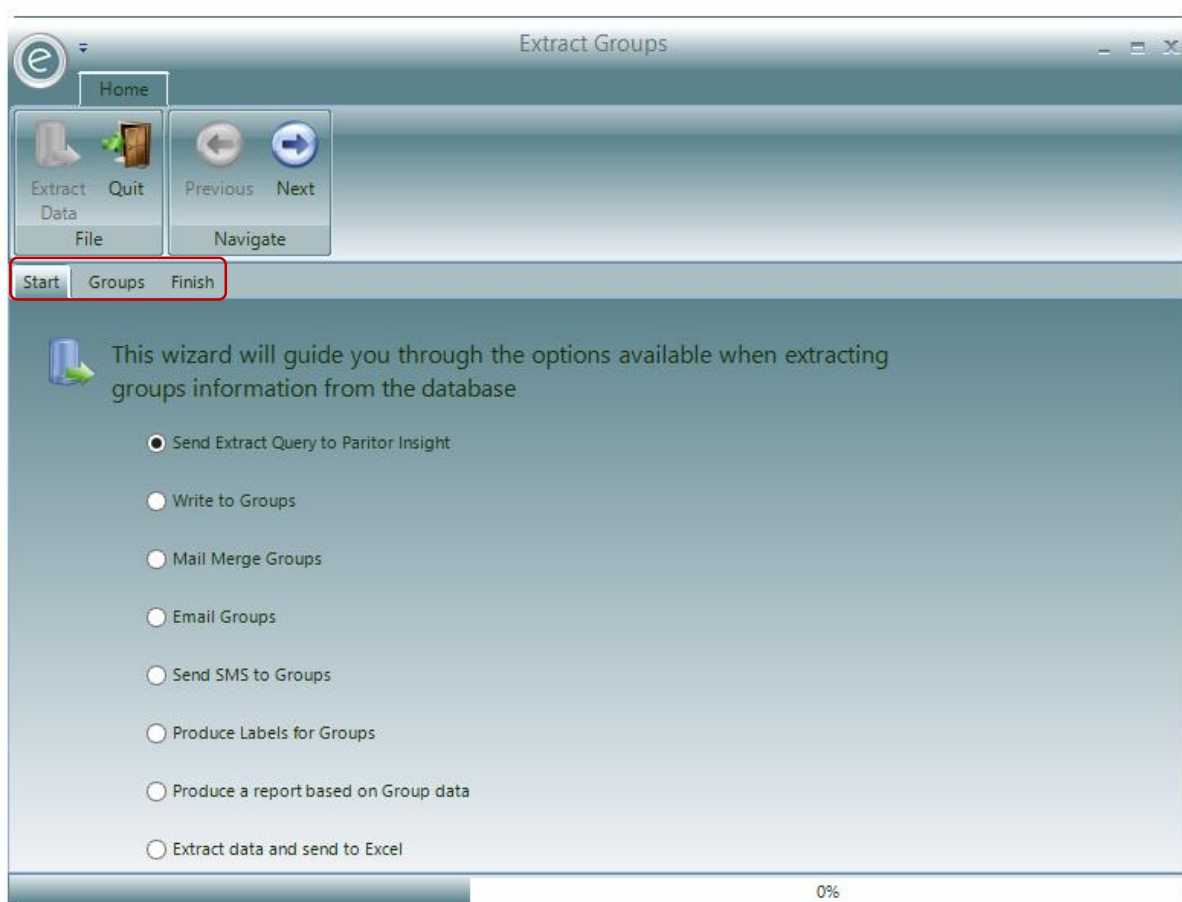
Start tab

The red box highlights the tabs which allow you specify which types of Group Records to extract. The Extract works using 'and' filters rather than 'or' filters.

The first tab is Start. Any other can be selected by clicking it.

Note: For the purposes of this guide, we will recommend to always click Next when you have finished selections for a particular tab.

To begin, select where you want to extract the data to. The default selection is to extract to Paritor Insight.

When you have selected your choice click Next:

Groups tab
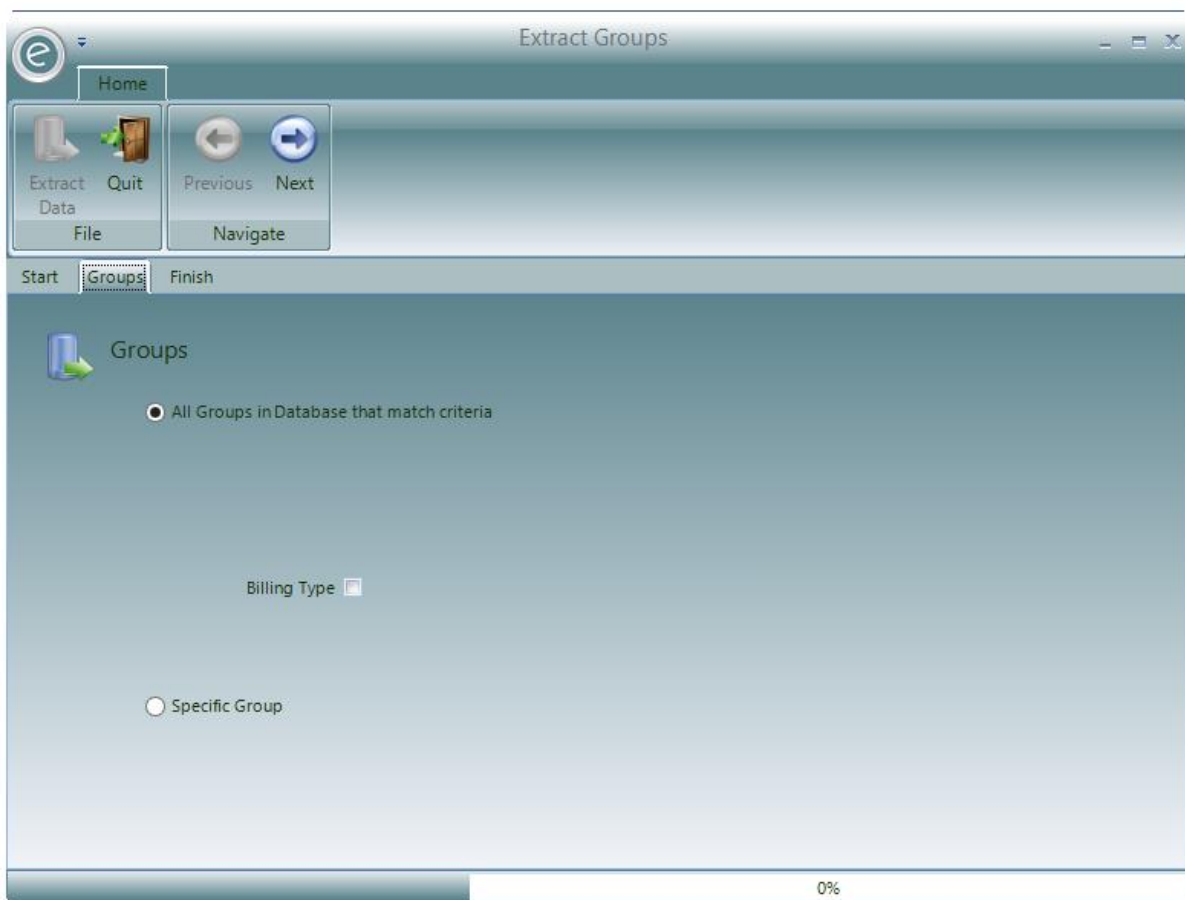
This is the **Groups** tab. You will be able to specify a particular Group to be extracted. **All Groups in Database match criteria** is selected as a default. You can optionally select a Billing Type from this.

If you select **Specific Group** you will need to select a Group.

When you have selected your options click **Next**:
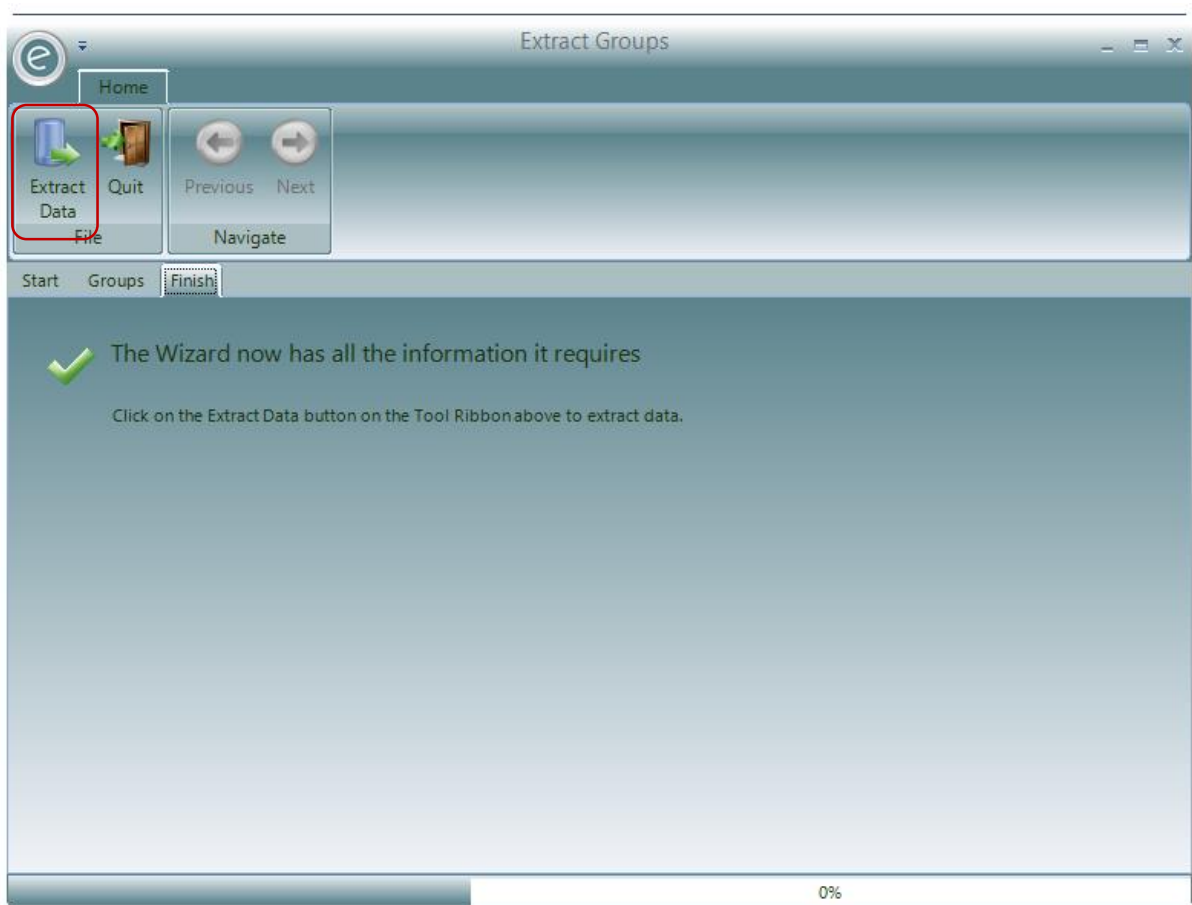
Finish tab

This is the **Finish** tab. The Wizard has finished and you may extract the data by clicking **Extract Data**.

Note: The **Extract Data** button is available to press at any point in this window. It is not necessary to strictly follow the wizard.

An example Group extract in Paritor Insight is displayed below:

5. Extract Pupil Records

▶ [Watch the Video Tutorial here](#)

To extract Pupil Records click:

Pupils (Ribbon Menu) > Extract Pupils

This will display the *Pupil Extract Wizard* below:
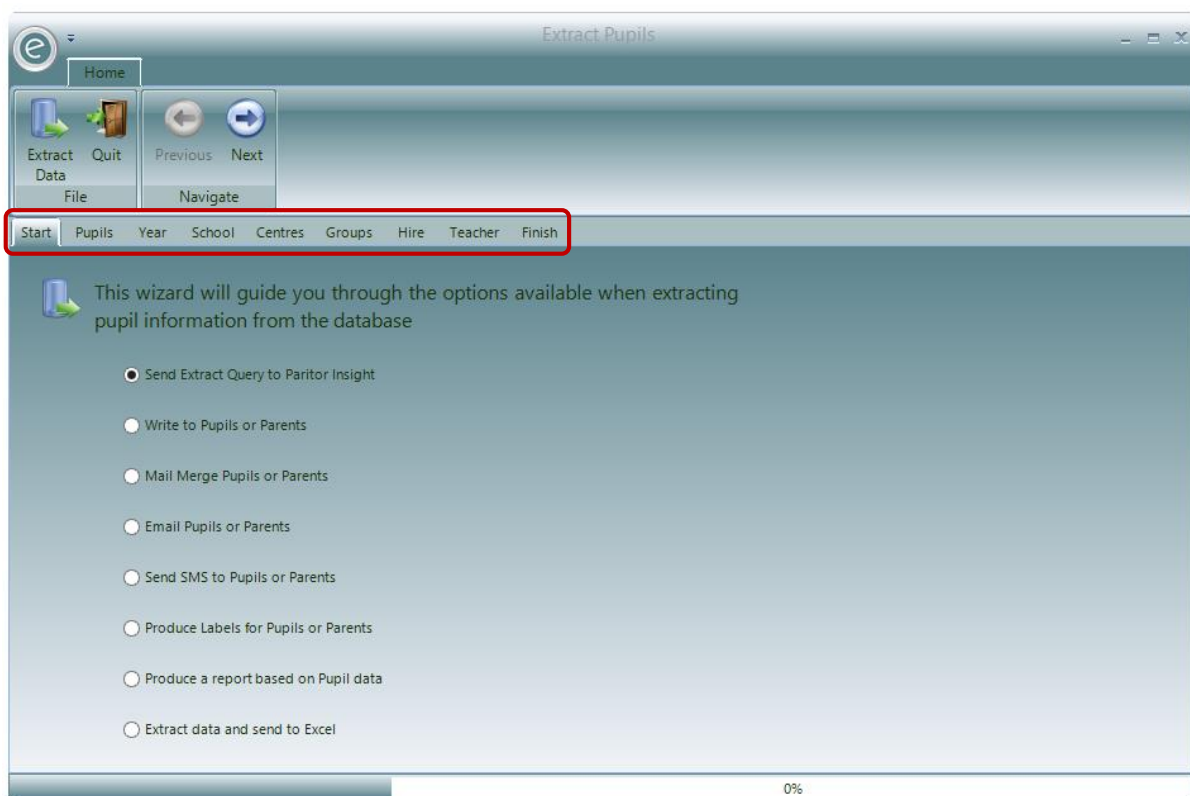
Start tab

The **red box** highlights the tabs which allow you specify which types of Pupil Records to extract. The first tab is **Start**. The Extract works using '*and*' filters rather than '*or*' filters. Therefore you can filter the data to see which Pupils attend School lessons *and* are members of a particular Group; not Pupils who attend School lessons *or* are members of a particular Group.

Any tab other can be selected by clicking it.

Note: For the purposes of this guide, we will recommend to always click **Next** when you have finished selections for a particular tab.

To begin, select where you want to extract the data to. The default selection is to extract to Paritor Insight.

When you have selected your choice click **Next**:

Pupils tab
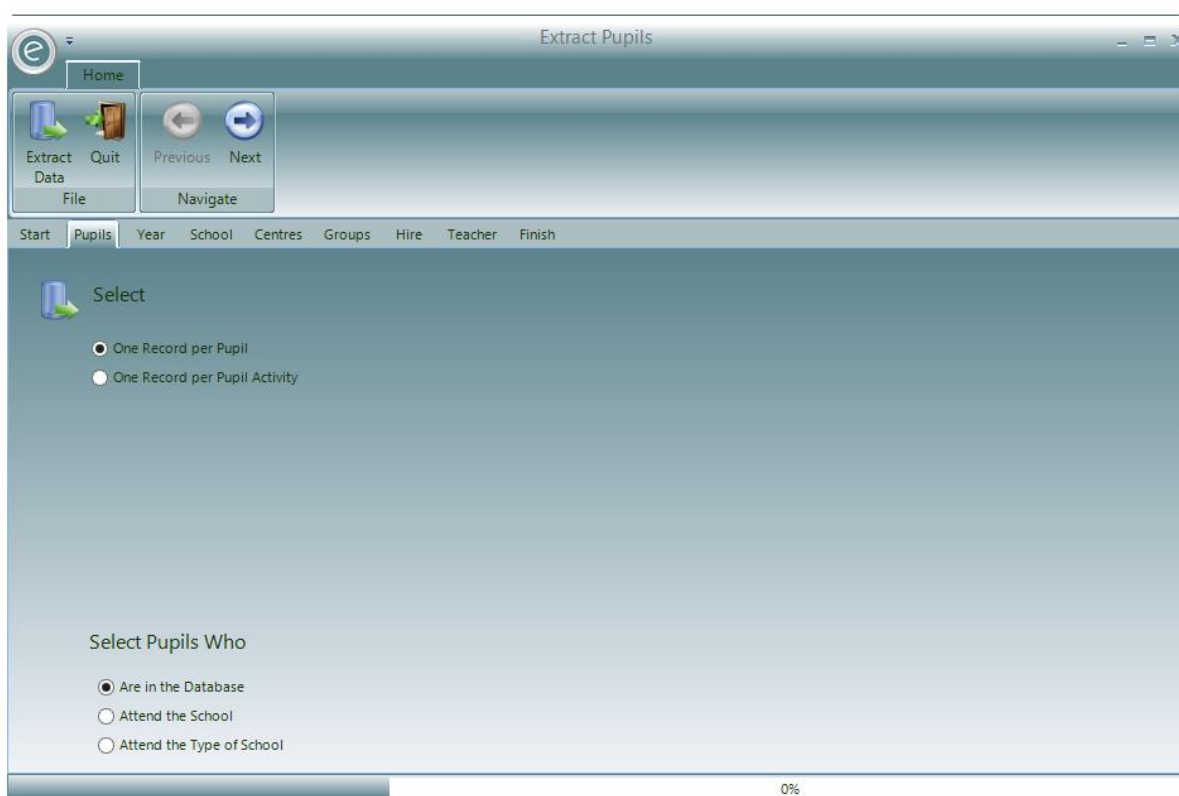
This is the **Pupils** tab. Here you can select the type of Record you to extract regarding Pupils. There are two options:

One Record per Pupil	*Default selection* – All subsequent criteria in your extract query will only extract one record for each Pupil. Useful for contact purposes
One Record per Pupil Activity	If you want to *analyse the different Activities* the Pupils are enrolled in, select this. When this is selected there are many more options that arise, which are explained below

On the bottom right you have the option to specify a selection of Pupils Records returned in the extract. The options are:

Are in the Database	*Default selection* – All Pupil Records that are in the database and match the search criteria will be extracted
Attend the School	Only Pupil Records within the chosen Schools will be eligible for data extraction
Attend the Type of School	Only Pupil Records within Schools of the chosen School Type will be eligible for data extraction

One Record per Pupil Activity

There are many options that appear in the window once **One Record per Pupil Activity** is selected in order to cater for a range of search criteria.

In the **red box** you can select the *type of activity* you want to see Records for including **Instrument Hires** and Pupils in **Waiting Lists**.

In the **green box** you can select any of the following *date range* options:

… Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Pupil Records in the chosen activity between the start and finish of the Provision.
… Specified Date Range	Enter a **From** and **To date**. The extract will include all Pupil Records in the chosen activity between the two dates
… Specific Date	Enter a specific date in **As At Date**. The extract will include all Pupil Records in the chosen activity for the entered date

In the **blue box** you can choose specify if the Pupil Records are *Starters or Leavers* in the activity for the given *date range*. **Not Relevant** is selected as a default.

Note: This only applies when **Schools Lessons, Centre Lessons, School & Centre Lessons** or **Group Membership** has been previously selected.

In the **orange box,** you can select the *specific Schools, Centres or Groups* that the Pupils attend. This follows from the previous activity selection.

Note: This only applies when **Schools Lessons**, **Centre Lessons** or **Group Membership** has been previously selected.

Include All ... is selected as a default. If you select **Include Specified ...** then all the available Schools, Centres or Groups will be listed with tickboxes next to each to each:

For example if Ambridge Grammar School and Atherton Academy are selected then Pupils in Ambridge Grammar Schools *or* Atherton Academy will be extracted.

When you have selected your options click **Next**:

Year tab

This is the **Year** tab. You will be able to specify the School Years that the Pupils are in. **Any School Year** is selected as a default.

Selecting any other option will show the Academic Year field for you to select the Academic Year for when the search applies:

If you select **Equal to School Year**, **Younger than School Year** or **Older than School Year** then an additional field will appear for you to specific the Year in question.

When you have selected your options click **Next**:

School tab
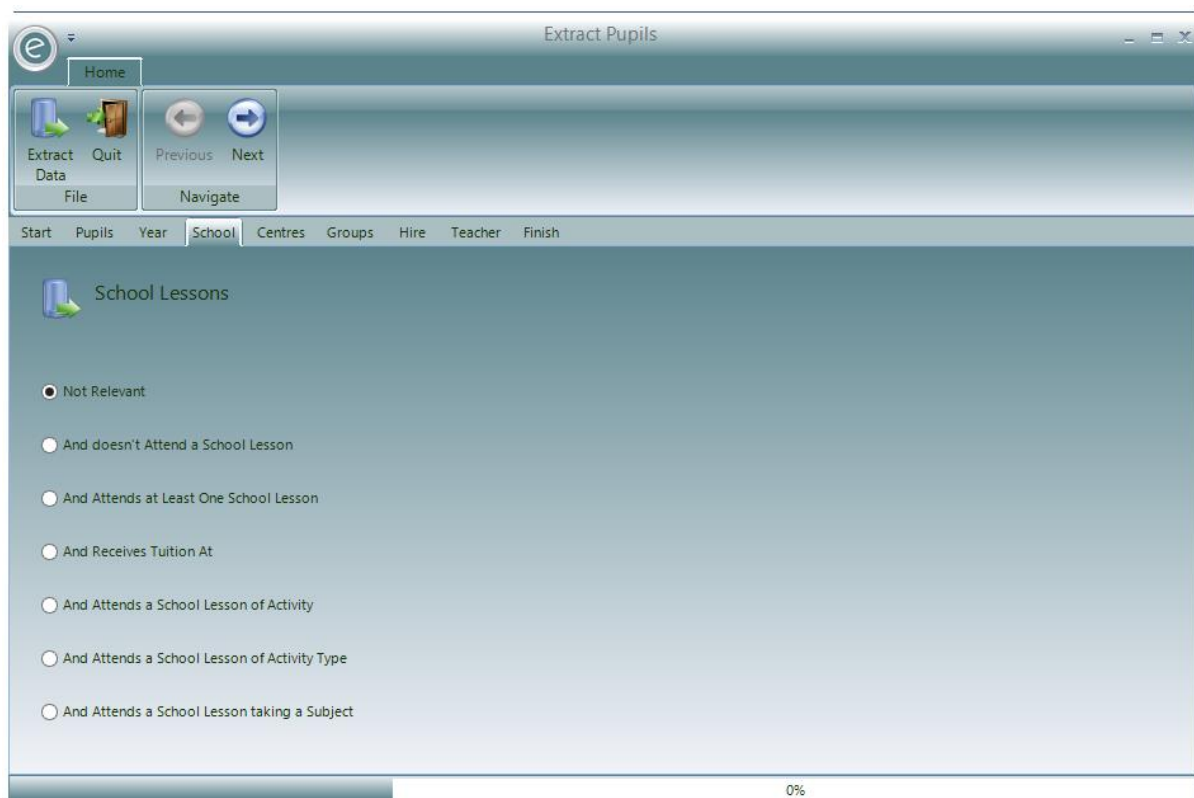
This is the **Schools** tab. You will be able to specify if the Pupils are enrolled on any School Activity Plans. **Not Relevant** is selected as a default.

1. If you select **And doesn't Attend a School Lesson** it will extract Pupils with no School tuition. The window will allow you choose from these options:

You can select any of the following date range options:

Select Pupils Not in lessons during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Pupils not in School Activity Plans between the start and finish of the Provision.
Select Pupils Not in lessons during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Pupils not in School Activity Plans between the two dates

Select Pupils Not in lessons on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Pupils not in School Activity Plans for the entered date

2. If you select **And Attends at Least One School Lesson** it will extract all Pupil Records with School tuition. The window will allow you choose from these options:

You can select any of the following date range options:

Select Pupils in lessons during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Pupils in School Activity Plans between the start and finish of the Provision.
Select Pupils in lessons during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Pupils in School Activity Plans between the two dates
Select Pupils in lessons on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Pupil in School Activity Plans for the entered date

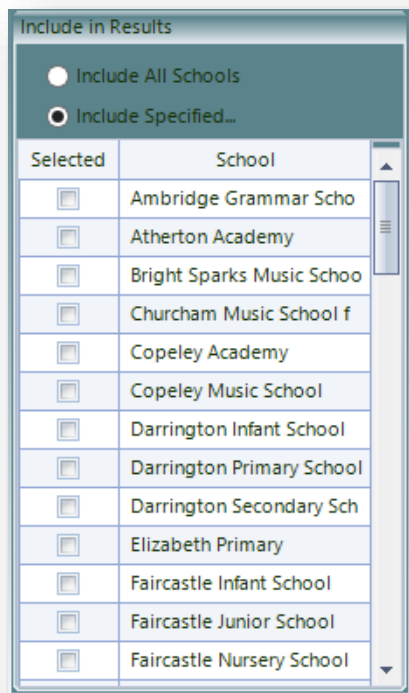**Note:** All subsequent options in this window will ask for you to specify this date range.

3. If you select **And Receives Tuition At** a field will appear for you to specify a *School*. The wizard will extract all Pupils with tuition at this School.

4. If you select **And Attends a School Lesson of Activity** a field will appear for you to specify an *Activity*. The wizard will extract all Pupils with tuition for this Activity.

5. If you select **And Attends a School Lesson of Activity Type** a field will appear for you to specify an *Activity Type*. The wizard will extract all Pupils with tuition for this Activity Type.

6. If you select **And Attends a School Lesson taking a Subject** a field will appear for you to specify an *Subject*. The wizard will extract all Pupils with tuition for this Subject.

When you have selected your options click **Next**:

Centres tab

This is the Centres tab. You will be able to specify if the Pupils are enrolled on any Centre Activity Plans. **Not Relevant** is selected as a default.

7. If you select **And doesn't Attend a Centre** it will extract Pupils with no Centre tuition. The window will allow you choose from these options:

You can select any of the following date range options:

Select Pupils Not in lessons during a Specified Period	Select a **Provision Type**, **Academic Year** and a **Provision Period**. The extract will include all Pupils not in Centre Activity Plans between the start and finish of the Provision.
Select Pupils Not in lessons during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Pupils not in Centre Activity Plans between the two dates

Select Pupils Not in lessons on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Pupils not in Centre Activity Plans for the entered date

8. If you select **And Attends at Least One Centre** it will extract all Pupil Records with Centre tuition. The window will allow you choose from these options:

You can select any of the following date range options:

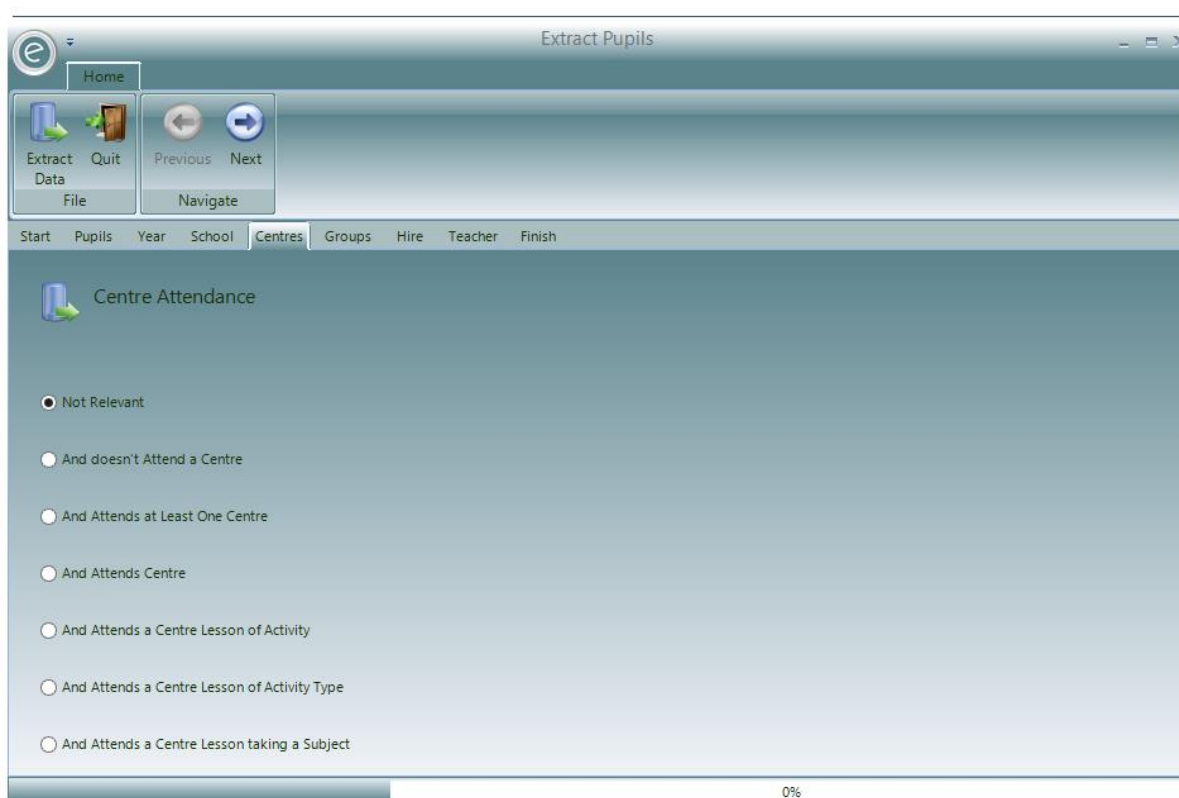| Select Pupils in lessons during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Pupils in Centre Activity Plans between the start and finish of the Provision.
Select Pupils in lessons during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Pupils in Centre Activity Plans between the two dates
Select Pupils in lessons on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Pupil in Centre Activity Plans for the entered date

Note: All subsequent options in this window will ask for you to specify this date range.

9. If you select **And Attends Centre** a field will appear for you to specify a *Centre*. The wizard will extract all Pupils with tuition at this Centre.

10. If you select **And Attends a Centre Lesson of Activity** a field will appear for you to specify an *Activity*. The wizard will extract all Pupils with tuition for this Activity.

11. If you select **And Attends a Centre Lesson of Activity Type** a field will appear for you to specify an *Activity Type*. The wizard will extract all Pupils with tuition for this Activity Type.

12. If you select **And Attends a Centre Lesson taking a Subject** a field will appear for you to specify an *Subject*. The wizard will extract all Pupils with tuition for this Subject.
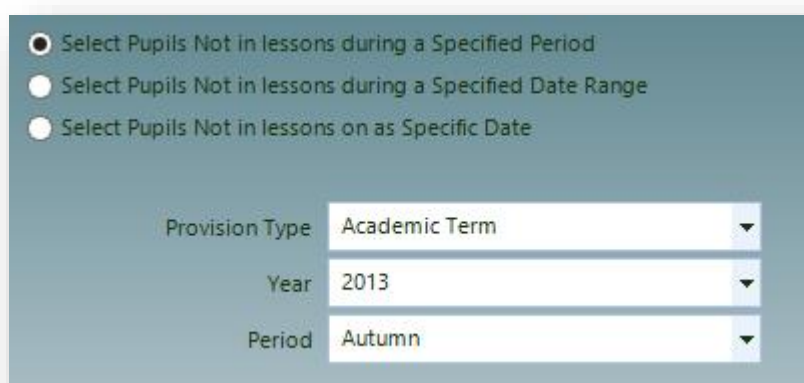
When you have selected your options click **Next**:

Groups tab

This is the Groups tab. You will be to specify if the Pupils you are interested in deliver any lessons. Not Relevant is selected as a default.

1. If you select And doesn't Attend a Group, the window will allow you choose from these options:

You can select any of the following date range options:

Select Pupils Not in Groups during a Specified Period	Select a Provision Type, Academic Year and a Provision Period. The extract will include all Pupil Records without Group membership between the start and finish of the Provision.
Select Pupils Not in Groups during a Specified Date Range	Enter a From and To date. The extract will include all Pupil Records without Group membership between the two dates

| Select Pupils Not in Groups on a Specific Date | Enter a specific date in **As At Date**. The extract will include all Pupil Records without Group membership for the entered date |

2. If you select **And Attends at Least One Group**, the window will allow you choose from these options:

You can select any of the following date range options:

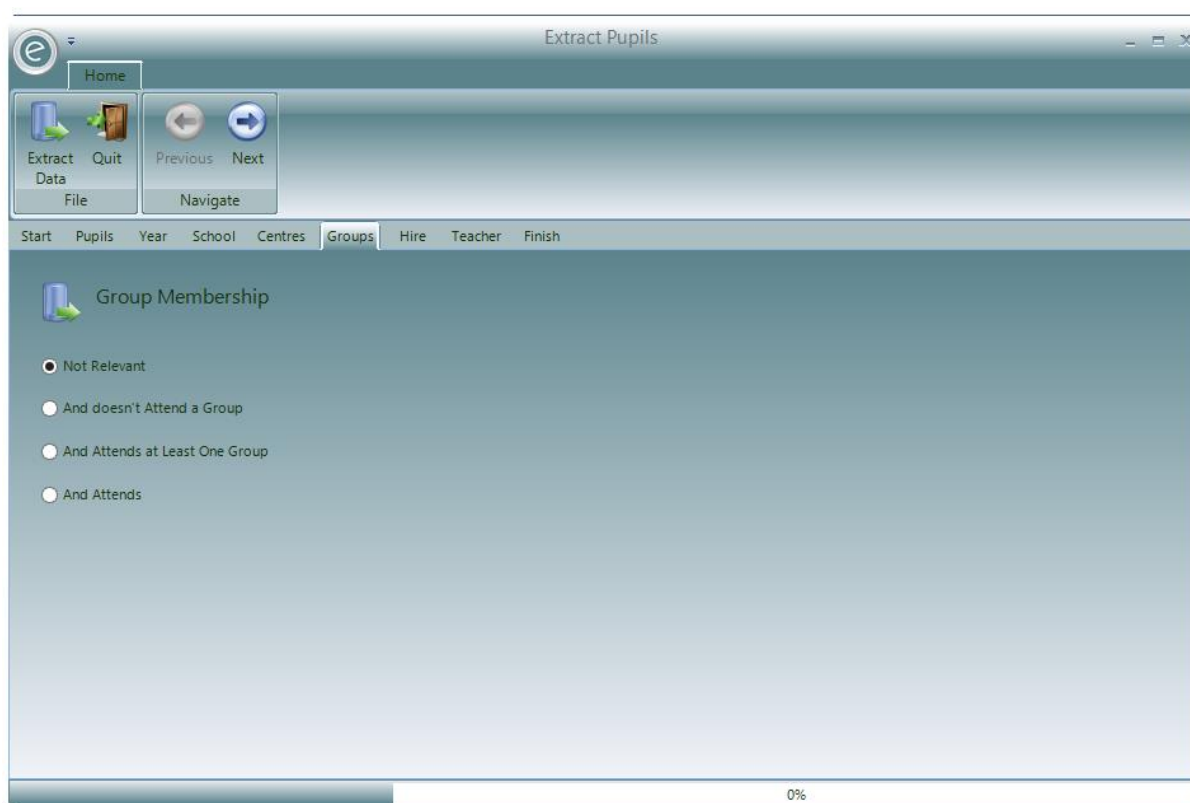| Select Pupils in Groups during a Specified Period | Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Pupil Records with Group membership between the start and finish of the Provision. |
| Select Pupils in Groups during a Specified Date Range | Enter a **From** and **To date**. The extract will include all Pupil Records with Group membership between the two dates |
| Select Pupils in Groups on a Specific Date | Enter a specific date in **As At Date**. The extract will include all Pupil Records with Group membership for the entered date |

3. If you select **And Attends**, the window will allow you choose from these options:

You can select any of the following date range options:

Select Pupils in Groups during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Pupil Records with Group membership between the start and finish of the Provision.
Select Pupils in Groups during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Pupil Records with Group membership between the two dates
Select Pupils in Groups on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Pupil Records with Group membership for the entered date

Additionally you can *select the specific Groups* that the Pupil attends. All available Groups are listed on the left. Select the Group(s) and click **>** to transfer to the right. Click **>>** to select all. To remove a selected Group click **<** to transfer back. Click **<<** to remove all.

Note: Selecting the Groups will not extract the Groups themselves, only the Pupils associated with them.

When you have selected your options click **Next**:

Hire tab

This is the **Hire** tab. You will be to specify if the Pupils you are interested in have any current loans or hires of Resources. **Not Relevant** is selected as a default.

1. If you select **And don't Hire a Resource**, the window will allow you choose from these options:

You can select any of the following date range options:

Select Pupils Not Hiring during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Pupil Records without hired Resources between the start and finish of the Provision.
Select Pupils Not Hiring during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Pupil Records without hired Resources between the two dates

Select Pupils Not Hiring on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Pupil Records without hired Resources for the entered date

2. If you select **And Hire at Least One Resource**, the window will allow you choose from these options:

You can select any of the following date range options:

Select Pupils Hiring during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Pupil Records with hired Resources between the start and finish of the Provision.
Select Pupils Hiring during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Pupil Records with hired Resources between the two dates
Select Pupils Hiring on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Pupil Records with hired Resources for the entered date

3. If you select **And Attends**, the window will allow you choose the previous date range and additionally specify a *Resource Group*.

When you have selected your options click **Next**:

Teacher tab
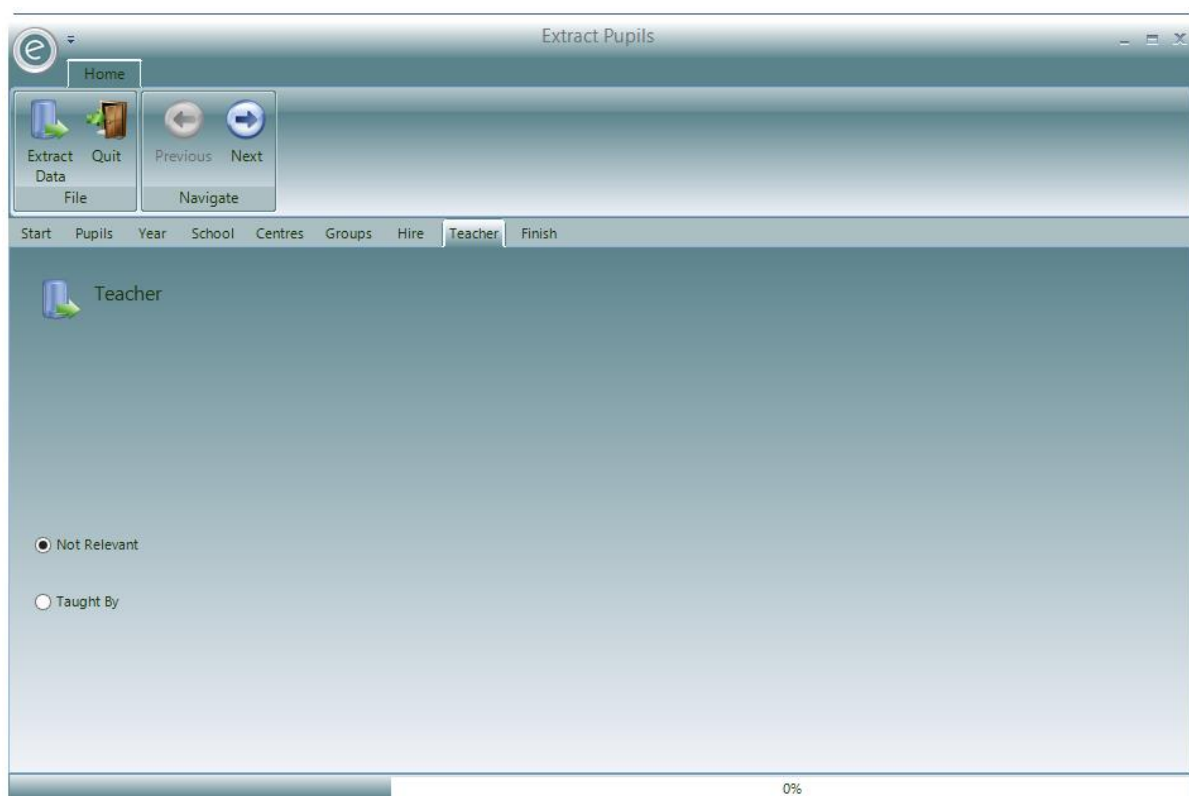
This is the **Teacher** tab. You will be to specify a particular Teacher that gave tuition the Pupils you are interested in. **Not Relevant** is selected as a default.

When **Taught By** is selected, the window will allow you to specify the Teacher and the following date range options:

You can:

Select Pupils taught during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include all Pupil Records in tuition with the chosen Teacher between the start and finish of the Provision.
Select Pupils taught during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Pupil Records in tuition with the chosen Teacher between the two dates
Select Pupils taught on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Pupil Records in tuition with the chosen Teacher for the entered date

When you have selected your options click **Next**:

Finish tab

This is the **Finish** tab. The Wizard has finished and you may extract the data by clicking **Extract Data**.

Note: The **Extract Data** button is available to press at any point in this window. It is not necessary to strictly follow the wizard.

An example Pupil extract in Paritor Insight is displayed below:

6. Extract Resource Records

To extract Resource Records click:

Resources (Ribbon Menu) > Extract Resources

This will display the *Resource Extract Wizard* below:

Start tab
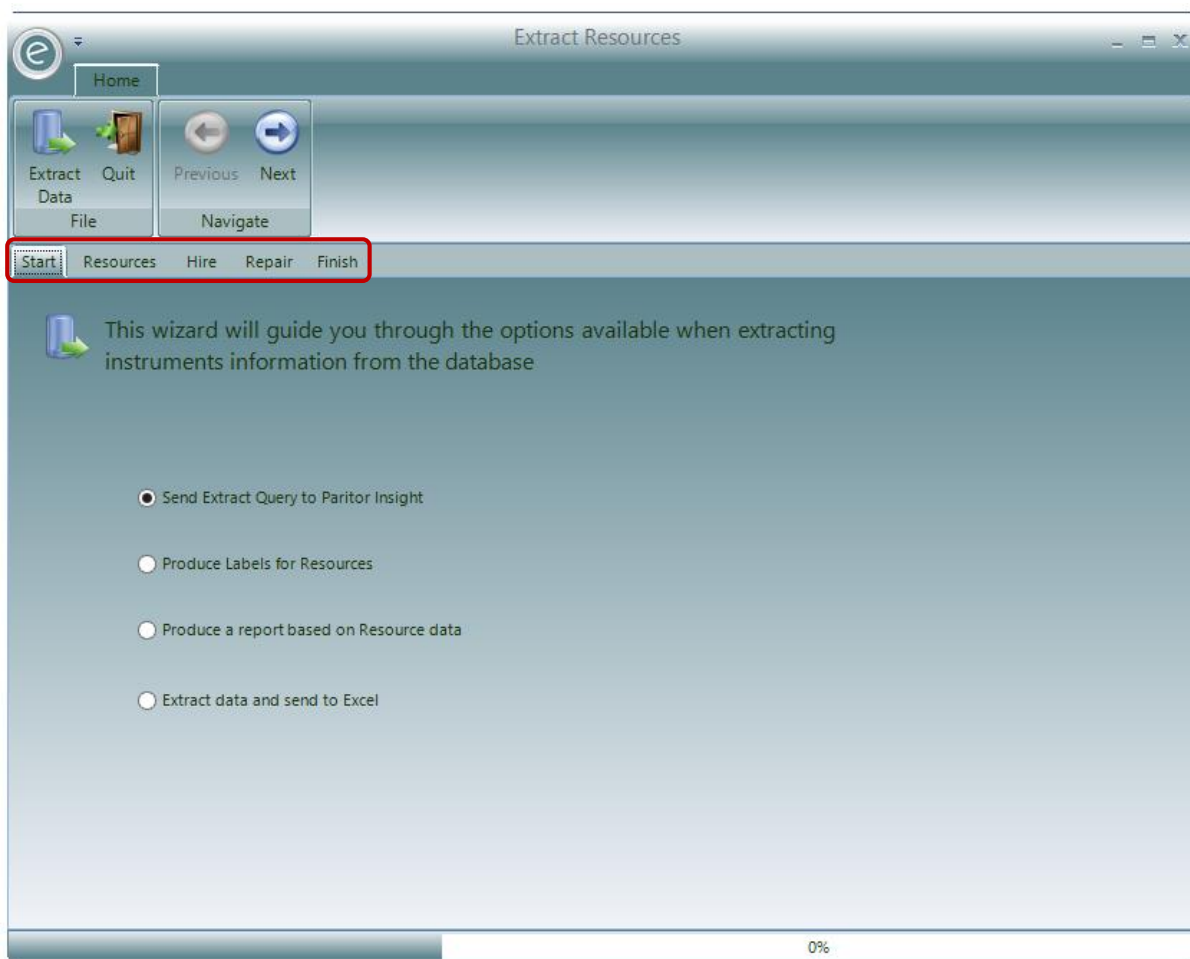
The **red box** highlights the tabs which allow you specify which types of Resources Records to extract. The Extract works using '*and*' filters rather than '*or*' filters. Therefore you can filter the data to see Resources from a particular Resource Category *and* on hire; not Resources from a particular Resource Category *or* on hire.

The first tab is **Start**. Any other can be selected by clicking it.

Note: For the purposes of this guide, we will recommend to always click **Next** when you have finished selections for a particular tab.

To begin, select where you want to extract the data to. The default selection is to extract to Paritor Insight.

When you have selected your choice click **Next**:

Resources tab
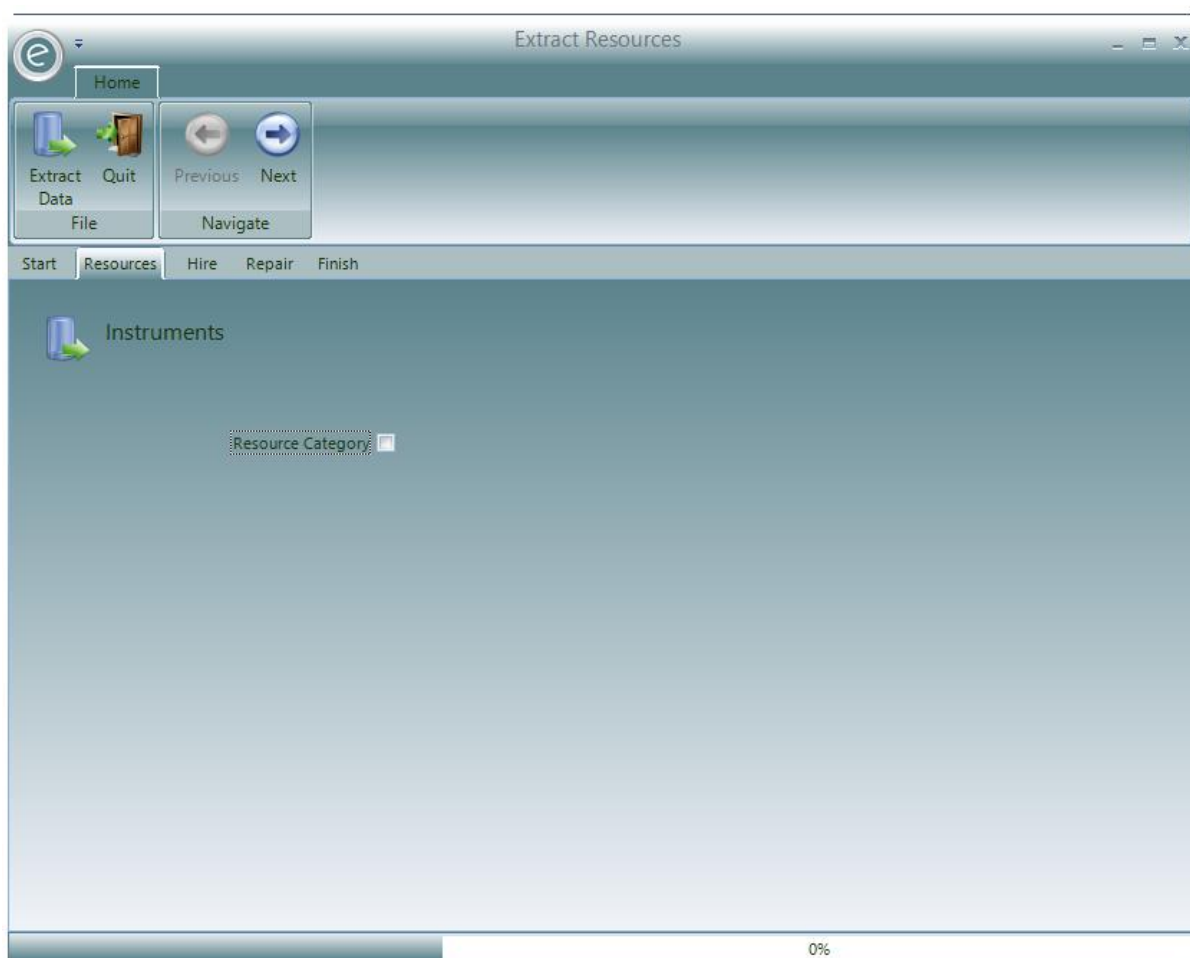
This is the **Resources** tab. You will be to specify a particular Teacher that gave tuition the Pupils you are interested in.

You will be able to specify the **Resource Category, Resource Group** and **Resource Type** successively. For example you begin by specifying the *Resource Category*, then you can continue to filter the selection by choosing a *Resource Group* and so on.

When you have made your selection click **Next**.

Hire tab
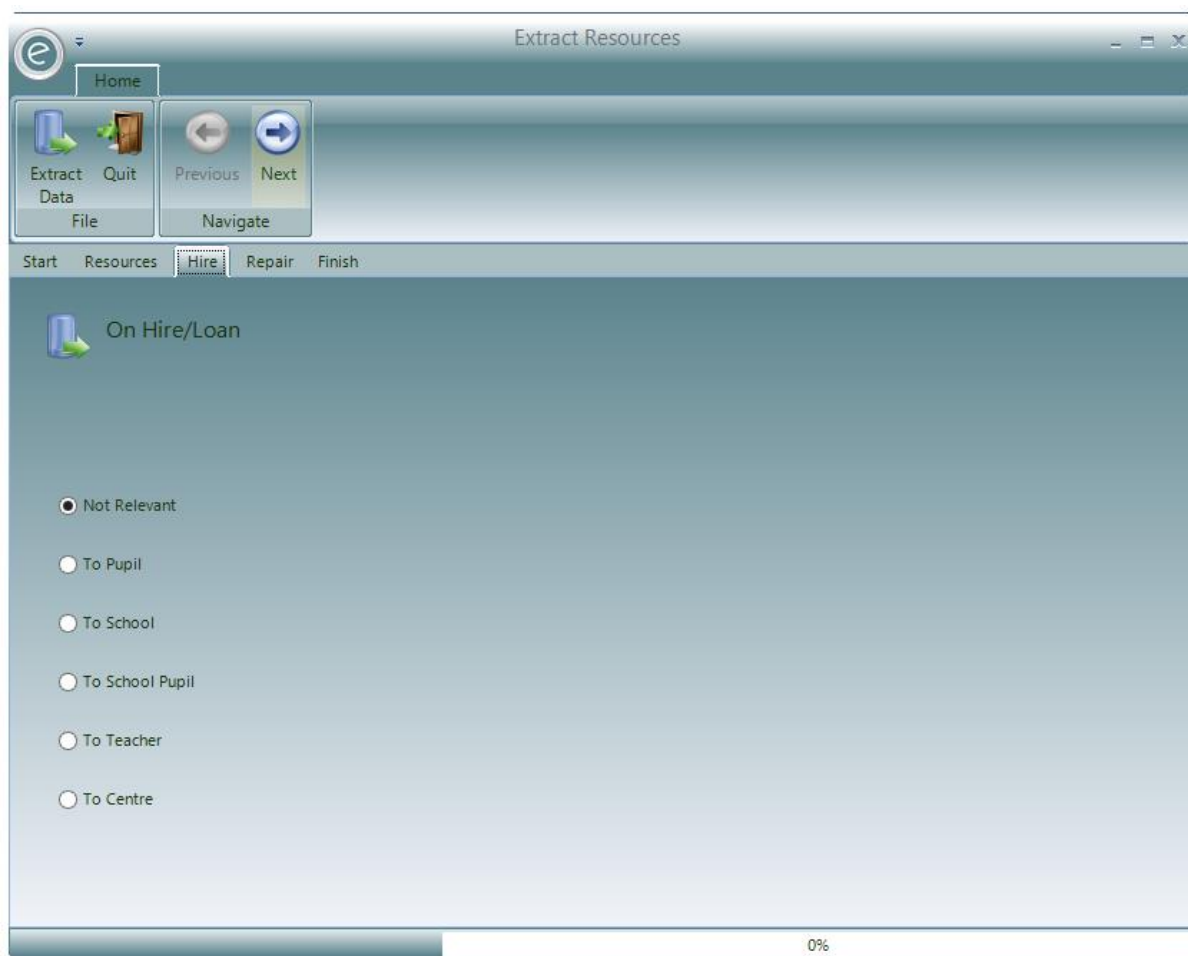
This is the **Hire** tab. You will be to specify if the Pupils you are interested in have any current loans or hires of Resources. **Not Relevant** is selected as a default.

For all other selections you will need to specify a date range:

You can:

Select instruments on hire during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period.** The extract will include all Resource Records on hire between the start and finish of the Provision.
Select instruments on hire during a Specified Date Range	Enter a **From** and **To date**. The extract will include all Resource Records on hire between the two dates
Select instruments on hire on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Resource Records on hire for the entered date

1. If you select **To Pupil** only the above date range will appear. All Resources on hire to Pupils will be extracted

2. If you select **To School** a field will appear for you to specify a *School*. The wizard will extract all Resource Records on hire to that School

3. If you select **To School Pupil** a field will appear for you to specify a *School*. The wizard will extract all Resource Records on a School Pupil hire

4. If you select **To Teacher** a field will appear for you to specify a *Teacher*. The wizard will extract all Resource Records on a Teacher hire

5. If you select **To Centre** a field will appear for you to specify a *Centre*. The wizard will extract all Resource Records on a Centre hire.

When you have made your selection click **Next**.

Repair tab
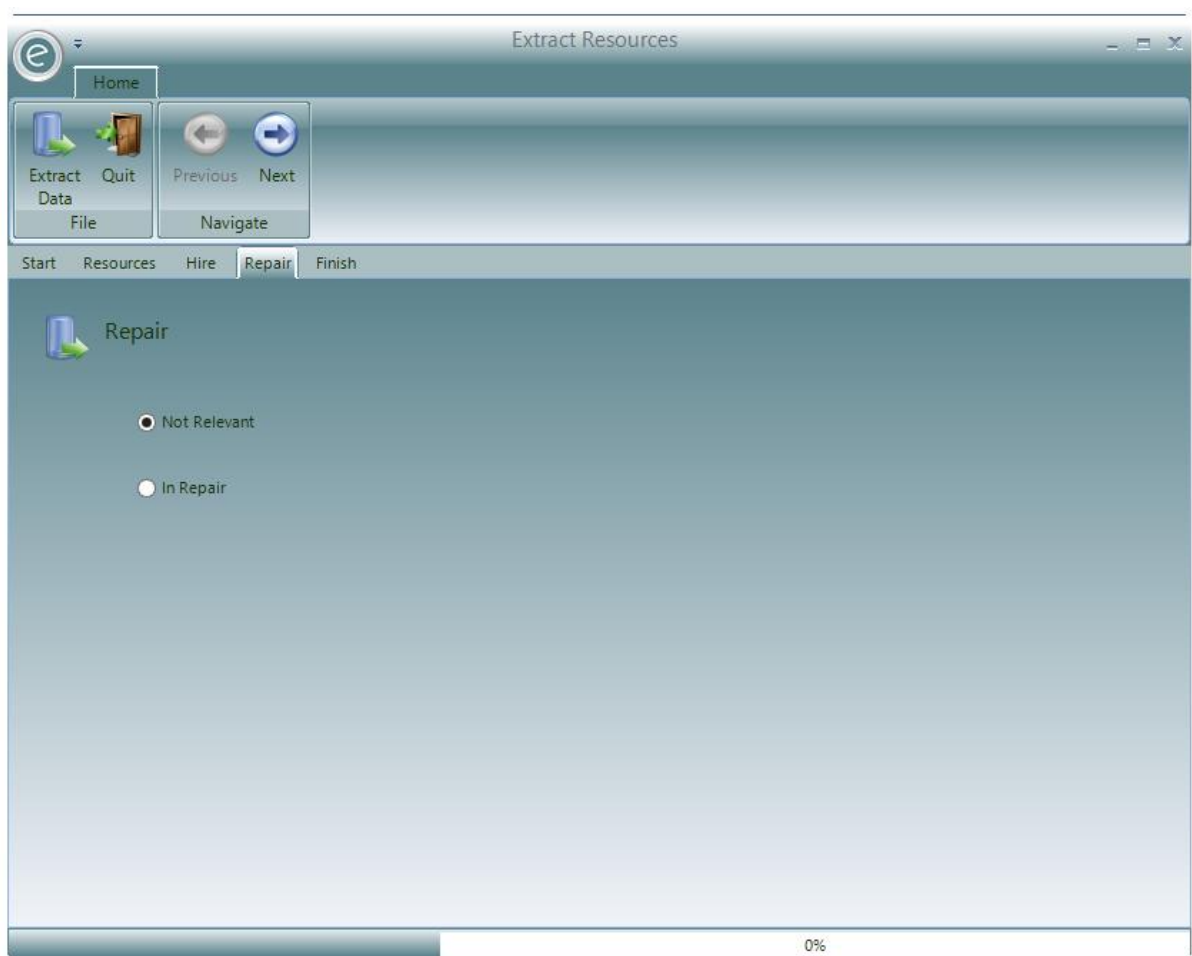
This is the **Repair** tab. You will be to specify the Resources are on in Repair. **Not Relevant** is selected as a default.

If you select **In Repair**, the window will allow you choose these data range options:

You can select any of the following date range options:

Select instruments in repair during a Specified Period	Select a **Provision Type, Academic Year** and a **Provision Period**. The extract will include Resources in repair between the start and finish of the Provision.

Select instruments in repair during a Specified Date Range	Enter a **From** and **To date**. The extract will include Resources in repair between the two dates
Select instruments in repair on a Specific Date	Enter a specific date in **As At Date**. The extract will include all Resources in repair for the entered date
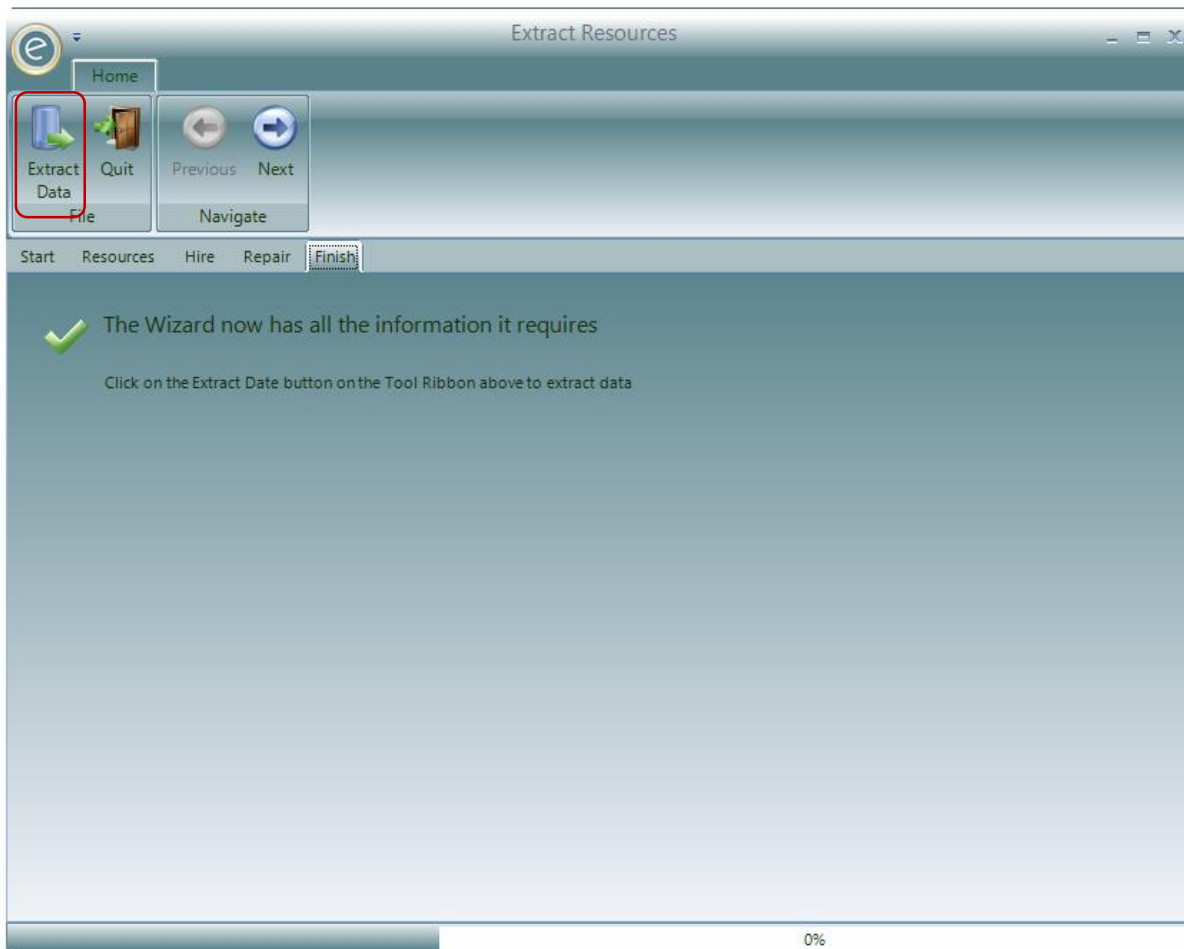
When you have made your selection, click **Next**.

Finish tab

This is the **Finish** tab. The Wizard has finished and you may extract the data by clicking **Extract Data**.

Note: The **Extract Data** button is available to press at any point in this window. It is not necessary to strictly follow the wizard.

An example Resource extract in Paritor Insight is displayed below:

SerialNo	Σ	RefID	Σ	PurchaseDate	Σ	Model	Σ	Make	Σ	CurrentValue	Σ	DisposedOfReason	Σ	DisposedOfDate	Σ	Notes	Σ
		4		01 01 2012		1		1		1000.0000		U					
		15		01/01/2012		1		1		400.0000		U					
		8		01/01/2012		1		1		1000.0000		U					
		16		01/01/2012		1		1		400.0000		U					
		30		01/01/2012		1		1		250.0000		U					
		20		01/01/2010		1		1		1000.0000		U					
		9		01/01/2012		1		1		500.0000		U					
		28		01/01/2012		1		1		250.0000		U					
		26		01/01/2012		1		1		250.0000		U					
		12		01/01/2012		1		1		500.0000		U					
		13		01/01/2012		1		1		500.0000		U					
		1		01/01/2012		1		1		1000.0000		U					
		6		01/01/2012		1		1		1000.0000		U					
		19		01/01/2010		1		1		1000.0000		U					
		5		01/01/2012		1		1		1000.0000		U					
		2		01/01/2012		1		1		1000.0000		U					
		3		01/01/2012		1		1		1000.0000		U					
		10		01/01/2012		1		1		500.0000		U					
		25		01/01/2012		1		1		250.0000		U					

7. Extract Debtor Records
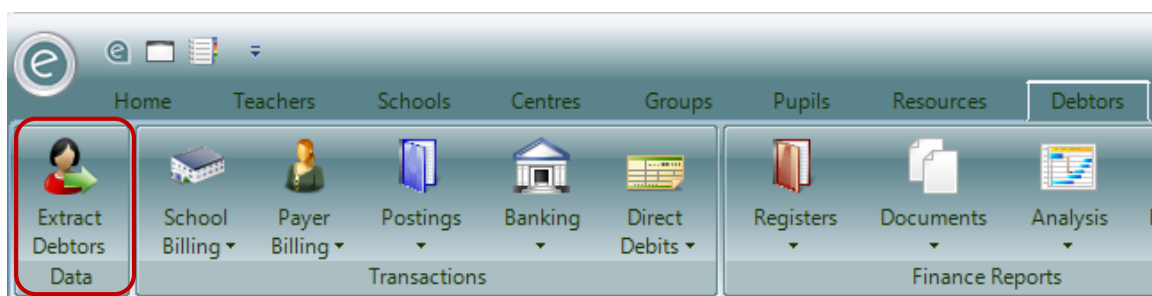
To extract Debtor Records click:

Debtors (Ribbon Menu) > Extract Debtors

This will display the *Debtor Extract Wizard* below:

Start tab
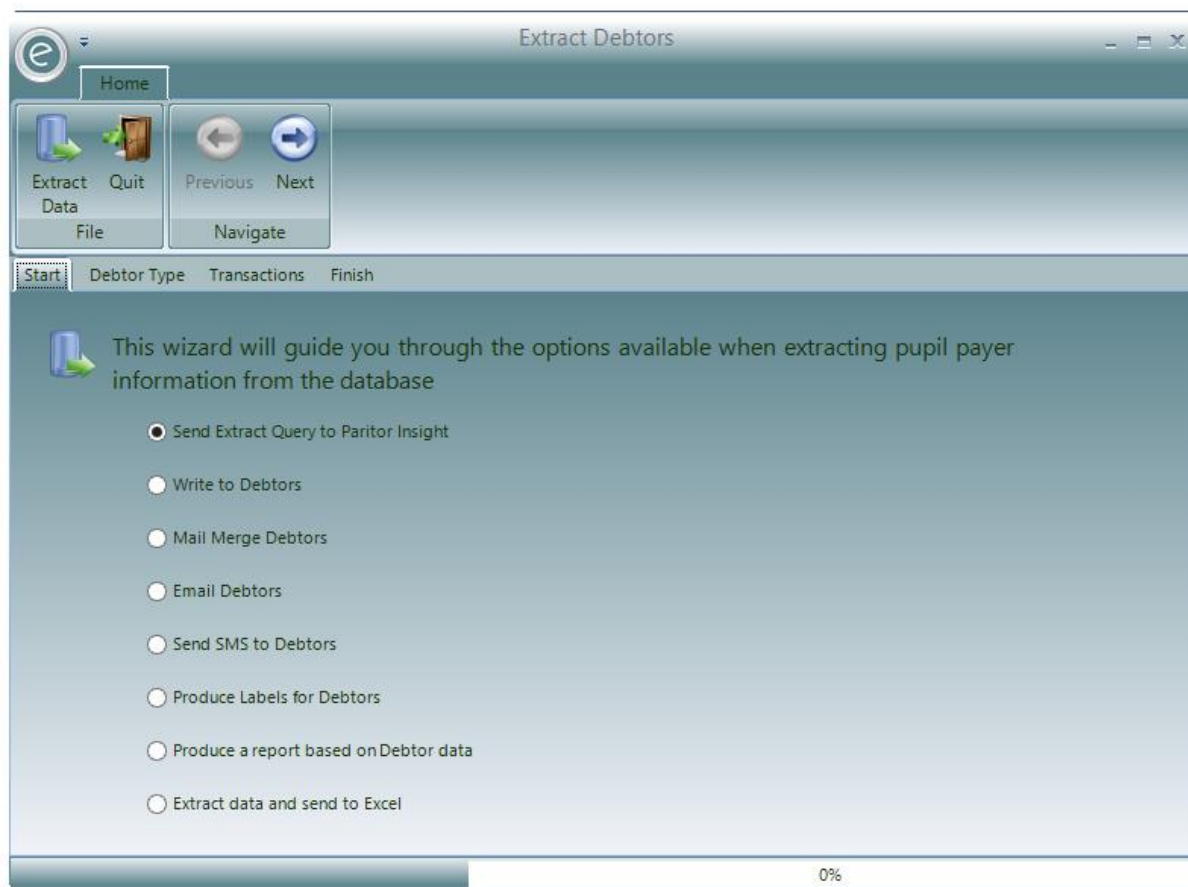
The red box highlights the tabs which allow you specify which types of Debtor Records to extract. The Extract works using '*and*' filters rather than '*or*' filters. Therefore you can filter the data to see which Debtors are Schools *and* have outstanding debt; not Debtors that are Schools o *or* those with outstanding debt.

The first tab is Start. Any other can be selected by clicking it.

Note: For the purposes of this guide, we will recommend to always click Next when you have finished selections for a particular tab.

To begin, select where you want to extract the data to. The default selection is to extract to Paritor Insight.

When you have selected your choice click Next:

Debtor Type tab
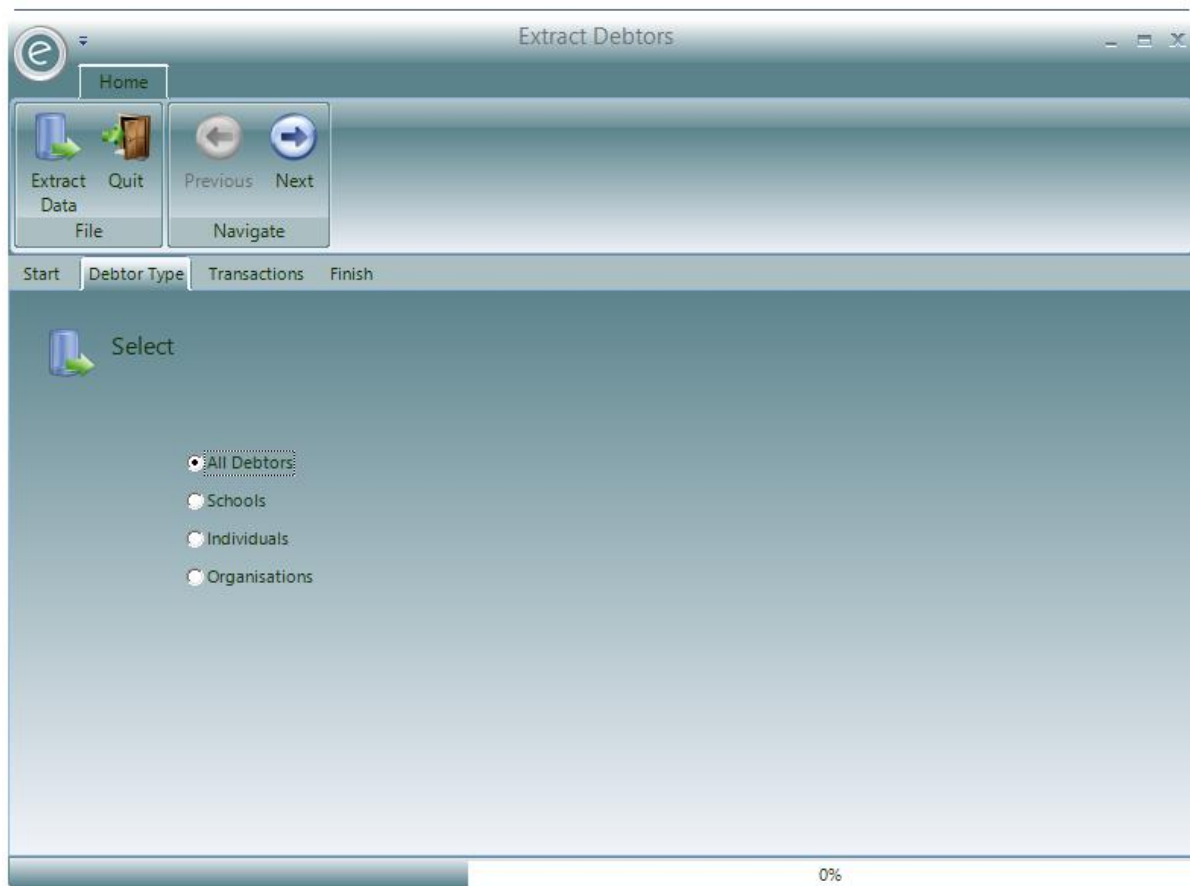
This is the **Debtor Type** tab. Here you can select the type of Debtor Record to extract. **All Debtors** is selected as a default.

You will be able to select either **Schools**, **Individuals** or **Organisations**. If you select Individuals you will also be able to specify if they are *Direct Debit* payers.

Once you have made your selection, click **Next**.

Transactions tab
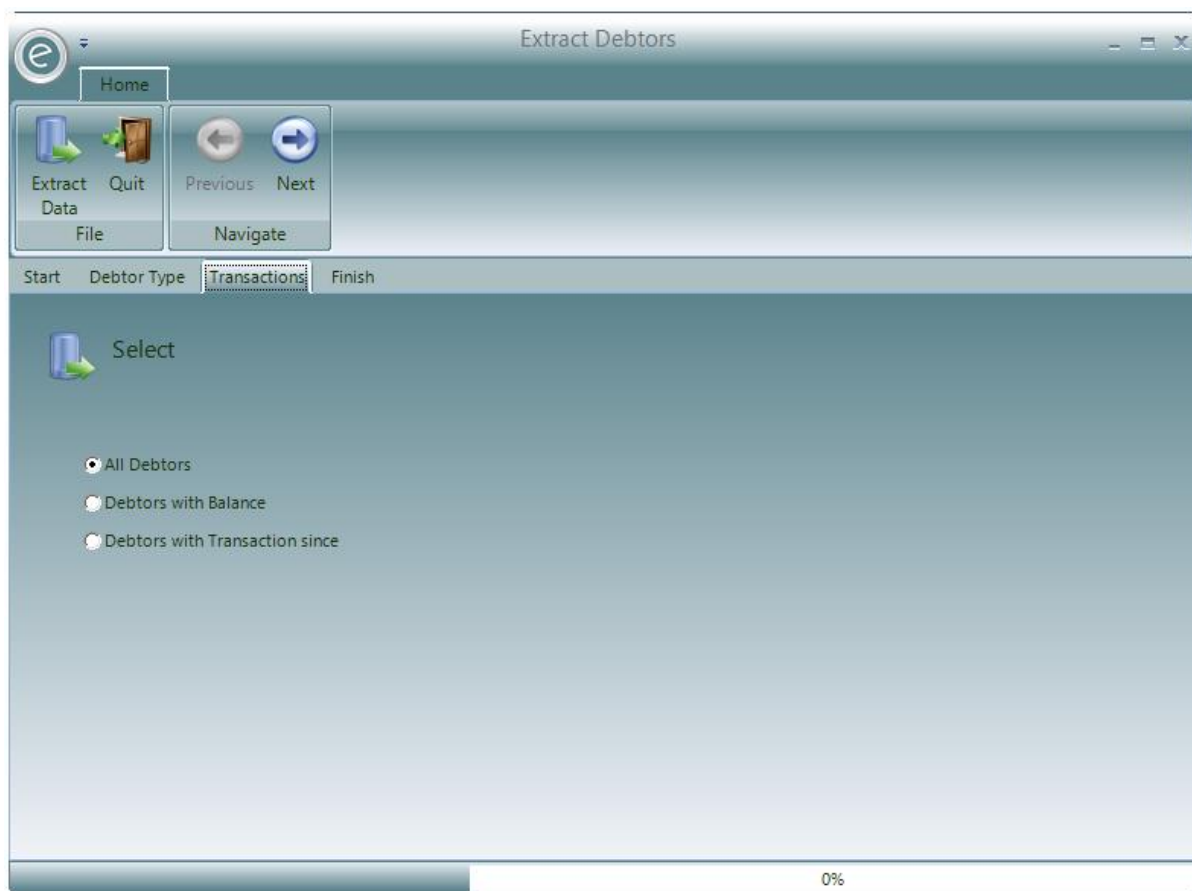
This is the **Transactions** tab. You will be able to select Debtors with or without balanced Ledgers. **All Debtors** is selected as a default.

Select **Debtors with Balance** to extract Debtor Records with balanced Ledgers.

Select **Debtors with Transaction since** to extract Debtor Records with transactions on their Ledger (e.g. Invoices, Receipts and Credits) since a specific date. A field will also appear for you to specify the date.

When you have made your selection, click **Next**.

Finish tab

This is the **Finish** tab. The Wizard has finished and you may extract the data by clicking **Extract Data**.

Note: The **Extract Data** button is available to press at any point in this window. It is not necessary to strictly follow the wizard.

An example Debtor extract in Paritor Insight is displayed below:

AccountNo	Σ	DebtorStatus	Σ	Classification	Σ	Title	Σ	FirstName	Σ	MiddleName	Σ	LastName	Σ	Email	Σ
65		N		3		Mrs						Ranger		ranger@borset...	
36		N		4										elizabethprimar...	
14		N		3		Mr		David				Franks			
37		N		4										stmarysacadem...	
55		N		3		Mrs						Jackson		jackson@borset...	
15		N		3		Mrs		Lucy				Carter			
30		N		3		Mrs		Julia				Daniels			
34		N		3		Mrs		Alice				Pope			
45		N		3		Mrs						Norton		norton@borset...	
12		N		3		Mr		Michael				Shen			
44		N		3		Mrs						Morrisey		morrisey@bors...	
54		N		3		Mrs						Ickson		ickson@paritor...	
61		N		3		Mrs						Zimmerman		zimmerman@b...	
42		N		4											
69		N		3		Mrs						Fisher		fisher@borset.c...	
11		N		3		Mrs						Jarvis			
60		N		3		Mrs						Xavier		xavier@borset.c...	
6		N		3		Mr		Matthew				Crawford		matt.crawford@...	
51		N		3		Mrs		Alison				Green		green@borset.c...	
58		N		3		Mrs						Vixon		vixon@paritor.c...	
22		N		3		Mrs		Dorris				Craig			
3		N		3		Mrs		Elizabeth				Pargetter		elizabeth.parget...	
62		N		3		Mr		Keith				Archerworth		archerworth@p...	
27		N		3		Miss		Felicity				Finch			

8. Data Extraction from a Record Card

The Data Tab at the top of the Record Card displays options in the Ribbon Menu relating to *data manipulation*. From here you can extract information to Paritor Insight for further analysis.

Shows a log of changes that have happened to the Record Card.

Extracts just this Record to *Paritor Insight*.

For more help on *Paritor Insight* please refer to the help pages.

Extracts all types of current Records to *Paritor Insight*.

For more help on *Paritor Insight* please refer to the help pages.

Communication

This section contains information on how to use the software to communicate to the contacts in your Records.

1. Communicate Tab

At the top of a Record Card are tabbed options in the Ribbon Menu. By selecting the **Communicate** tab you can:

- Send Phone Calls
- Send Text Messages
- Send E-mails
- Create MS Mail Merges
- Send Labels
- Write Letters

An example of this from a Teacher Record Card is displayed below:
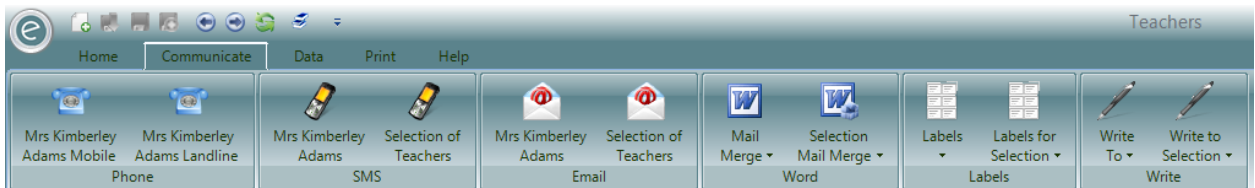
Here you can send communications directly to the specific person in the Record or a selection of Records.

Alternatively on the Console Screen you can go to the **Tools Tab**.

Note: This manual will only cover how to send phone calls, texts and e-mails. For mail merging, labels and letters please refer to the **Paritor Insight** manual.

Send Text Messages

 [Watch the Video Tutorial here](#)

To access:

Open a Record Card > Communicate tab > Select from SMS Section

Alternatively from the *Home Console*:

Tools (Ribbon Menu) > Send Text Message

You can send a text message to

- Pupils
- Parents
- Teachers
- Debtors
- Or any number entered manually

Upon clicking one of the above options the window below will appear:

Enter a message and press **Send SMS.**

Send Emails

 [Watch the Video Tutorial here](#)

To access:

Open a Record Card > Communicate tab > Select from Email Section
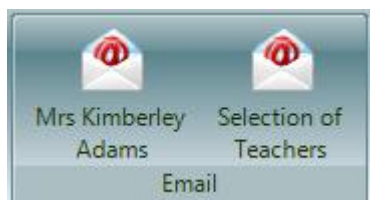
Alternatively from the *Home Console*:

Tools (Ribbon Menu) > Send Email

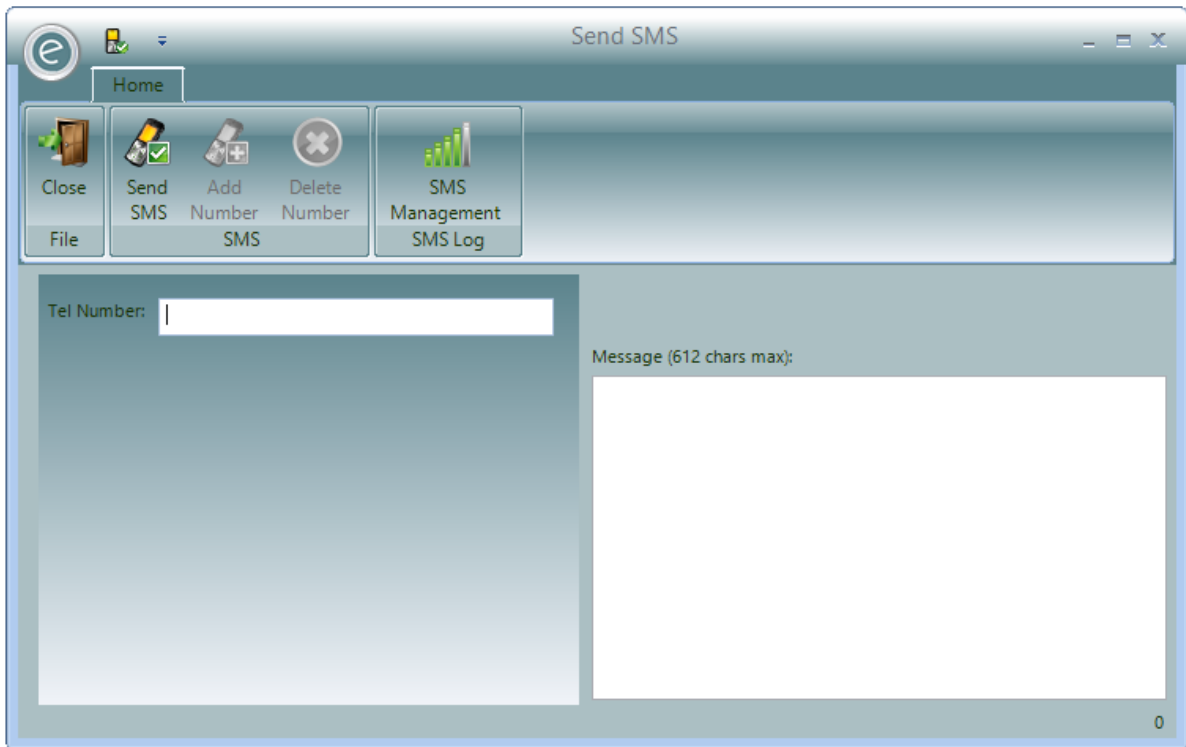You can send an email message to:

- **Pupils**
- **Parents**
- **Teachers**
- **Debtors**
- **School HOD's**
- **Centres**
- **Or any address, entered manually**

Upon clicking one of the above options the window below will appear:

The following functions in the Ribbon Menu perform the following processes:

Send	To send the email
Rich Text	This will format your email in Rich text. If this icon is toggled then a tab for Rich text is available just above the message body.
HTML	This will format your email in HTML. If this icon is toggled then a tabbed option for HTML is available just above the message body.
Add Clipboard	Add an attachment from the clipboard i.e. screenshot
Add Attachment	Add an attachment from the File Explorer
Delete Attachment	Delete an attachment
Insert Data Field	You can insert standard database fields
Insert Special Field	To insert a special field like a data field
Spelling	Check spelling

Email and Text Parents of Pupils

You will also be able to email or send a text message to the Parents of a Pupil from the **Communicate** tab of the Pupil Record Card. This is displayed below:

In this example, the Pupil is named **Billy Archer** and his parents **Mr Kenton Archer** and **Mrs Pat Archer** are directly contactable from this tab.

2. Correspondence Tab

▶ [Watch the Video Tutorial here](#)

All recipients have a **Correspondence** tab which is displayed below. This can be assessed by:

Opening a Record Card from the Menu Bar > Correspondence
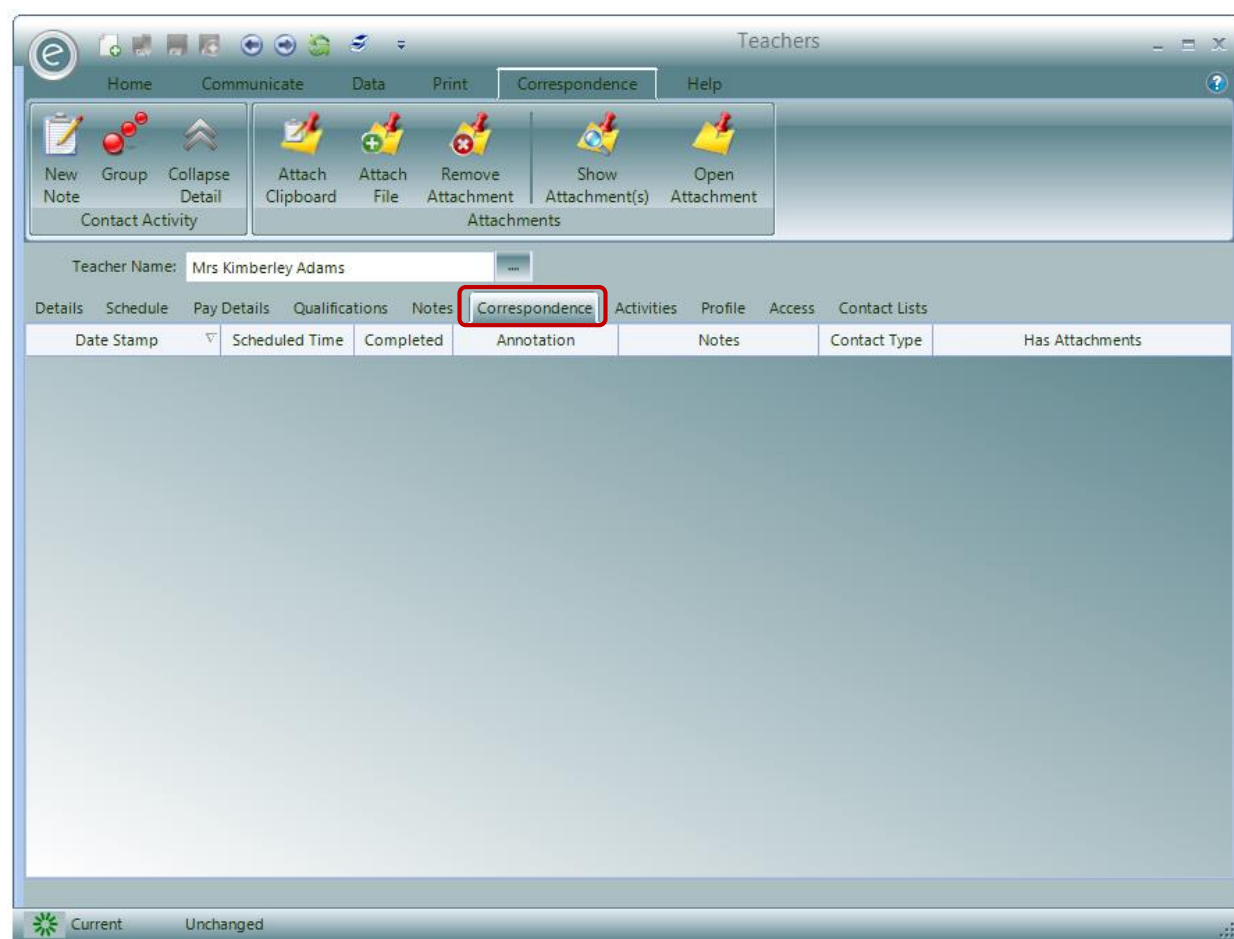
All information regarding messages sent from within the system correspondence is logged here. You will be able to see the *subject, sender, and contents of the communication as well as any attachments* that it may have had.

Clicking **Group** will allow you to drag a column header into some space above and this will group the data by that column. This effectively summarises the information.

The **Collapse Detail** button will hide rows of text in the columns, thereby increasing the increasing the number of rows in view. After this has been clicked it can be reversed by clicking **Expand Detail**.

By clicking **New Note** you can log any correspondence with that contact from outside of the system, for example if you wanted to log a phone call. If this note of correspondence had *any associated documents*, these can be attached, viewed and removed by clicking:

Attach Clipboard   Attach a screenshot

Attach File   Attach a file such as a Word Doc from your File Explorer

Remove Attachment   Remove the associated attachment from the Note

Show Attachment(s)   Display screenshot

Open Attachment   Open the attached file

3. Sending Bulk Emails

In order to send an email to a large (or small) group of recipients such as Parents or Teachers you will firstly need to run the appropriate *Data Extract* for the desired Records. For example if you wanted to send an email to a selection of Teachers teaching at a particular School, you will need to extract the Teacher Records.

Note: For more information regarding data extraction and the options available in the extract wizards please refer to the **Data Extraction** Chapter.

Once the Records have been extracted to Paritor Insight you will need to click **Email** at the top in the Ribbon Menu.
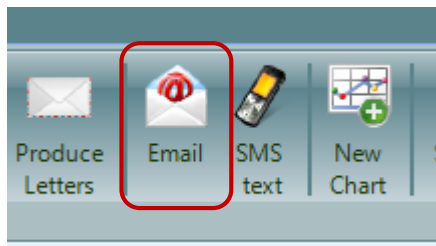
This will display the window below:

You will have two options for selecting the email addresses:

Use pre-defined email addresses for this data selection	The default option selected – here the email address' that are extracted are automatically selected for the recipient. This option is highly recommended as a log of this correspondence is

|	
	recorded in the *Correspondence Tab* of their Record Card
Select Email Address from one of the selected data fields	Here you will be able to select the email field yourself. However this email *won't be logged* in the Correspondence Tab!

When you have selected an option, click Next and then select Create Emails to begin writing your emails.

Note: If you choose to select the email address yourself you will also need to select the email address field and the fields to identify the recipients before clicking Create Email.
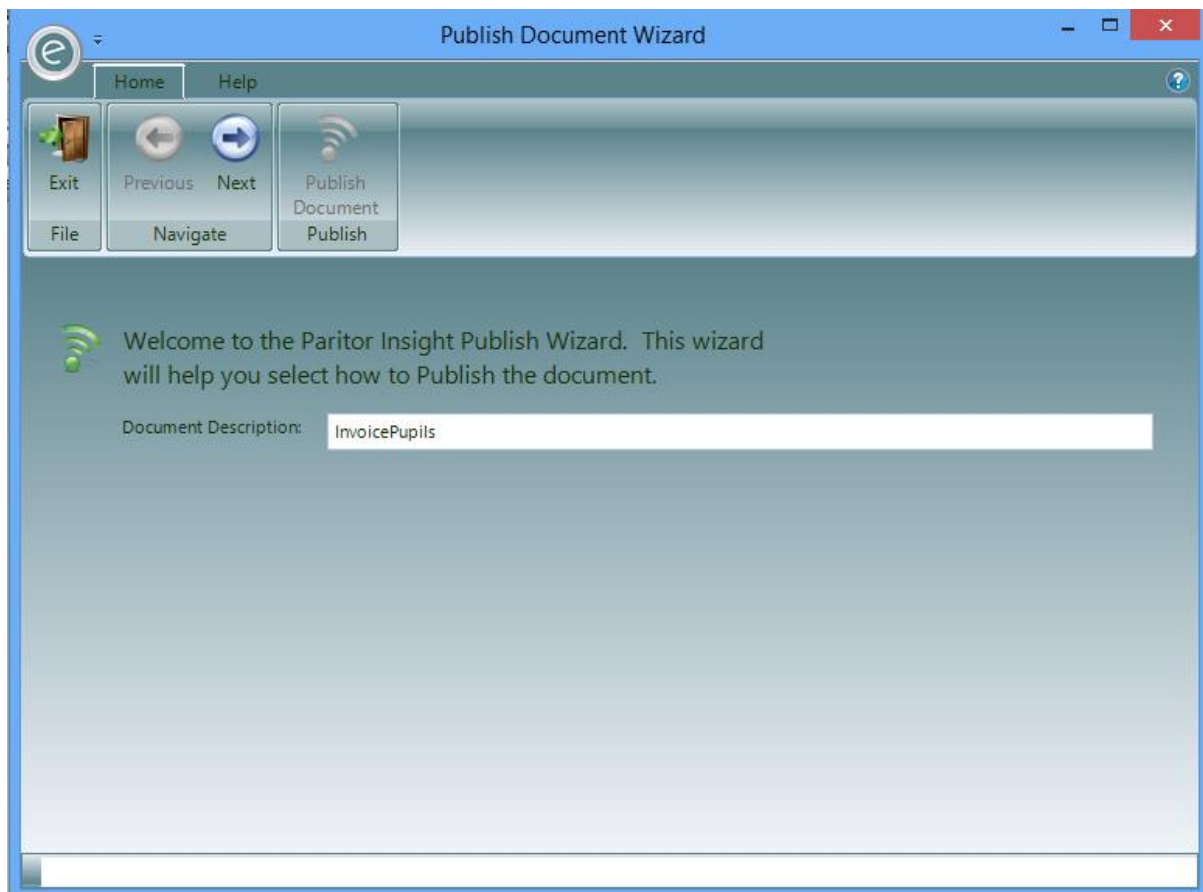
4. Publishing and Printing Reports

Publishing Document Wizard

[Watch the Video Tutorial here](#)
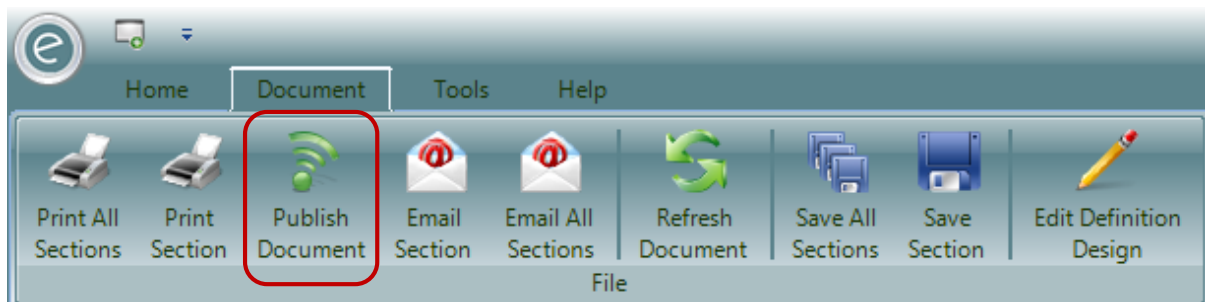
Once you have the Report open in front of you click **Publish Document**, as highlighted in the red box, to start the *Publishing Wizard.*

The first window of the Publishing Wizard is displayed below:

In this window you can specify what you want the Attachment to be called.

Here you also need to select the option to Publish the document via email.

When you are happy with this page click Next. On the next window enter the text of your email:
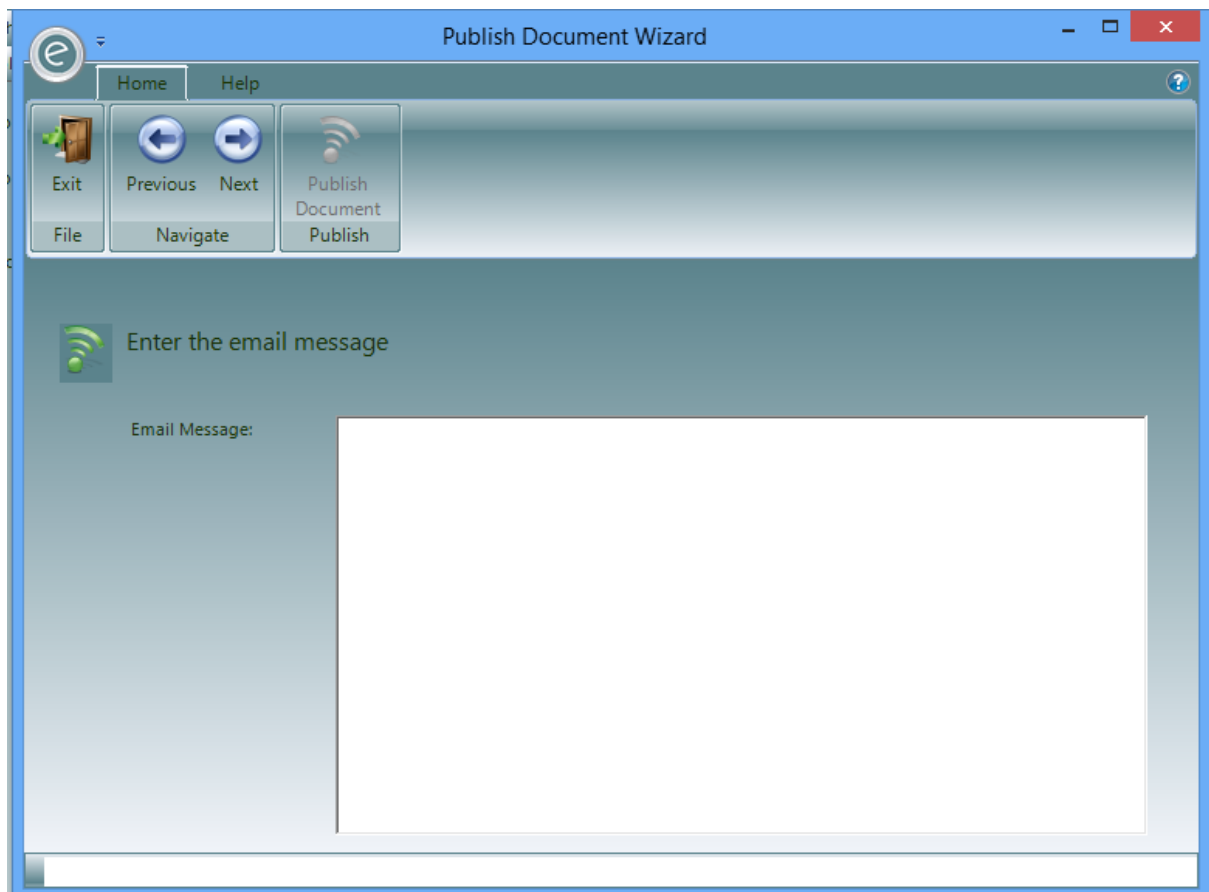
You can either write it here in Plain Text or if you can paste the text into here if you want to have different Fonts and Text Sizes. Once you are happy with the Text click Next:
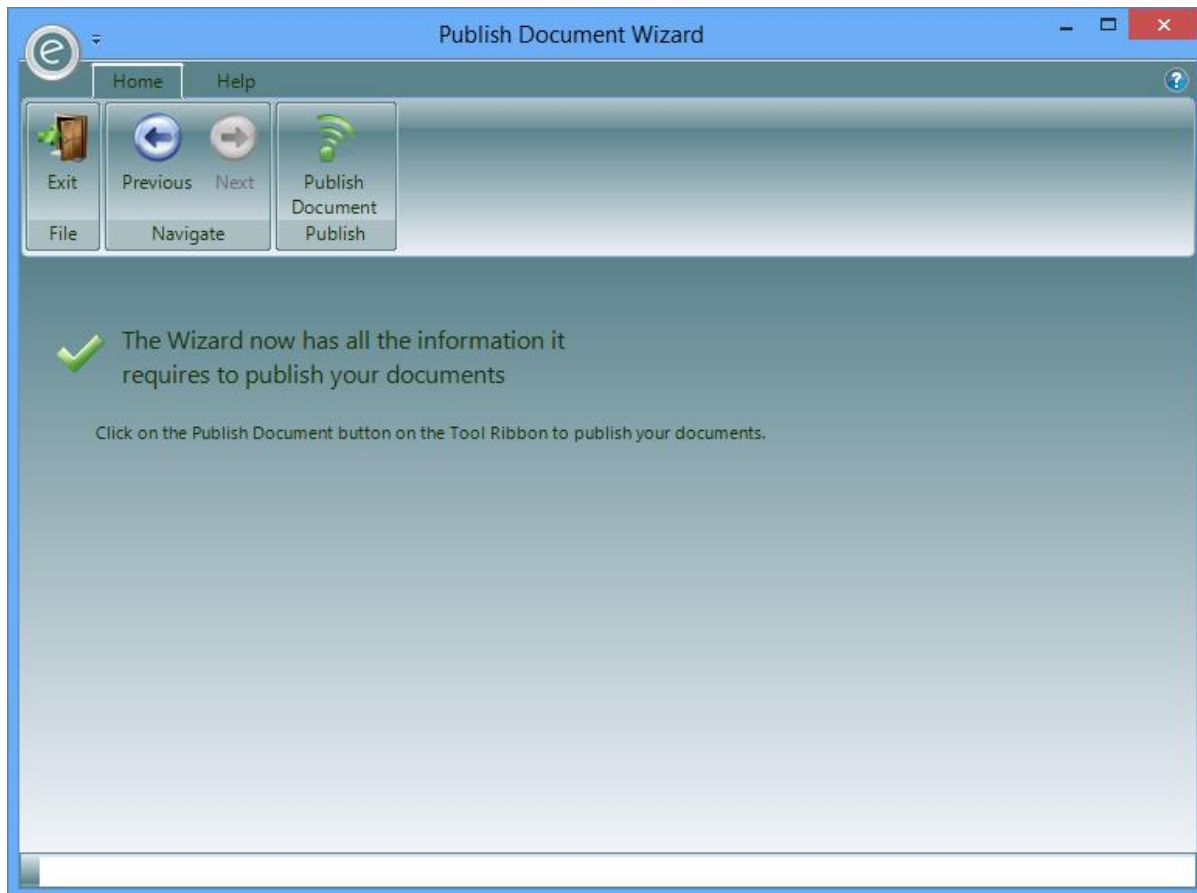
You will now be free to click Publish Document.

The system will then email out your Invoice to Payers who have Email Addresses.

Printing Reports for Payers without Email Addresses

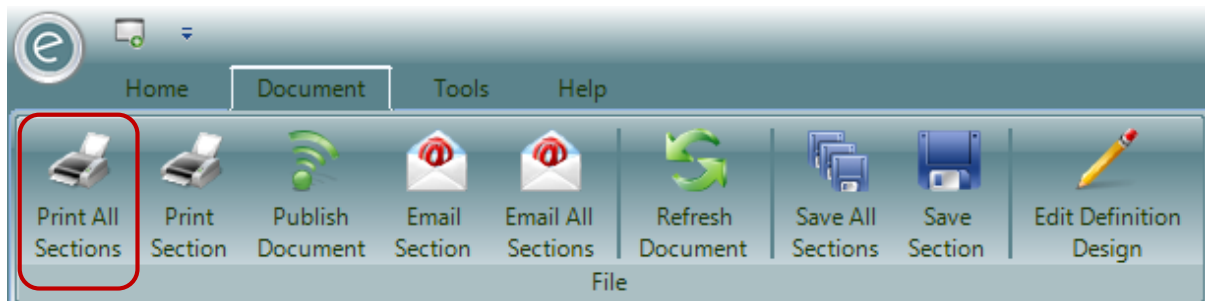Once the publishing is complete you will need to print the Reports for Payers *who have not given you their email addresses.*

Once you have done this go to the Report tab and click Print All Sections to print the remaining Reports:

5. Microsoft Mail Merge Letters

▶

Mail Merge letters are created from Mail Merge documents. These contain a mixture of text, images and other objects common to all the merged letters plus *Merge Fields*. Merge Fields refer to columns in the *source dataset*. For example, a source dataset may contain columns containing the recipients address then the Merge Document will contain Merge fields that refer to these columns.

You can create any number of Merge Documents, one for each different type of letter you have and for each different type of recipient. Merge Documents can be simply stored somewhere on your system or they can be added to the Ensemble menu structure.

When creating a Merge Document you can base it on a *common template*. A template may for example contain the basic layout of your letters including your logo.

Merge Document Templates

Merge Document Templates are simply Word documents that contain common information that you want to be included on different merged letters. They would typically include your business logo and contact details.

Note: They *do not contain and merge fields* and so can be used in any merge document regardless of the data source the merge document is based on.

You create templates directly from within MS Word.

Creating a Merge Document

To create a Merge Document you can:

1. Open a Record Card of the type of recipient for which the final letter is intended
2. Or Extract a set of data that relates to the recipient type.

To create a document designed to be sent to a Teacher you need to either open the Record Card of any Teacher or produce a Teacher extract. This sets the context that you are in so that you are offered only those fields that relate to the current data set.

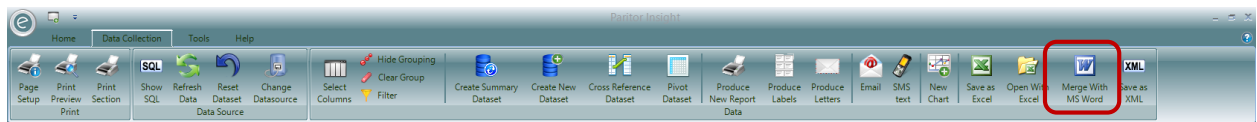**Note:** An extract often produces more information than opening a Record Card.

To do a Mail Merge from a Record Card:

Open a Record Card from the Menu Bar > Communicate Tab > Mail Merge/Selection Mail Merge > Select the first popup menu item.
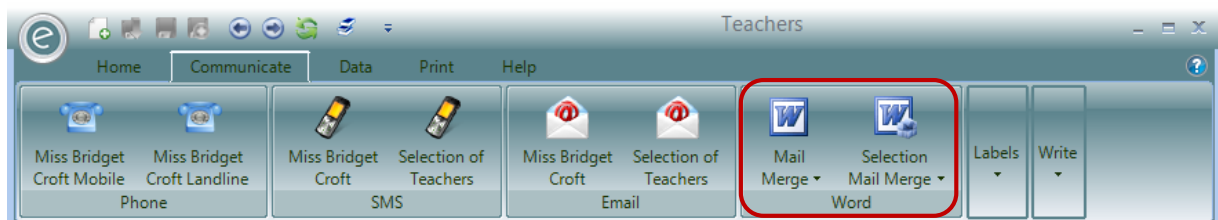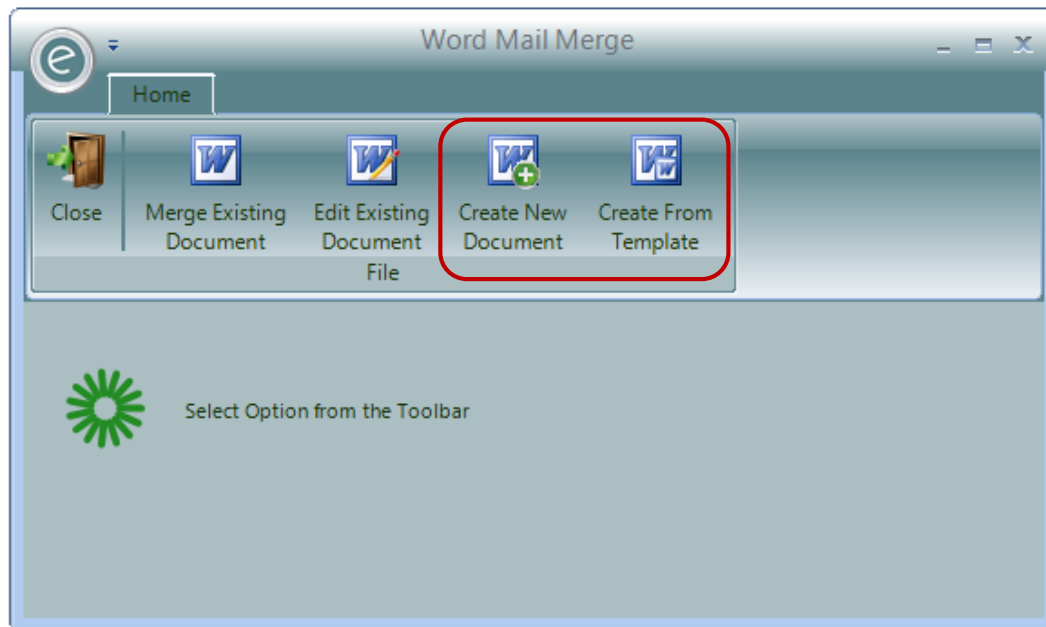

Alternatively to do a Mail Merge using a data extract go to:

Teachers/Schools/… (Ribbon Menu) > Extract "…" > Extract Data > Merge with MS Word

Any of these actions will display the following *Mail Merge Manager* dialog:

Click on either the **Create New Document** or **Create From Template** buttons.

Selecting **Create From Template** will ask you for the location of a *Word Template* document. A new *Word* document will be created. You can now populate the document as required and include any Merge Fields from the data source.

An example of this is shown below, where the dropdown menu contains various Merge Fields:
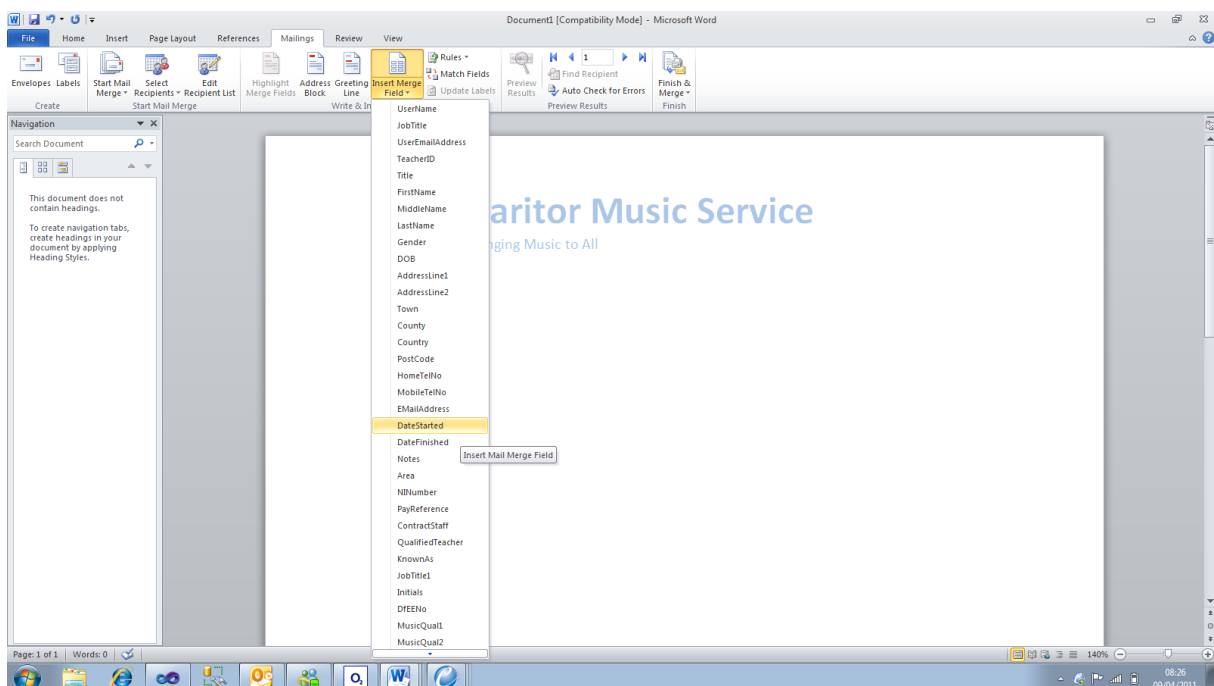
When you have finished defining your Merge Document click on Finish and Merge in MS Word to produce your letters.

If you intend to use the Merge Document again then you should save it somewhere on your file system. If other Users need to use it then save it on your network where they will also have access.

Editing a Merge Document

To modify a Mail Merge Document follow the same process as above to open the Mail Merge Manager and take the option Edit Existing Document.
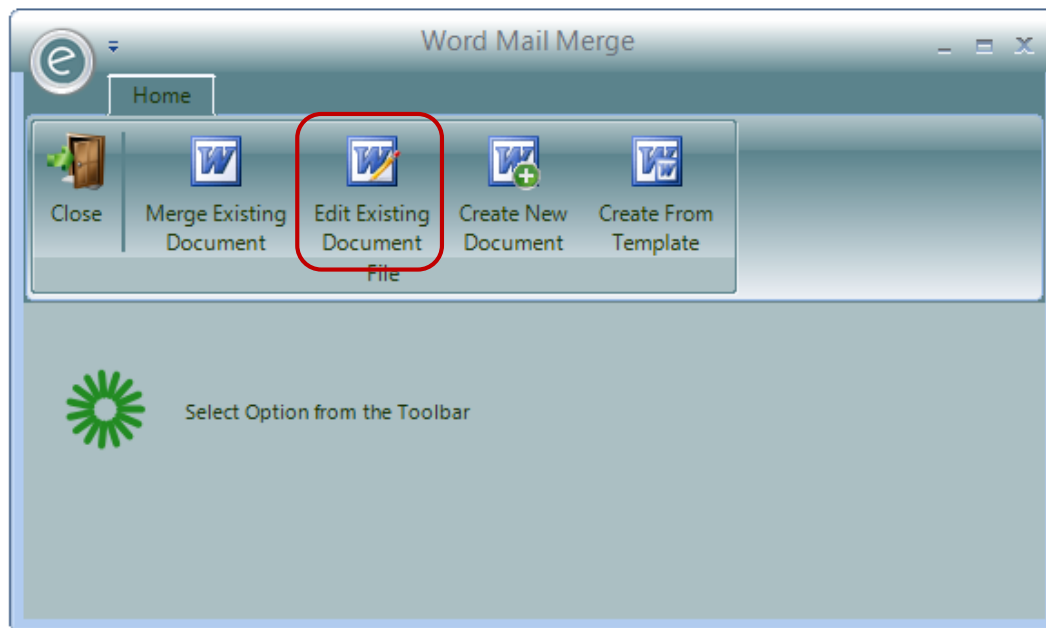

This will open the document in MS Word linking it to the data source thereby allowing you to edit the document and change any Merge Fields.

Merge an Existing Document

Alternatively if you have previously saved a Merge Document you can take the Merge Existing Document option in the Mail Merge Manager to skip the editing phase and directly produce a set of Merged Documents.
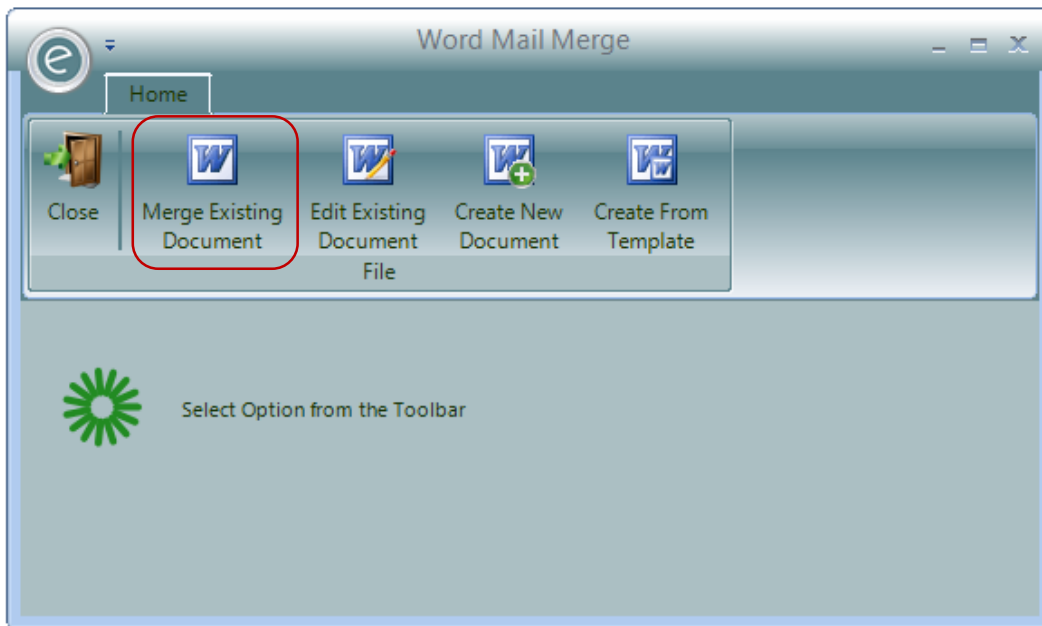
Adding a Merge Document to Your Menus

If you have Merge Documents that are regularly used then you can add these to your menu structure so that they can be quickly produced. Follow the steps above to Create and Save a Merge Document.

Once saved:

Open up the associated Record Card > Communications tab > Mail Merge/Selection Mail Merge > Manage Items in Menu

This is shown below:
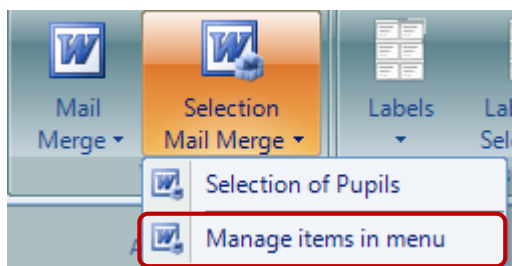
This will display a Manager Dialog which allows you to add documents to the current record types menu.

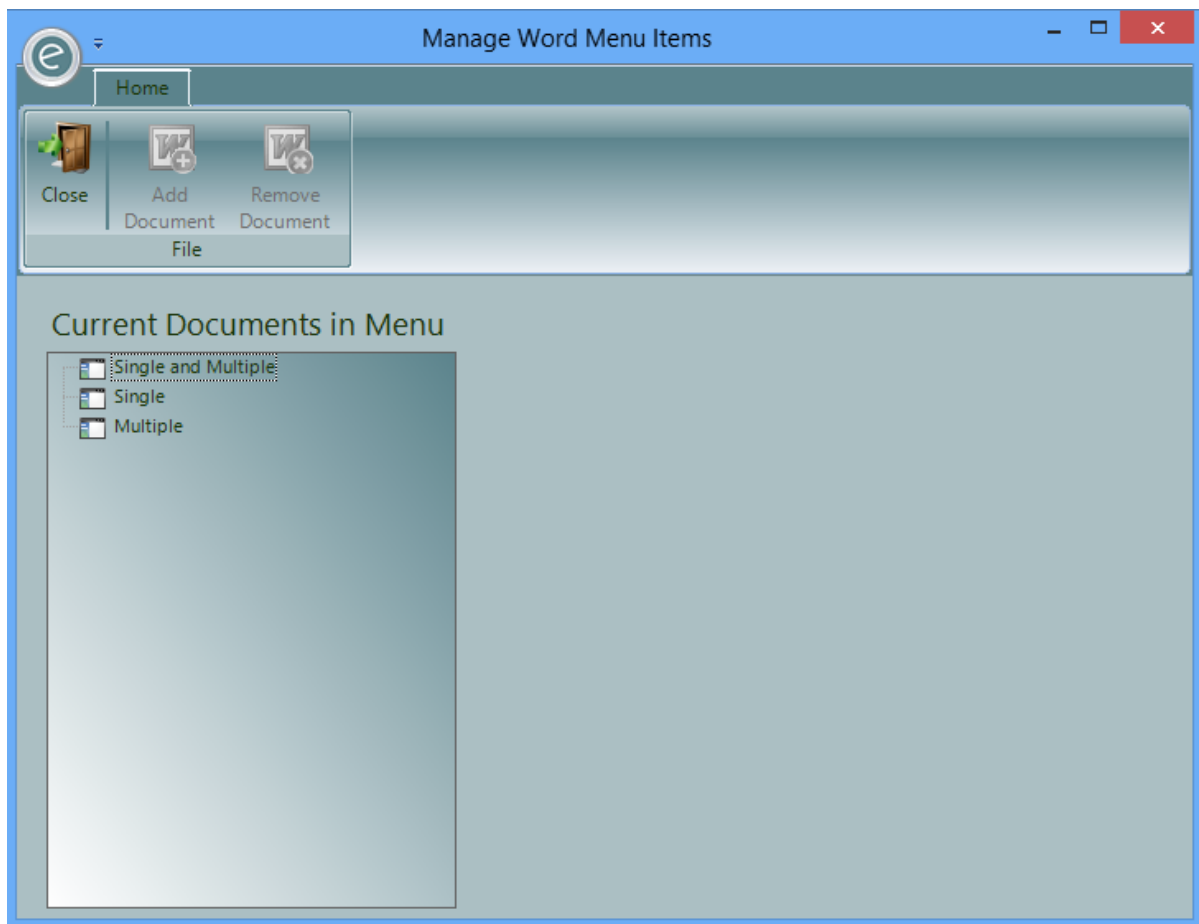The dialog displays three nodes.

- **Single and Multiple** – This is for documents you want to appear in both the Mail Merge and the Selection Mail Merge menus.
- **Single** – This is for documents you want to appear in just the Mail Merge menu
- **Multiple** - This is for documents you just want to appear in the Selection Mail Merge menu.

  Note: The Mail Merge menu will create documents *just for the currently displayed Record Card*, whereas the Selection Mail Merge will take you through the Extract Wizard allowing you to select *a set of records* that match your selection criteria. The Extract Wizard makes a lot more columns available than the basic Record Card so if you create a Merge Document via the Extract and use some of the additional columns, adding it to the single menu may result in some of the Merge Fields not being resolved.

Select the Document Type you require and then click Add Document. This will display a File Open Dialog from which you can select the Merge Document you want to add. Locate and select your document. You will see that it lists it under the selected Document Type.

To remove an item from a menu, follow the steps above to open the Manage Word Menu Items dialog, select the document and click on the Remove Document button. If you want to move a document from one Document Type to another, delete from one and add to another.

When complete, close the manager dialog and also the original Record Card. Reopen the Record Card and you will see your document has been added to the menu.

Tools Tab

This Chapter will cover the Tools tab in the Ribbon Menu. This contains various miscellaneous functions in *Housekeeping* and settings such as the *Parameters.*
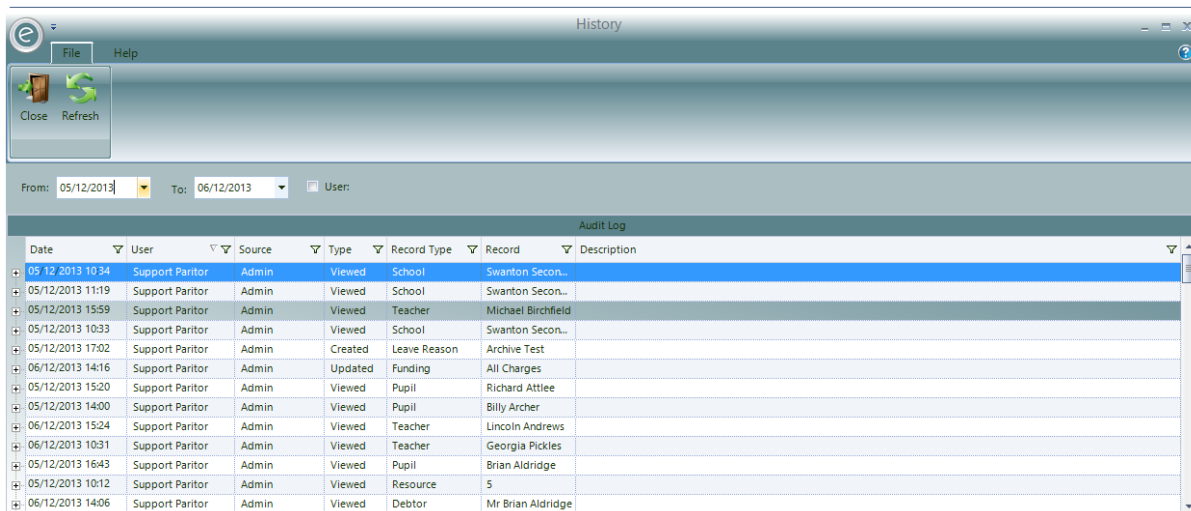
1. Audit Log

 [Watch the Video Tutorial here](#)

You can view the history of which users have viewed and edited data for all Records by clicking on *Audit Log*

This can be accessed by clicking:

Tools (Ribbon Menu) > Audit Log

This will display the window below:

You will be able to specify the **date range** for the log and a **User**.

When the *Type* column header indicates that the Record was *Updated* or *Created* then you can click on the **+** on the left of the row to expand the row and see more information.

2. Preferences

 [Watch the Video Tutorial here](#)

Another useful Tool can be found in *Preferences*. To access this, click:

Tools (Ribbon Menu) > Preferences
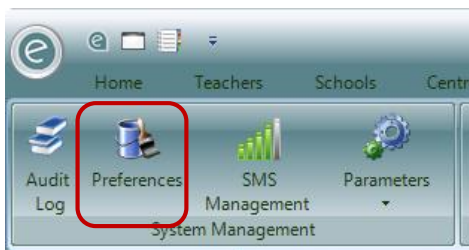
This will display the window below:
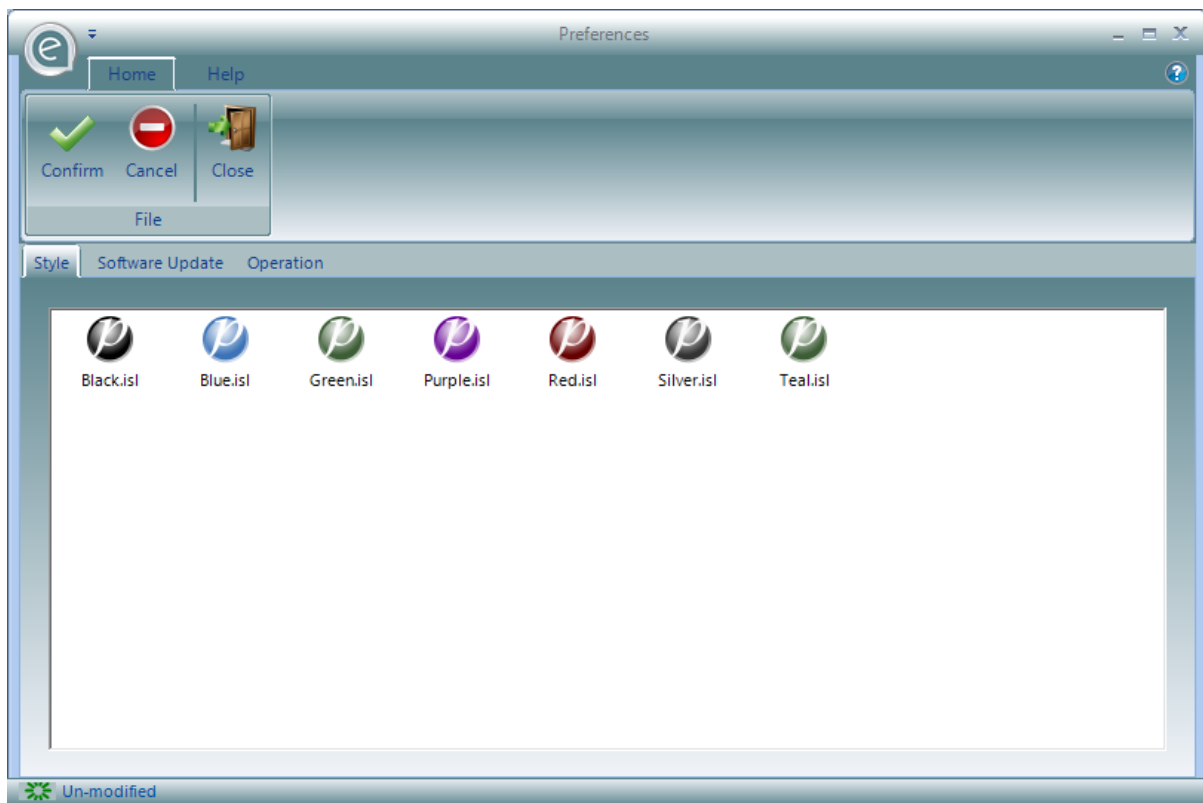
In here you can change:

- The colour scheme of your software
- The back-up warning times.

Click **Confirm** to save changes.

3. SMS Management

You will be able to view a log of text messages sent in Ensemble and purchase additional texts in *SMS Management*.

To access this, click:

Tools (Ribbon Menu) > SMS Management

This will display the window below:
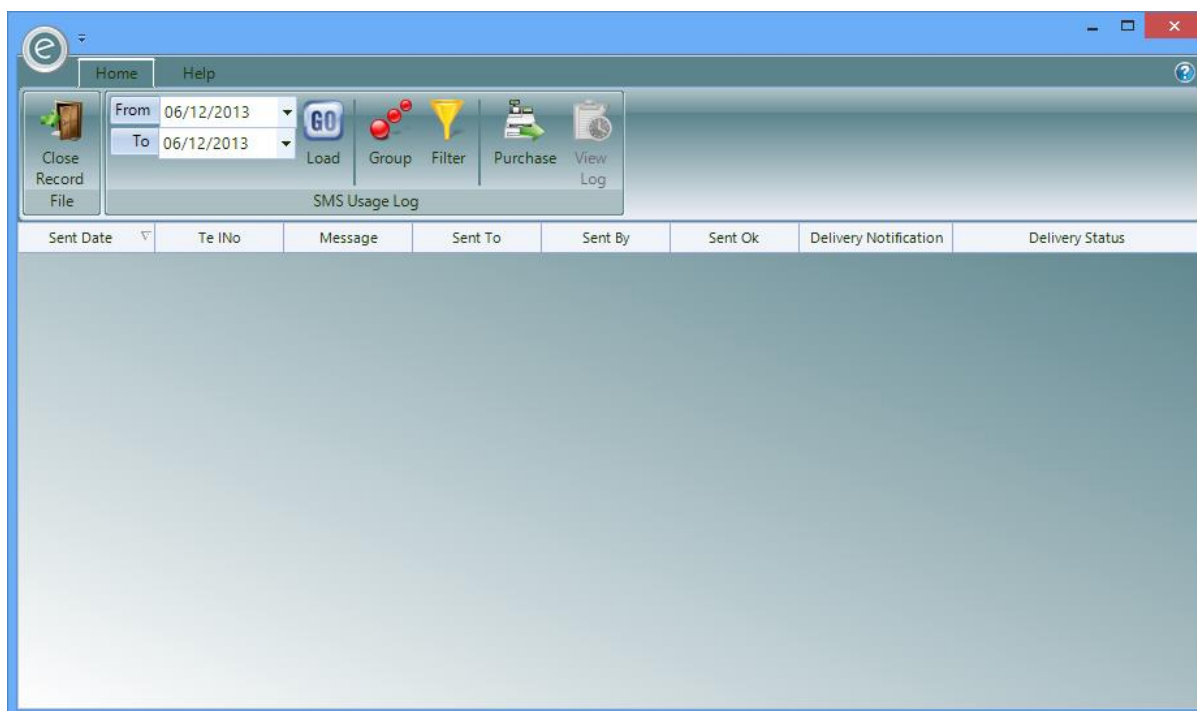
To view the log of sent texts, specify a **date range** and then click **Load** in the Ribbon.

You will be able to **Group** and **Filter** the data too.

Click **Purchase** to go to the Ensemble Text Store and browse additional text options. It will also display the number of texts your service has available. Click **View Log** to return to the Log screen.

When finished click **Close Record**.

4. Parameters

  Watch the Video Tutorial here

In order to customise the system so that it best suits the way you operate, a set of *Parameters* are available. By carefully selecting the correct options for each of these parameters you can tailor the system to the way you work.

Parameters are found in:

Tools (Ribbon Menu) > Parameters

The Parameters are divided up into four areas, these are:

Configuration Settings   These parameters hold details of your business and system configuration details.

Education Parameters	Information on what functions with the system you wish to use, variable field names, options on Teachers' pay and connection details for links to external database systems.
Finance Parameters	Various options on how you calculate billing and manage your debt.
Online Portal Parameters	Various options for altering online parameters.

Click on the above links for more details on each Parameter.

5. Change Database

▶ [Watch the Video Tutorial here](#)

If your service has additional databases linked to Ensemble, you change switch between databases by clicking:

Tools (Ribbon Menu) > Change Database

6. Housekeeping

The Housekeeping section is a menu with miscellaneous options for the database in Ensemble. As the name implies, they keep the database *tidy* and help manage Imports and Custom Reports.

The headers below will discuss these features.

Note: The *Import Data* options are discussed in the **Importing Data** Chapter.

Document Definitions Manager
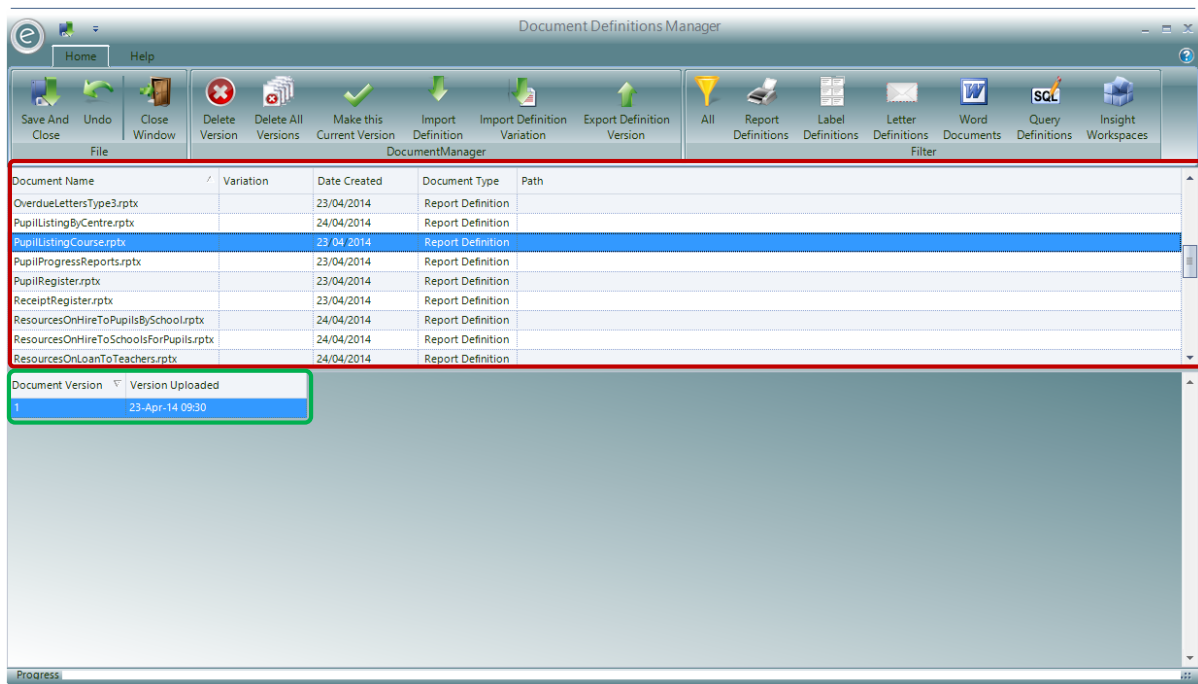
▶ [Watch the Video Tutorial here](#)

The *Document Definitions Manager* is used to manage all the Custom Reports used by your service. You will be able to import, export and delete Report Definitions.

To access this click:

Tools (Ribbon Menu) > Housekeeping > Document Definitions Manager

This will display the window below:

Al the Reports with Custom Report Definitions are displayed in the **red box**.

When one is selected you can view the version history as highlighted in the **green box**.

If you want to import a Report Definition you will need to select the Report and click **Import Definition** in the Ribbon Menu. You will then need to browse your File Explorer for the *.rptx* file to import.

To make the new imported Report Definition the default, click **Make this Current Version**.

Report Definitions can be exported by clicking **Export Definitions Version**.

To delete a Report Definition you will need to select it and then click **Delete Version**. If you want to remove all the Report Definitions and use the default Reports embedded in Ensemble click **Delete All Versions**.

When you have finished making your changes click **Save and Close**.

Report Definition Variations

You will also be able to save multiple variations of a Report here too. For example if your service have different invoice layouts for payers that are billed normally or by direct debit you can manage both here.

In order to save the alternative report variations you will need to click **Import Definition Variation**. In the *Variation* column you can then write a short description in order to identify which report is which.
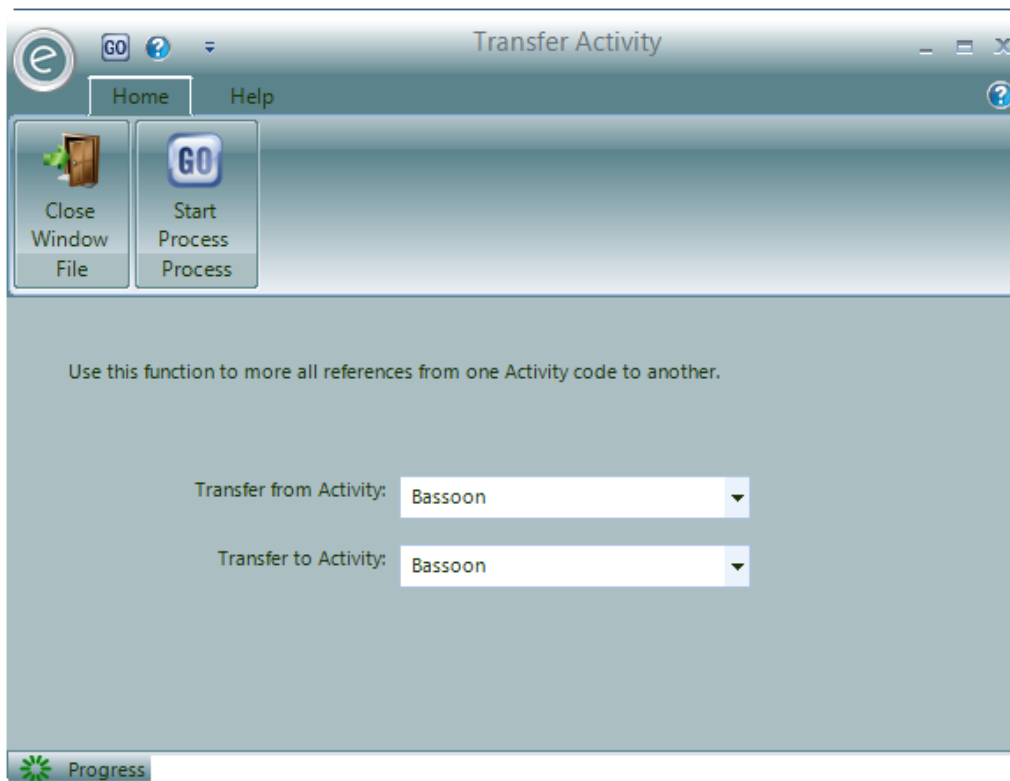
Transfer One Activity Code to Another

If there's tuition associated with a particular Activity that you want to relocate to another then you can do this by clicking:

Tools (Ribbon Menu) > Housekeeping > Transfer One Activity Code to Another

This will display the window below:

Select the Activities to transfer **From** and **To**.

Click **Start Process** to begin.

When finished click **Close Window**.

Merge Duplicate Contacts

 [Watch the Video Tutorial here](#)

If there are duplicate Contact Records in Ensemble, you can merge the duplicates into one Record. When searching for Records, those with the same *name, address or telephone number* will be flagged as potential duplicates by Ensemble. When the merge is performed, all the information relating from one Record such as tuition, Invoices and hires will be merged with the other. Perform this process by clicking:

Tools (Ribbon Menu) > Housekeeping > Merge Duplicate Contacts

This will display the window below:

If Ensemble detects any Records that may be duplicates, this window will be displayed. You will need to check and then merge or ignore the Records flagged.

The red box displays:

- How many Records were picked up in the database as potential duplicates – two Records were discovered in this example
- Contact details for the Records that will be kept. You can edit the information here too
- The Contact Role of the Record. This example found a Teacher but other Contact Roles could be found such Pupils and Payers.

The green box will display any other Records that Ensemble detected as a duplicate to the Record to be kept in the red box. You can scroll through the grid and verify if it is or not. If you want to merge a Record in this grid then *tick the tickbox* under the first column header Merge.

Once you have finished verifying the Records click Merge in the Ribbon Menu to merge the Records.

Alternatively click Skip if you don't think it is necessary to merge the current Records shown.

Note: You may also choose to skip if you wanted a Record displayed in the grid to become the main Record to keep. The Record that was originally allocated to keep will now appear in the grid to be merged.

Non-Working Time

This holds dates where no activity can take place across the *whole of your service*. The system wide calendar can be found in:

Tools (Ribbon Menu) > Housekeeping > Non-Working Time

This will display the window below:

Select the dates you wish to define as unavailable by simply *clicking* on the calendar or for *multiple dates* you can *drag across*. They will appear as *red squares*.

When finished, click **Save and Close**.

Important: If you have already set up your lesson Schedule you will need to run the *re-diarise* procedure for these changes to be made effective. Otherwise your changes will not appear in the Diary Entries. Therefore we advise that this is inputted before an Academic Year begins.

Note: For more information regarding the re-diarise process please search for **Reset Schedule Diary**.

Update Teacher Activities

You can update the Activity List of a Teacher using the *Update Teacher Activities* function. Since the Activity List is manually maintained it can become out dated quickly. For example a Teacher may only have Piano as an Activity on the List by may be conducting tuition for Piano and Keyboard. This function will therefore search through the Activity Plans on the Schedule for a Teacher and use this information to update their Activity List.

Note: Activity Lists are defined in the Activities tab of a Teachers Record Card. For more information regarding this refer to **Activities** in the Chapter **Core Records**.

To perform this update click:

Tools (Ribbon Menu) > Housekeeping > Update Teacher Activities

This will display the window below:
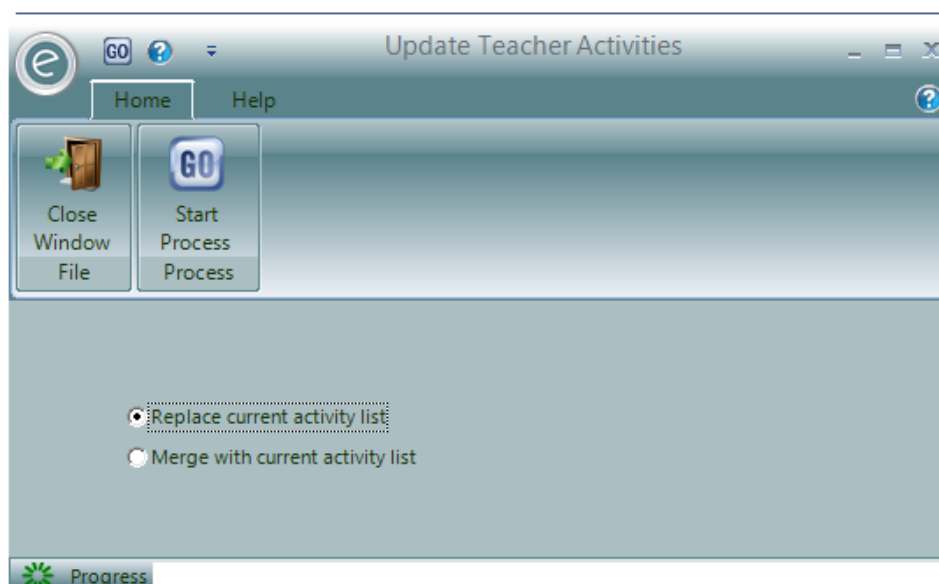
You will be able to choose to:

Replace current activity list	Overwrite the current Activity List with the Activity Plans that are in the Schedule
Merge with current activity list	Merge the current Activity List with the Activity Plans that are in the Schedule

Click **Start Process** to begin.

Reset Schedule Diary

There may be times when the Schedule Diary needs to be *re-set*. To do this there is a feature called *Rediarise*.

This will re-allocate Diary Entries to the Schedule Requirements, therefore resetting adjustments made by shuffling Diary Entries.

Note: Only Activity Plans with the *Auto-Diarise setting activated* will be rediarised, therefore those with Diary Entries that were manually entered will not be reset.

Important: We do not recommend using this feature unless absolutely necessary as it will cause considerable disruption to existing Schedules if they have been altered.

To clarify, here are the changes to the Schedule and the Diary Entries that are and aren't affected by this procedure:

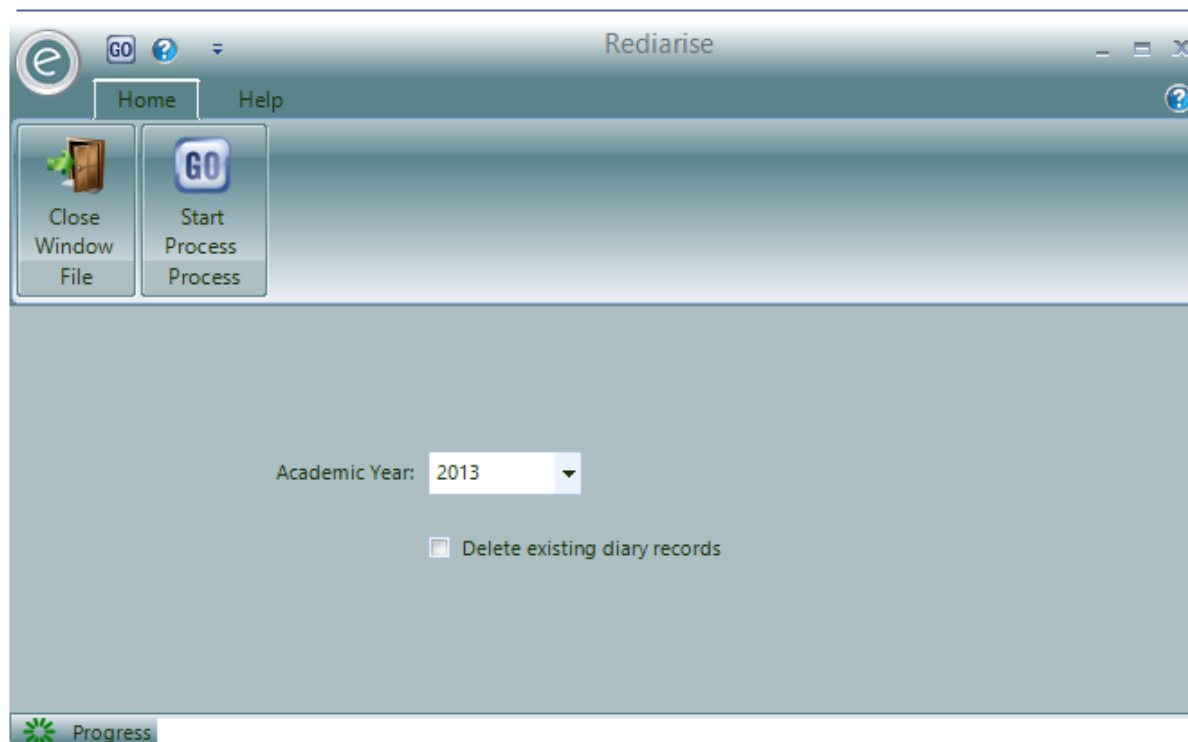| Won't be Reset	Will be Reset
Changes to Schedule Requirements such as Start Time, Day, Duration	Task Results

| Any change of Teachers or extra Teachers added | Make-up Lessons |
| Any Variations made to the Schedule Provisions | Any shuffled Diary Entries |

To reset the Schedule Diary click:

Tools (Ribbon Menu) > Housekeeping > Rediarise

This will display the window below:

Select the **Academic Year** to perform the Rediarise.

If necessary tick **Delete existing diary records** to *remove all Diary Entries* before the Rediarise procedure begins.
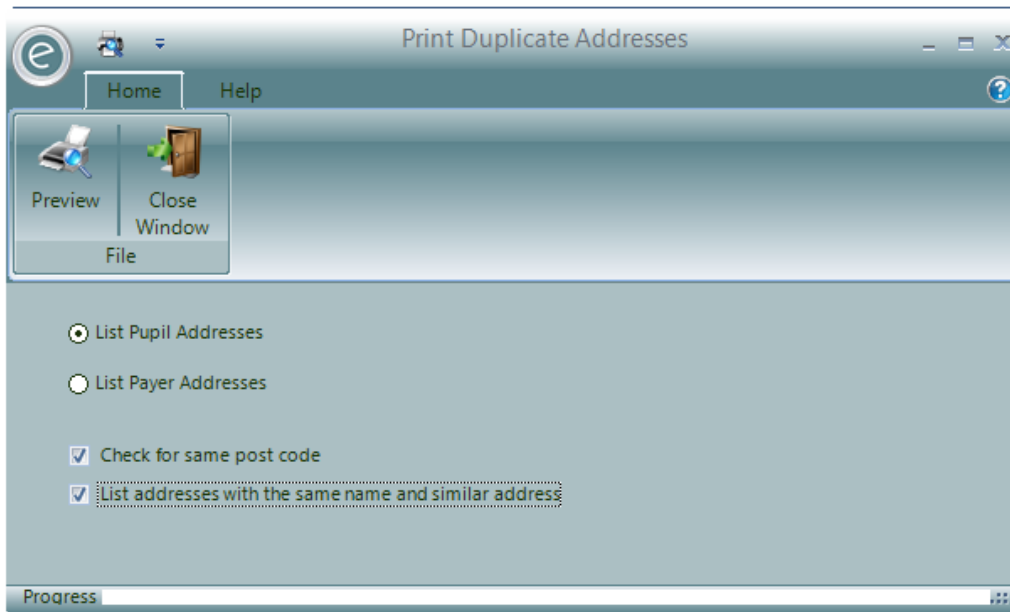
Click **Start Process** to begin.

Print Duplicate Addresses

If you need to print off a list of Records with duplicate addresses (e.g. siblings and parent/child) you can do this by clicking:

Tools (Ribbon Menu) > Housekeeping > Print Duplicate Addresses

This will display the window below:

Allocate Debtor Transactions

If there are transactions in the Debtor's Ledger that are unallocated, then this can be cleaned up by the Allocate Debtor Transactions process. Ensemble will search for transactions to be allocated such as Invoices and Receipts or Credits.

Note: For more information regarding allocation of transactions in a Debtor's Ledger refer to **Managing Debtors Accounts in the Debtor's Ledger** in the **Finance in Ensemble** Chapter.

To perform this procedure click:

Tools (Ribbon Menu) > Housekeeping > Allocate Debtor Transactions

This will display the window below:
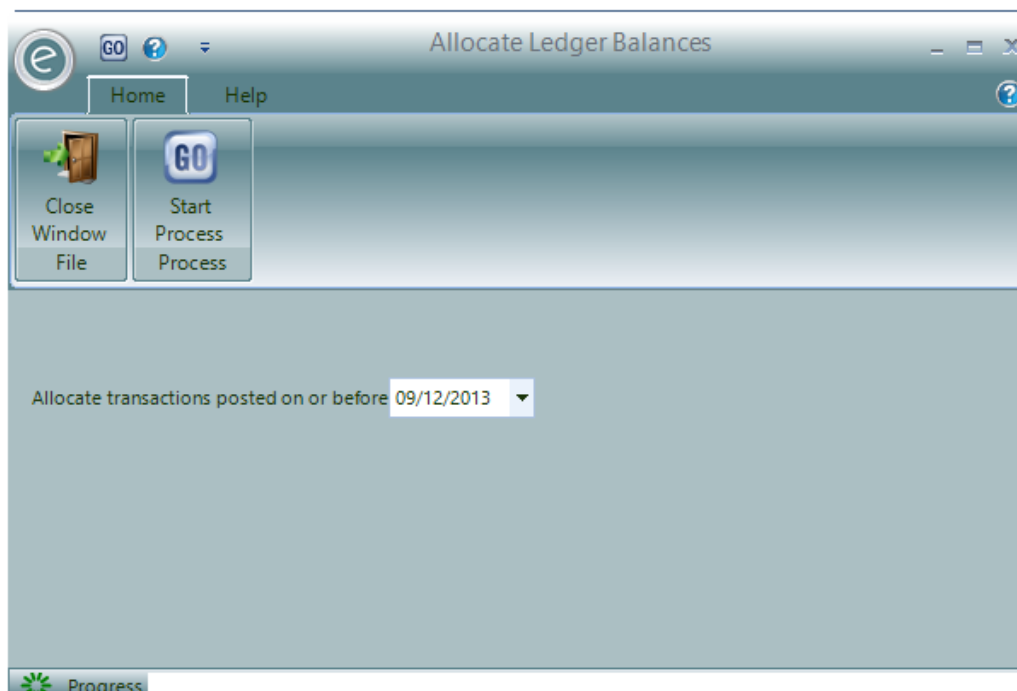
Simply select the date for the process to run from.
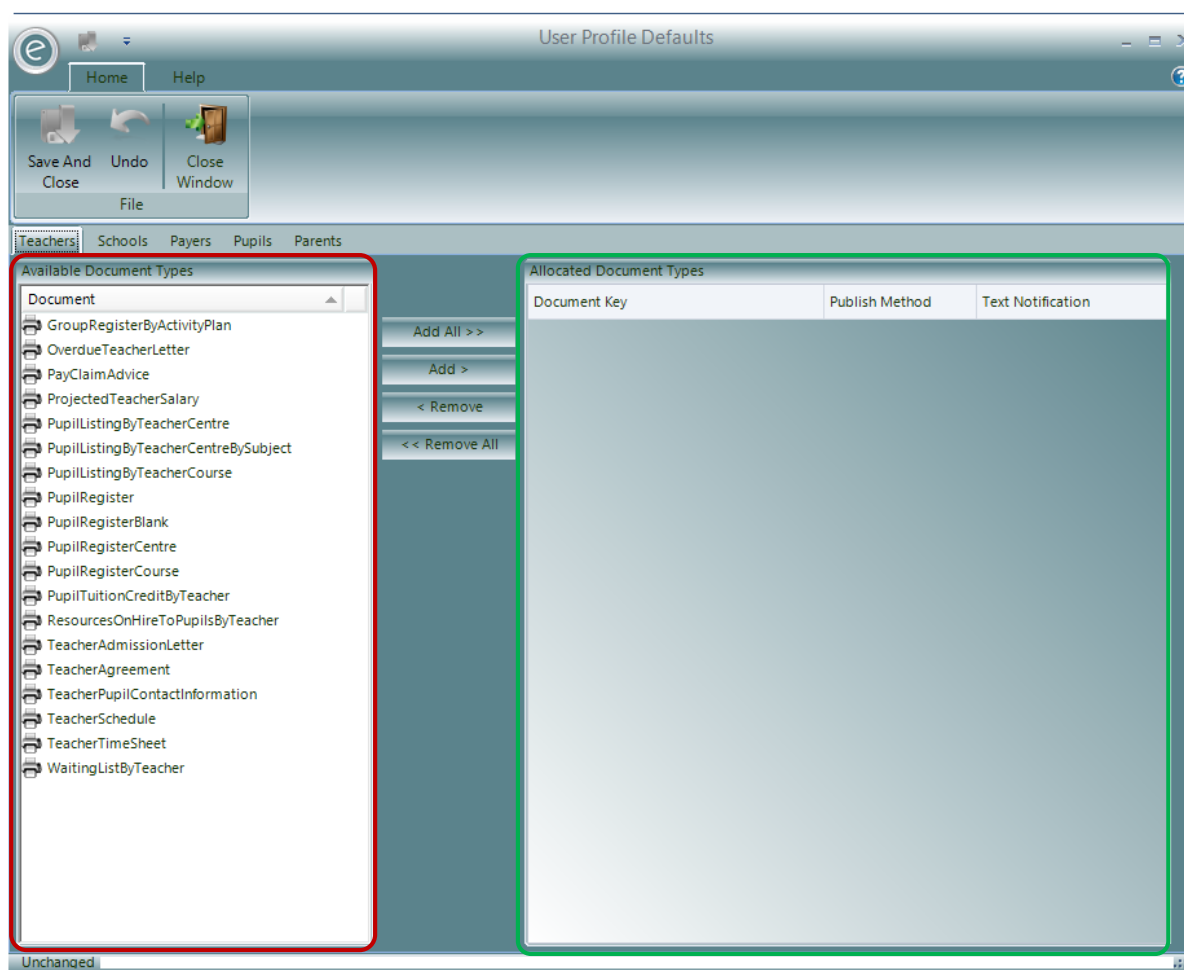
Click Start Process to begin.

User Profile Defaults

You select the default documents in Ensemble that are available to various Contact Record Types. These documents may be Invoices, Registers or any Report that is available in the software. This is known as the *User Profile.*

To do this click:

Tools (Ribbon Menu) > Housekeeping > User Profile Defaults

This will display the window below:

All available Document Types are listed in the Available Document Types section, highlighted by the red box. Select the Document Type and click Add > to transfer to the Allocated Document Types section, highlighted by the green box.

Publish Method	Select the preferred distribution method for this document e.g. email or print
Text Notification	Select if you want to notify the contact by text as confirm

Click Add All >> to select all. To remove a selected Document Type click < Remove to transfer back. Click << Remove All to remove all.

Defaults User Profiles can be constructed for

- Teachers
- Schools
- Payers
- Pupils
- Parents

There is a tab for each one.

Click Save and Close when finished.

Viewing a User Profile in a Record Card

The User Profiles for the available Records above can all be viewed and edited in the individual Record Card. This is all done within a tab called Profile.

For example in a *Teacher Record Card*:

Tuition (Menu Bar) > Teachers > Open a Teacher Card > Profile tab

This will display the window below:
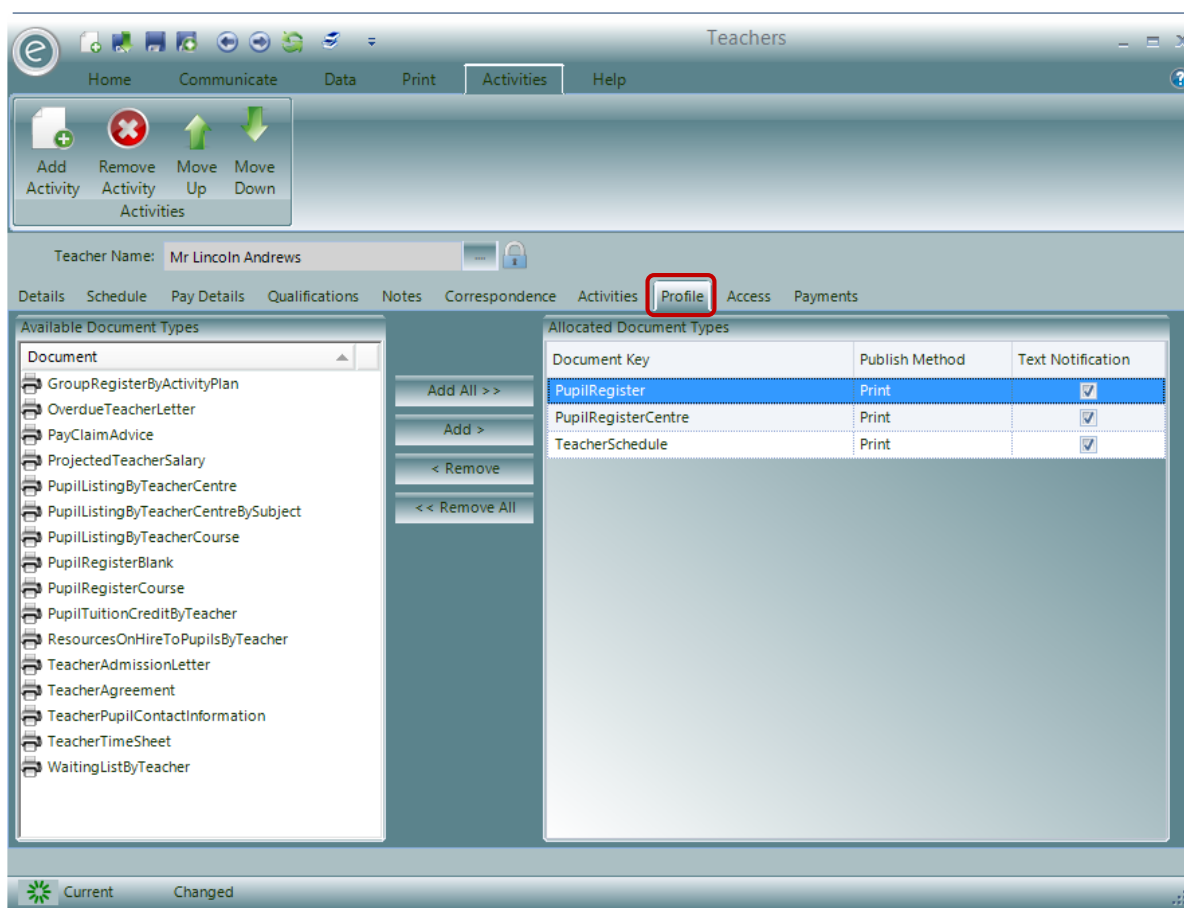
The options in the tab are identical to those within Housekeeping.

When you have finished making changes for this Record click Save and Close.

Pupil School Transfer

At the end of the Academic Year there will be many pupils which need transferring School, such as progression from Primary to Secondary education or moving to College. This can be done with the Pupil School Transfer.

For more information regarding this please refer to the **Importing Data** Chapter.

Import Debtor Account Numbers

 [Watch the Video Tutorial here](#)

On many occasions you may need to *import Debtor information* into Ensemble and this is done with a .CSV file.

For more information regarding this please watch the video above or refer to the **Importing Debtor Numbers** section in the **Importing Data** Chapter.

7. SQL Interface

There is a built in *SQL Interface* window within Ensemble that can be used to edit and query bulk records in the system. SQL is a programming language. For example you can use to update all the email addresses of a range of Records. You aren't expected to use this window very often but there many online resources available if you wish to use it.

To access this click:

Tools (Ribbon Menu) > SQL Interface

This will display the window below:
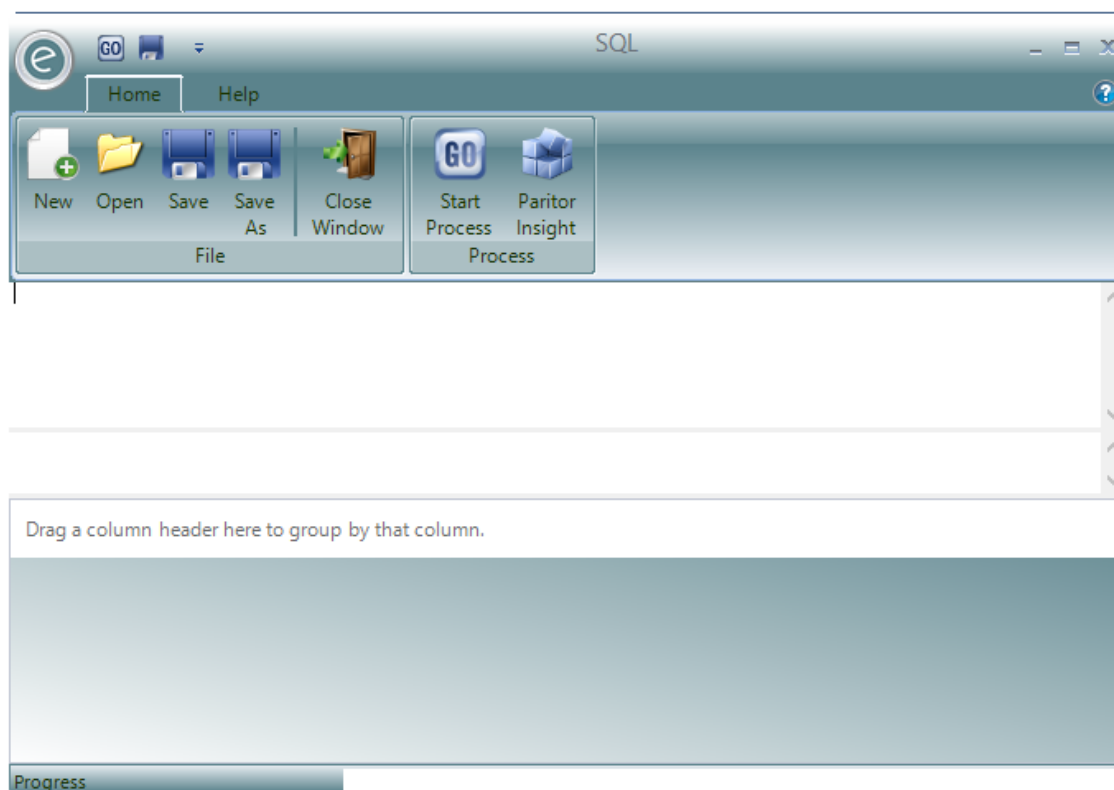
You can enter the *SQL String* into the white typing area below the Ribbon Menu.

Click **Start Process** to execute the commands.

A member of our Support Team may attach a *.sql* file in a Support Ticket. Click **Open** to open the .sql and the SQL String will appear in the typing area ready for you to execute.

You also have the option to save an SQL String you have made in this window as a *.sql* file by clicking **Save** or **Save As**.
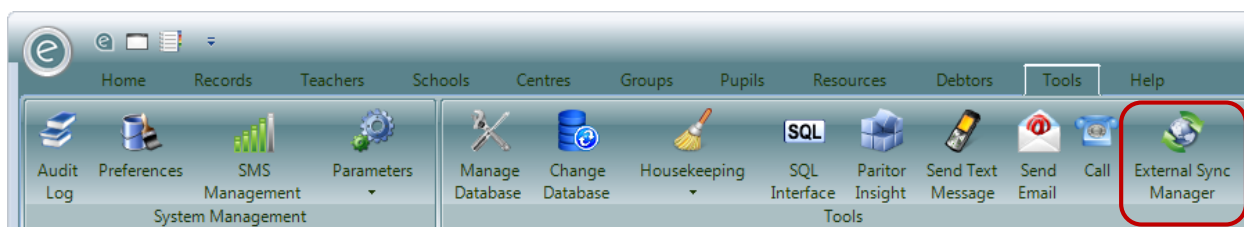
Clicking **Paritor Insight** will run the SQL String in Paritor Insight.

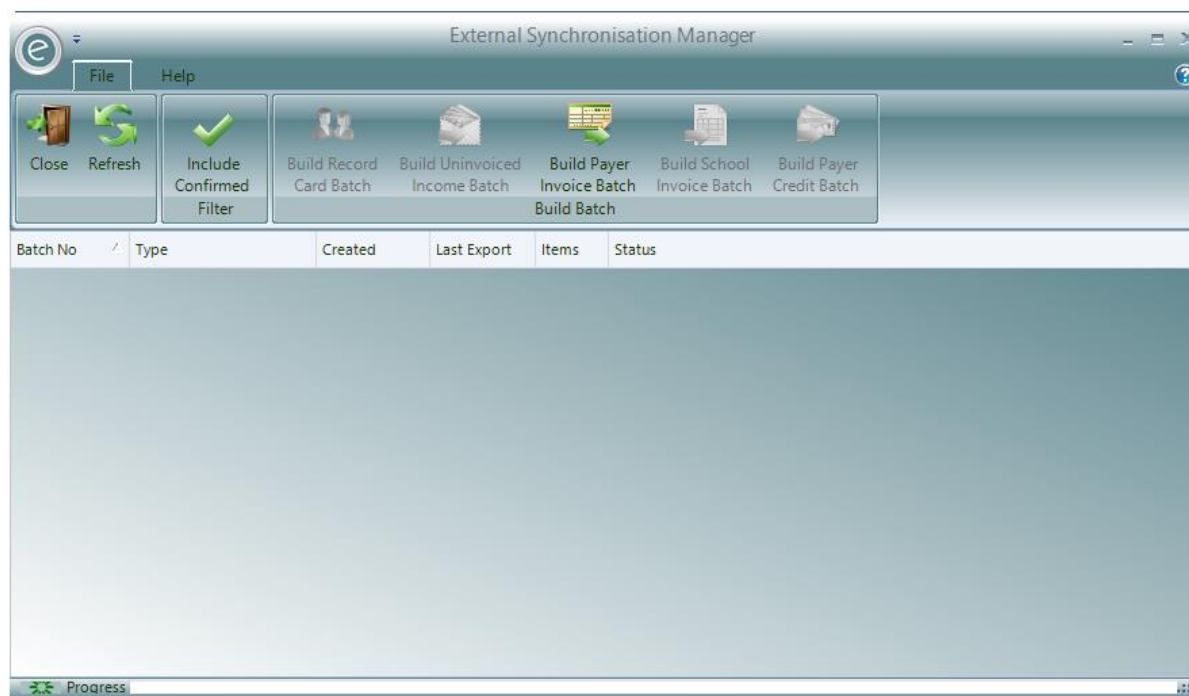When finished click **Close Window**.

8. External Synchronisation Manager

If you are a service that uses other programs to produce Finance Reports such as Sage or SAP, you will be able to export batch files using Ensemble. To access the *External Synchronisation Manager* click:

Tools (Ribbon Menu) > External Sync Manager

This will open the window below:

The available batch types are displayed in the Build Batch section which are:

- Record Card Batches
- Uninvoiced Income Batches
- Payer Invoice Batches
- School Invoice Batches
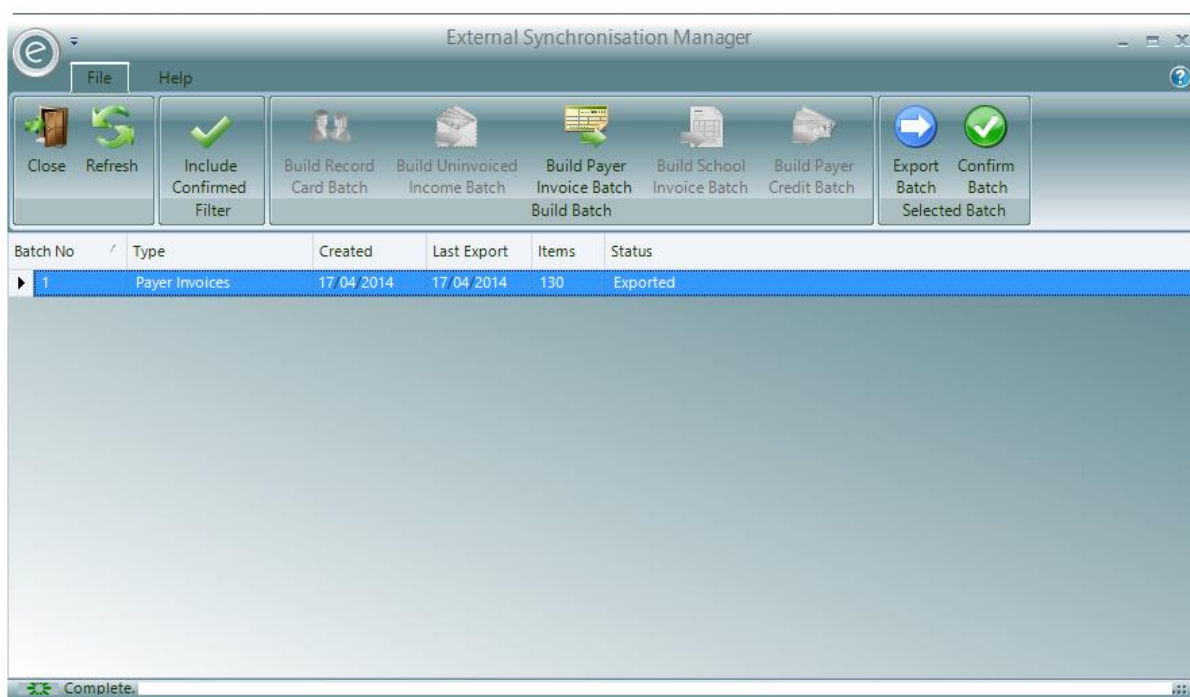
- Payer Credit Batches

Since different services have different Financial Reports they wish to export, the options available to you will be made to your requirements. Once we have developed a batch option for your service it will become coloured and available to select.

Example Batch Creation and Submission

For example to export Payer Invoice batches you will need to click **Build Payer Invoice Batch**. Ensemble will then build the batch file and then export it to the shared location folder specified in the *Configuration Settings*.

Note: If you are unsure where the shared location is set to or how to set it, please search for **Allocating a Shared Location Folder** in this guide.

Once the batch has been successfully built and exported, the window will be displayed as below:

A new row will appear for the new batch file. It will display the type of batch, the batch number, when it was created and last exported, the number of items in the file and the status of the current batch. In our example, the current batch has been **Exported**.
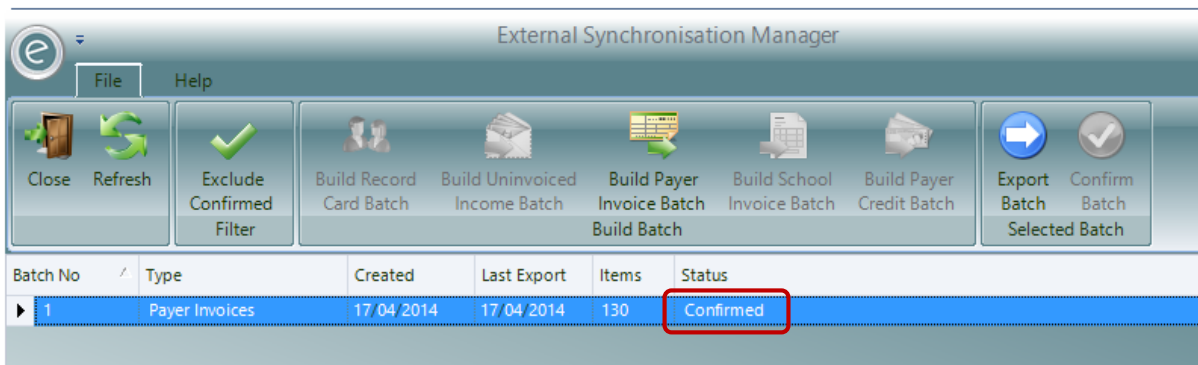
If the batch needs to be exported again (i.e. shared location folder may be updated) you can click **Export Batch** in the Ribbon Menu.

If there are new items that need to be added to the batch so it needs to be built again, you can **click Build Payer Invoice Batch**. This is remove the previous batch, build a new one and then export to the shared location folder.

Once you are confident that the batch exported is correct, click **Confirm Batch** so it is ready for submission to your external finance system.

Important: Once a batch is confirmed, it *can't* be re-built. Please make sure that you are perfectly satisfied with the batch before confirming. However you will still be able to *export* the batch again.

Once you have confirmed the batch, its Status will change to **Confirmed**:

All of your confirmed batch will now be displayed in the External Synchronisation Manager. You can choose to filter the batches displayed by clicking **Exclude Confirmed** or **Include Confirmed** to exclude or include confirmed batches respectively.

Connecting to a Central Pupil Database

1. Overview

By setting up connection details you can access Pupil information from a *Central Pupil Database* and copy this information into the Pupil Record for Ensemble. There are three possible routes to follow when setting up this connection.

1. **Internal Redirection** - A table is created within the Ensemble Database and data from the Central Pupil Database is copied into this table on a regular basis. The connection details within Ensemble are set to look at this table when requesting Pupil information.

2. **Dynamic View Link** - A view is installed within the Central Pupil Database that returns the required Pupil information given a Pupil's name and optionally date of birth. The view is installed with its own set of credentials so that given access to this view the User cannot access any other information or perform any other action on the Central Pupil Database. A windows ODBC connection (A DSN) is defined on each Users work station to connect to this view. Ensemble is configured to access this DSN when requesting Pupil information.

3. **Web Service** - Ensemble is configured to access a web service which provides Pupil information.

2. Entering Field Mappings

Field mappings have to be set so *Ensemble* knows which fields of the *External Database* should be used to populate the fields within *Ensemble*.

To access this, click:

Tools (Ribbon Menu) > Parameters > Education Parameters > External Database tab > Tick 'Use an External Database' > Field Mappings tab

This will display the window below:

Simply associate the fields to the correct columns and **Save and Close** when complete.

3. Internal Redirection

 [Watch the Video Tutorial here](#)

There is a table called *tblExternalPupil* within the Ensemble Database.

The table columns should be *externally populated* with the information required by Ensemble. The table must have information in the columns for First Name, Last Name, Date of Birth and the Pupil's Unique Number.

To set Ensemble to use this method you must set the *External Database Parameters* as follows.

To launch:

Tools (Ribbon Menu) > Parameters > Education Parameters > External Database tab > Tick Use an External Pupil Database > Internal Redirect

This will display the window below:
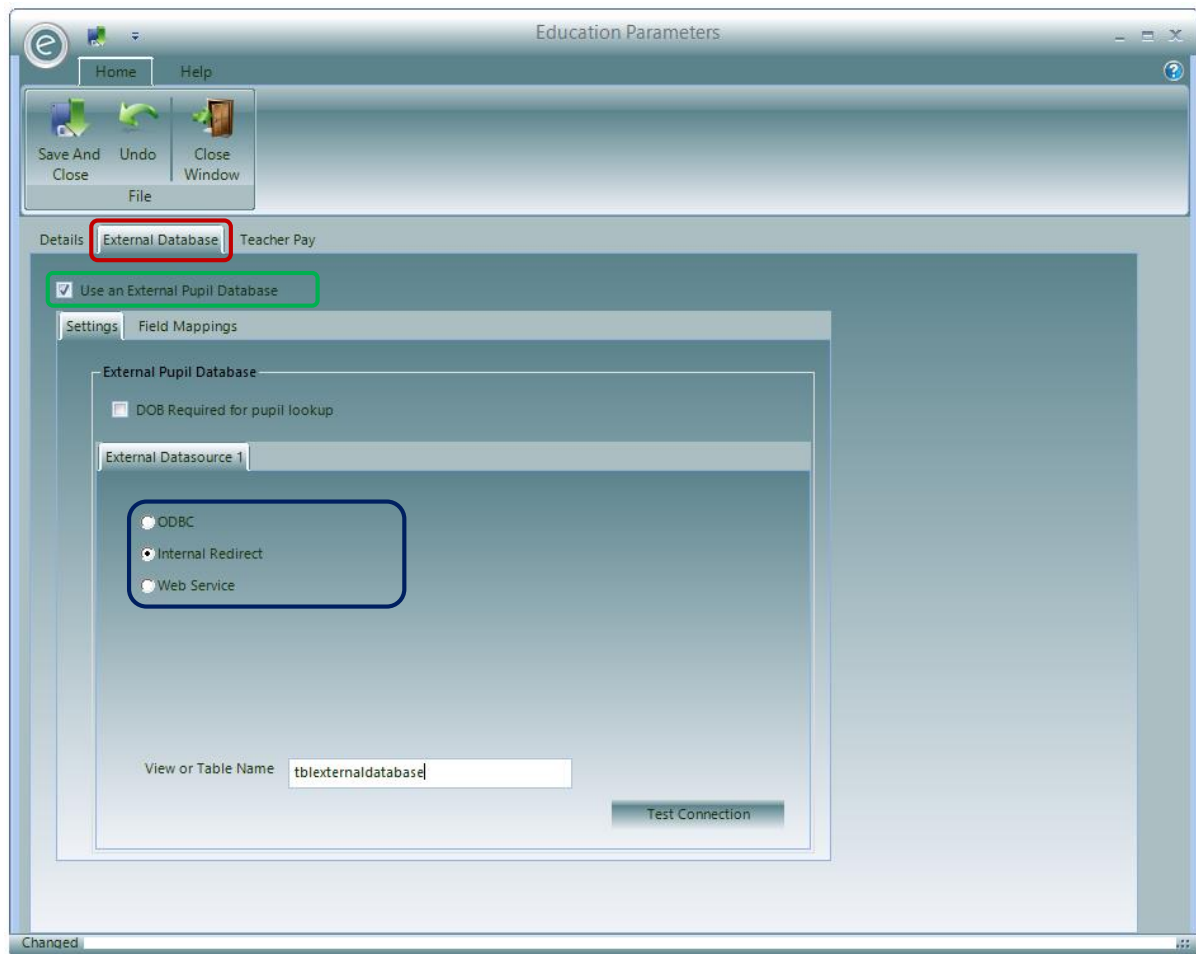
In the **View or Table Name** text box enter the name of the table containing the imported Pupil information.

By default the system will require you to enter the First and Last Name of any Pupil you wish to find, you can enforce a requirement to also provide a date of birth by ticking the **DOB Required for Pupil Lookup** option.

You can *check the correct details have been entered* by clicking on the **Test Connection** button.

4. Dynamic Link View

▶ [Watch the Video Tutorial here](#)

The *View* is a script which when installed within a Central Pupil Database will return Pupil information. The view should be installed in the *External Database* and given a set of access credentials. Views for *CapitaOne EMS* and a few others Pupil databases are available. For more information please contact support@paritor.co.uk.

In order to access the view an *ODBC Data Source connection* has to be defined on each Users work station.

ODBC Data Source Administrator

To connect Ensemble to a View installed within a Central Pupil Database you need to create a system DSN. To do this you need to open the *ODBC Data Source Administrator*. You can open the *ODBC Data Source Administrator* from:

- The Administrative Tools option in the Windows Control Panel
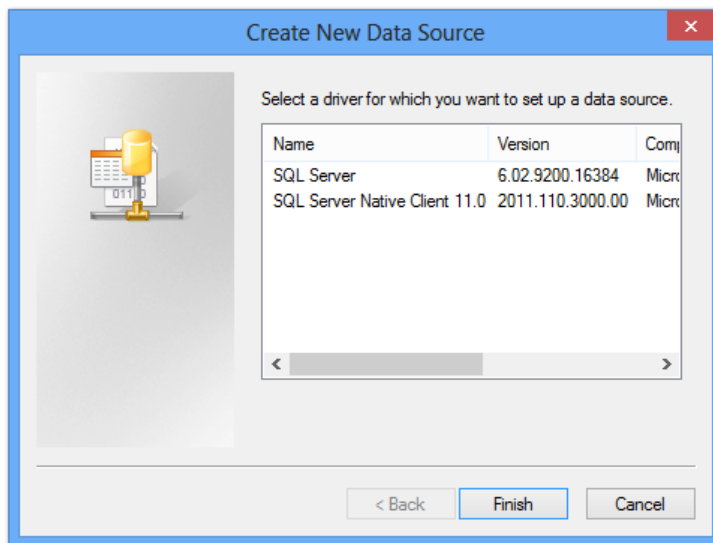- Or search for *Odbcad32* in the Start Menu

Either option will display the window below:
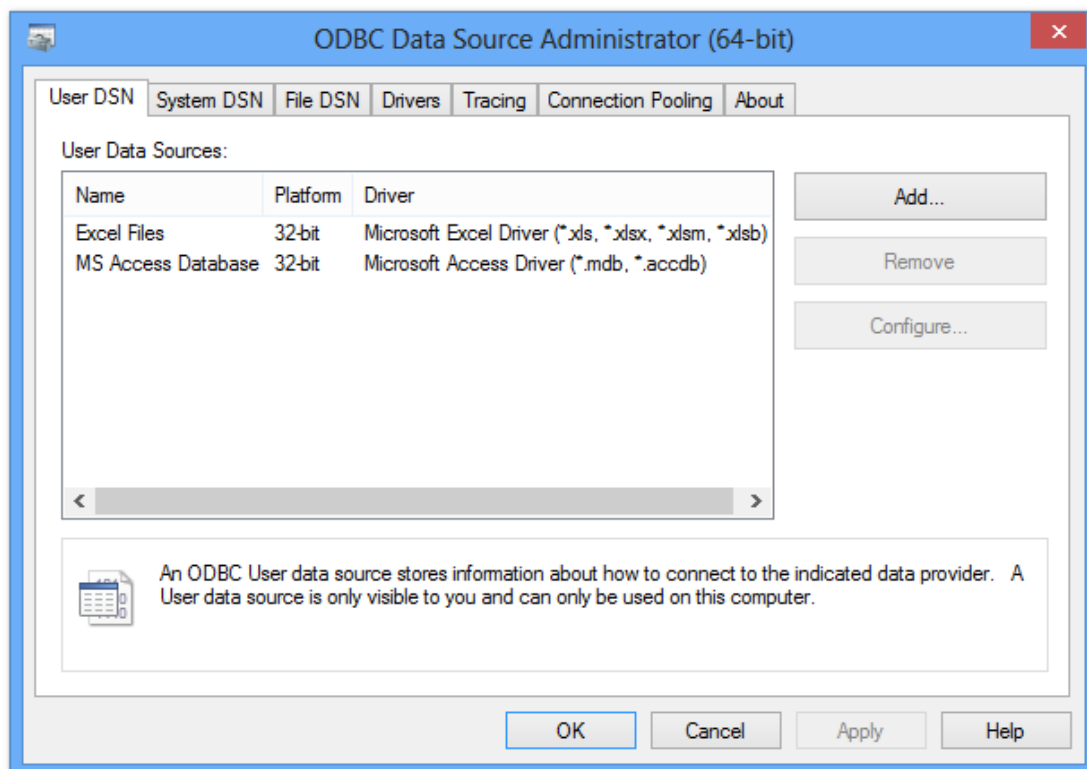
Select the System DSN tab and click on Add

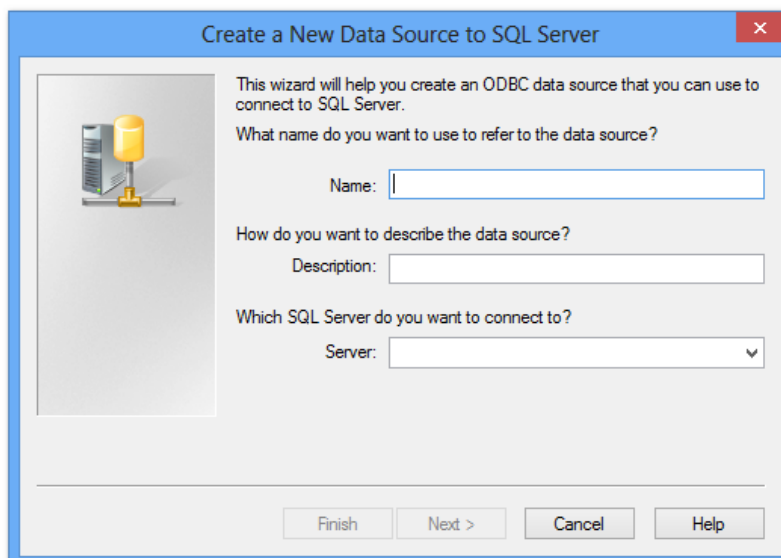The following window is the first screen of the *Create New Data Source wizard*.

Scroll to the type of data source you wish to insert.

Note: If you are planning to use a Data Extract choose *SQL Server*. Otherwise select the matching data source for your requirements.

To continue with the process click **Finish**.

If selecting *SQL Server* it will display the next window:

You will need to enter a **Name** and **Description**, and then define the **Server** to connect to.

It is always advisable to make meaningful descriptions if prompted for one, as this may help identify the data source at a later date.

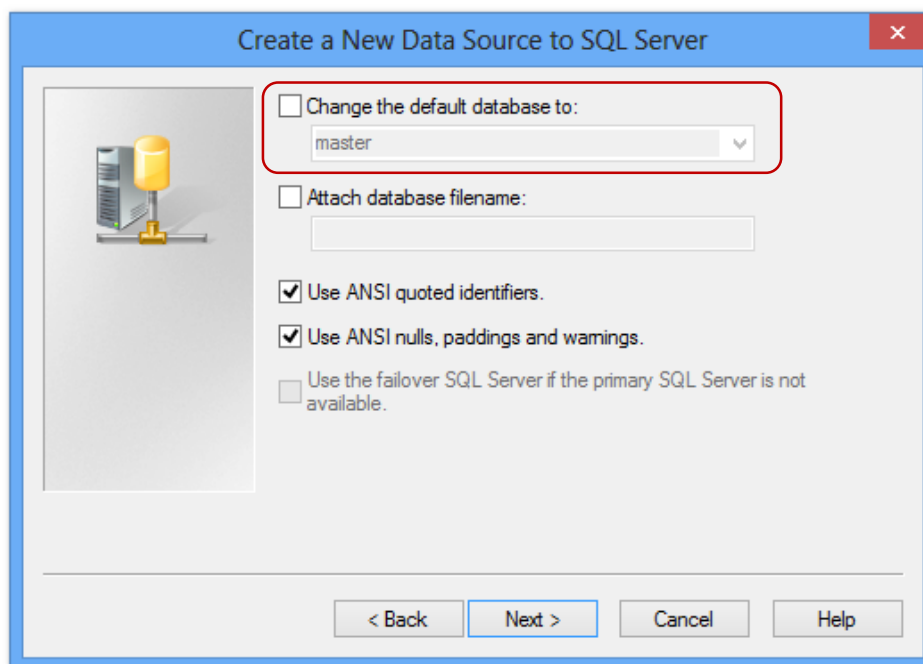To continue with the wizard please choose **Next.**

The next window asks for the login details of the *SQL database*:
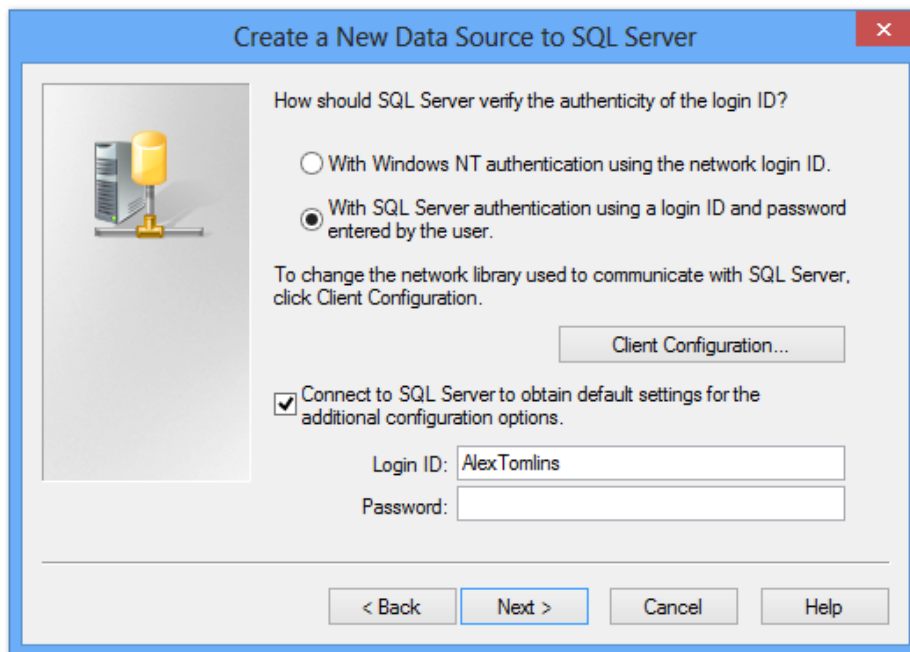
Select the **SQL Server Authentication** option to comply with Ensemble. These login credentials will be used by the data source to login to the SQL database.

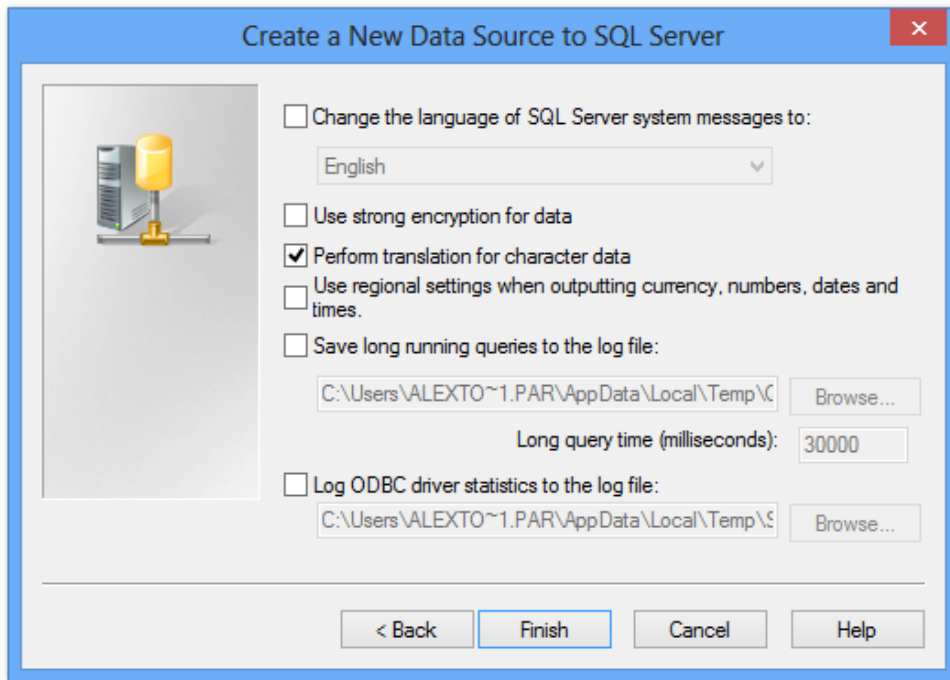To continue with the wizard please choose **Next.**

The next window asks for options concerning the data source:

Make sure you **Change the default database to** *Ensemble Enterprise* as SQL servers may have security restrictions on certain databases. This option is highlighted in the **red box**.

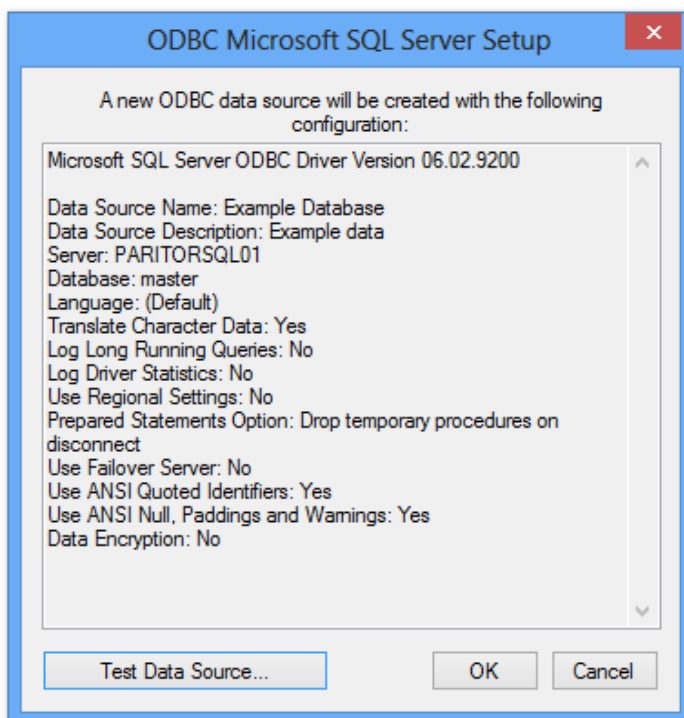To continue with the wizard please choose **Next**.

The next window asks for the final settings before creating the data source:

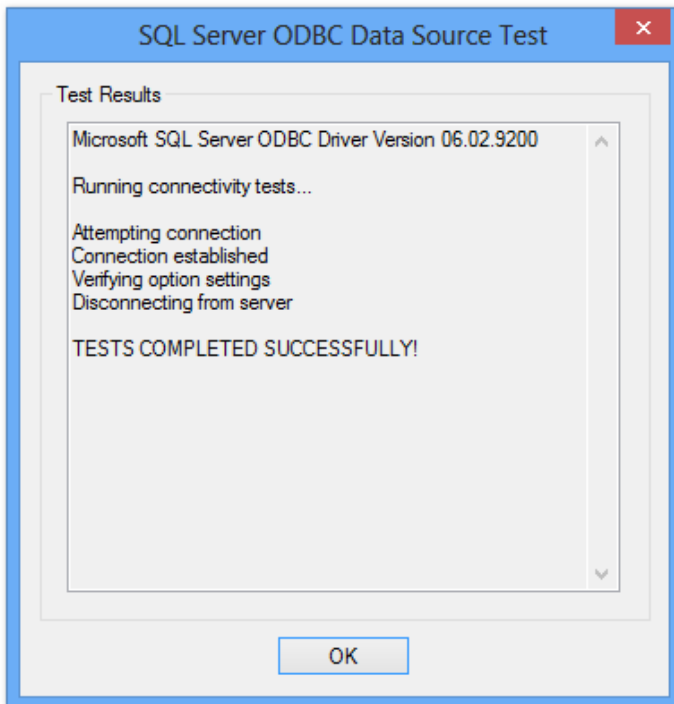No settings need to be adjusted from the default to create an Ensemble data source.

To continue with the wizard please choose **Finish**.

The next window summarises the wizard settings and gives you the option to test the data source setup:
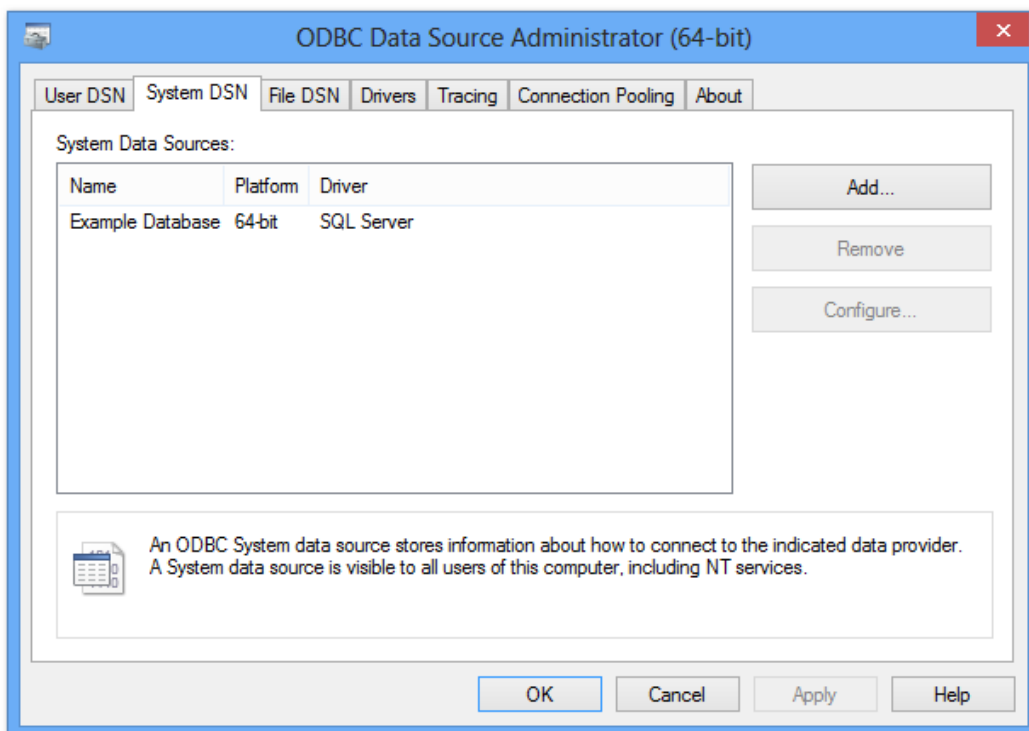

Check the details are correct and click on **Test Data Source.**

When the test is completed you are presented with this window:

To continue with the wizard please choose OK and then OK again on the *Server Setup Window*.

The next window shows you that the new *System DSN* is installed and ready to be called from within *Ensemble*.

To complete the process, please choose OK and return to the desktop.

Connect the DSN to Ensemble

To connect the DSN to Ensemble, click:

Tools (Ribbon Menu) > Parameters > Education Parameters > External Database Tab > Tick 'Use an External Pupil Database' > ODBC

This will display the window below:
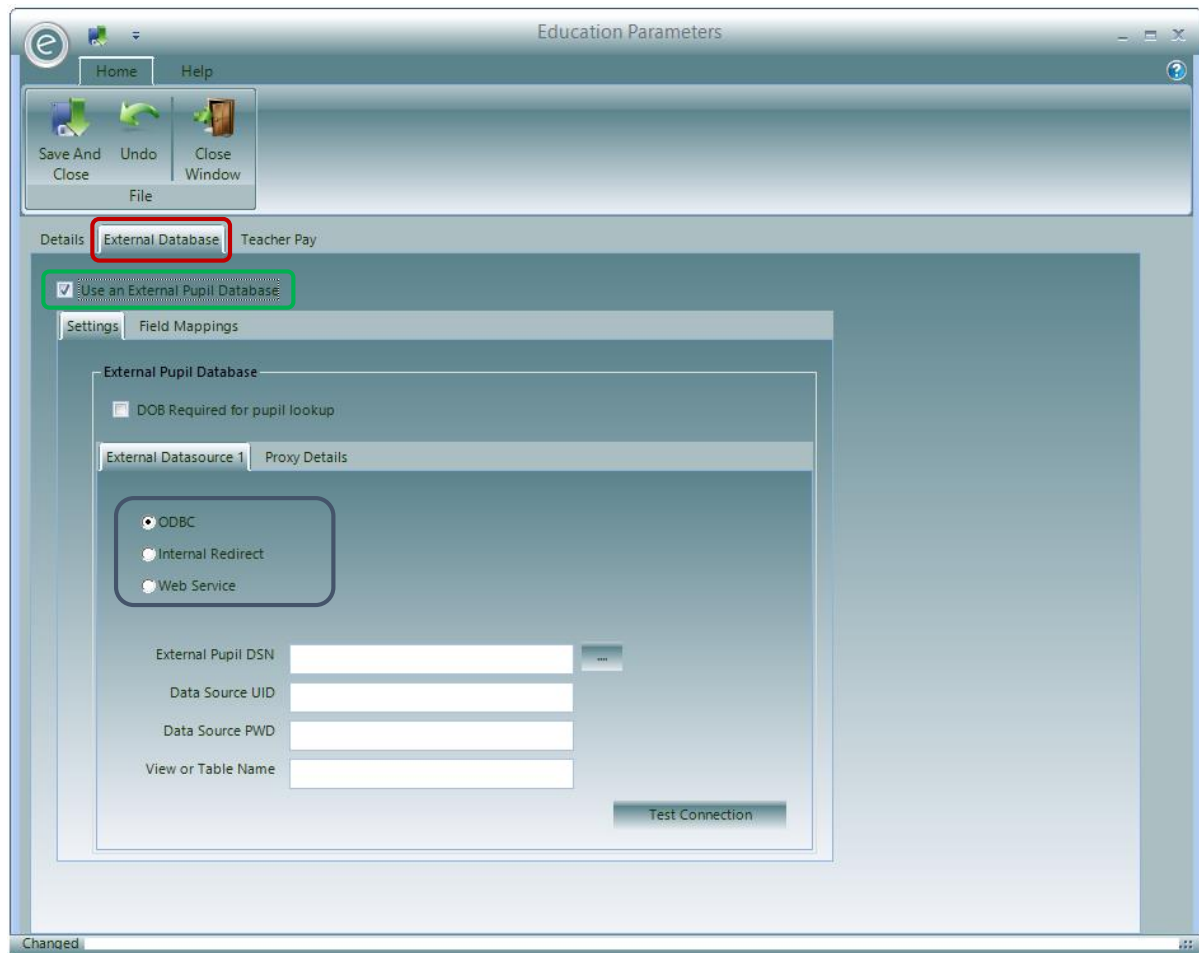
ODBC will be selected as a default.

Now enter the **External Pupil DSN, Data Source UID, Datasource Password PWD** and **View or Table Name.**

When you have finished click **Test Connection** to make sure that it works.
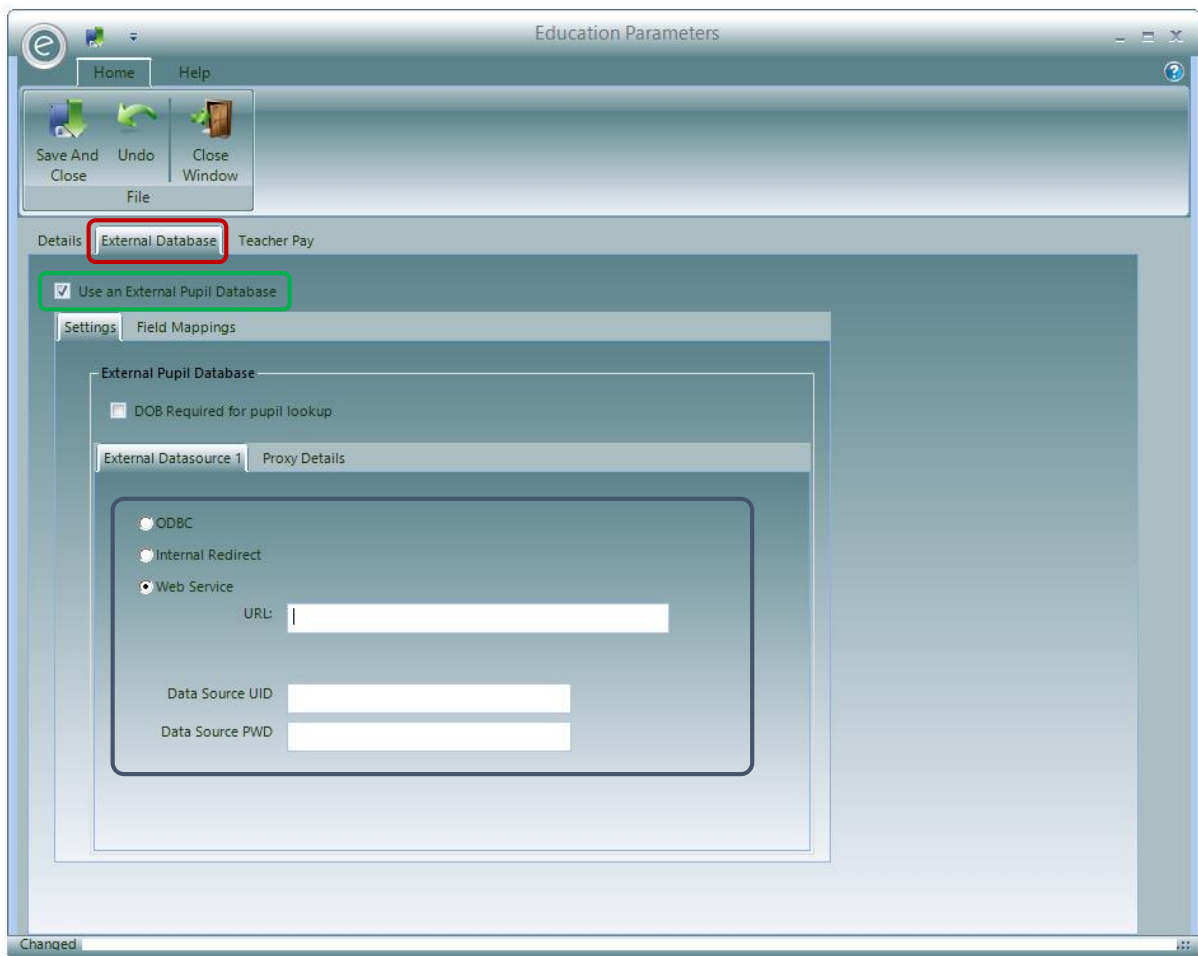
5. Web Service

▶ [Watch the Video Tutorial here](#)

Where your central Pupil database is exposed via a web service you can define Ensemble to access this service.

To do this, click:

Tools (Ribbon Menu) > Parameters > Education Parameters > External Database Tab > Tick 'Use an External Pupil Database' > Web Service

This will display the window below:

Enter the web service URL and credentials.

If the access to the web service is via a proxy server, click on the Proxy Details tab and enter details for the proxy server. This is displayed below:
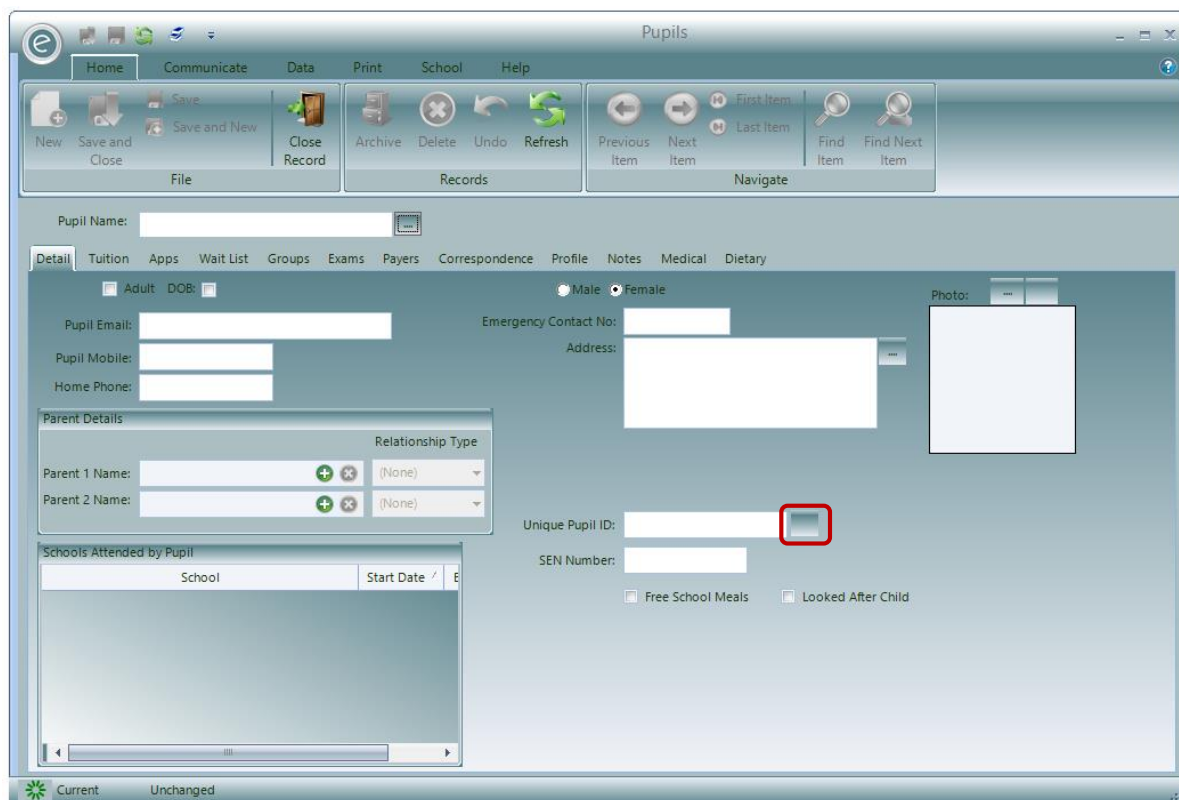
6. Using the Central Pupil Database Link

▶ **Watch the Video Tutorial here**
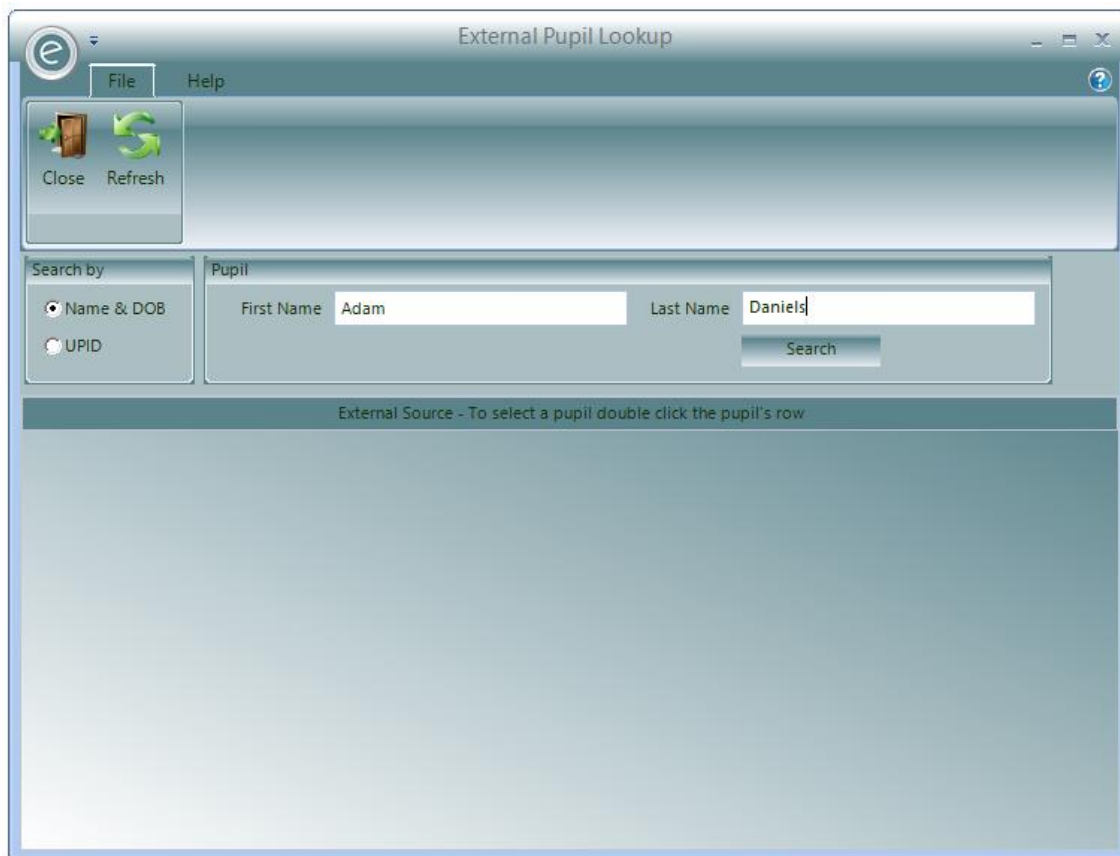
To use the Central Pupil Database Link:

Open a new Pupil Record Card and click the **Search Icon**, highlighted in the **red box**, next to the **Unique Pupil ID** field.

This is displayed in the window below:

The *External Pupil Database Lookup* window will appear allowing you to search through the *External Database*, depending on how you have setup the DSN.

This is displayed below:

You can search by **Name & DOB** or **UPID**.

Click **Search** to find the Pupil.

Updating Pupil Records

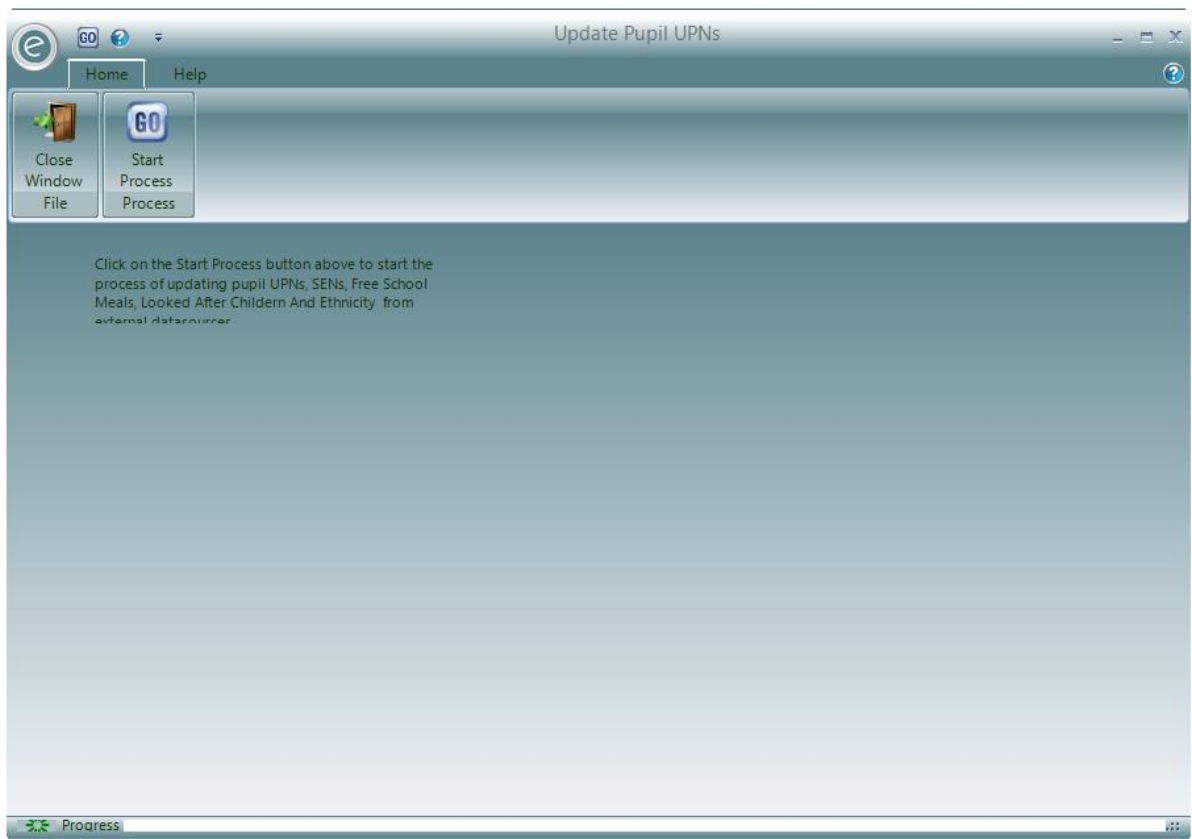If information inside Pupil Record Cards changes such as:

- Address
- Pupil and Parent Contact Details
- Current School
- UPN
- SEN
- Free School Meals
- Looked After Children
- Ethnicity

These can be updated for all the linked Pupil Records by clicking:

Pupils (Ribbon Menu) > Update Pupil Data

This will display the window below:

Simply click **Start Process** to begin.

Appendix

1. Exporting to Sage

Open Sage accounts and select the data import Wizard from the file menu.

You can try this in the training database or the live Sage data, however in either case, backup first. The Sage wizard prompts you to do this.

You now have to choose the type of data you want to import, this is called a "Audit Trail transactions" by Sage

Now set the data type and location. You need to select the .csv option not the .xls/.xlsx option then use the brows button to select the file produced by ensemble. Leave the first row contains headings option unticked.

The next step is to map the columns:

Finally save the format or mapping.
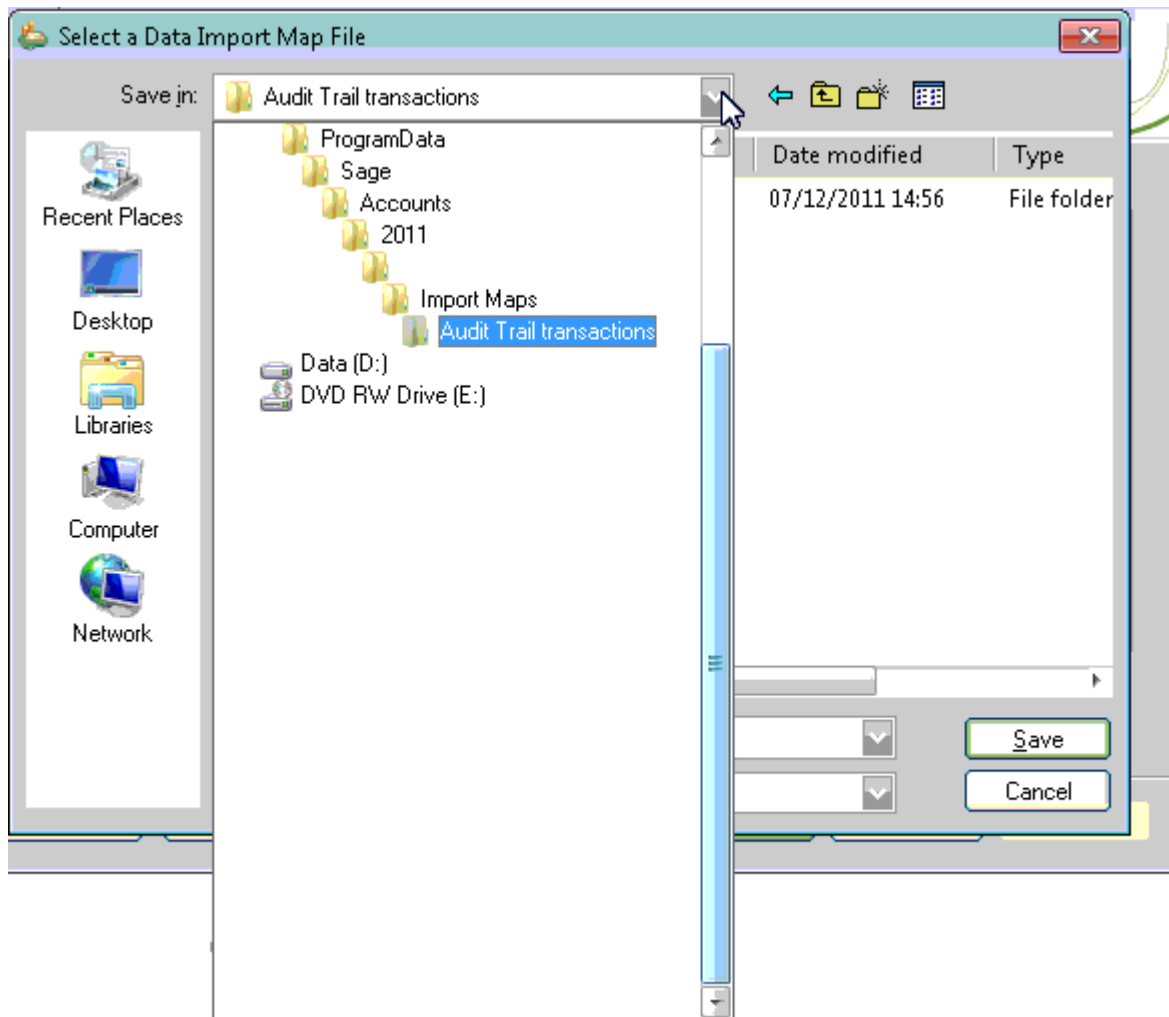
After this you should proceed to the finish window and check your options and if you are happy then do the import.