PARITOR XPERIOS

Paritor Xperios User Guide

Setting a New Tempo for Performing Arts Tuition

www.paritor.com

Tel | 01392 796575
Email | info@paritor.co.uk | support@paritor.co.uk

© Copyright 2020 – Paritor Ltd

All rights reserved. No part of this document may be reproduced, stored in a retrieval system or transmitted in any form or by any means, without the prior written permission of the publisher.

The authors and publishers have made every effort in the preparation of this document to ensure the accuracy of the information. However, the information contained in this document is provided without warranty, either express or implied. Neither the authors nor the publishers will be held liable for any damages caused, or alleged to be caused, either directly or indirectly by this document.

First Printed January 2020

Revised 5th February 2021

Version 5.9.1

Published by

Paritor Ltd

Ground Floor, Compton House, 11 Park 5, Harrier Way,

Exeter, Devon EX2 7HU

Tel (01392) 796575

info@paritor.co.uk

http://www.paritor.com/

Preface

Paritor Xperios *is a "living product" which is constantly being enhanced as a result of user feedback. Therefore, every attempt is made to keep this document up to date. 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

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

The design of Xperios has been developed over several years and incorporates many features. These features include a meticulously designed user interface with careful use of colours and special controls such as drop-down menus and lists to make the user's life easier.

The software will be distributed with a comprehensive set of documentation tools which are made available to the user via a help system and through online videos. Users may also access the Paritor website for the latest updates and information.

Data maintained by the system is stored in a SQL database and is therefore easily extracted, manipulated, and analysed by a multitude of tools. These include the components of Microsoft Office, such as Excel, or any other product designed to integrate with SQL 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 and processes, explaining each individual function and its use. Ft

Who is this document for?

This document is intended for the use of any user or potential user of the Paritor Xperios Software. The document covers general usage topics and specific areas including system setup and configuration. Therefore, it should be used by those responsible for managing all aspects of the business. It should also be used in part by those responsible for managing specific areas of the business.

What is covered in this document?

This document describes how to set up and configure the software and how to carry out various processes and tasks you will perform during the business year. Detailed explanations and screenshots of the software itself are provided throughout.

Style conventions

The document makes use of several different styles of text and layout to help you differentiate between varying information. Below are examples of the styles used and an explanation of what they mean.

- All features and functions in Xperios 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 and labels that appear on the screen (such as buttons or those in menus) are displayed as File or Help OR use speech marks.
- 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 may be listed and an explanation is provided beside it. The field name is in **bold**:
- **Pay Reference** Enter the Teachers' pay reference

Table of Contents

Getting Started **9**
Installing Xperios 9
Running Xperios for the First Time 11
How is your Data Managed? 13
Look and Feel **14**
Layout of Xperios Screen 14
The Dashboard 15
Record Card 16
Standard Dialogue 18
Screen Size Manager 18
Culture and Language **20**
Culture 20
Language 21
Setting Your Device Region 22
Education System 23
System Settings **24**
Organisation 24
CRM 40
Rapport 43
Calendar 48
Activity Sections 51
Catalogue 56
Schools 57
Teachers 58
Accounts 60
Resources 63
Contacts **65**
Finding Contacts 65
Organisations and Individuals 65
Types of Contacts 65
Adding a Contact 66
Teachers 67
Adding Prospectus Items to a School/Centre 68
Schooble Account 69
Disassociating Users 70
Associating Individuals with Organisations 70
Manage User Access to Ensemble **74**
Introduction 74

Multiple databases for one person 74
Enabling Access for a User 74
Re-Sending User Invitations 75
Studies 77
Study Service Types 77
Adding a Study 77
Editing a Study 78
Study Items 78
Edit Study Items 79
Making a Study Offer 79
Revoking an Offer 79
Transferring Students to another Study 80
Transferring Multiple Students to another Study 80
Events 81
Types of Event 81
Event Service Types 81
Adding Events 81
Editing an Event 83
Adding Event Extras 83
Understanding the Event Application Flow 84
Approving an Application Requiring Evaluation 85
Event Transfer 85
Scheduling an Event 86
Recording Attendance 86
Recording Achievement 86
Audition 87
Audition Service Type 87
Adding an Audition 87
Editing an Audition 89
Audition Items (Defining the required information) 89
Audition Genres 90
Audition Subjects 90
Audition Exam Boards 91
Scheduling Auditions 91
Recording Results 91
Transferring Applicant to a Study 91
Transferring Applicants to a Group 92
Exams 93
Creating an Exams Service Type 93

Adding Exams 93
Editing Exams 95
Time Slots 95
Groups 96
Creating a Group Service Type 96
Adding a Group 96
Editing a Group 98
Adding Members to a Group 98
Editing Member Details 99
Group Waiting List 100
Pupils 101
Managing Delegates 101
Contacting Pupils 102
Inviting Pupils from Tuition Waiting List 103
Managing the Online Catalogue 104
Catalogue 104
Instructions 105
Image 105
Applying Online 106
Events 107
Auditions 110
Exams 111
Teacher Online View 112
Tuition 113
Tuition Service Types 113
Assigning Pupils to Lessons 113
Adding an Activity 115
Editing Activities 116
Attendance 117
Withdrawing Pupils 117
Transferring Pupils 117
Resources 118
Understanding what Resources are 118
Adding a Resource 118
Editing a Resource 119
Allocating a single resource 119
Setting the charge 119
Allocating multiple resources 119
Repairs 119

Financial Management **120**
Invoicing 121
Invoice Summary 122
Posting a Credit Adjustment 123
Authorising Credits 125
Auto-Generate Refunds 129
Creating a Credit Refund 129
Withdrawing a Person from an Activity 131
Posting Manual Receipts 132
Posting a Refund Request 134
Writing Off an Invoice 135
Card Payments Schedules 135
Changing the Status of an Invoice 136
Hold Payment Schedule 136
View Emails regarding a Scheduled Payment 137
Looking at a Debtors Portal 138
Business Management **140**
Managing Invoices 140
Managing Notes of Interest List 143
Managing Tuition Waiting List 144
Managing Resources Waiting List 145
Managing DBS 145
Dashboard **146**
Dashboard View 146
Grids 147
Filters 148
Sum 148
Select Columns 149
Group Data 150
Extracting Data 151
Report **152**
Report Dialogue 152
Report View 153
Importing Data **154**
Paritor Online Resources **158**
Appendix **159**

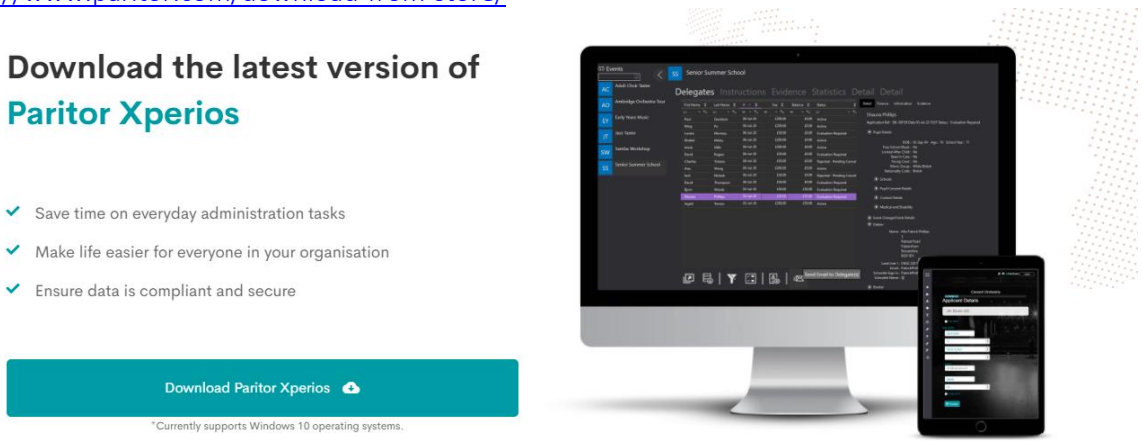
Getting Started

Installing Xperios

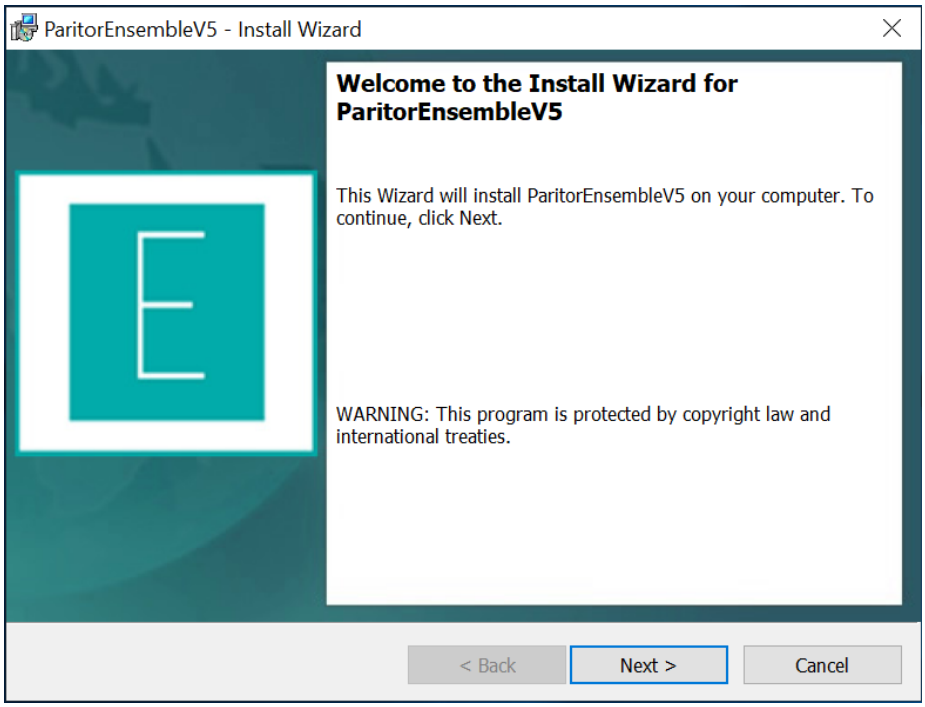
To download the software, go to the website link below and click on Xperios.

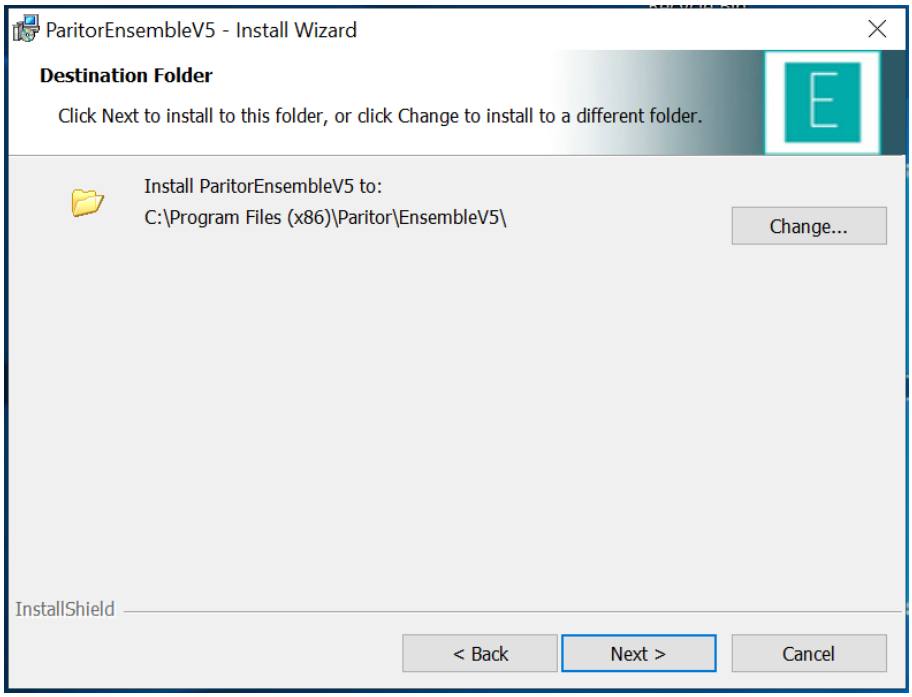
https://www.paritor.com/download/

https://www.paritor.com/download-from-store/

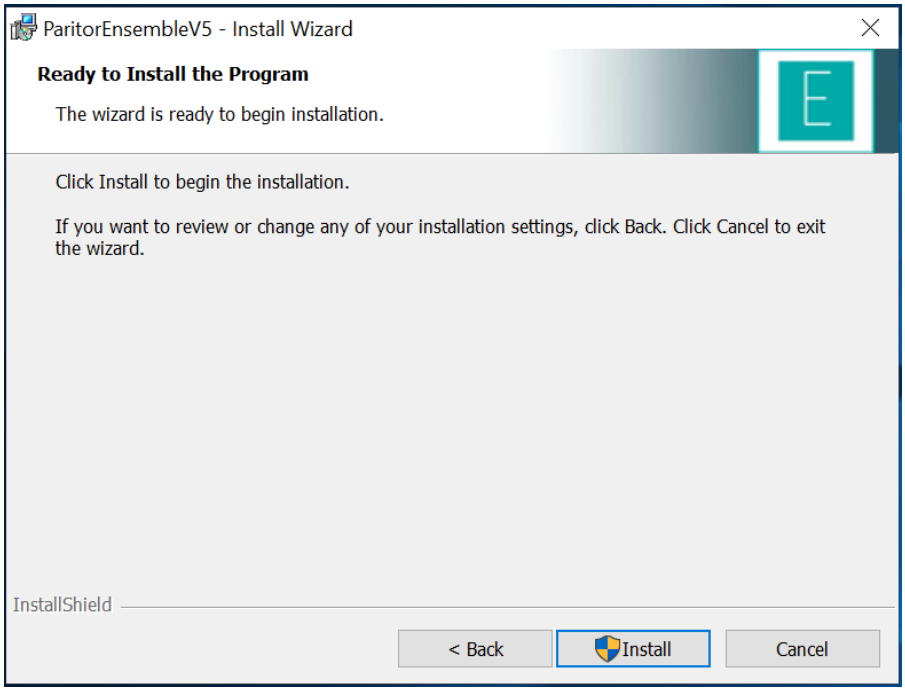


This will start the download. Once this has finished, click on the finished download to start the installation process. The installation process may vary depending on the download location.

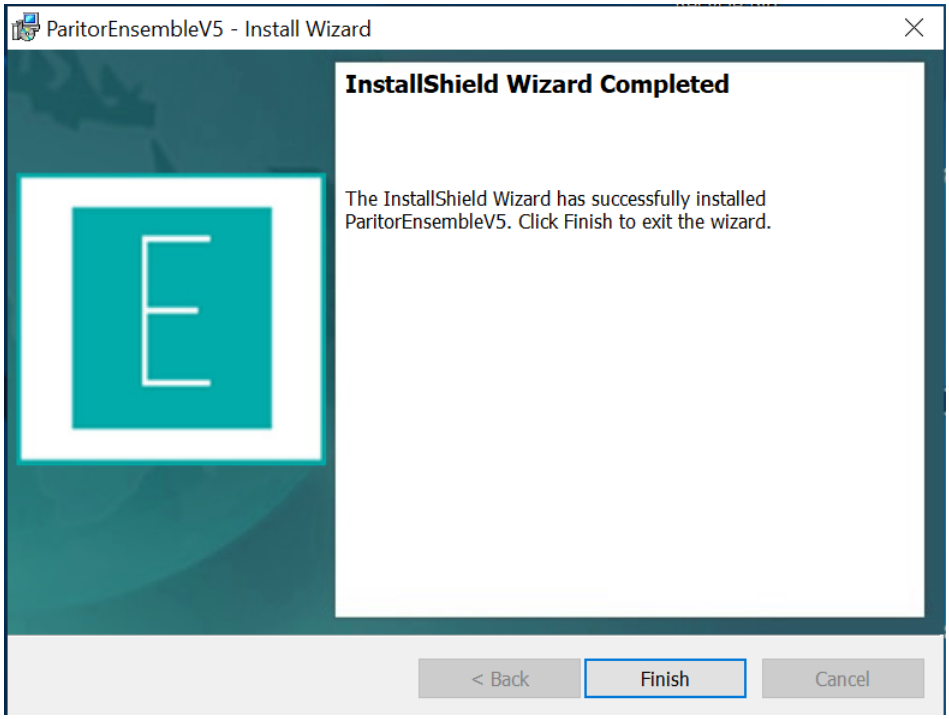




Here, you can choose where you would like Xperios to be stored within your computer.



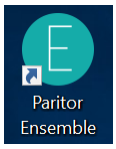
Once the installation is complete the screen below is displayed.



You have now installed Xperios.

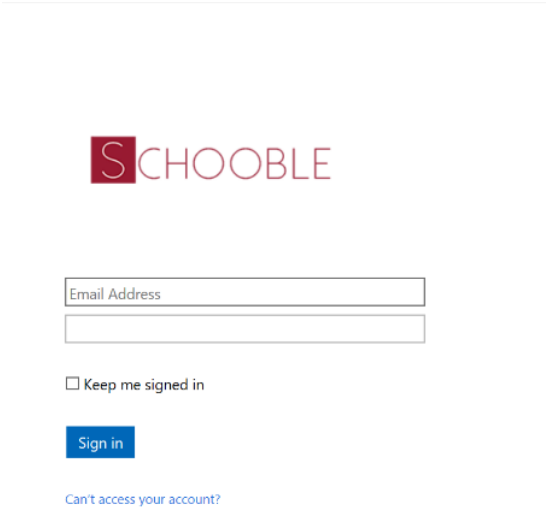
Running Xperios for the First Time

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



Double-click on the icon. The Schooble sign in screen will appear. Use this screen to sign-in to your Schooble account.

Tip: select the "Keep me signed in" box to have your details remembered. Selecting this box means you will only need to sign-in again if you log out or change device.



If you are already registered as a User with a single database association, you will automatically be connected to that database within Ensemble.

If you are a User with multiple database associations, you will be presented with a list of databases on start-up. From here, you can select the one to use during your current session.

If you are not registered with any database, you will only have the option to Exit Xperios at this present time.

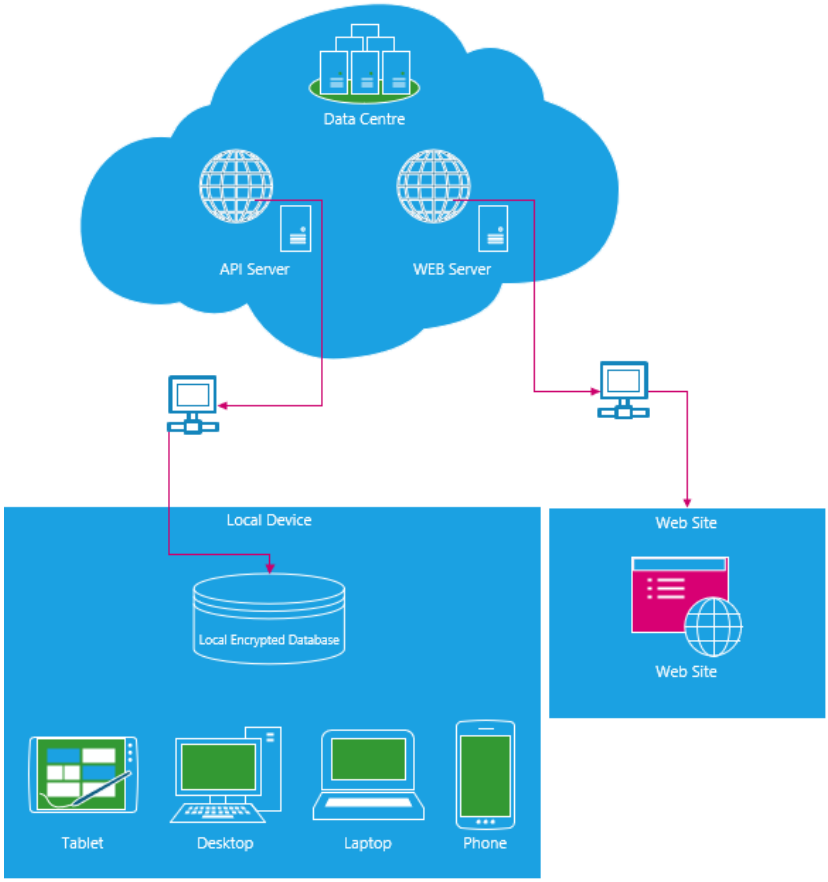
Once connected to a database, you will be presented with the main Xperios Dashboard screen.

The menu options are hidden while the core data from your database is synchronised with your software. Once this initial synchronisation is complete the menu options will appear. At the same time, the remaining non-core data is synchronised in the background.

The synchronisation process can take a while depending on the size of the database you are connected to. This lengthy process of a full synchronisation only takes place when you first connect to a database or if you explicitly request a full re-sync under User Settings.

How is your Data Managed?

All data is held on servers based in regional data centres managed by Microsoft Azure. Xperios also holds a local copy of your data in an encrypted format on your device and keeps this in sync with your master database.



This provides two advantages. Firstly, it means that Xperios is superfast at looking up and displaying data. Secondly, it allows you to access Xperios in “Read Only” mode when you are not connected to the internet.

Please note, you need to be connected to the internet when you change any data and all changes made are to both the master database and your local database.

Look and Feel

The look and feel of Xperios have been designed with the modern day in mind. Screens now come in multiple shapes and sizes. These vary from a traditional desktop setup to mobile devices like phones and tablets.

Xperios is designed to take advantage of new technology and adapt to the device you run it on. Xperios maintains a consistent modern look and feel across a whole range of devices.

Layout of Xperios Screen

This section covers in detail the new look of Version 5.

Xperios uses a set of standard and easy to use screen layouts to display and edit data, such as…

- The Dashboard- This is the main screen layout which is displayed when you open Ensemble. It is the hub for managing all operations.

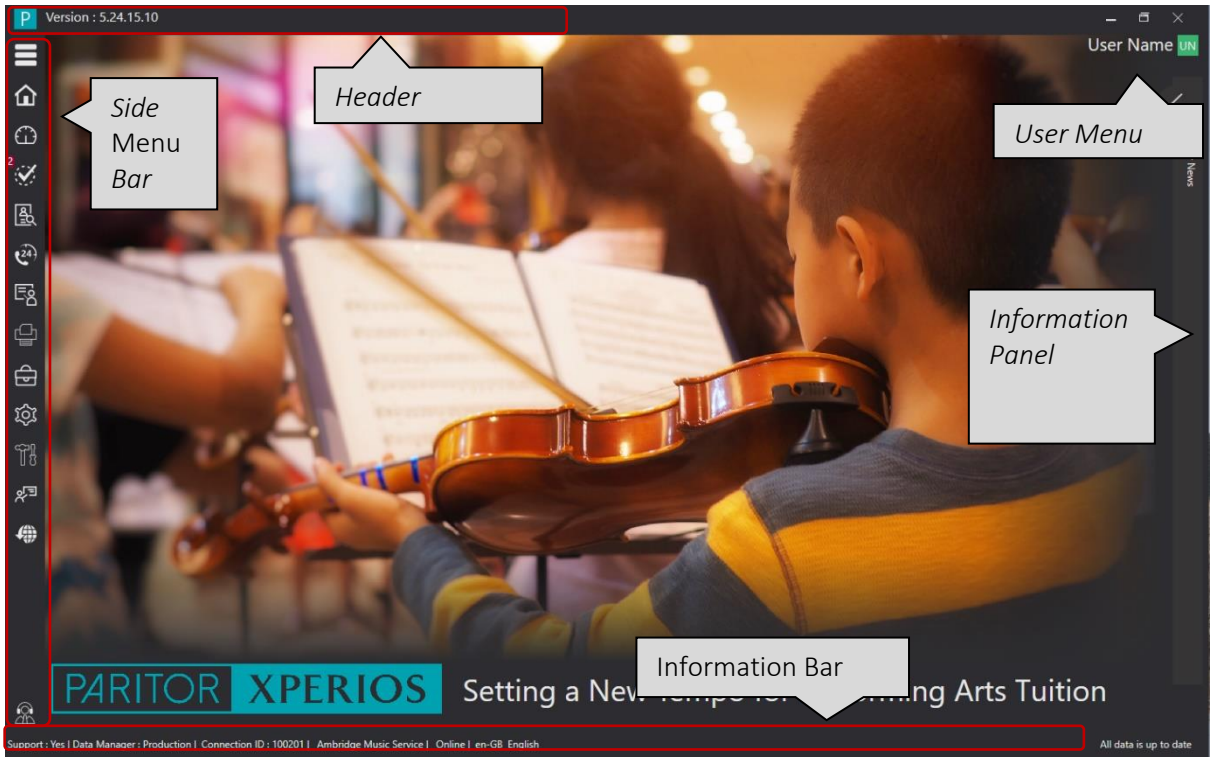
- Record Card- Primary data objects such as Contacts, Events, and all drop-down list items are managed via a record card view.

- Standard Dialogue- Whenever the system requires data to be entered by the User to complete a process it will display a standard dialogue layout view.

- Report Dialogue- When running a Report, the system will use a Report dialogue layout to request any Report criteria.

- Report View- When displaying a Report, the system will use a Report layout view to present the data.

The Dashboard



Header

Displays the current version of the software.

Information Bar

This includes the currently connected database ID and name, the connection state, i.e. Offline or Online and the current background process such as the progress of any data items being synced with the main database.

Side Menu Bar

The main menu bar provides access to most functions and processes. This adapts to the access levels you have, i.e., it only displays options granted to you as a user. Items in this menu may open a function, process, or may display a sub-menu with additional options.

User Menu

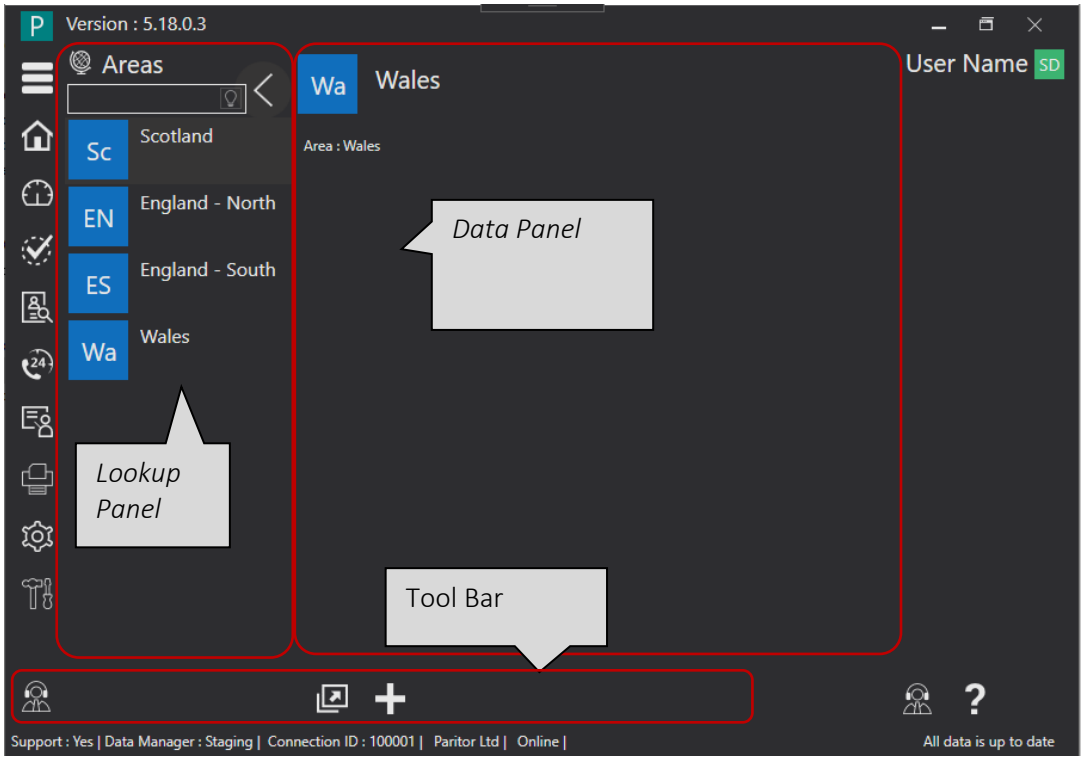
A drop-down menu provides options for you to switch to alternative databases, log out, or manage your personal preferences and your account.

Information Panel

This is a flyout area on the right of the screen which is used to display useful information such as News from Paritor or progres199 acts as a News Feed for following your interests.

Record Card

When selecting a Primary object set such as a *Contacts,* or drop-down list objects such as *Areas*, the system will switch to the Record Card layout view. This consists of two primary sections:



Lookup Panel

The Lookup Panel displays a summarised list of the information held within the database. If the list is relatively small an unfiltered list will be displayed. If the list is larger you will need to enter some criteria into the filter before any items are shown.

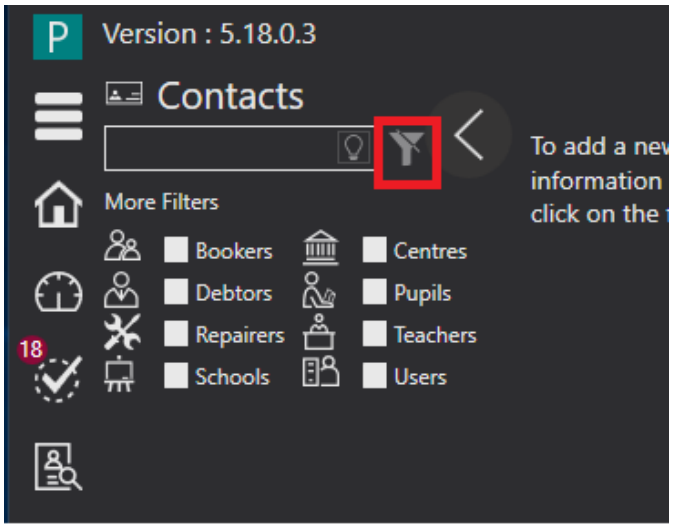
These filters work depending on the type of data you are sorting. In all cases, you can filter by the name of the item.

Where the list contains people, you can also include part of the first name and last name, e.g. if you want to list all the John Smith's you can type in "J Smi" as this will return all items that have a first name starting with a "J" and a surname starting "Smi".

If the list contains people or organisations, you can enter other fundamental values such as a phone number, email address, or postcode.

Values specific to the item can also be entered into the filter criteria. For example, if the list is a list of Instruments, you can enter the Instrument Serial Number, or in the case of an Event, you can enter the Event Code.

Some item lists also have an additional filter option area. For example, Contacts have a filter area where you can select the type of contact to include in the display. This additional filter area is shown or hidden by clicking on the filter button next to the filter text.



Data Panel

If you select an item from the look-up panel the full information is displayed in the Centre Data Panel.

This is the main area for displaying and managing data. Its where selected data items are displayed in detail, created, and amended.

The panel has two modes: View Mode and Edit Mode.

You can switch modes by clicking on the Edit or View icon in the toolbar.

When in view mode, you can only access values for fields containing data. So, if you are viewing a contact record for a person whose mobile phone number you do not have, the mobile phone number field is not displayed.

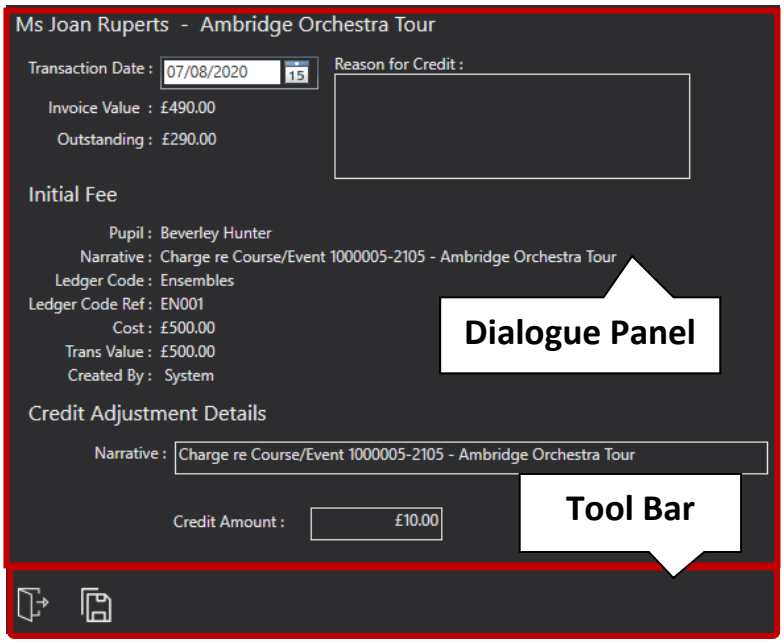
When in Edit mode all fields are displayed.

Tool Bar

The Tool Bar contains a list of menu options. These will change depending on the type of data you are viewing, the item type, and various other factors.

Standard Dialogue

Various processes, such as posting an adjustment to an invoice, require the User to enter values. In such cases, the system will display the Standard Dialogue view layout.



Dialogue Panel

Like the data panel above, this area is used to display existing data and prompt for additional data to be entered by the User.

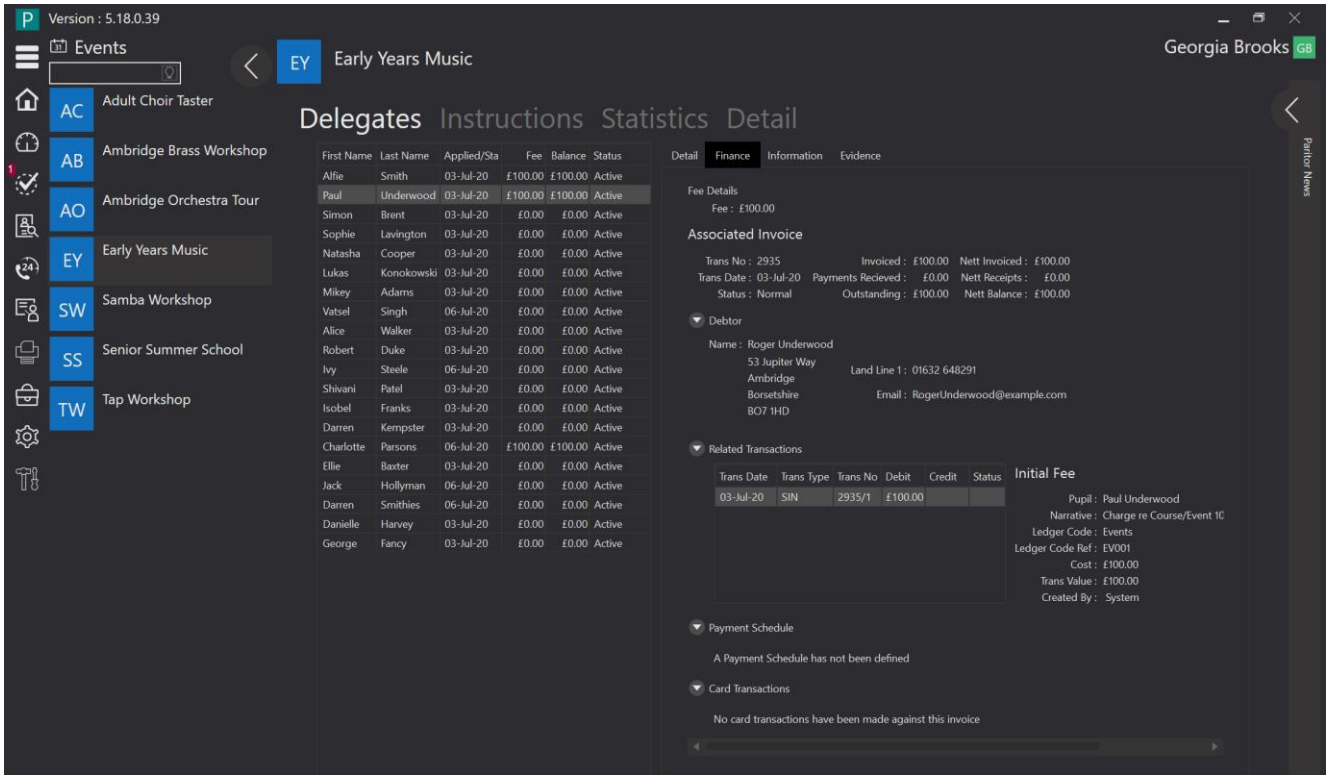
Tool Bar

Like the toolbar above, this contains a list of menu options. The list of menu items will change depending on the function but will always contain an Exit and a Save icon.

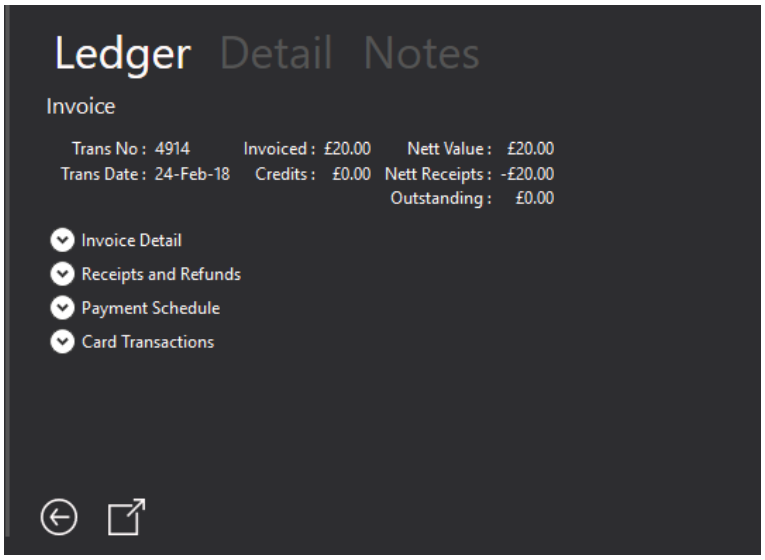
Screen Size Manager

Xperios now has a screen size responsive design. This means that if the screen is too narrow to display all the data it will overlay data from the furthest right-hand panel over to the panel on the left, as is shown in the following example.

Here, the screen is wide enough to display the list of transactions and the panel showing an expansion of the current transaction.



If we narrow the screen to a point where the right-hand panel does not have enough room to be displayed it is set to overlay the transaction list panel.



When this happens, an additional icon is displayed. This is the Back-Screen tool and will flip the screen back so that it displays the hidden panel. In the example above this would be the Transaction list.

Culture and Language

Culture

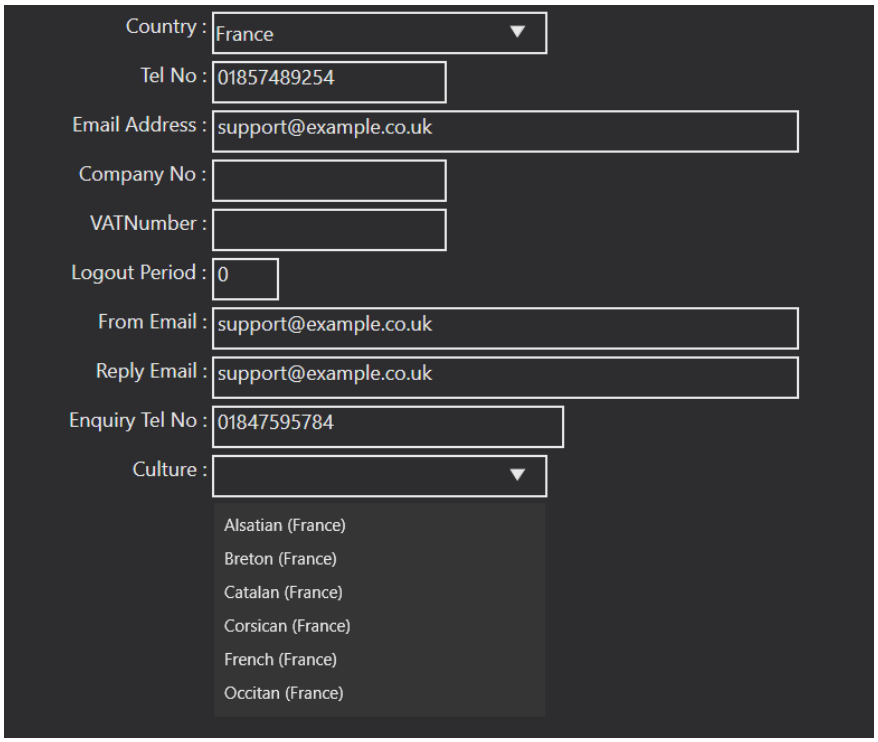
When a Culture is set the whole business is adjusted. The default language will change as well as other data in accordance with that culture. Whoever uses Xperios within your business will be presented with your chosen culture setting. The setting alters the default language and formats currency, date, and time.

To change your culture, go into **Settings** and then **System configuration**. Then edit the record.

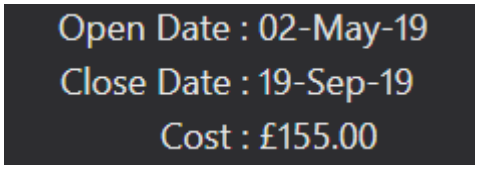
First, you will need to select your "country".

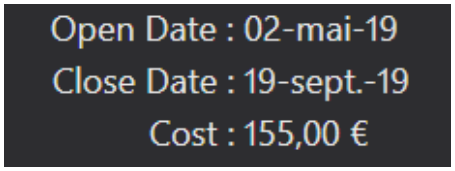
Once you have chosen your country you will be able to access a list of available culture options.

As you can see below, if you were to select France, six culture options would become available to you: Alsatian, Breton, Catalan, Corsican, French, and Occitan.



By changing the country to France and the Culture to French you can see the changes below. These include alterations to the date and currency, however, the language for everything except the date is as it was before.

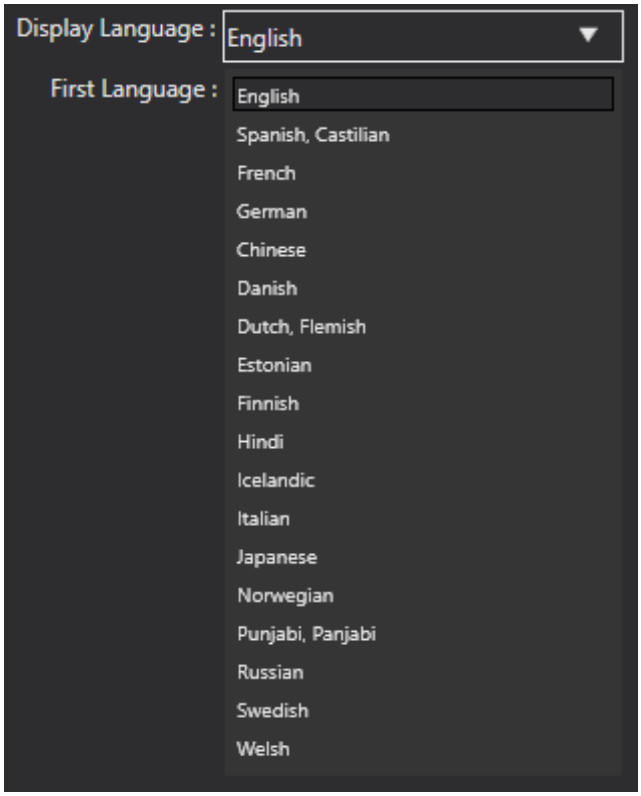




Language

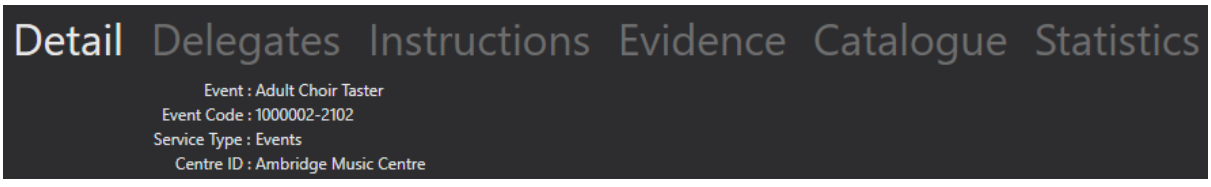
The Culture is set for the business whilst the language is set for each User and alters how labels are displayed for them. To change this, access your Schooble account go to **Settings** and **Edit the record**. There is a “First Language” and a “Display Language”.

The “First Language” is your first or native language. This will not change how the forms are displayed. The “Display Language” is the language you select from our supported languages. All forms will be displayed in your selection.



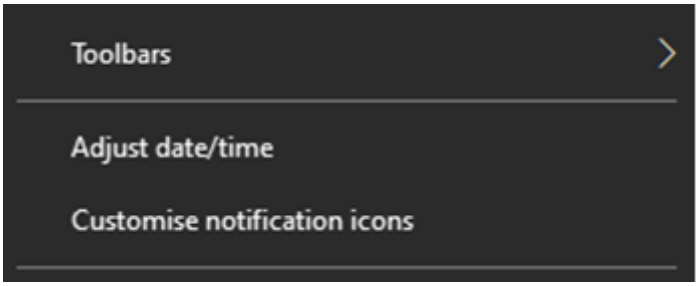
When you change your “Display Language”, the language for all your forms will change. This will not change the language of the data. This is set based on your business Culture selection. We currently support English, Spanish, Castilian, French, German, Chinese, Danish, Dutch, Flemish, Finnish, Icelandic, Italian, Norwegian, Swedish, and Welsh.

As shown below, when the “Display Language” is changed to Chinese the headers and labels have changed to Chinese. However, the data is still in English as this is the Culture of the business

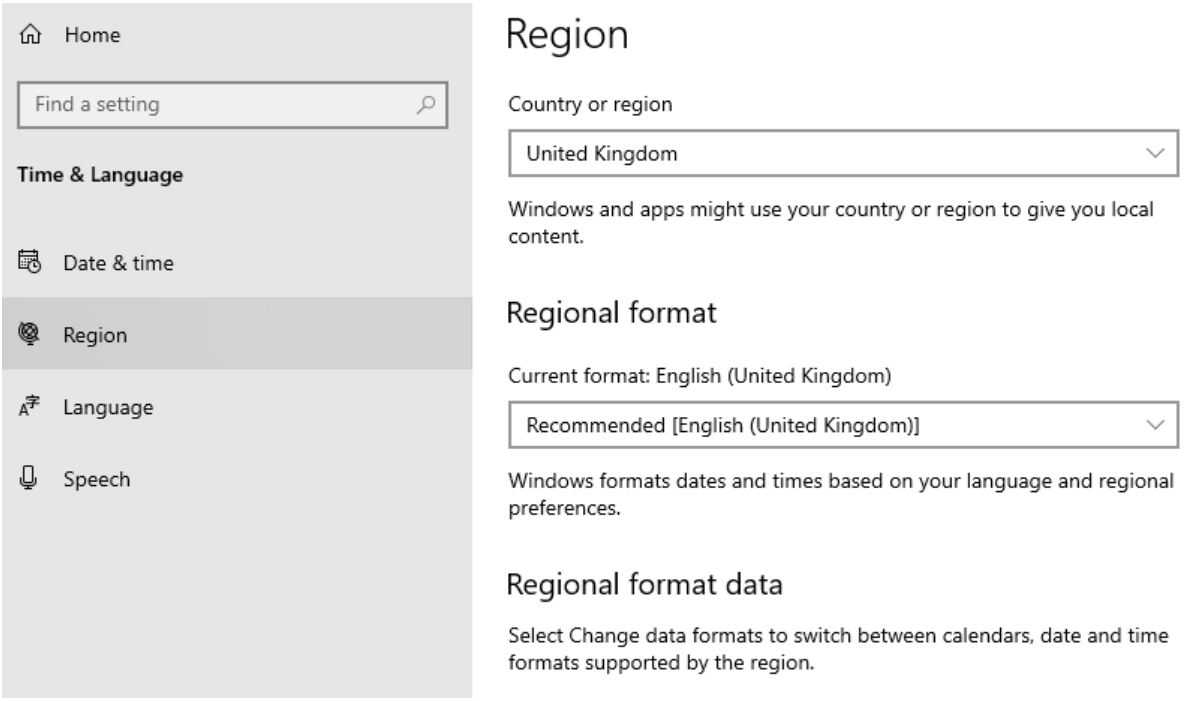


Setting Your Device Region

If you have set your Culture and Language to the same country but are still getting some dates and currency showing in a different language you may need to adjust your computer settings. To do this on a device running Windows, right click on the date and time in the bottom right of your screen and select “Adjust date/time”.



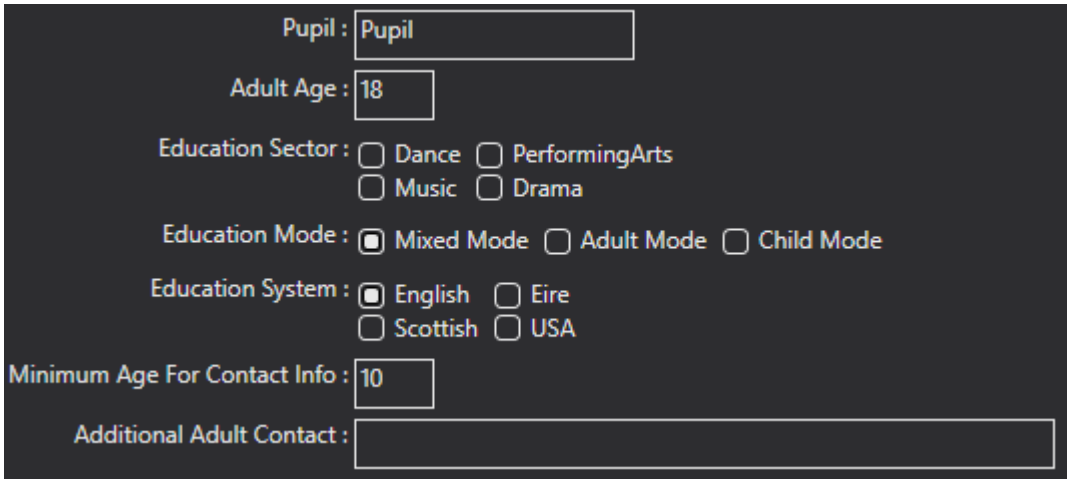
Once the display shown in the example below has opened, select “Region”, and set the region to the correct one for your business. If the correct region for your business does not shown in the drop-down menu, double-check that you also have the correct Country selected. If your business operates within the UK, make sure that you have English (United Kingdom) selected instead of English (United States). Once you have selected the correct format you can close this window. You will need to restart your computer for these changes to be made.



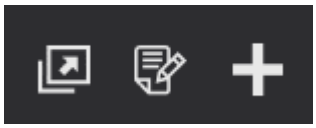
Education System

To change your Education System, go to System Configuration under Settings. Next, select the Tuition tab. Click on the Edit icon to enter Edit mode as shown in the example below.

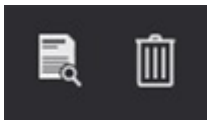
Here, you can adjust the education sector that you teach, the education mode and the type of education system you work in. This will alter the way school years are displayed and how a pupil school year is calculated.



System Settings



These three icons are common across all systems settings. The first icon will open the display in a new window. The second is used to Edit a record. The third is used to Add a New Record.



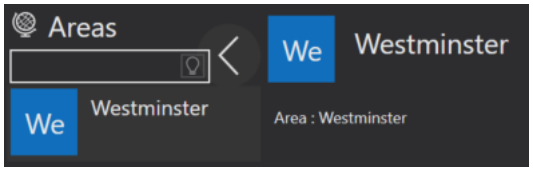
Once you enter Edit mode these icons will appear, the first one will take you back to view mode. The second one will delete the record. As soon as you start editing the view icon will disappear.

Once you start editing a record these icons will appear. The first icon is the Save icon. The last one will undo any changes you have made.

In some areas there is an option to add positions. This is used to indicate where in a drop-down menu the item should sit.

Organisation

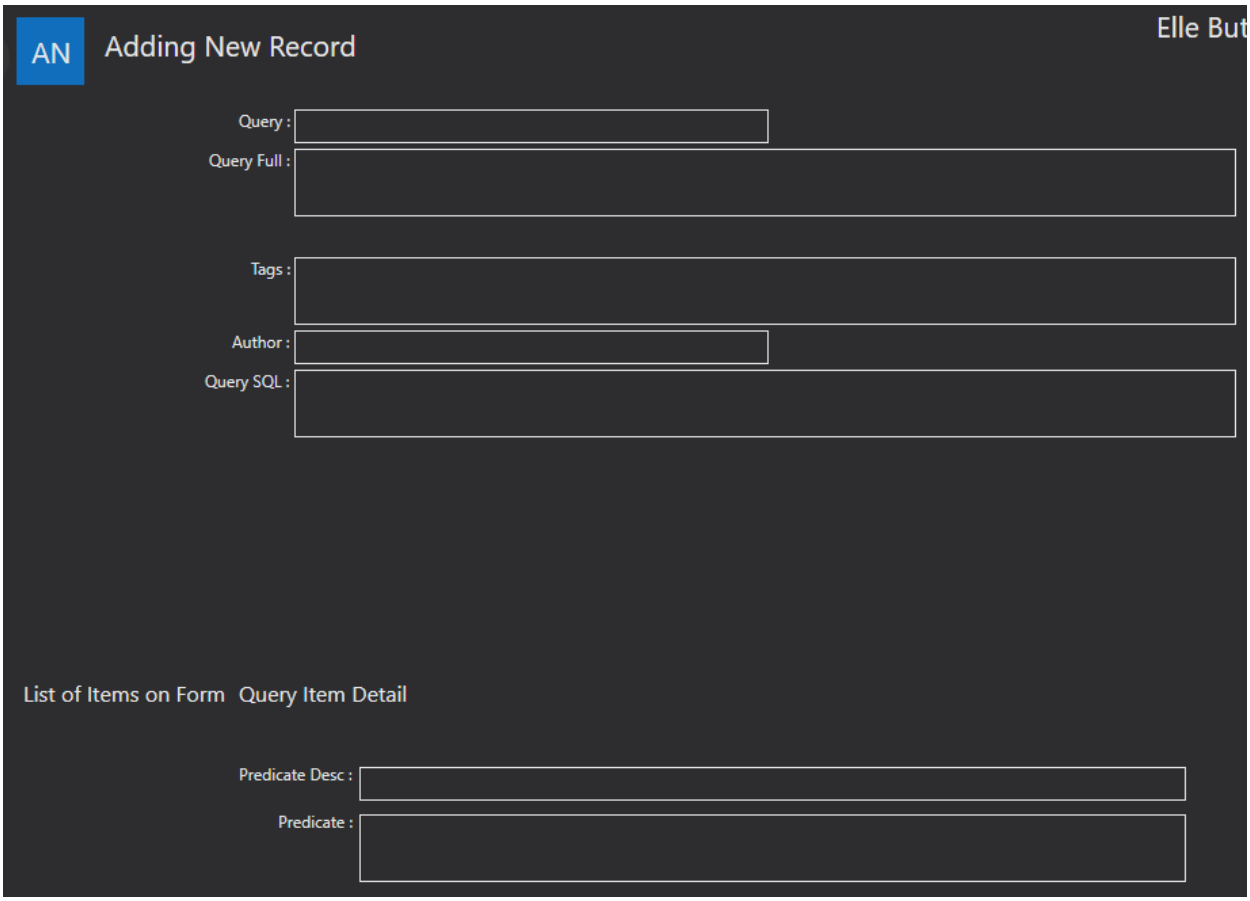
Areas



These are optional. They are used by Teachers, and within Centres and Schools. They can be added, edited, and deleted using the icons shown at the top of this page.

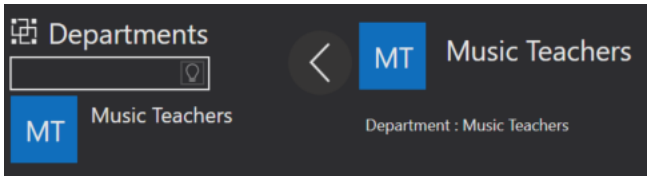
Dashboard

Data Query



To add a new data query, go to System Settings and select “Data Query”. When you have added a data query it will appear in your dashboard as a query to run. The “Query Full” field is intended for a description of what the query will produce.
The ”Tags” field allows you to add tags which can be used to filter the queries you can run in your Dashboard.
The “Author” field, allows you to add who has written the query. For example, the query could be created by an external person. Then you can enter the “Query SQL” to produce the query. Once you have inputted all the information for your query, use the Save icon to save the record.

Departments



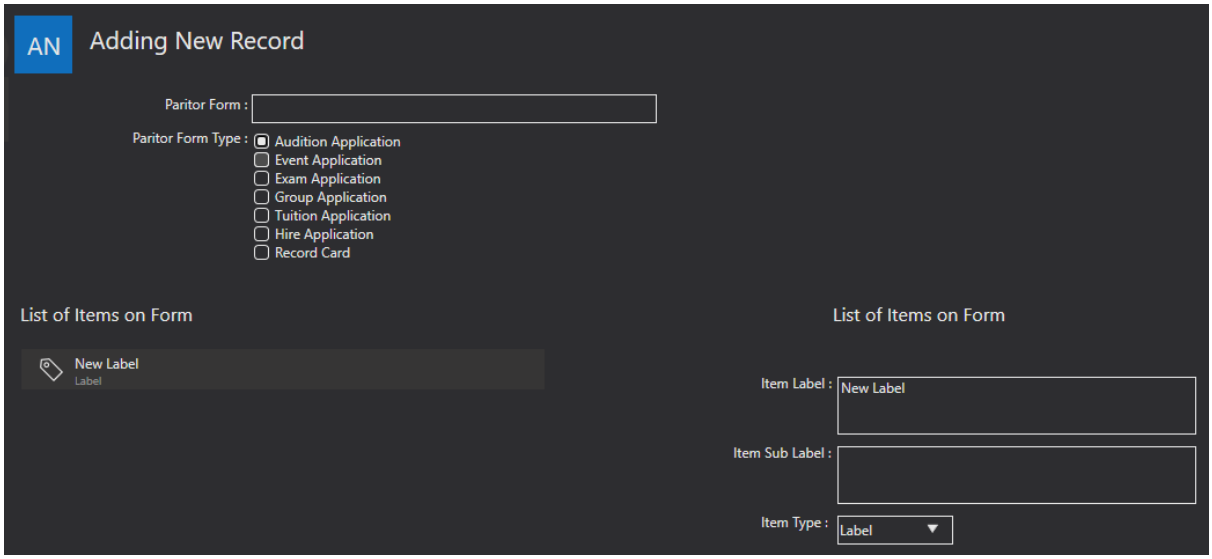
Here, you can define the departments within your organisation. They can be added, edited, and deleted using the icons shown at the top of this page.

Forms

To create a new form, you use the edit icon. These forms can then be used when creating any type of tuition, select the form type that is relevant, the form will only appear as an option on the relevant tuition. When selected to be used for creating one of these they will then appear as part of the online application process.

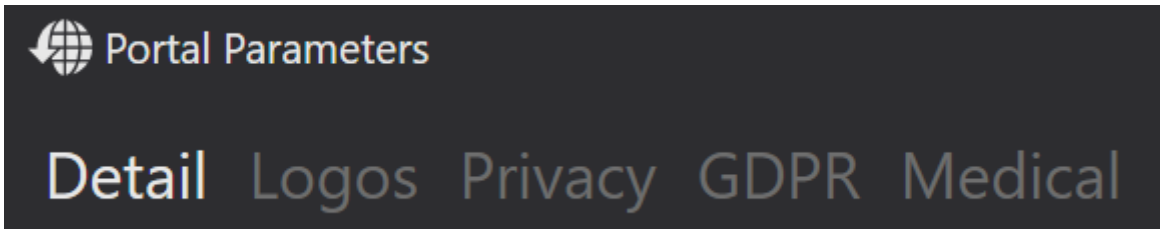
Once you have selected the form type use the plus icon shown here to add a new form item. You can add as many form items as you wish, if you want to remove one use second icon shown here. You can select what type of form item it is. A label form will allow you to add a label, to describe what information you are asking for. A numeric form will ask for a figure, and you can set what the maximum and minimum value can be for this. A text box single line will allow the applicant to type in a text box up to one line. Whereas a text box multiline, allows any amount of text. A date form will ask for the applicant to input a date, and an email form will ask for an email to be inputted. The checkbox will ask for a checkbox to be ticked, and a checkbox and text will allow additional text with the check box. Finally, the drop-down menu will allow you to at items for a drop-down menu. To input these in the text box below the item type, you will need to type each item followed by a comma before a space and then the next icon.

You can rearrange your form using the icons shown here, moving different form items up and down the list to decide on the order. Once you are happy with your form use the save icon to save the record.



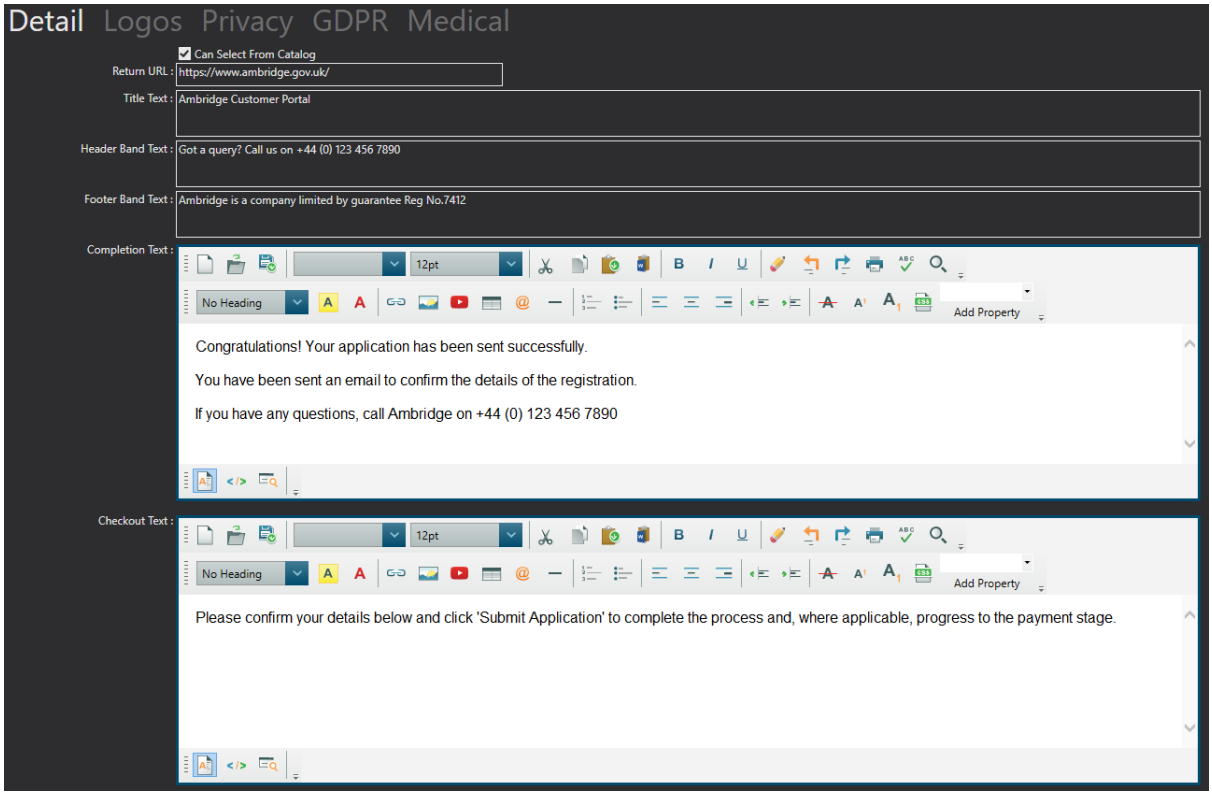
Portal Parameters

To Edit your portal parameters, go to Settings. Under each organisation are the portal parameters. Here, you can edit what information is on your portal website when someone is booking onto a course. You can also Edit your record using the same Edit icon shown at the beginning of **System Settings.**



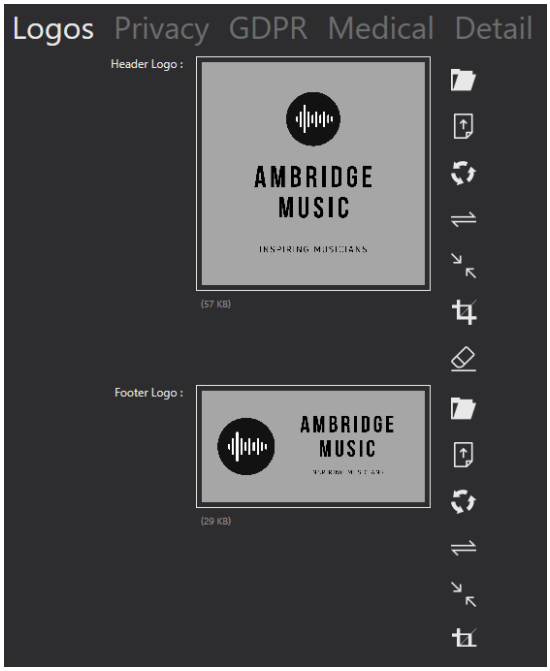
Detail

Under the “Detail” heading you can change the text that will be displayed in your header and footer. This text is altered using a standard text box. You can also include a return URL. This will be where the customer is sent once, they have completed their application.



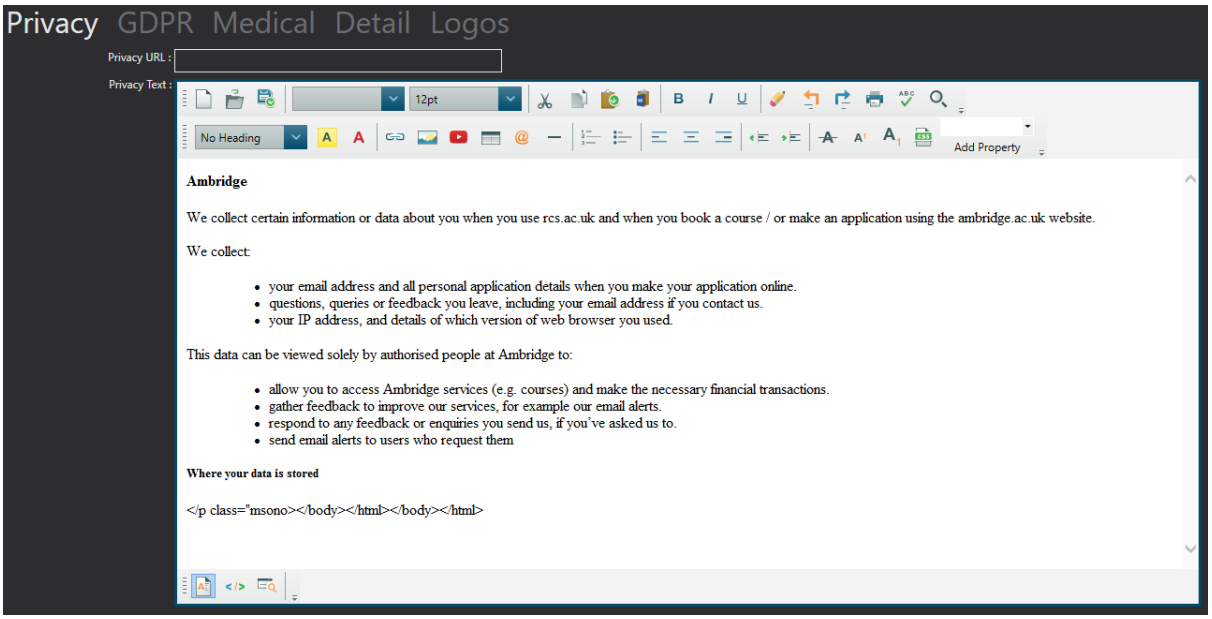
Logos

Under the “Logos” heading you can Add and Edit the logos used in your portal for both the header and footer. The tools available to make this adjustment are further explained in our **chapter on “Managing your Catalogue” on page 104.**



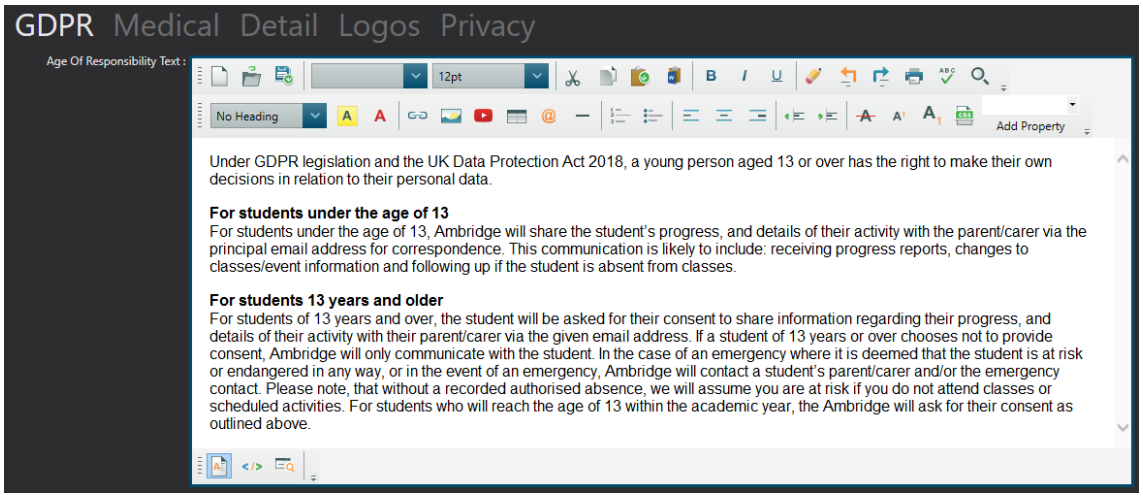
Privacy

Under the “Privacy” sub-heading you can add a link to your privacy notice, or you can fill the text box with your privacy notice. If you include a link, those visiting the website can click through to your privacy notice. The privacy text is edited using the same HTML Editor.



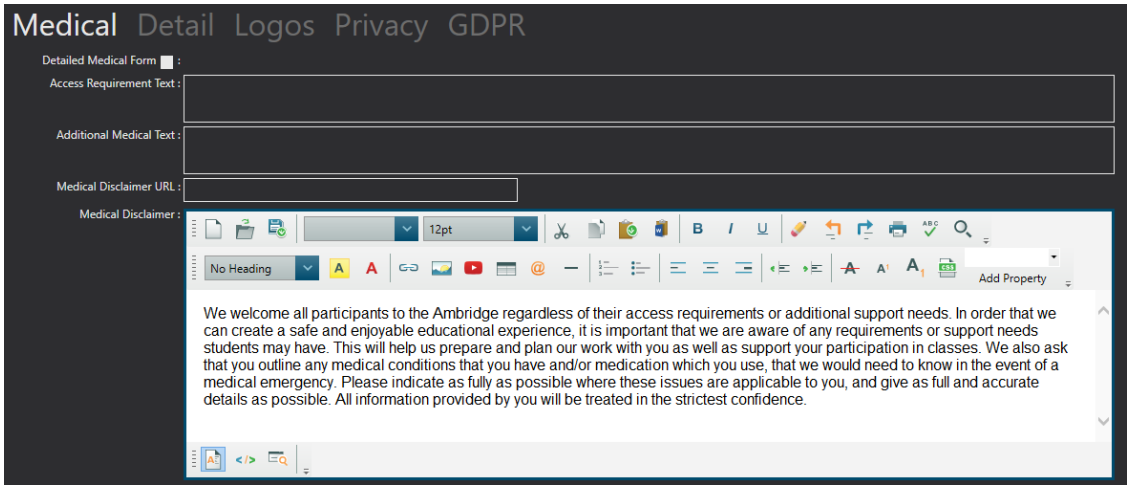
GDPR

Here, you can add any GDPR compliance statements that you may want to include in the booking process using the HTML Editor.

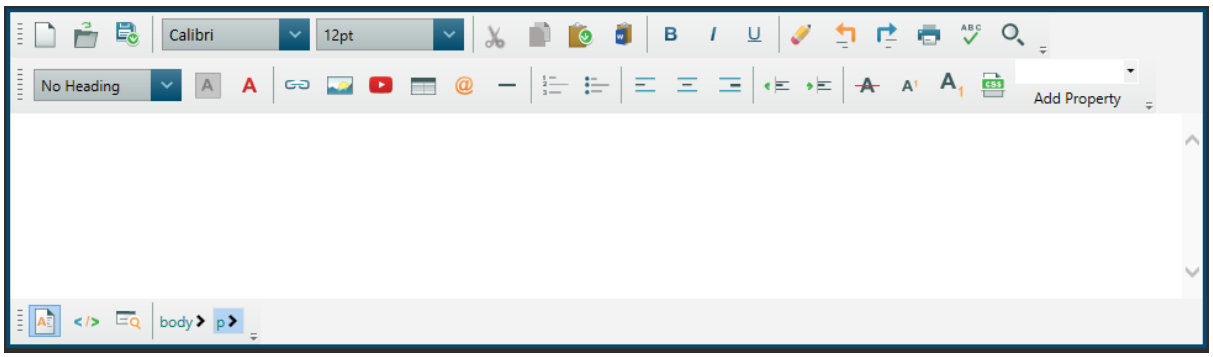


Medical

Here, you can refine your questions for access requirements and additional medical information. You can also add in a medical disclaimer using either a URL to your medical disclaimer or by typing it into the HTML Editor.



HTML Editor



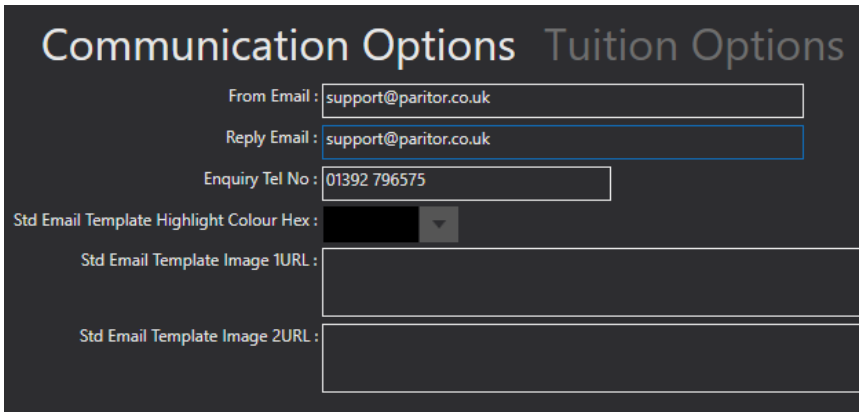
Above is an example of how the HTML editor should look This is used in several places across the software and can be edited using the standard Edit icon. The HTML editor provides options to Edit the font, the text size and colour, and highlight the text.

System Configuration

Detail

This display shows all the information for your organisation, such as name, address, email, and VAT number. In here you can also change your Culture for the whole business. This information can be added, edited, and deleted using the icons shown at the beginning of **System Settings.**

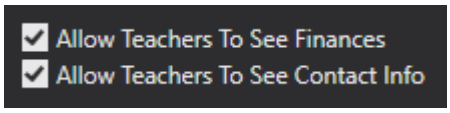
Communication Options



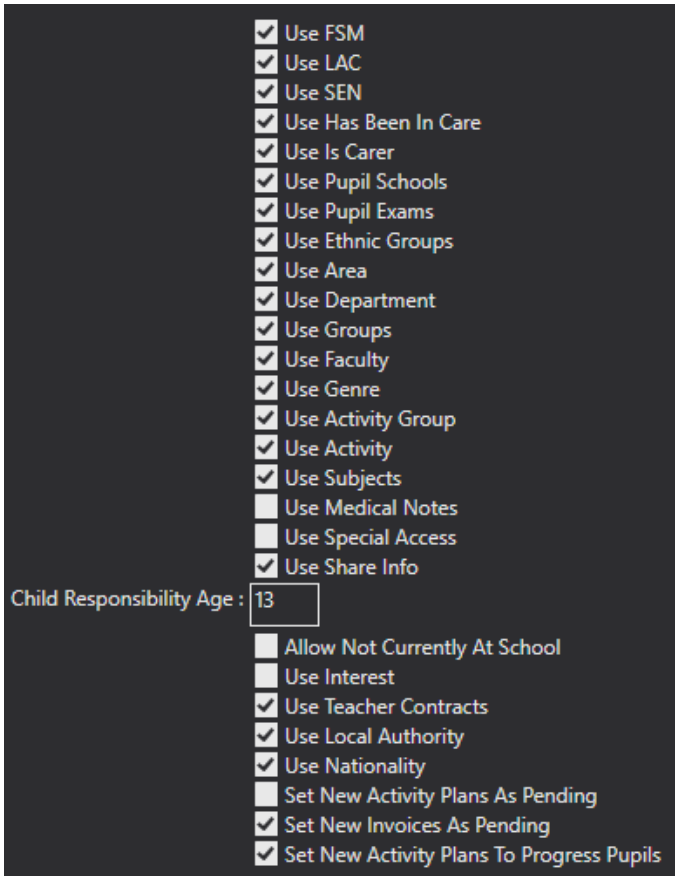
Tuition options

The first section under tuition options is where you set up your education system, **for more information on this please see page 23**. Next, you can define the minimum age for contact information allows you to select the minimum age of which you collect contact information for a pupil. When set to zero then it will not ask for any, please note that it is not compulsory, and so the applicant does not have to enter it.

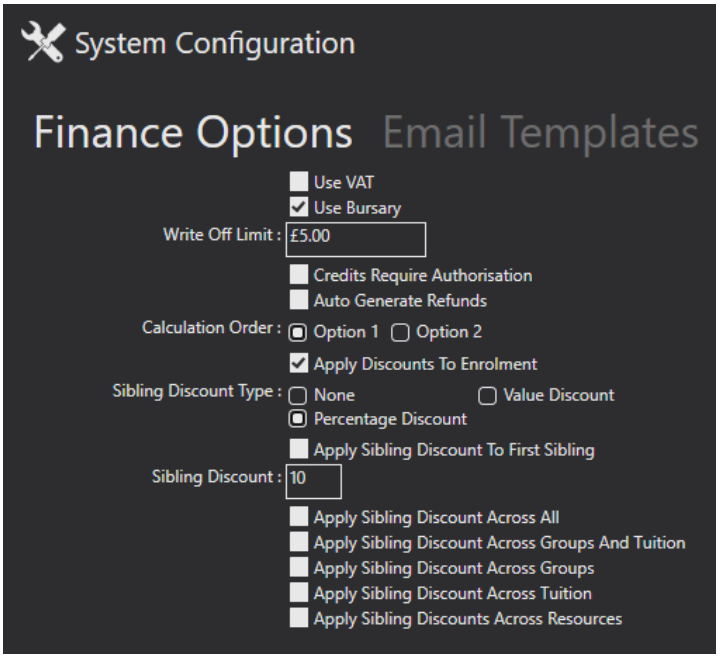
If the use share info is ticked then the child age of responsibility will appear, this is the age you set for you GDPR compliance. This overrides the minimum age for contact and so if it is lower than the age of contact it will ask for contact information regardless due to GDPR. When this is selected the contact information for the pupil becomes compulsory. So, if your minimum age for contact is 10, and your child age of responsibility is 13, then for children aged 12-12 there contact information will be asked but is not compulsory, but children age 13 and above it will be compulsory. You can also define whether you require information e.g. if the child has been in care. This information can be added, edited, and deleted using the icons shown at the beginning of **System Settings.** "Use Groups" is linked to User Groups which can be created in your Settings. **Instructions on adding User Groups can be found on page 39.**



Lastly on this tab you can select what information you allow your teachers to view.



Finance Options



To define how your discounts are applied, go to Systems Settings followed by the Finance tab. Here, you can define the Write Off Limit, whether credits need authorisation, if refunds are auto-generated, instalment options for payments, and the start date of payments.

The Write Off Limit determines at what value an invoice can be written off. Usually this might be done if a small or negligible fee remains on the debtor's account. To learn more on how to Write Off an invoice see page 135.

The Calculation Order will define which discounts are applied first:
Option 1: Uses the order, Sibling Discount, Payer Remission, Pupil Remission, Bursary 1, Bursary 2, and Discount.
Option 2: Uses the order, Payer Remission, Pupil Remission, Bursary 1, Bursary 2, Sibling Discount, and Discount.

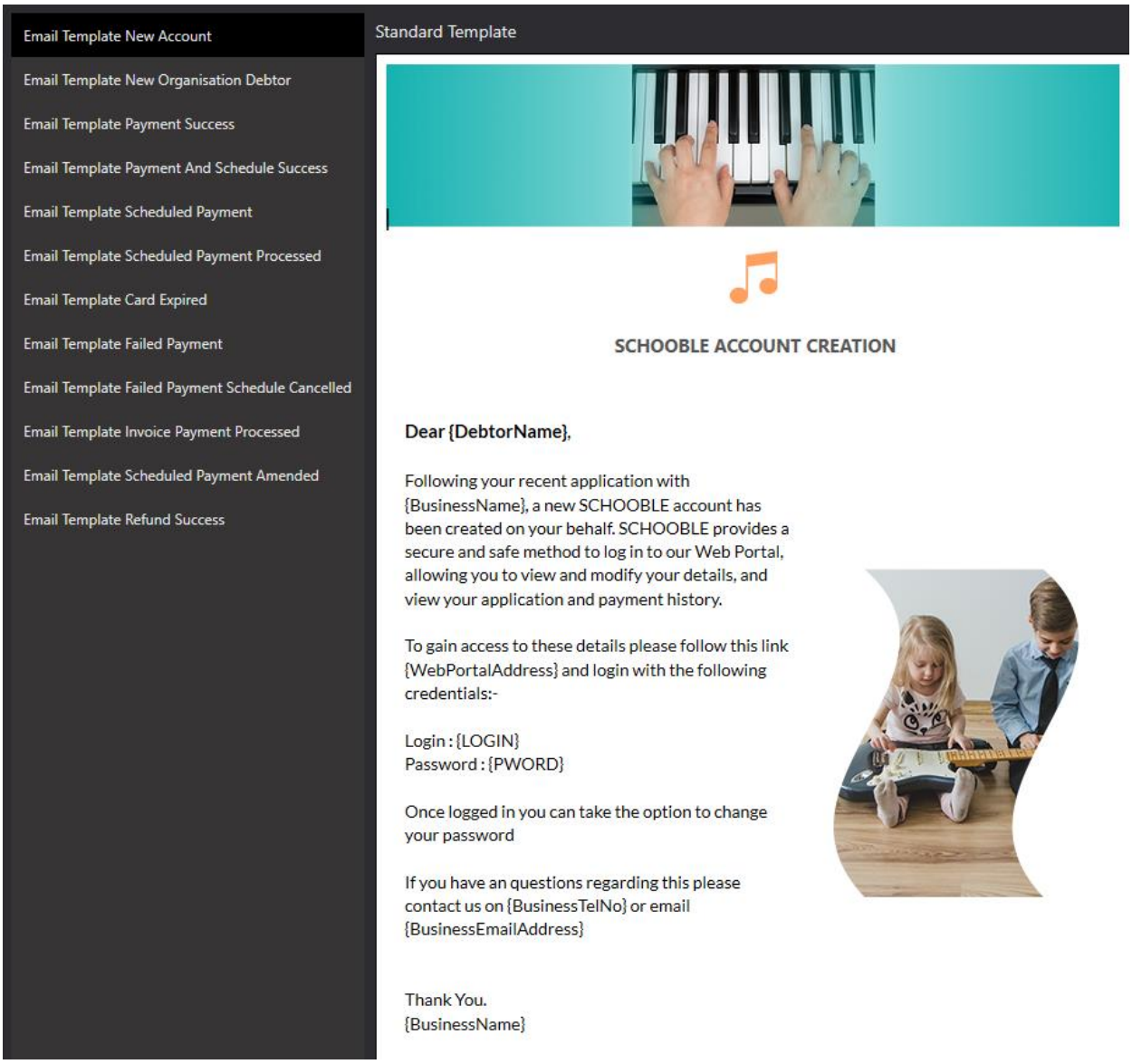
"Apply Discount to Enrolment" will determine if there is a discount on the enrolment fee. If this is left unticked no discount will be applied to the enrolment fee, but discount will be applied to the full payment. There is also the option to choose if the Sibling Discount is a percentage or a set value, followed by an input box for the value. By applying Sibling Discount to the First Sibling, you are given the option to apply the Sibling Discount to all siblings or from the second sibling. If this box is ticked, the discount will be applied to all siblings.
You are also required to state where you would like to apply the Sibling Discount.

"Apply Sibling Discount Across All" will mean that the system will look for a sibling enrolled in anything. By ticking this, the other tick boxes will disappear.

"Apply Sibling Discount Across Groups and Tuition" will cause the system to search for a sibling in Groups and Tuition. Selecting this option will make the bottom three options disappear.
Lastly, you can "Apply Sibling Discount Across Groups, Tuition, and Resources". These are individual cases: you can have all three ticked, but they are not all linked. If these groups are ticked the system will look for siblings who are also in a Group, and likewise, if Tuition is ticked it will look for a sibling who is also registered under Tuition.

Email Templates

To view the standard email templates and change the email template being used, open your **System Settings**, and go to System Configuration. Then go to the Email Templates tab. Here, you should find a display like the example below.

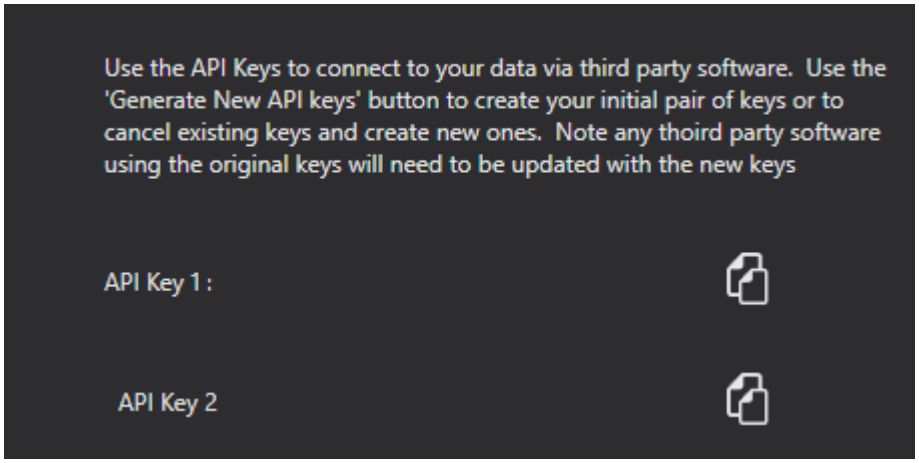


When you select an email, template type you can view the email assigned to that template type. All template types are automatically set to the Xperios standard templates. However, you can change these. To change an email template, you will need to create a new email template. To do this, click on the Email Template subheading under CRM in **System Settings**. **For information on how to set up a new template please see page 41.**

Once you have set up your email templates use the Edit Record icon to enter edit mode. You should now be able to use the tick boxes to select which email template type you want to change the email template for. A drop-down menu will appear next to the email template type. The menu details all the email templates you have created. Select the email template that you wish to use for that email template type and use the Save Record icon to save the changes.

API Keys

Here, you can generate API keys for connecting your data via third party software.

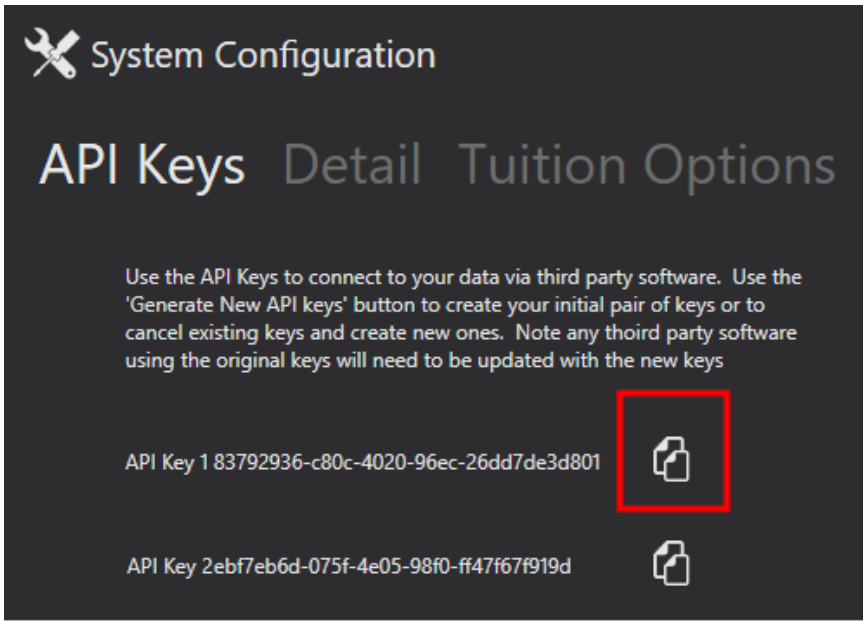


Connect to the Xperios Data API

We provide a public access API designed to allow users read access to their data. This is done using tools such as Excel, PowerBI and other reporting tools. API calls require a call header to contain an API key. API keys are obtained from within Ensemble. You can use these API keys to search for a specific query all of which are explained in the appendix. The first bullet point is the name of each query. The rest are the parameters for these. You will need swap the blue text for the required information.

Getting the API Keys

To get your API key you will need to generate it. Start by opening "System Configuration" under "**System Settings**". Then go to the API key tab, and select the icon shown here.



You can then use the icon highlighted in the example screenshot to copy the key.

Using Data API In Excel

The following is the process required to pull a summary list of Event Delegate data into Excel. First, open Excel, then go to the data tab. Here, you can select from web. Next, select advanced and enter the data shown below for Event Pupil List Summary.

1. The Xperios API.
   https://api.paritor.com/api/bi/

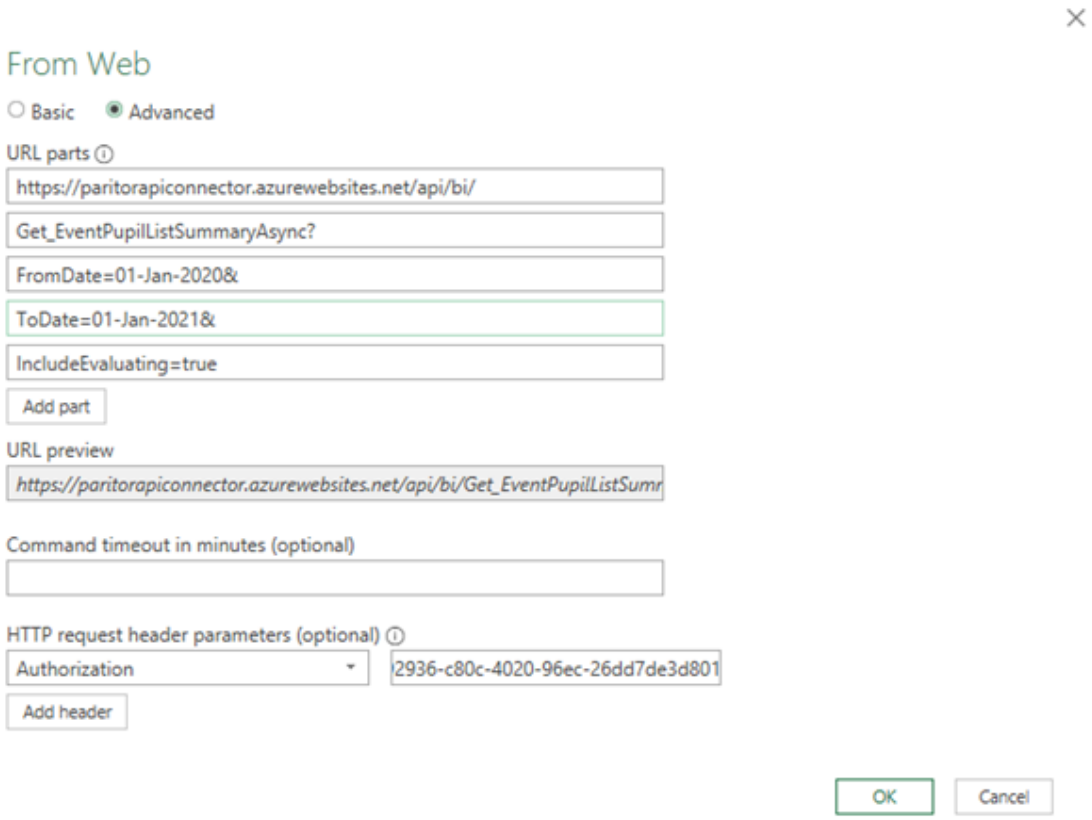
2. The Query Name followed by question mark. For Example:
   Get_EventPupilListSummaryAsync?

3. Parameters and Values. The parameters for the example query:
   FromDate=01-Jan-2020&
   ToDate=01-Jan-2021&
   IncludeEvaluating=true

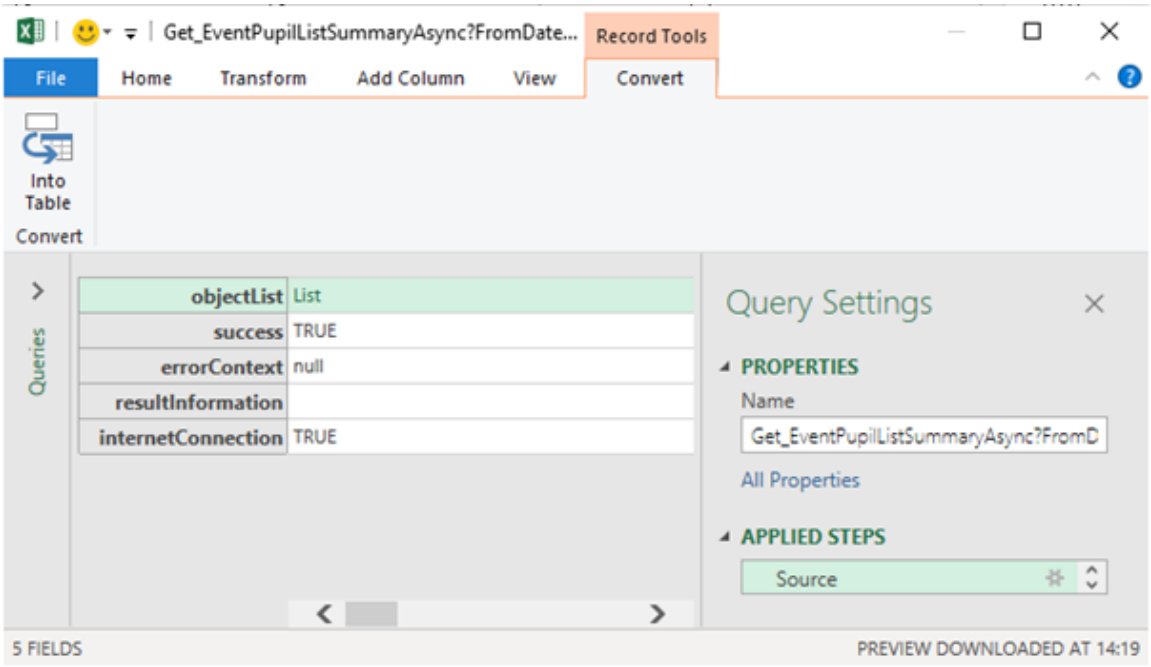
Note the last parameter does not end with &.

4. Select Authorization for the HTTP request header.

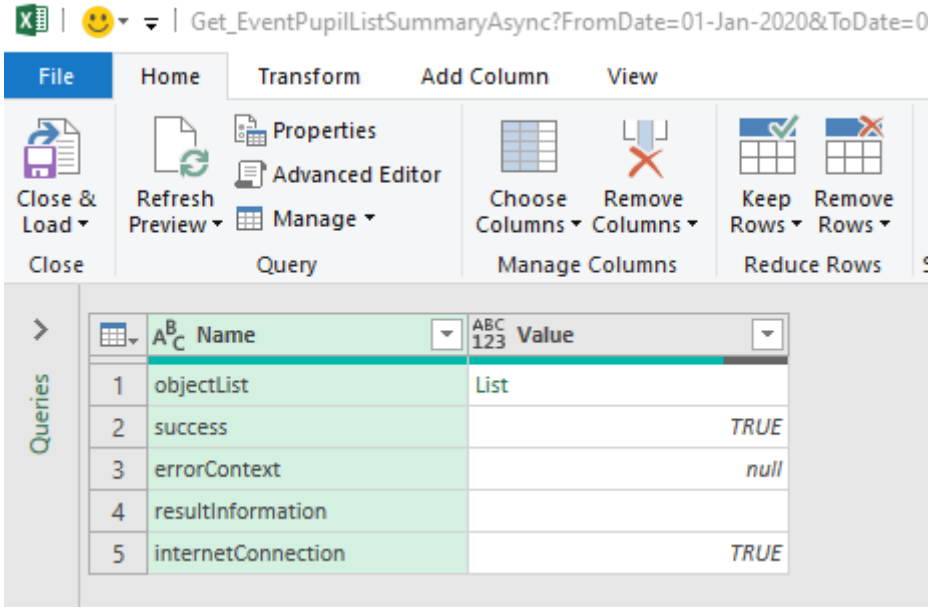
5. Paste in your API key as the value. Click OK and the resultant Query Preview will be displayed.



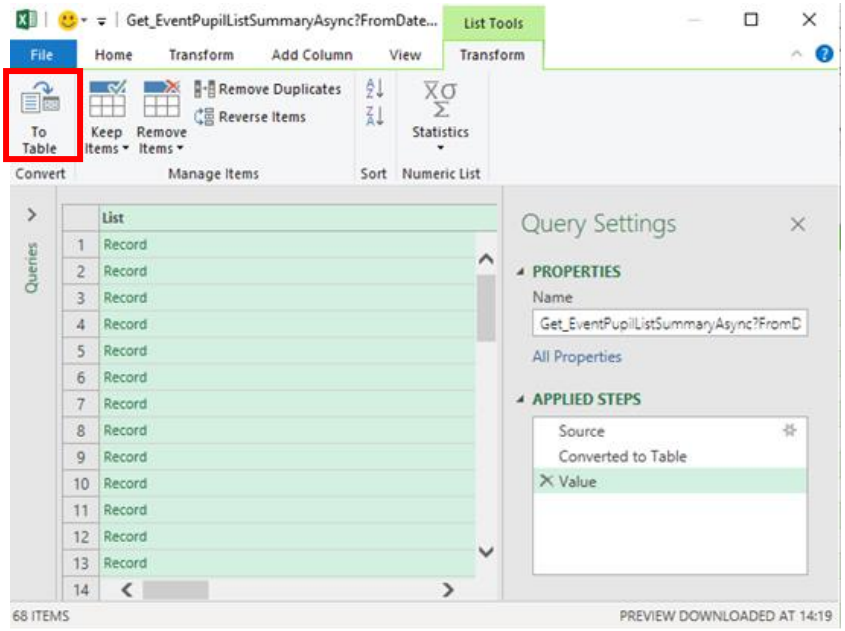
6. You must now transform the data into Excel. The data is contained in the first line called “objectList”. Click on the “Into Table” button to convert to a table.



7. Double click on the Cell containing the work “List”.

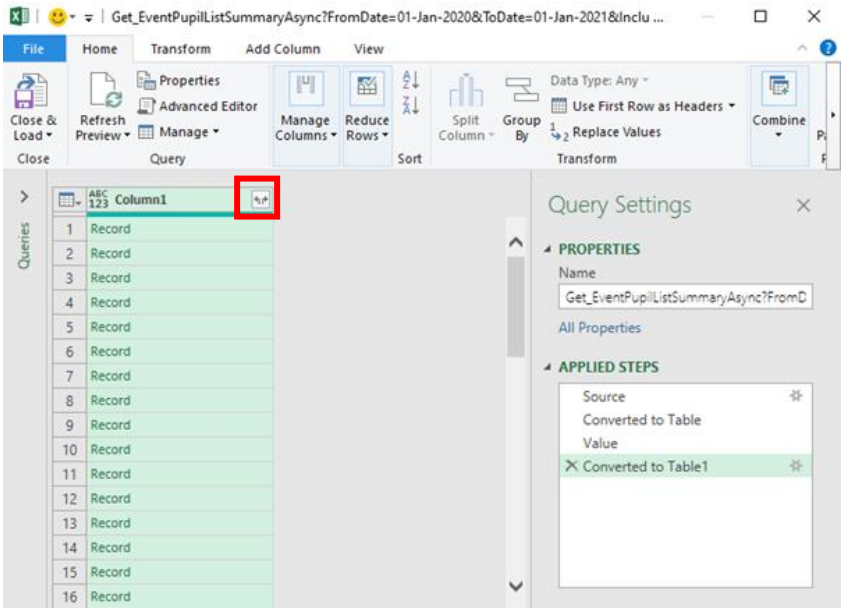


8. Click on “To Table” button to display the table dialogue.

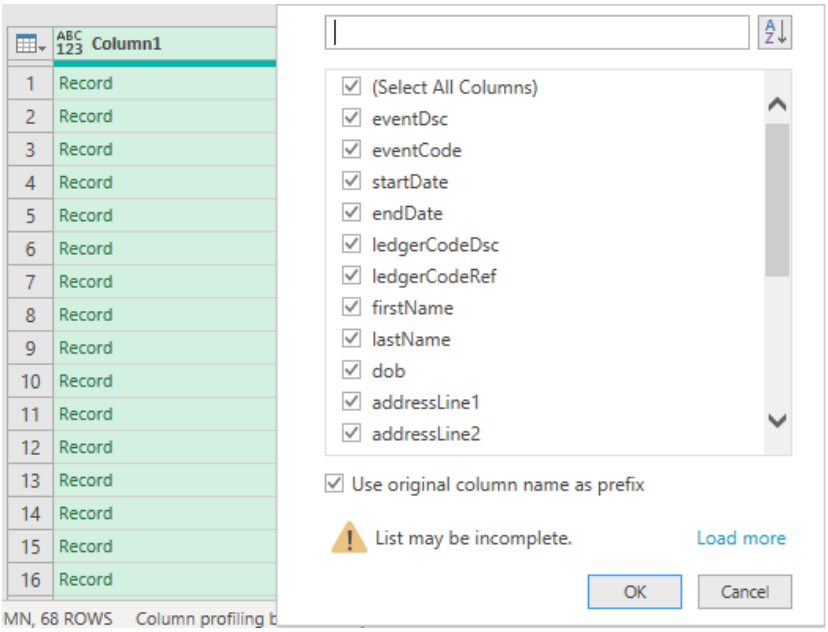


9. Click OK.

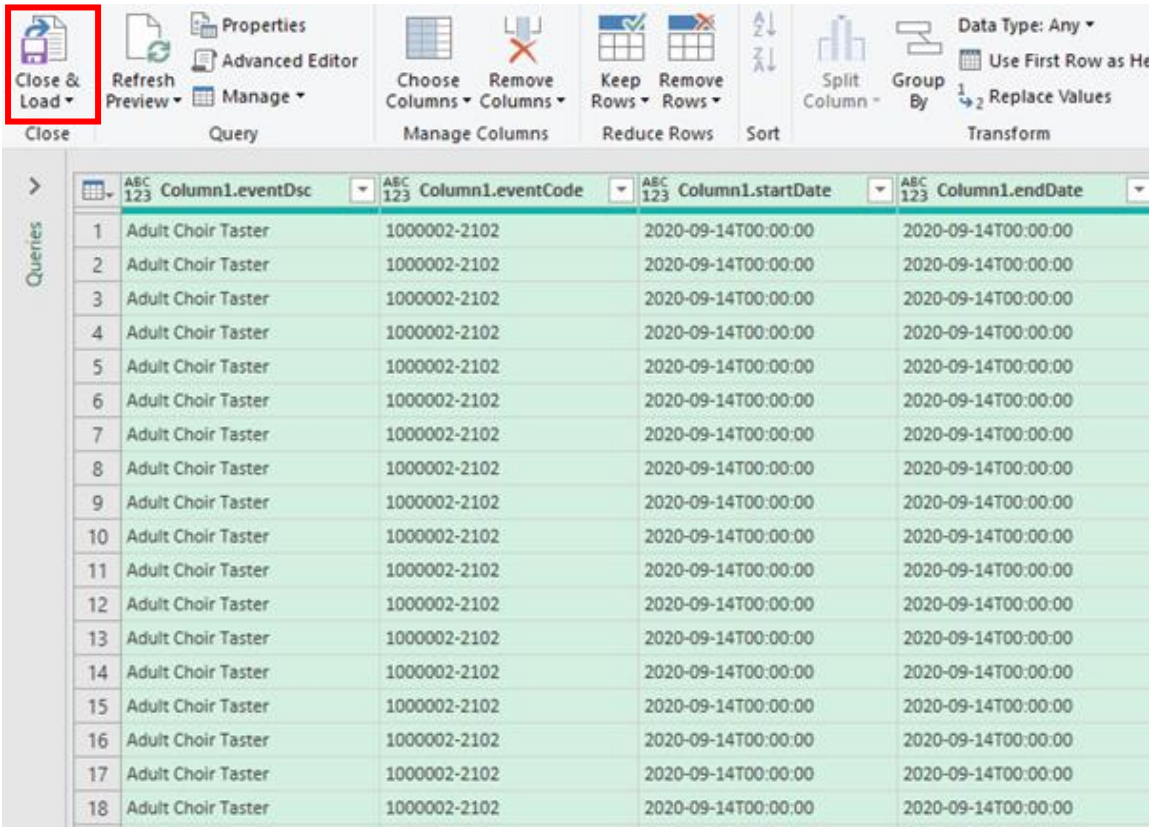
10. Click on the Expand Column to select and expand the required columns.

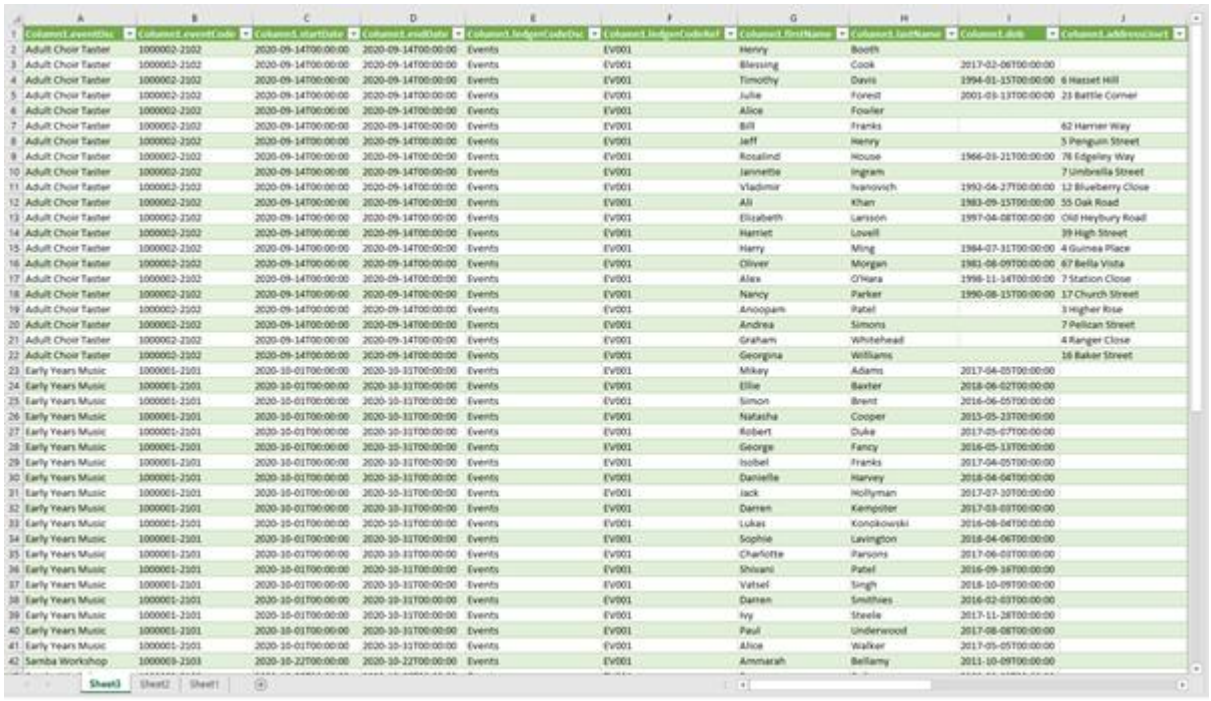


11. Click OK.



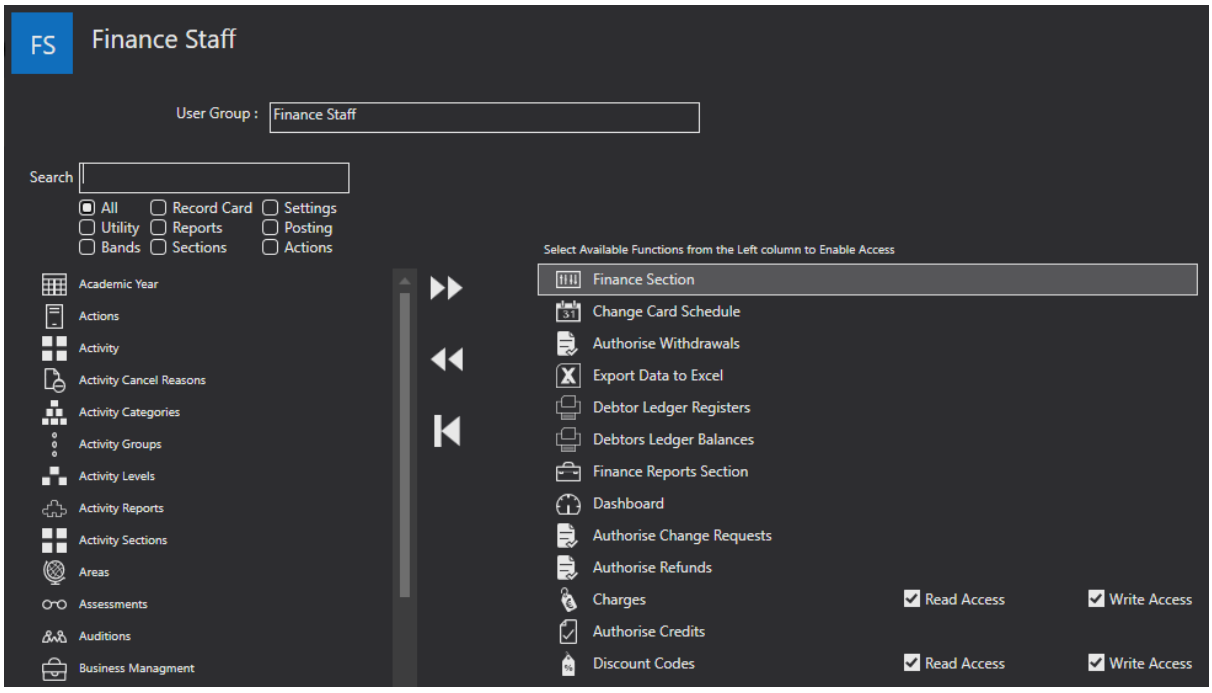
12. Click on the Close and Load button to save to Excel Sheet.





User Groups

Here, you can define different types of Users to allocate within your systems. User Groups is a sub-heading under Organisation found by clicking on the Settings icon in your side menu bar. Each User can have a different mix of functionalities within the system. A User Group can be added, edited, and deleted using the icon shown at the beginning of **System Settings**. To add functions to a User Group, select the function you want and use the double arrow pointer on the right. The double arrow facing left will deallocate the selected function. The single arrow with the line will deallocate all functions.



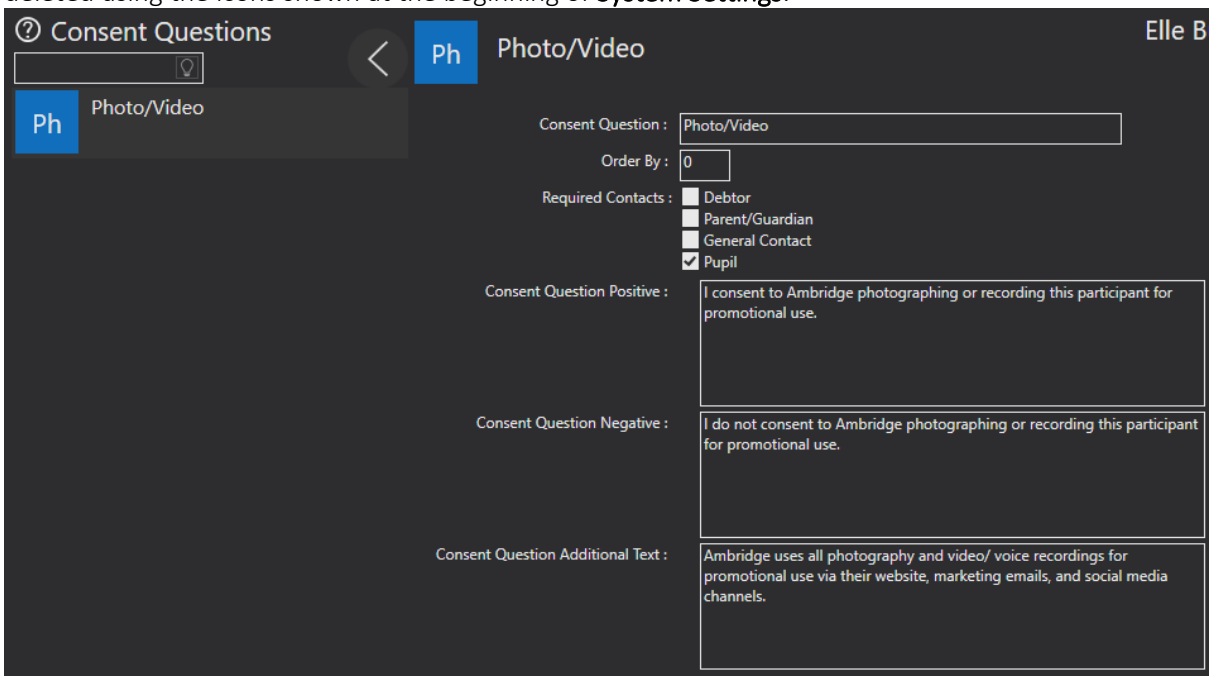
CRM

Business Type

These are the types of businesses that you may have associated an organisation with i.e. schools. This can be added, edited, and deleted using the icon shown at the beginning of **System Settings.**

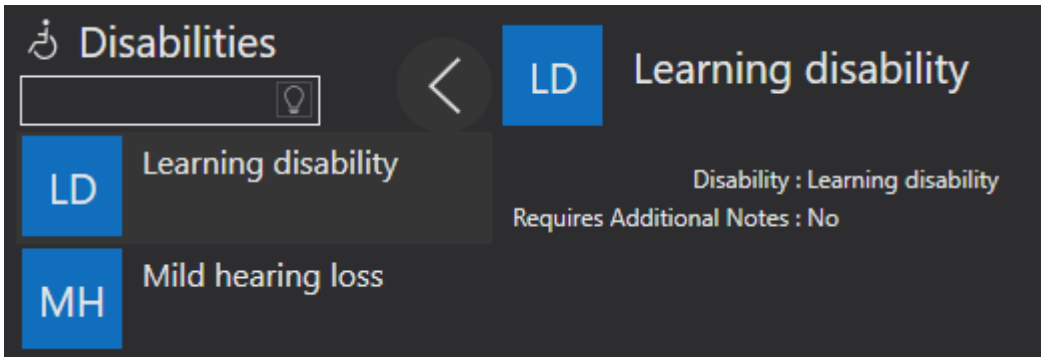
Consent Questions

Here, you can define any consent that may need to be given by either a pupil or guardian. For example, if photographs and recordings are going to take place. This can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.



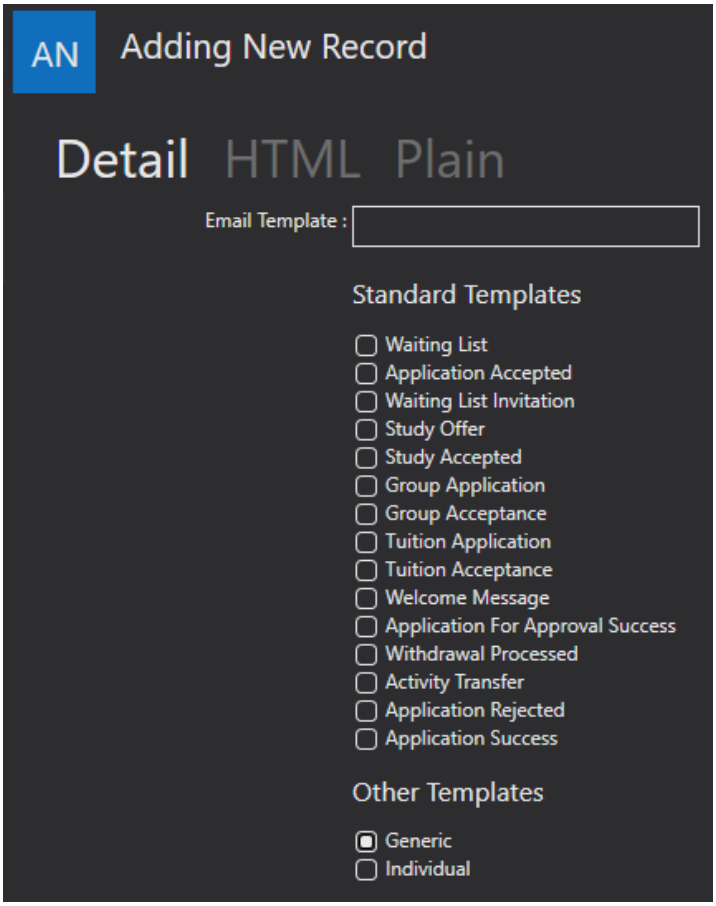
Disabilities

Here, you can define the Disabilities you want listed on online application forms. You may want to group some together. For example, you could list hearing impairment as an option and ask for additional notes, or you could break down hearing impairments into types: deaf, serious hearing loss, slight hearing loss etc. This section can be added, edited, and deleted using the icons shown at the beginning of **System Settings.**



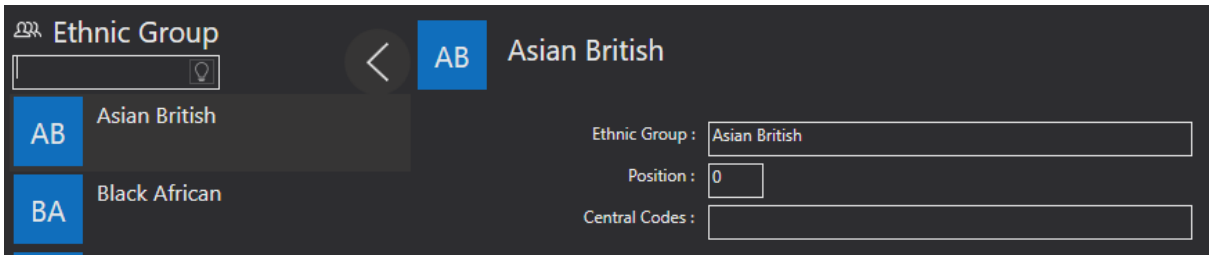
Email Templates

Here, you can design and/or add email templates for all emails sent from within Ensemble. The "Detail" tab is used to provide essential information about the template being created. The "Email Template Type" defines the circumstances in which the email should be sent. Once an "Email Template Type" has been selected and you have included a template name you can create your email. The "HTML" tab includes the same HTML editor used throughout the entire system. The "Plain" tab allows you to create a text only version of your email. This version can be used if the email is sent to a recipient whose email provider doesn't correspond with the HTML editor. Once finished you can Save your email templates. Each template can be assigned a function within "Service Types".



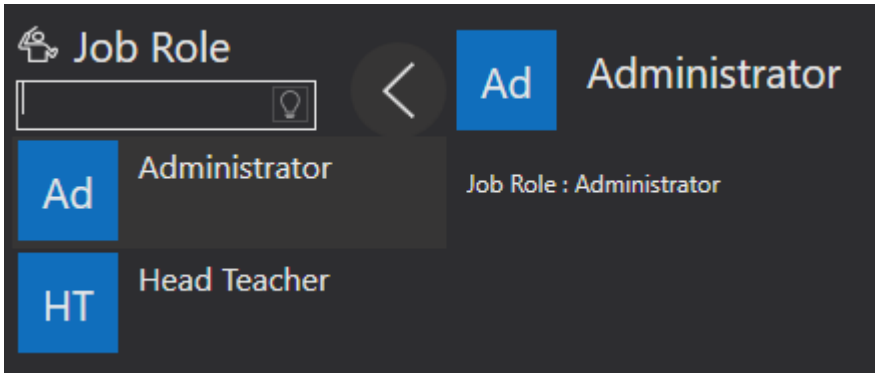
Ethnic Group

You can define ethnic groups used for online applications. You can be as broad or as specific as you like. This information can be added, edited. and deleted using the icons shown at the beginning of **System Settings**.



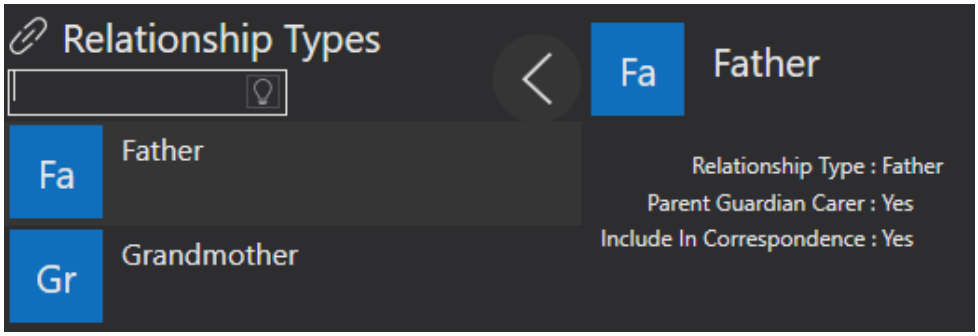
Job Roles

Job Roles are used to help identify your staff. For example, the Job Role of Head Teacher can be applied to all the head teachers in the system that fulfil that Job Role. Assigning Job Roles makes Users easier to filter. Job Roles can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.



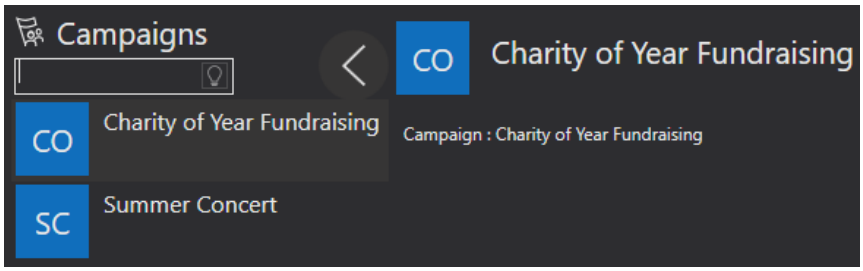
Relationship Types

Here, you can define relationship types as a means of linking Contacts. These links can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.



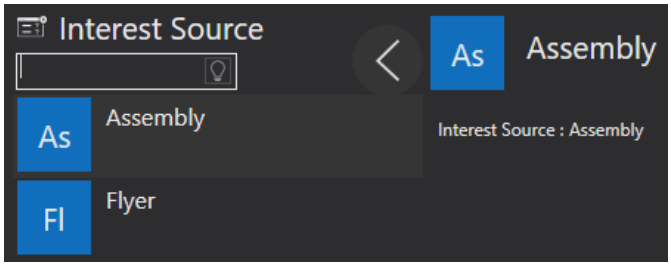
Rapport

Campaigns



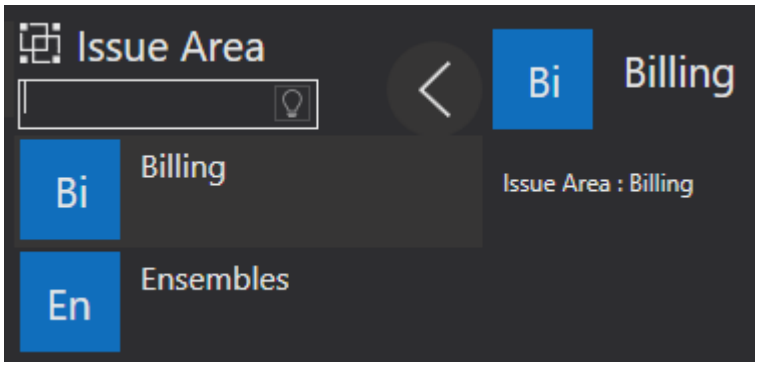
You can add, edit, or delete these records using the icons shown at the beginning of **System Settings**.

Interest Source



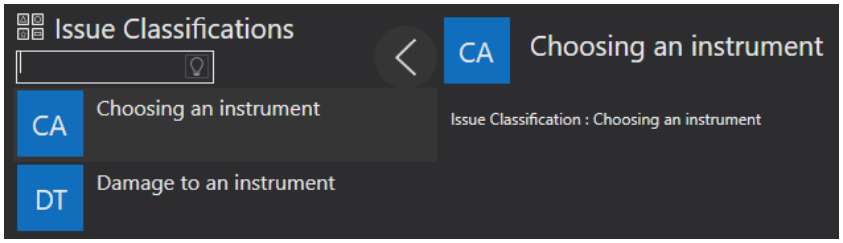
Here, you can create categories defining where bookers might have discovered the tuition they are booking onto. You can add, edit, or delete these records using the icons shown at the beginning of **System Settings**.

Issue Area



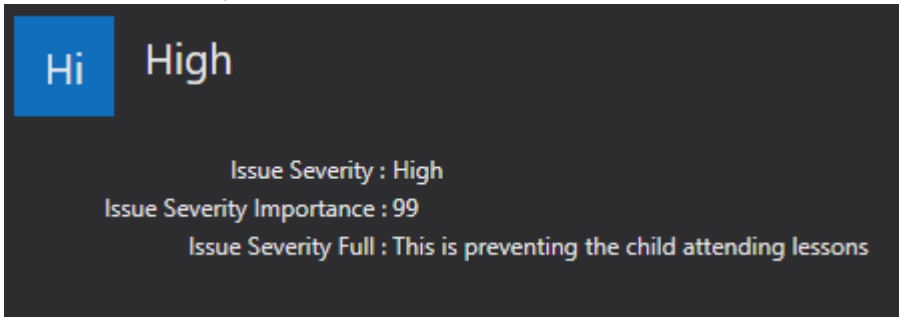
Here, you can define categories for an issue. This will help with allocating a User to solve the issues under this category. You can add, edit, or delete these records using the icons shown at the beginning of **System Settings**.

Issue Classification



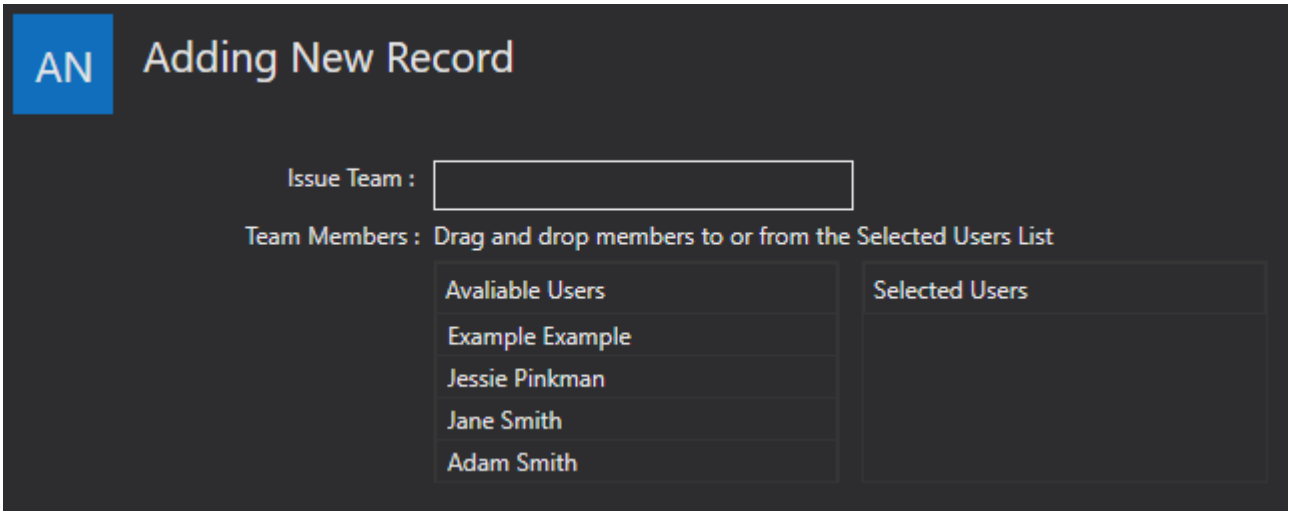
Here, you can describe issues so that it is easier to resolve them. You can add, edit, or delete these records using the icons shown at the beginning of **System Settings**.

Issue Severity



Here, you can define different issue categories based on how that issue effects something. For example, you might consider how an issue would affect a pupil's tuition. You can add, edit, or delete these records using the icons shown at the beginning of System Settings. The "Issue Severity Importance" is a scaled number which you can use to define the level of importance. How great a value must be to indicate a degree of severity is determined by your/ your organisations chosen scale.

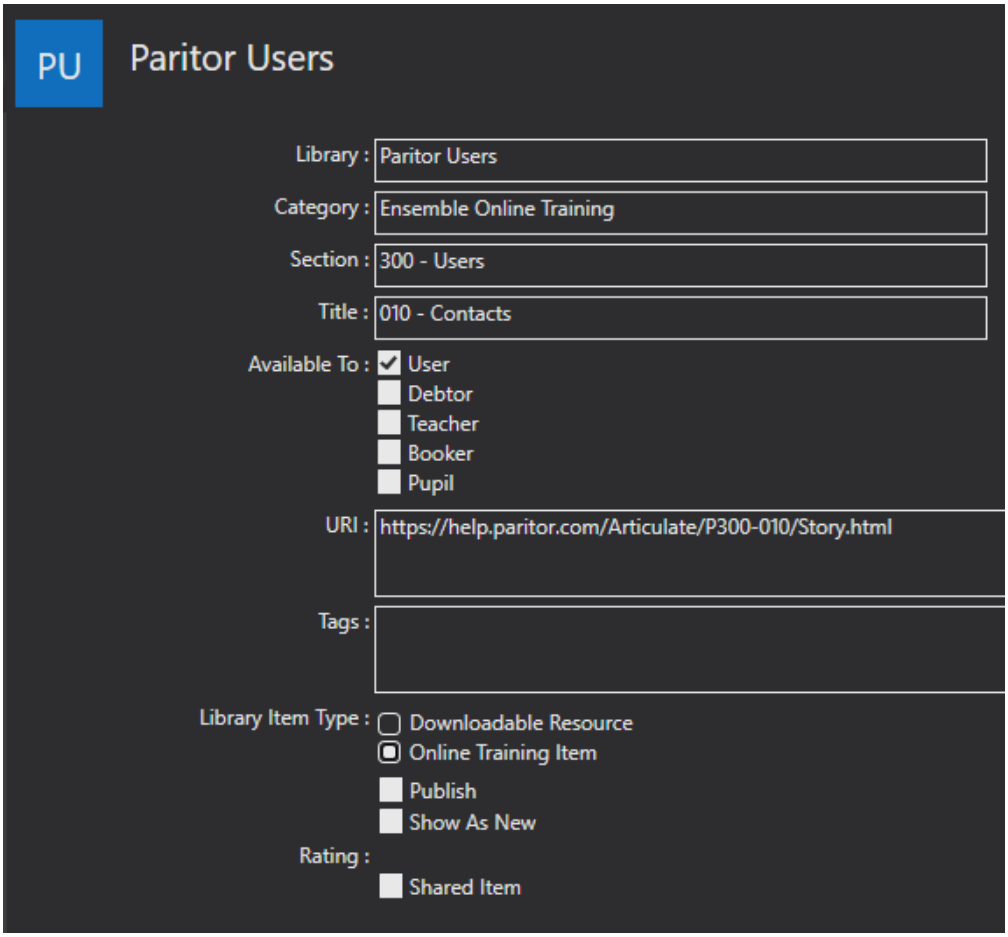
Issue Team



Here, you can define your team, including who will deal with any incoming issues. They must be a User of the system. You can add, edit, or delete these records using the icons shown at the beginning of **System Settings**.

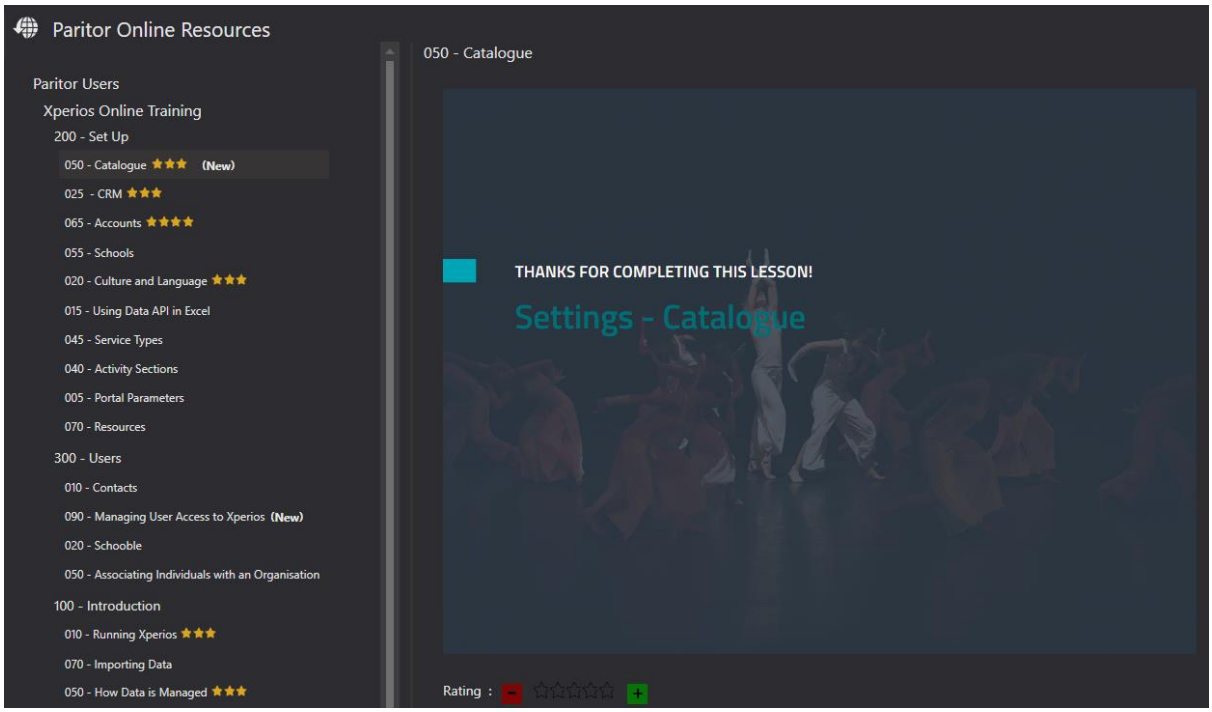
Library Items

To add a new library item, open **System Settings** in your side menu bar, then select Library Items from the Rapport tab. Use the Add Record icon to add a new library item.



The first four options allow you to title and categorise the items, the title field is the only required field of these four, but you can use the rest to help group your items. Next, is the option to select what type of contact can view the item. The sixth field is where you can add the URL for you item. The "Library Item Type" specifies what type of item you are adding. If you leave "Publish" unticked, the item will be saved as a draft and will not be available to view. The "Show As New" option allows users to see when a new library items is uploaded by showing (New) next to it in online resources.

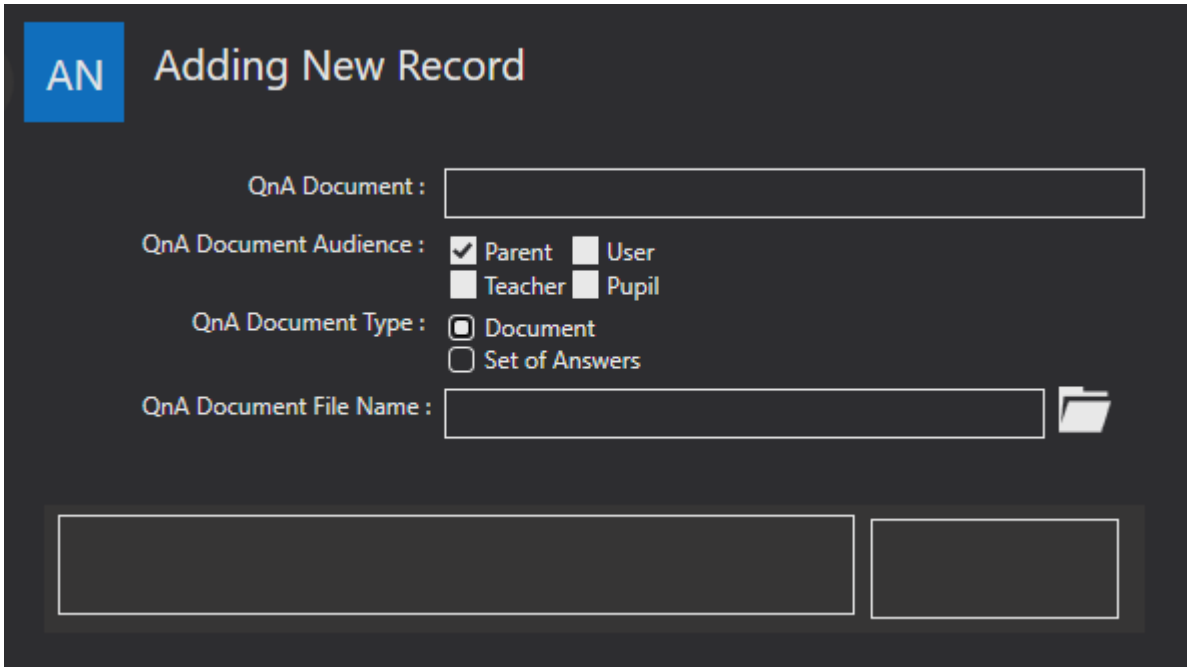
When complete, anyone who has been assigned a contact type with the correct access settings can view the library items under their online resources. Here, they can view all library items by selecting them from the side menu bar. **For more information on viewing your library items see page 158.**



Marketing List

Personas

QnA Documents



To add, edit, or delete a QnA Document use the same icons as shown at the beginning of **System Settings**.

When editing/adding a QnA document you will be presented with a screen like the one here. The first field is where you will need to add a title for your QnA document. Then is the intended audience, this will help you identify if you are using the correct one. If you select the "Set of Answers" option, the ability to upload a document will disappear. The document file name is where you are able to upload a document if you already have your QnA document produced somewhere else.

When you add a QnA document you can use the icons below. From left to right their function is as follows...

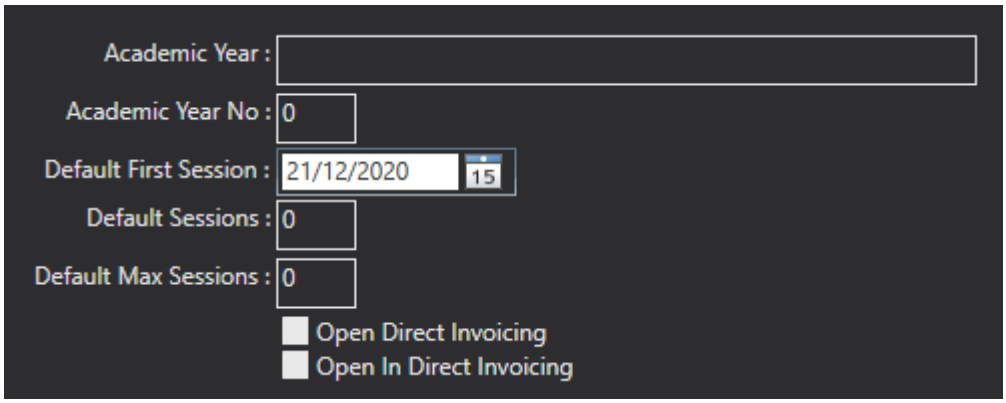
1. Pop-out Window
2. Save Record
3. Add an Answer
4. Remove an Answer
5. Add a Question
6. Remove a Question

Calendar

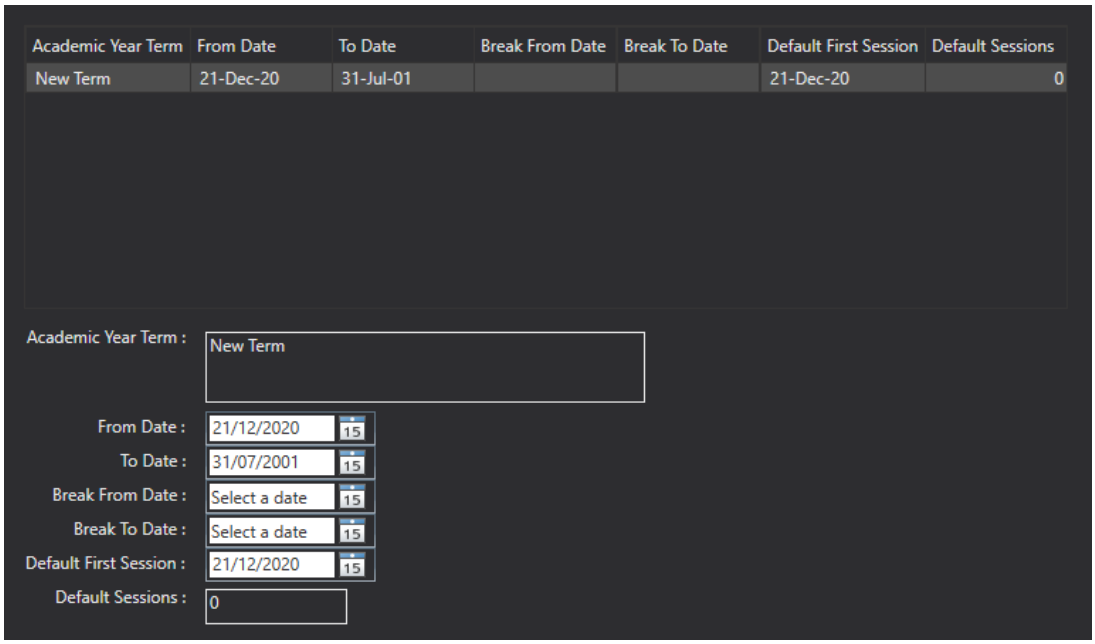
Academic Year

To set up your academic years, go to **System Settings** and select Academic Year from the Calendar tab. Next, use the Add New Record icon to start adding a new academic year.

First, add the title of the "Academic Year" e.g. 2019/2020.
"Academic Year No" is a number reference for you to use.
The "Default First Session" is the date at which the academic year starts. Therefore, any activity in that academic year will start by default on that date, unless changed.
The "Default Sessions" field should detail the default number of sessions that an activity will run for in the academic year.
The "Default Max Sessions" is the maximum number of sessions that run in the academic year.
"Open Direct Invoicing" allows you to invoice a pupil directly using the system for that academic year.
"Open In Direct Invoicing" allows you to use indirect invoicing. For example, when invoicing a school that will then invoice pupils themselves.



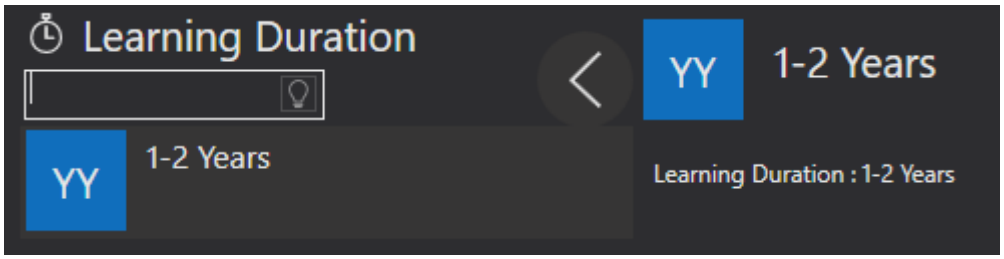
Then, use the Add Terms to Academic Year icon to add a new term. To make changes to the details, click on the row for that term.



The “Academic Year Term” field is intended for naming your new term.
The “From Date” and “To Date” are for detailing the start date and end date for the term. You can also add breaks within the term. For example, if you have a half term you can include this here. Then, you can choose the default start date for the session of the term using the “Default First Session” field, as well as the default number of sessions for that term using the “Default Session” field. If there is a break in your term, the system will take this into account. When an activity is assigned an academic year, the dates of all sessions will be determined depending on the start date, number of sessions, and any breaks. When you are happy with your new terms, use the Save Record icon to save the academic year.

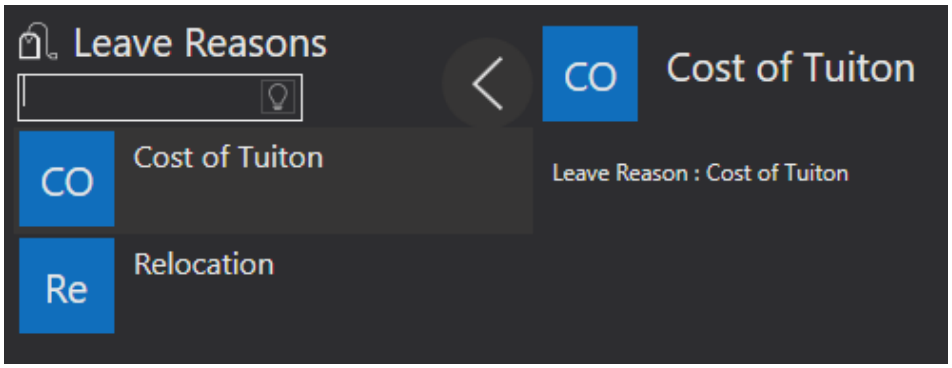
Learning Duration

Here, you can define the length of time that a pupil has been taught a subject for. This is used on applications for the pupil to communicate the duration of their learning This data can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.



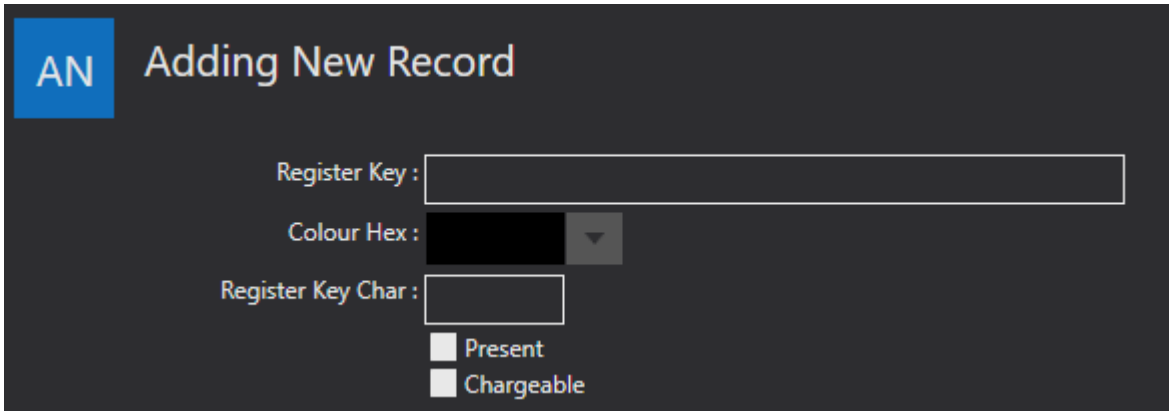
Leave Reason

Leave Reasons are the reasons why you may be withdrawing someone from a tuition. This can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.



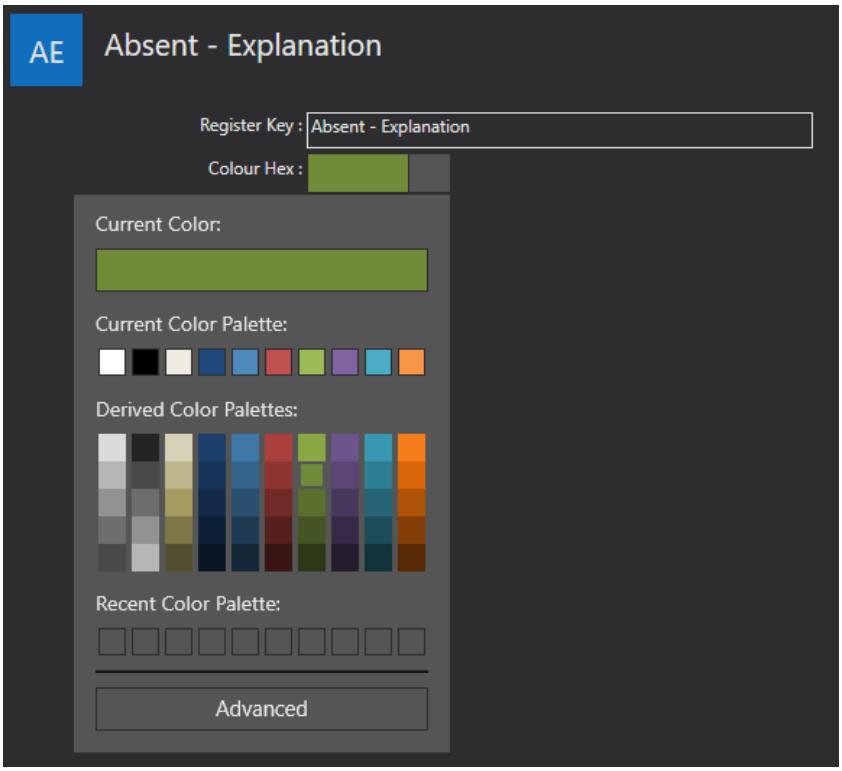
Register Keys

Register Keys are used by teachers to determine if someone has attended their Tuition. They can gauge if a pupil was absent by referring to the colour of the Register Keys. These can be added, edited, and deleted using the icons shown at the beginning of **System Settings**. The "Register Key Chart" can be used as a shortcut when applying a recognised Register Key.



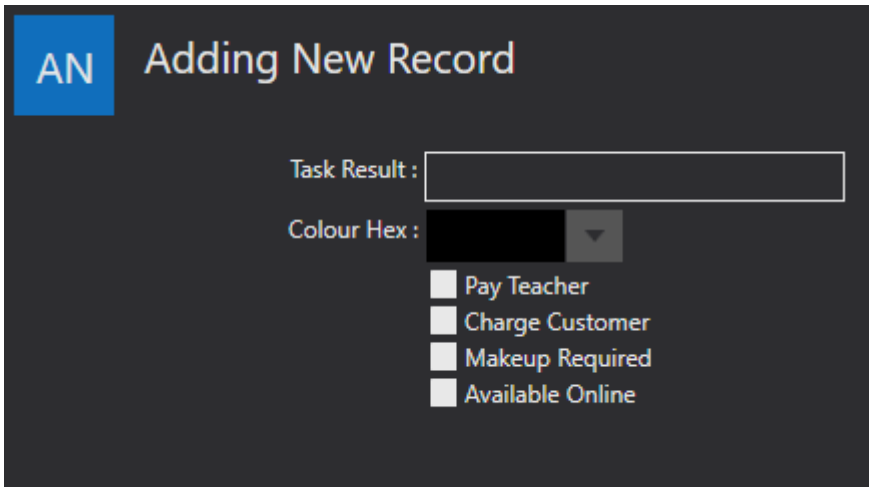
Colour Hex

One you have selected a Task Result from the options in the list to the left of the screen, select the Colour Hex field whilst in Edit mode. Task Result colours can be defined to help organisations register when a class has been held. Use the colour picking tool to select a colour from the drop-down box as shown in the example below. Select "Advanced" to create a colour not already defined as part of your "Current Colour Palette". Adjust the slide bars accordingly to produce different results.



Task Results

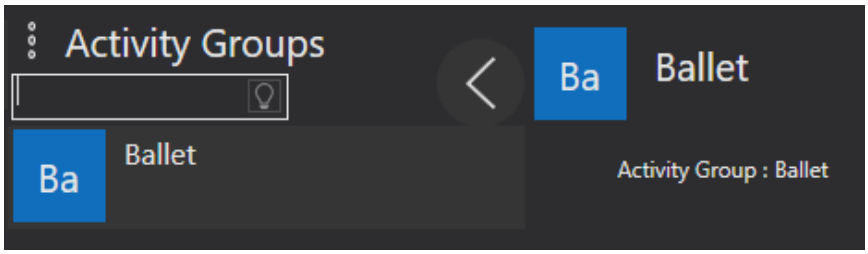
Task Results are used to note whether a lesson was carried out, and if it was not, the reasons for this. They include if a teacher should be paid, if the pupil should be charged, and whether there needs to be another lesson to make up for it not being delivered. This data can be added, edited, and deleted using the icons shown at the beginning of System Settings.



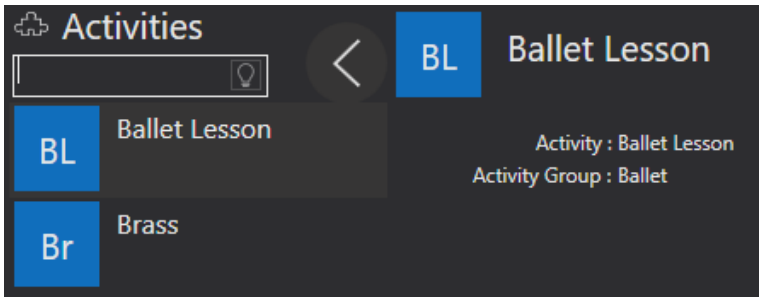
Activity Sections

Activity Groups

Here, you can define your Activity Groups. Activity Groups are used to categorise the types of Activity that you or your organisation offers. You will need to set these up first to use them to define your activities. When adding an Activity to any type of Tuition you will first need to select the Activity Group for that Activity. Your Activity Group can be added to, edited, and deleted using the icons shown at the beginning of System Settings.

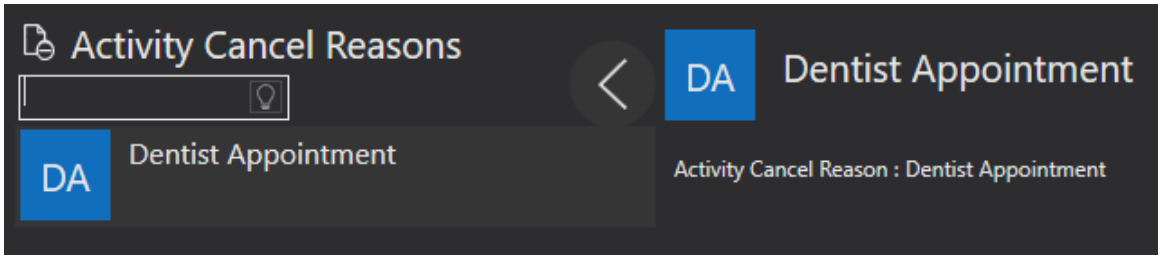


Activities



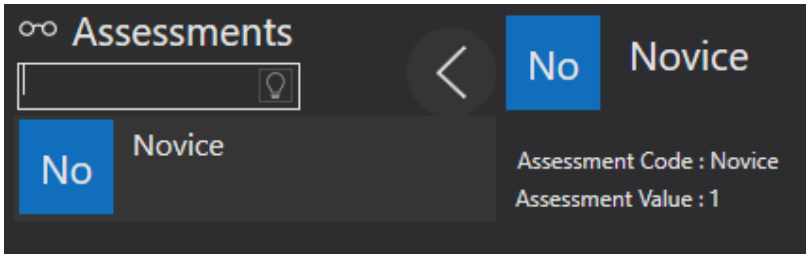
This is a list of all the Activities you or your organisation offers. They are linked to an Activity Group. Activity Groups can be added, edited, and deleted using the icons shown at the beginning of System Settings.

Activity Cancel Reason



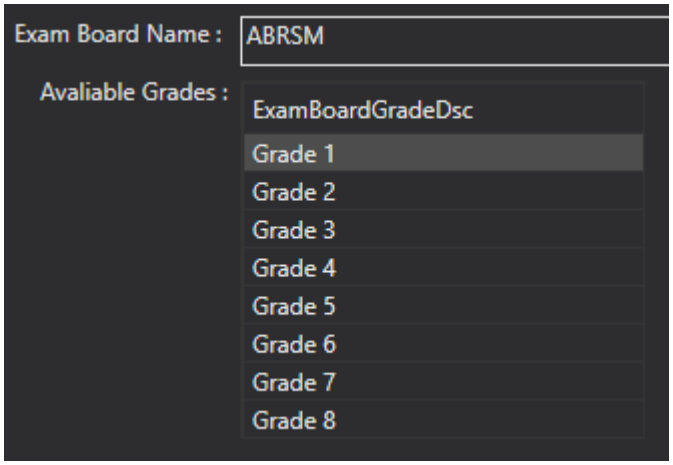
This is where the activity is cancelled, and you want to list a reason why. An example is 'Threshold not met', or 'Venue no longer available'. Activity Cancel Reason can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.

Assessments



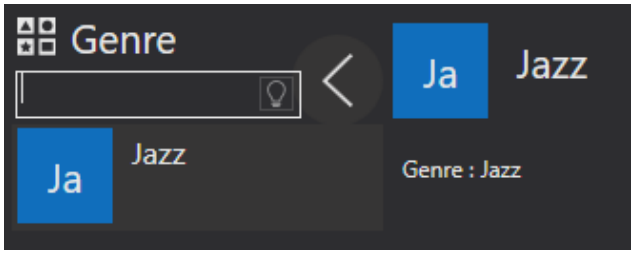
These the levels you use to assess
a pupil's progress. They can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.

Exam Boards



Exam boards are the different examining bodies that you use within your organisation. These can be used when setting up an exam. To add or remove a grade, use the icon shown here.

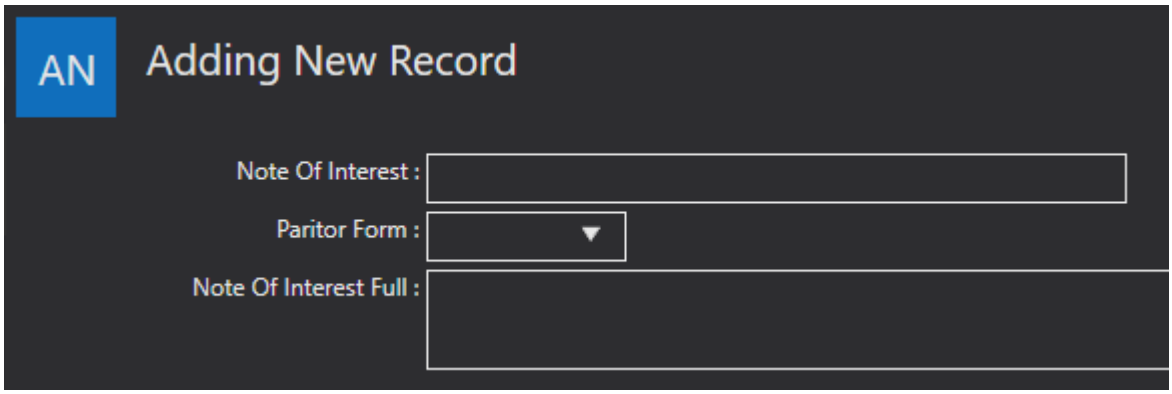
Genre



This is where you define your genres e.g. classical for music, and ballet for dance. Genres can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.

Notes of Interest Areas

Here, you can create Note of Interest forms. These are used by customers to express their interest in something that you are offering. This information can be used to help you to decide if your offer is worth running.
The Note of Interest text box intended for a title. This is what customers will see when looking at the Notes of Interest before they click on it. Next, you can add a Paritor Form to the Note of Interest. Use the drop-down list in this field to see any of the forms that you have created in your system. For more information on creating forms please see page 26.
The Notes of Interest Full is where you can add a description for the Note of Interest record, you are creating. Once created, your record will be available for viewing via the Live portal.
To view your record, a customer can go to their Live portal, and select the pencil icon to register their interest. This action will show a list of any notes of interest that you have created.
When an applicant registers their interest, they will be asked for their guardian's information, and their student information, followed by the Paritor form that you have attached. Once complete, you can view this in the Notes of Interest section of Business Management. **For more information on viewing these please see page 143.**



Service Types

Service Types are set up so that the Xperios system can track and log the services that an institution might manage.

To create a new Service Type, click on the **Settings icon**.

Service Types can be found in the **Activity Section**. To create a new Service Type, select the plus icon at the bottom of the page that appears once you have clicked on "Service Types".

The form on the following page (as shown below) will contain the details of the Service Type. In the Service Type box, fill out the name of the service being provided.

To select your Service Type Category, click on the box corresponding to the category that best describes the service being added.

"Centre Direct Tuition": describes lessons that happen within a centre.
"Indirect Tuition": describes lessons that take place in a school which is responsible for paying for lessons.

"Allowance"
"Event": describes a one-off lesson with a maximum capacity.

“School Direct Tuition”: describes an external means of payment for tuition e.g. a parent.
“Group Membership”: describes memberships to ensembles, orchestras, bands etc.
“Audition”: determines whether an audition will need to be held for the service.
“Hire”: Describes instrument hire.
“Exam Sessions”: describes the act of booking an examiner to determine the skill level of a pupil.
“Study”: describes a day long learning session for the student which is unique to tuition learning.

By ticking the check box beside “Department”, one of the departments from a dropdown list can be selected. The different departments for this list must be added in Settings. Instructions for doing this can be found on page 25.

From Email is the email address that will appear as the sender on any automated emails related to your selected department.

Reply Email is the email address that any response to the From Email address should go to.

Both From Email addresses and Reply Email addresses can be typed into their corresponding boxes.

The box titled Enquiry Tel No is intended to be filled with a telephone number for any queries. This number will be shown on all outgoing emails.

You can assign a “Manager” and “Assistant Manager” to your Service Type by clicking on the necessary tick boxes. Any contact that is a User can be assigned as a Manager or Assistant Manager. This is done by selecting the correct Users from the drop-down list.

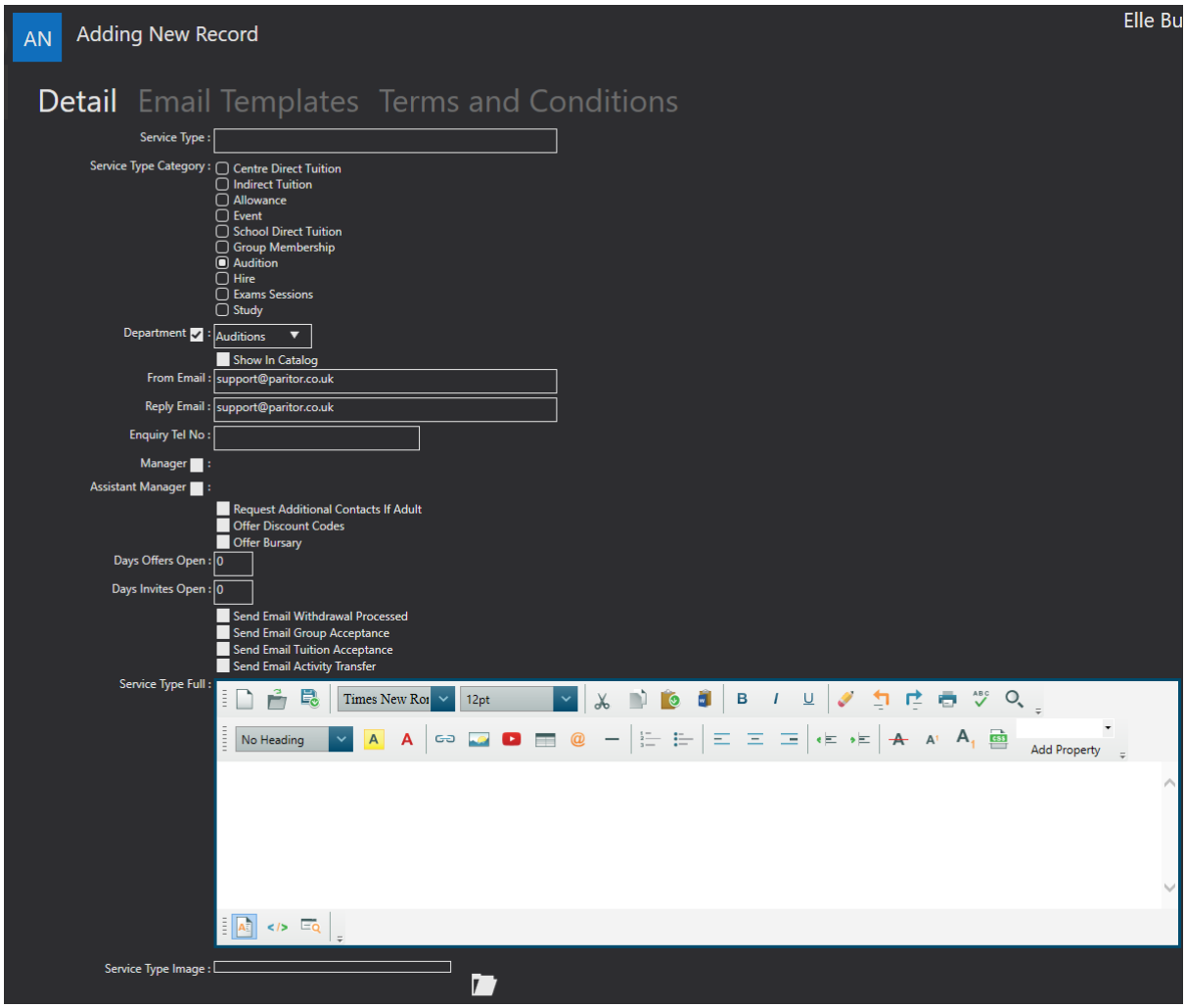
The request “Additional Contacts if Adult” will prompt the booker to add an additional contact if the pupil being booked onto the lesson is an adult. If this is unticked, then when booking an adult onto tuition they will not be asked for any additional contacts. Tick this box if you wish to have an additional contact for an adult, such as an emergency contact.

There are four email options that you can tick when creating a service types, these define which emails will be sent out in regards for the service type you are creating. The “Send Email Withdrawal Processed” email will be sent if you withdrawal anyone from any tuition with this service type. The “Send Email Group Acceptance” will send an email to inform an applicant that they have been accepted onto the group that has this service type, this option will only be available for group service types. The “Send Email Tuition Acceptance” will send an email to inform an applicant that they have been accepted onto the tuition that has this service type, this is only available for the centre direct and school direct tuition. The “Send Email Activity Transfer” will send an email to anyone you have transferred from one tuition to another that has this service type, this will only appear for service types where you can transfer, so will not appear for exam service type. If these are unticked, then the emails will not be sent out automatically.

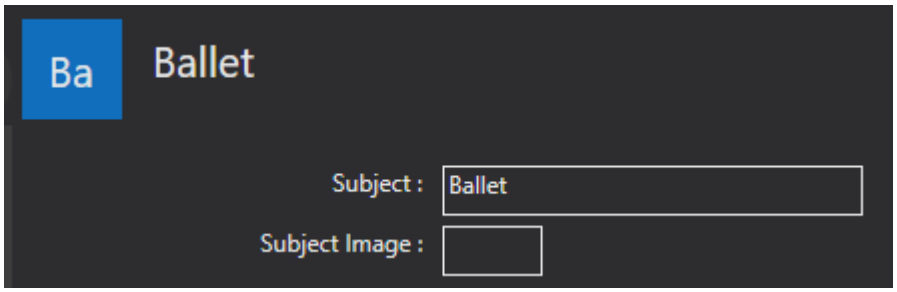
Depending on the Service Type you are creating different Service Type variants should alter the form on your screen. This is because one Service Type may require further: more specific information, than another. These variants should appear or disappear based off your selection under Service Type Category.

For example, the Event Service Type also includes Days Evaluation Offer Open, Days Waiting List Invites Open, and Invite Open Period Text. These fields should be filled with the required information to help manage these more specific aspects of the Event you are creating.

The Email Templates Tab is where you can override the standard email templates. Here you can use any email templates you have created to override the standard one. To see how to create your own email templates see page 41.



Subjects

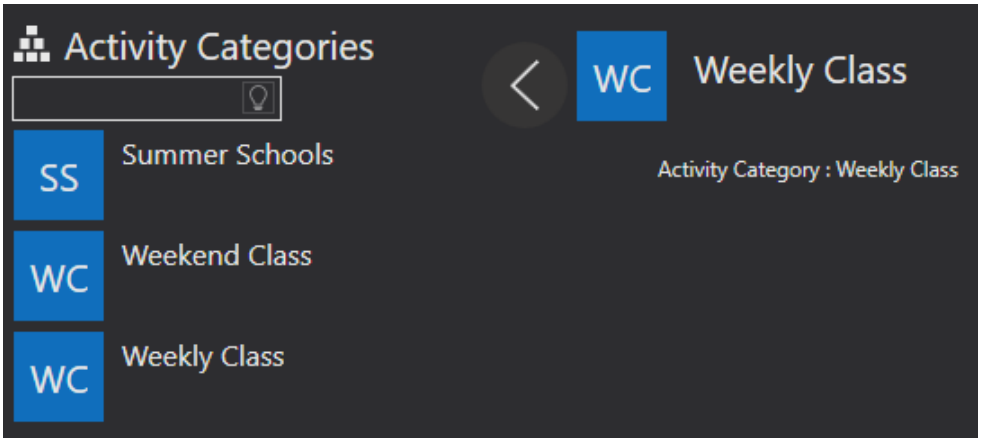


Here, you can define all the subjects that are taught across your organisation. These can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.

Catalogue

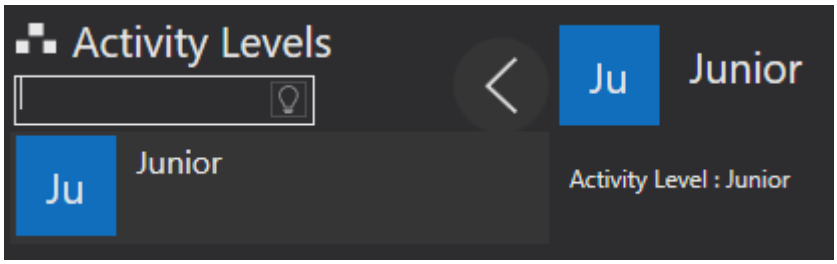
Activity Categories

Activity Categories define the different categories you divide your tuition services into based off when they are taught. These categories will appear in your online catalogue. You can add, edit, or delete these records using the icons shown at the beginning of **System Settings**.



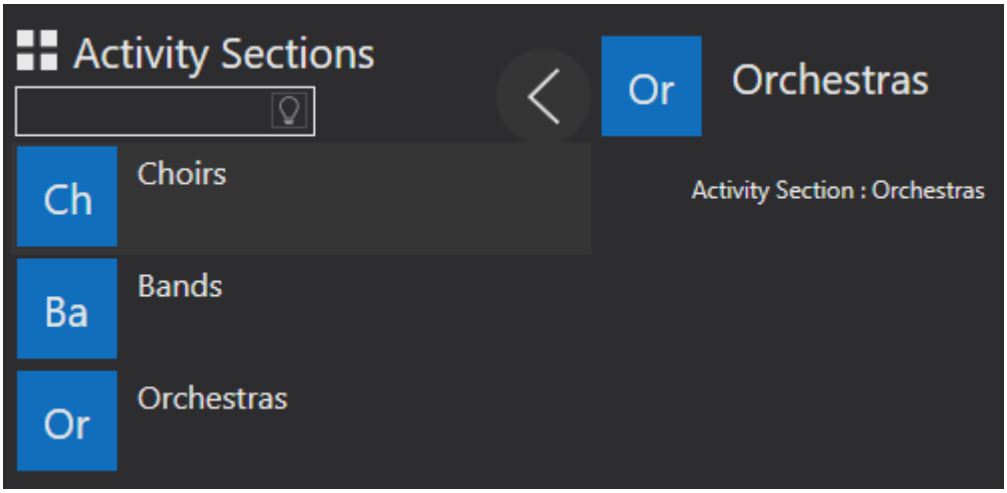
Activity Levels

These define the age-appropriate level for each of your activities. Activity Levels will appear in your online catalogue to help filter your options. You can add, edit, or delete these records using the icons shown at the beginning of **System Settings**.



Activity Sections

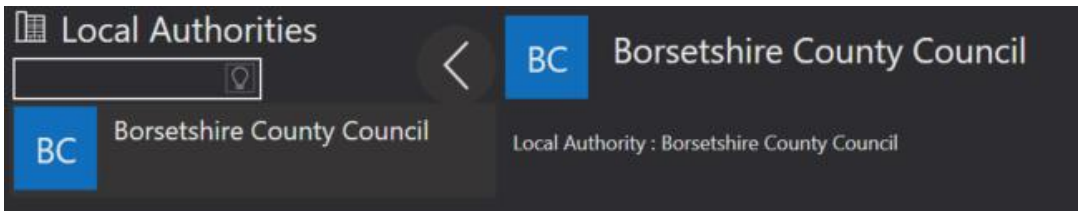
Here, you can define the different sections or divisions within each of your activities. These will appear in your online catalogue to filter your options. You can add, edit, or delete these records using the icons shown at the beginning of **System Settings**.



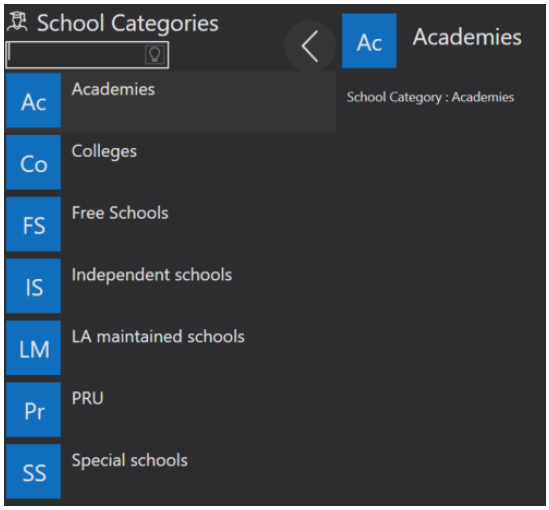
Schools 55

Local Authorities

These are your local authorities e.g., Devon County Council. They can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.

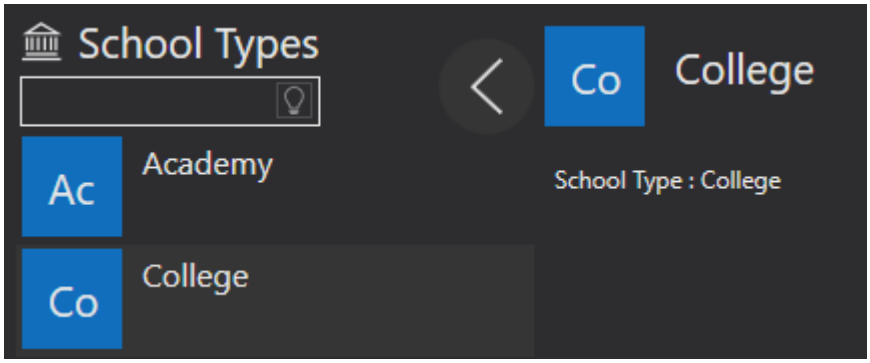


School Categories



A school category defines funding types e.g. academy, public. These can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.

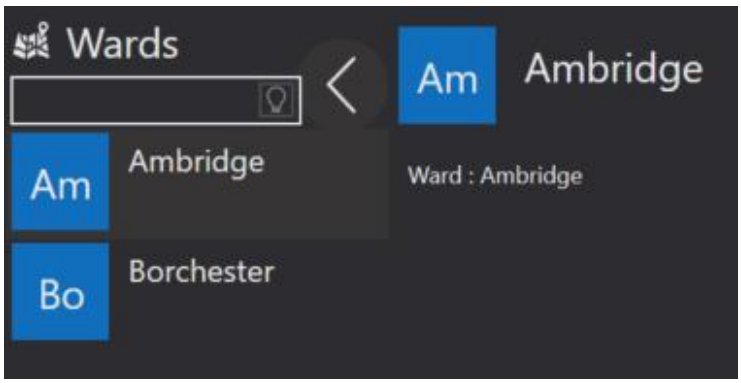
School Types



A School Type is the education level and speciality provided e.g., primary, secondary, special needs. These can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.

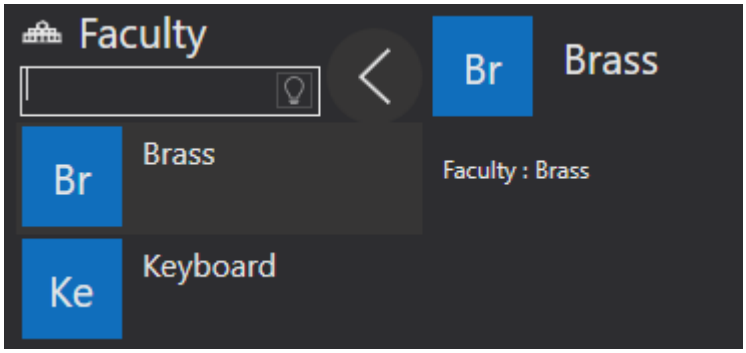
Wards

These are how your local authorities are divided. All schools are part of a Ward. These can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.



Teachers

Faculty



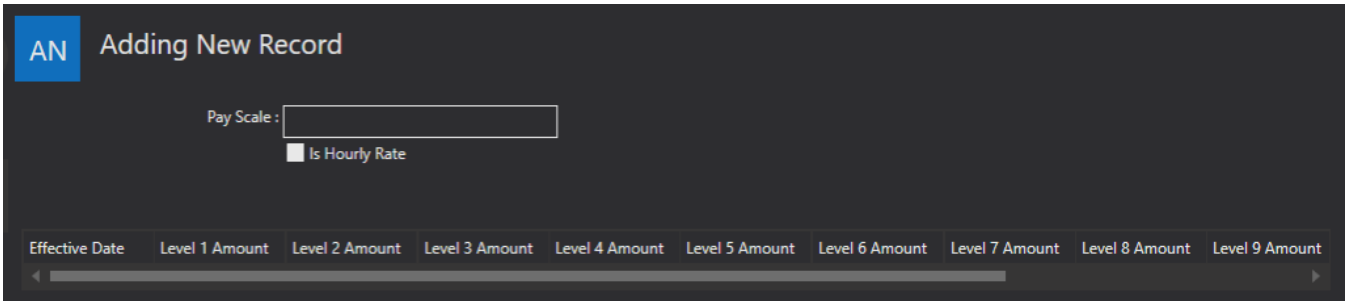
These are the different areas that are taught e.g. brass, string. These can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.

Teacher Pay Scales

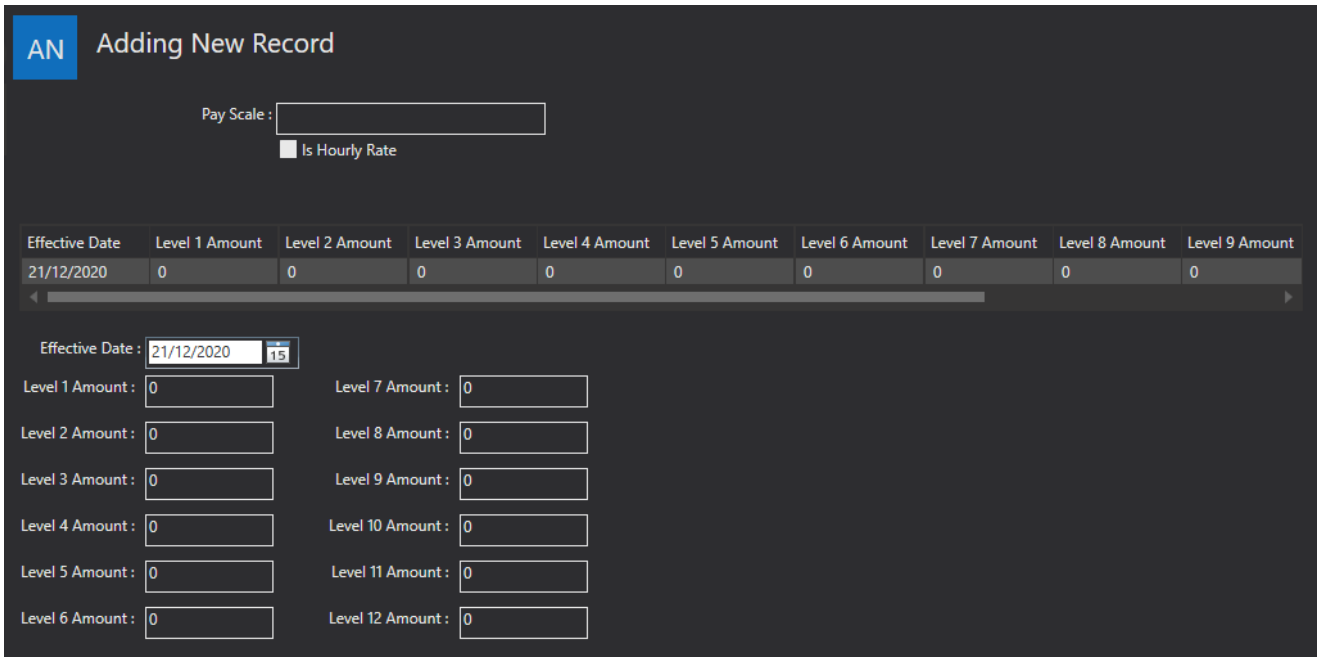
To set up your teacher pay scale, open Settings from your side menu bar, and select “Pay Scale” from the Teacher Tab.

From here, you can add a new pay scale by using the Add New Record icon, which will open a display similar to the example below.

You can select if the amount that you put in is an hourly rate or not.
First, you can add a name for your “Pay Scale” such as qualified, or unqualified.



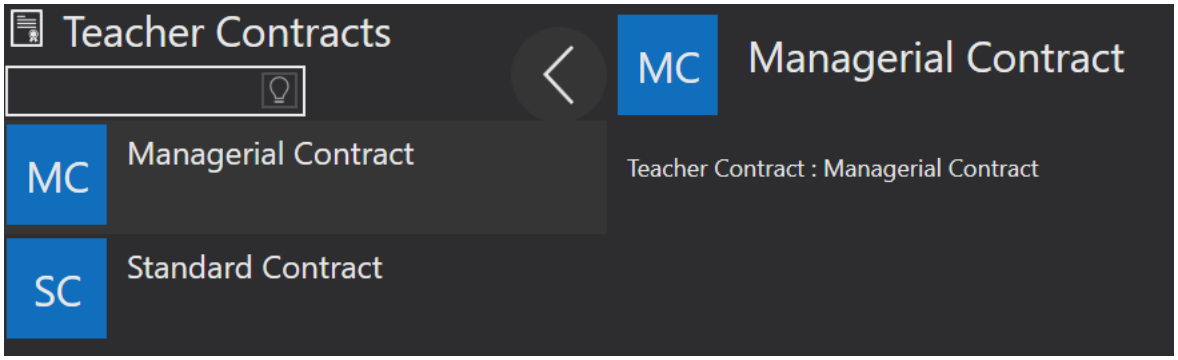
Then use the Create New Pay Scale icon to add a new pay scale. Select the row, and a similar display to the example shown below should appear.



You can then alter the pay scale and the date that this pay scale will come into effect. Next, you can alter the amounts for each level of the pay scale.

Teacher Contracts

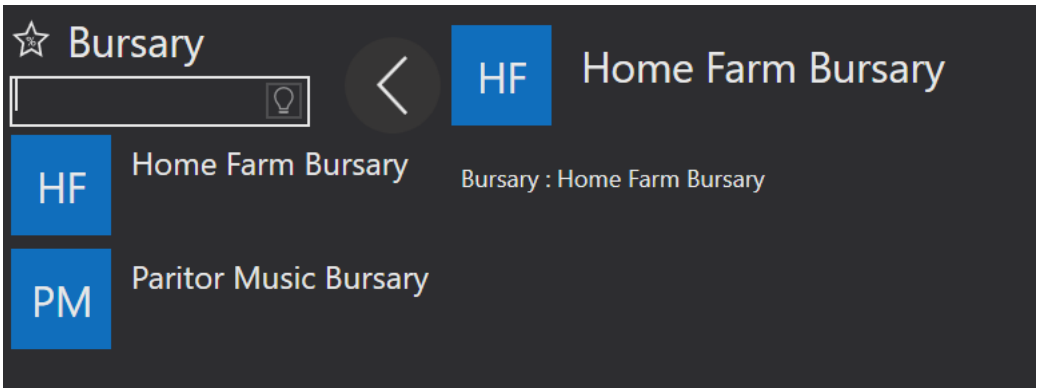
Any number of Teacher Contracts can be defined to cover the various terms under which contracted Teachers are employed. They can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.



Accounts

Bursary

Here, you can define the bursaries you or your organisation offers. You will be able to set individual bursary offers for students. I.e., when you give someone a bursary you can select the type of bursary and then enter the individual amount. These can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.



Charges

The Charges feature of Xperios is used to manage payments for the various services and activities you provide.

To access Charges, select the Settings icon found on your main dashboard.
Then, select Accounts followed by Charges.

Select the Add a New Record icon to add a charge record.

Below is an example of how the display should look once you have reached this stage…

The **Activity Rate** should include the name of the activity being charged for.

The **Activity Rate Type** should detail the type of payer. You can select from **Charge to Payer, Group Membership, Instrument Hire, School Charge per Pupil,** and **School Charge for Time**.

The "Charge to Payer" tick box signifies that a parent or guardian will be charged for the service.
"Group Membership" refers to a charge for a Group Study.
"Instrument Hire" indicates a charge for hiring an instrument.
"School Charge per Pupil" should be selected if the charge is made to school per pupil e.g. a charge is made of £10 per pupil for five pupils making a total £50 charge to the school.
"School Charge for Time" should be selected if a pupil's school is charged based on the length of time a service takes.

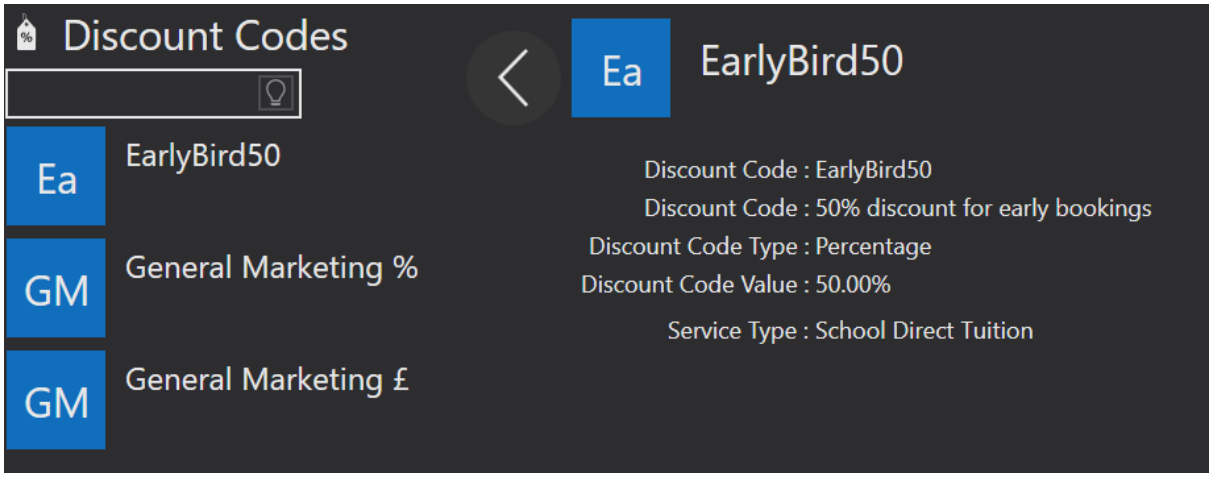
Only if **Charge to Payer, School Charge per Pupil, and School Charge for Time** are selected will the **Activity Rate Charge Basis** option appear. The Activity Rate Charge Basis offer three options: **Charge per Hour, Charge per Session** e.g. If there are ten sessions per term then the charge for each session is multiplied by ten, and **Charge per Year**, which is is a flat rate without the number of session taken into account.

For "Charge per Hour" and "Charge per Session" an automatic credit can be set up which would only require amending should a change be made to the scheduled plans.

Once your new record is complete.
click on the Save icon at the bottom of the screen.

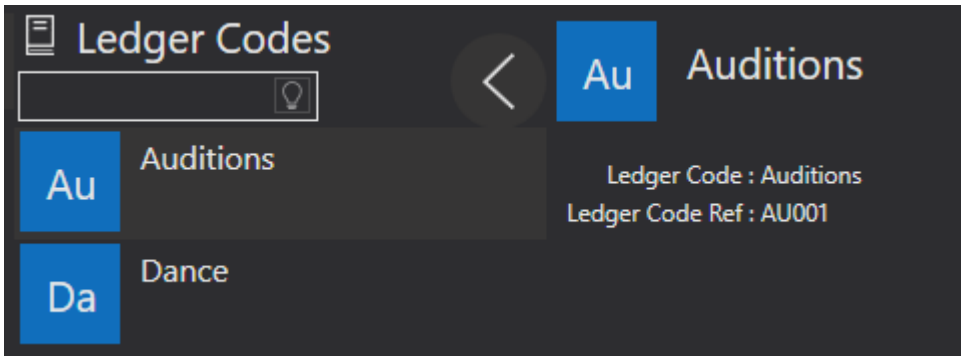
Discount Codes

Here you can add and define any discounts by giving them a title and a value. These can be added, edited, and deleted using the icons shown at the beginning of **System Settings.**



Ledger Codes

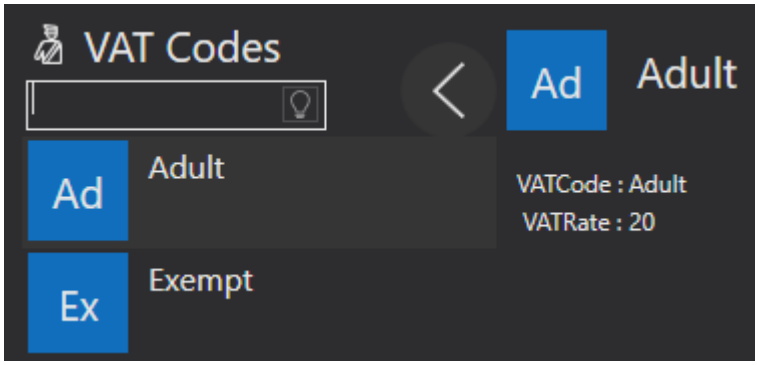
A Ledger Code is used for the financial tracking of certain departments within an organisation. For example, in a music school, each lesson type might have a different Ledger Code. They can be added, edited, and deleted using the icons shown at the beginning of **System Settings.**



Remissions

Here, you can add and define your remissions by giving them a title and a value. These can be added, edited, and deleted using the icons shown at the beginning of **System Settings.**

VAT Code

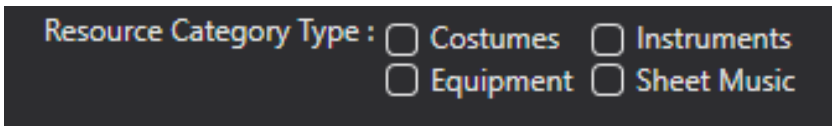


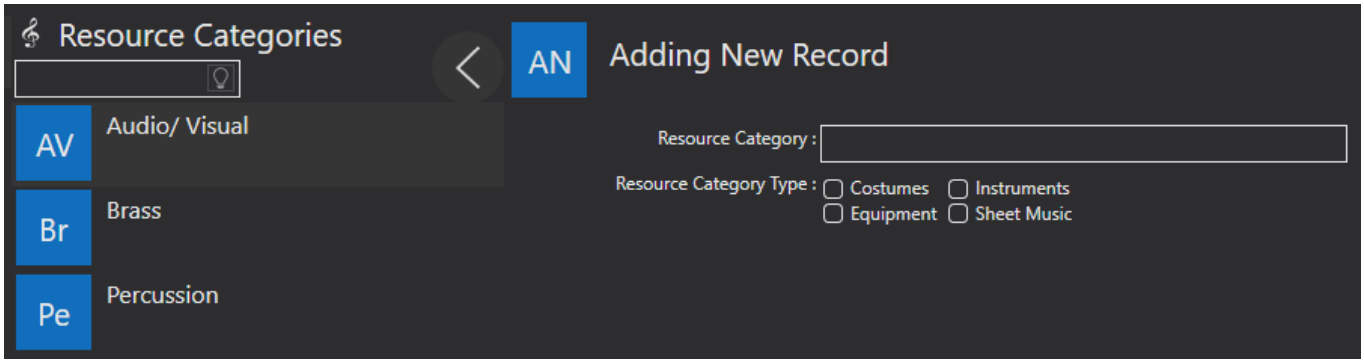
Here, you can add and define your VAT by providing a code and VAT rate. This can be added, edited, and deleted using the icons shown at the beginning of **System Settings.**

Resources

Resource Categories

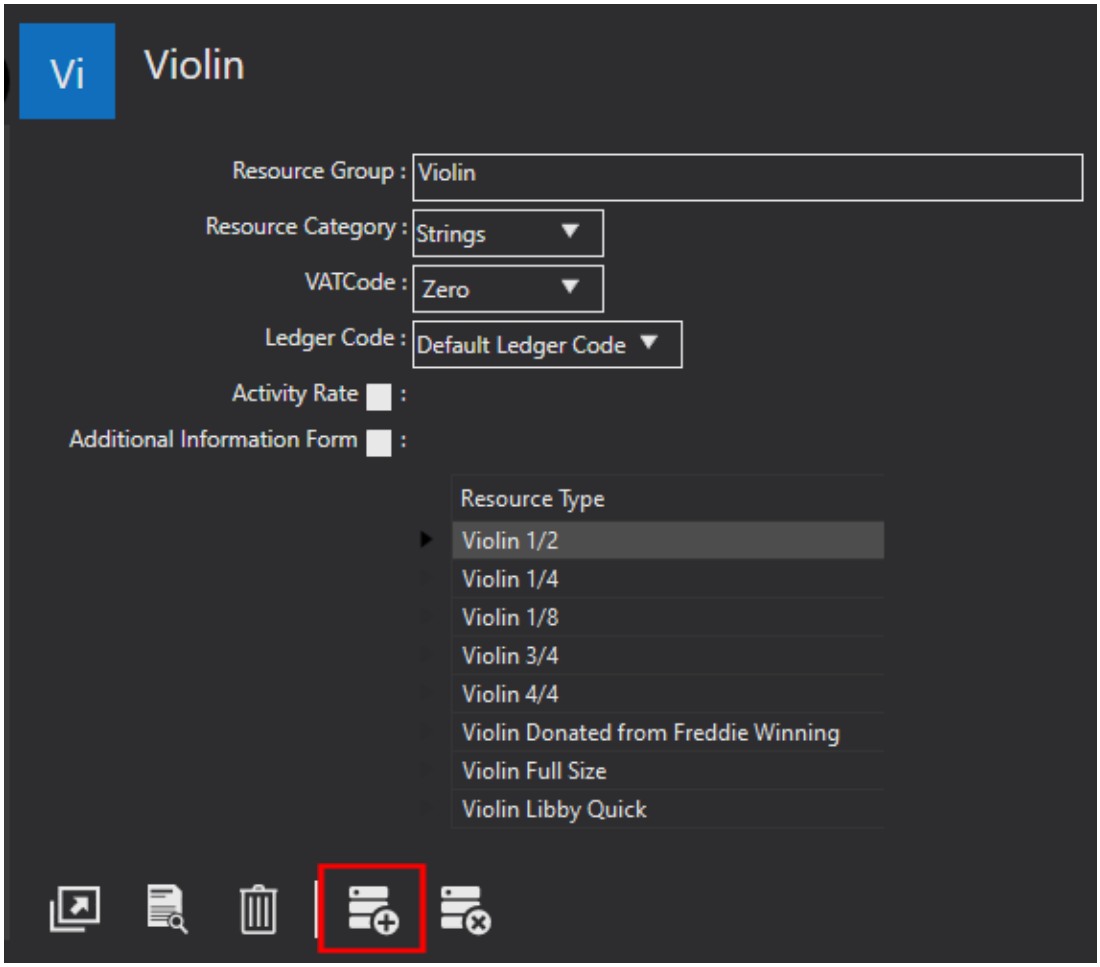
The top of the tree; Resource Categories are broad e.g. Percussion or Strings. They include the Resource Category Type which defines what kind of resource is being used. Use the tick boxes to select either “Costumes”, “Instruments”, “Equipment”, or “Sheet Music”. You can find these options under Settings followed by Resources. They can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.



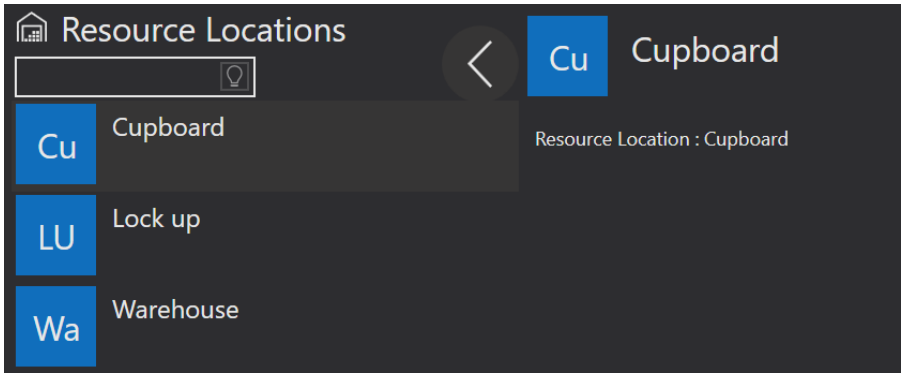


Resource Groups

Resource Groups are defined within a Resource Category. They consist of the types of resource within that category e.g. “Violin” and “Cello” belong within the “Strings” category. The “Resource Category Option” provides a drop-down list of all created resource categories. The “VAT” and “Ledger Code” fields are also drop-down menus consisting of predefined codes. The “Resource Types” can then be added, these are how your resource groups are split. In the example below, for “Violin” there is ½, ¼, etc. The resource type can be added using the icon highlighted below. The icon to the right of it is used to delete a resource type. Resource types can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.



Resource Locations



The Resource Locations are where different resources may be held when not on loan or hire. They can be added, edited, and deleted using the icons shown at the beginning of **System Settings**.

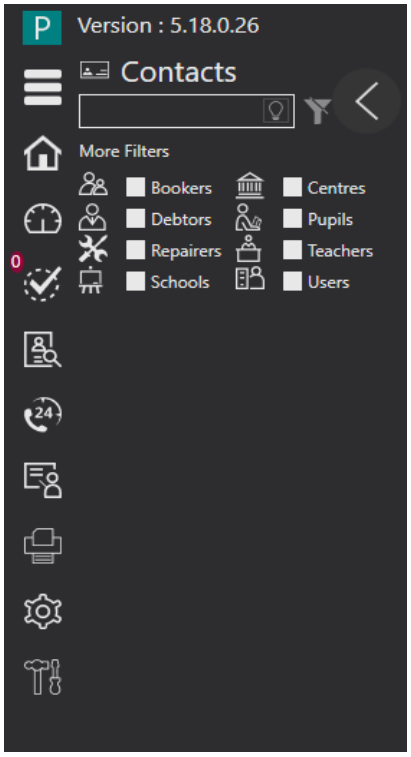
Contacts

Finding Contacts

To find a contact, select the contacts menu from the side menu bar. A contact will not show until you search under Contacts.

To search for a contact, start by typing in the search bar any variant of their name i.e. their surname, part of their first name, part of their surname, email, any telephone number, or post code. You can also filter your Contacts when you are searching for them using the filter button.

When the filter button is clicked you can select any one or more of the filters to find your contact.



Organisations and Individuals

Organisations are schools or centres where tuition takes place.

Individuals are people who may use the system, this can include members of your team, teachers, parents, guardians, and pupils.

Types of Contacts

There are eight different types of Contact split into individuals and organisations: User, Teacher, Debtor, Pupil, Booker, Repairer, School, and Centre. A contact can be more than one of these types e.g. someone who is a booker will quite often also be the debtor. When someone books online they will automatically be made a booker. If money has been exchanged, they will also be made a debtor. For example, a case when the booker and debtor are different people might involve a school secretary and a parent. A school secretary would book a whole class event, making them the booker. The school or the parent would be the debtor.

User: a user is someone in your organisation who uses the Xperios system.

Teacher: a teacher is someone who carries out tuition.

Debtor: a debtor is someone who pays for the tuition.

Pupil: a pupil is the student who is taking the tuition.

Booker: a booker is someone who books a pupil onto tuition.

Repairer: a repairer is a person or organisation who repairs instruments.

School: a school is where tuition is provided.

Centre: a centre is an alternative venue for providing tuition.

Adding a Contact117

To add a Contact, click on the Contacts icon in your side menu bar and select the “Add a New Record” icon.

When adding a new record, you will have the option to choose whether the contact is a person or organisation. The type of contact they are will determine which of the above contact type icons will show.

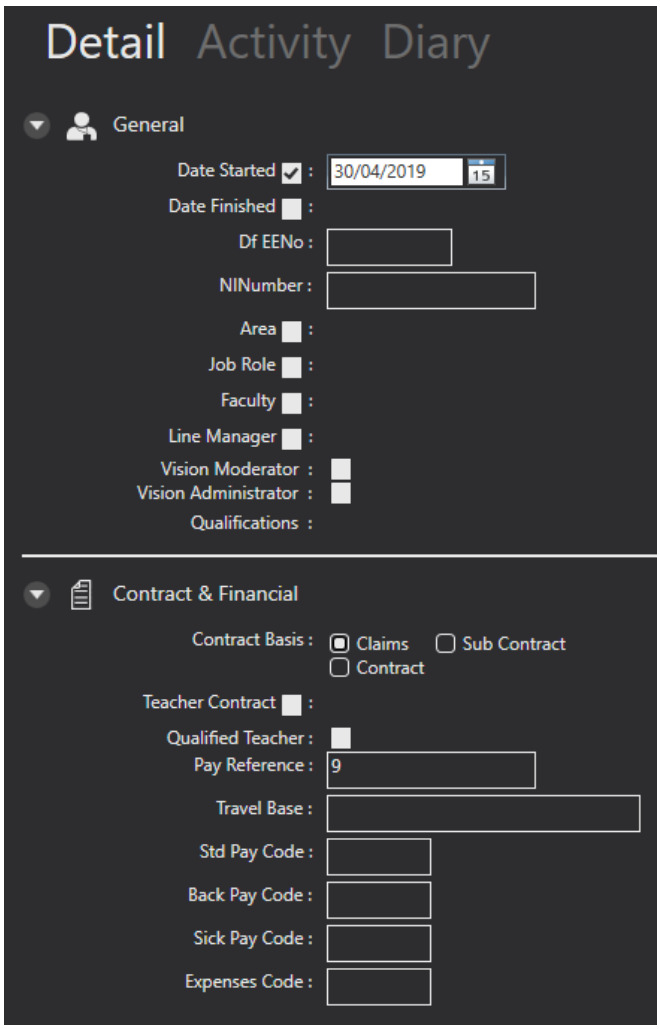
The one contact icon that will not show is the Booker icon as someone can only become a Booker if they go online and book Tuition.

You can create a Contact without choosing any of the types above by clicking the Save button once you have added the relevant information.

If a contact is made for someone who is already on the database, the two contacts will merge. For the contacts to merge they must have the same last name, and the same title or same first name/first initial. They must also have one other piece of contact information matching from either: the first line of their address, a private email address, landline contact number, or mobile contact number. The system will then recognise your new Contact as the same person and will merge the information so that there are no duplicate records.

When two contacts merge the system makes a new record and deletes the previous record containing the same data.

Teachers



Select a teacher to go to their Teacher tab. You should see a display like the example shown above when you select the Detail tab and enter Edit mode. Your display should also look like the example screenshot when adding a new contact.

The first section of this form is General. Here, you can fill in information about the teacher including when they started working for you.

The tick boxes are for including optional information about that teacher. The “Area”, “Job Role”, and “Faculty” options can be set-up in your System Settings. For more information on setting these up see page 58.

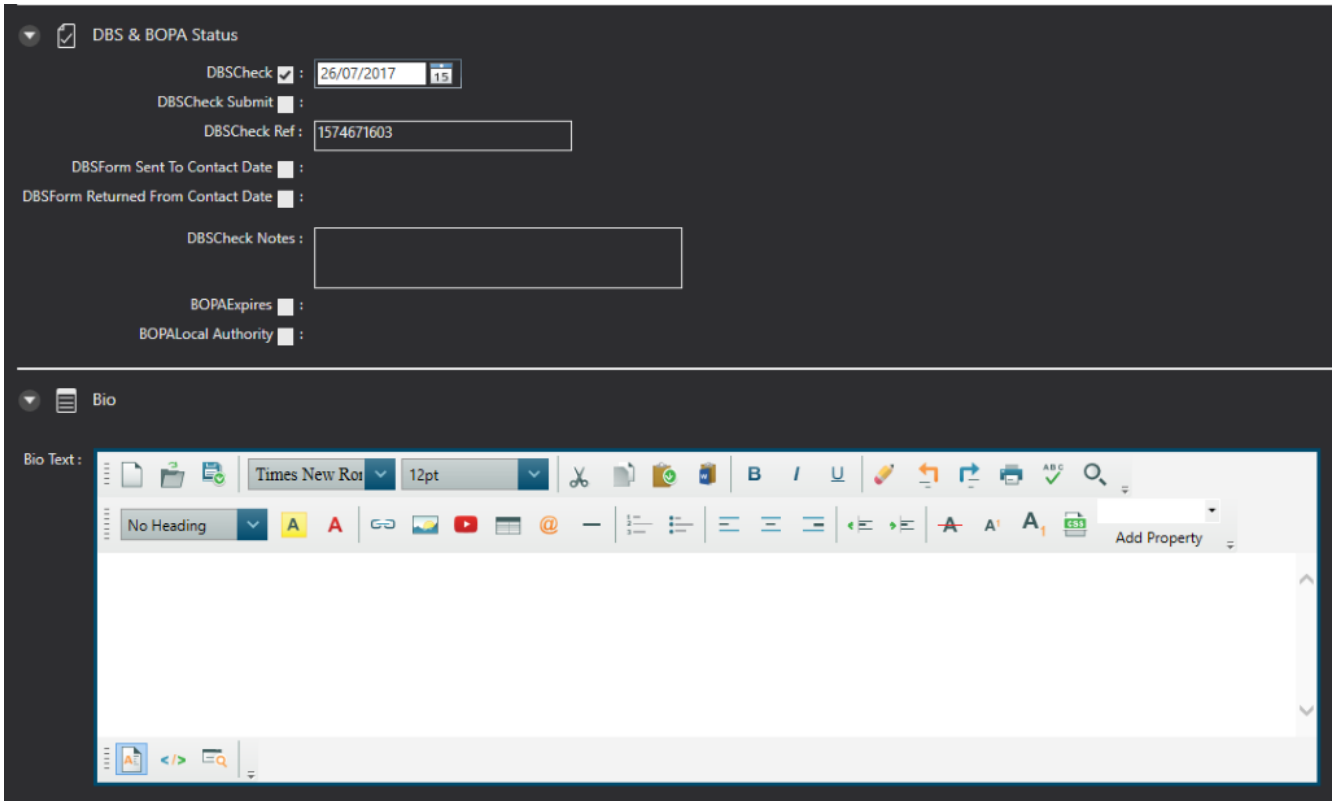
The “Line Manager” option allows you to select another teacher as a line manager where applicable.

The Contract and Financial section of the form is where you can include all information about the teacher being paid and the contract they are on.

The “Teacher Contract” option will provide a drop-down list of any teacher contracts you have set-up. To see how to do this, see page 60.

Next, you can fill in information on their DBS check and BOPA status, allowing you to keep it up to date and check when a teacher may need to renew these. An example of this section of the form can be seen below.

The Activity tab, shown in the first screenshot above, displays any activities taught by the teacher; you can make amendments to the activity from there. **For more information on activities see page 115.**



Adding Prospectus Items to a School/Centre117

For both Schools and Centres you can add Prospectus items. These include details of the tuition available at the venue. To add a prospectus item for a School or Centre search for the venue in your Contacts. Once you have found the correct record go to the “School” or “Centre” tab, then select the “Prospectus” tab. Next, enter Edit mode using the standard Edit icon found in the bottom left-hand corner of your display. Once in Edit mode you can add, edit, and remove prospectus items. To add a new prospectus item, select the Add icon, as highlighted in the example below. Here, you can add a title, description, and price details.

You will also need to allocate a “Service Type” to your item. Your service types are set up in **System Settings**, **for information on how to do this see page 53.**

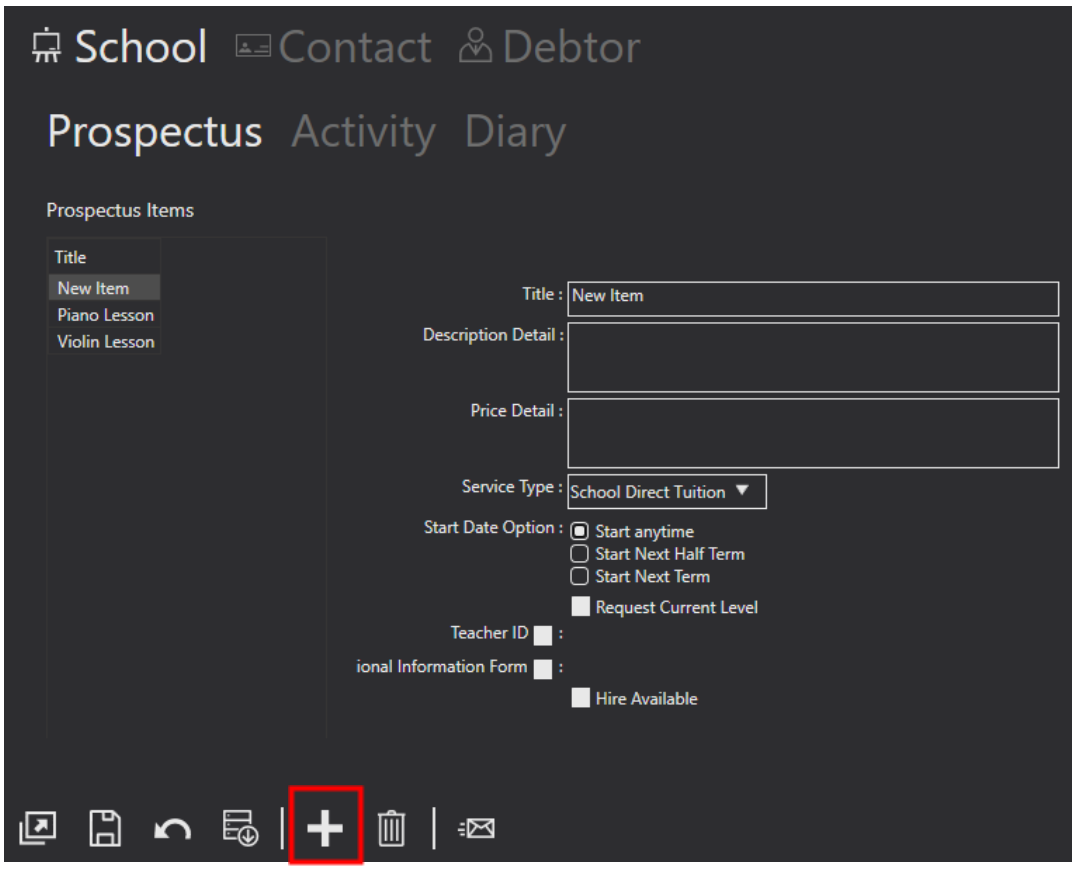
The “Start Date” is the date that a pupil can start the tuition if they apply. This could be an immediate start or at the beginning of the next half or full term.

“Request Current Level” if ticked will ask the applicant what their current learning level is for the relevant subject. You can select to add a teacher to this.

Additional Information Forms can be set up in System Settings as shown on page 26. If this tick box is selected, you can choose which to add for this prospectus.

Lastly, you can select if equipment hire is available. If hire is available, when booking online the applicant can select if they want to hire an instrument.

The Save icon should then become available and should be used to keep your additions. Now, when you leave the record and return to the “Prospectus” tab a display like the one shown in the example will appear. You can add as many prospectus items to a School or Centre as required.



Schooble Account

A Schooble account is the account that all Users of the system will access to log in. It is also used by bookers, parents/guardians, or pupils that want to see their account activity, book tuition, and pay invoices. Each User should have ONE account regardless of the number of roles they perform e.g. teacher and parent, or if they are associated with more than one music service that uses Ensemble.

To book onto any service, contacts will need to create an account or log in if they already have an account. They cannot book anything without a Schooble account. If a contact does not have a Schooble account and you still want to grant them access to the portal, **follow these steps:**

To associate a contact with a Schooble account, open their Contact record and click on the “Schooble” tab. Here, you can find out if there is already a Schooble account associated with the Contact. You will need the contacts’ last name and email address to access this information.

At the bottom of the page, you will see the two icons below:

If the Contact has an email but no Schooble account, you can create one using this button. Once completed an invite will be sent to the recipient. This will allow them to sign into the Schooble account you have made for them using a temporary password.

This icon links a current Schooble account to your organisation by associating the existing account to your database.

By using either icon the recipient is sent an email with an invitation link. By following this link an association can be made. The link will connect to your portal, where the recipient can either create an account or sign into an existing one.

If the recipient creates an account, their details will be auto filled using the information stored in their Contact record within Ensemble. Provided the Contact record holds all the relevant information the recipient will only need to create a new password.

Once an account has been created, they will be taken to the sign in page. Once signed in, the recipient will be able to view all their information.

There will now be a different view under the recipients “Schooble” tab on their Contact record. All their data should match their contact details in Ensemble. Here, you will also find an email address for the recipients Schooble sign in, as welll as their unique Schooble ID.

Disassociating Users

In some cases, you may want to associate a contact with a Schooble account but are unable to because the email is already associated with another Schooble account. If this is the case, you will need to disassociate the account that holds that email from the Schooble account.

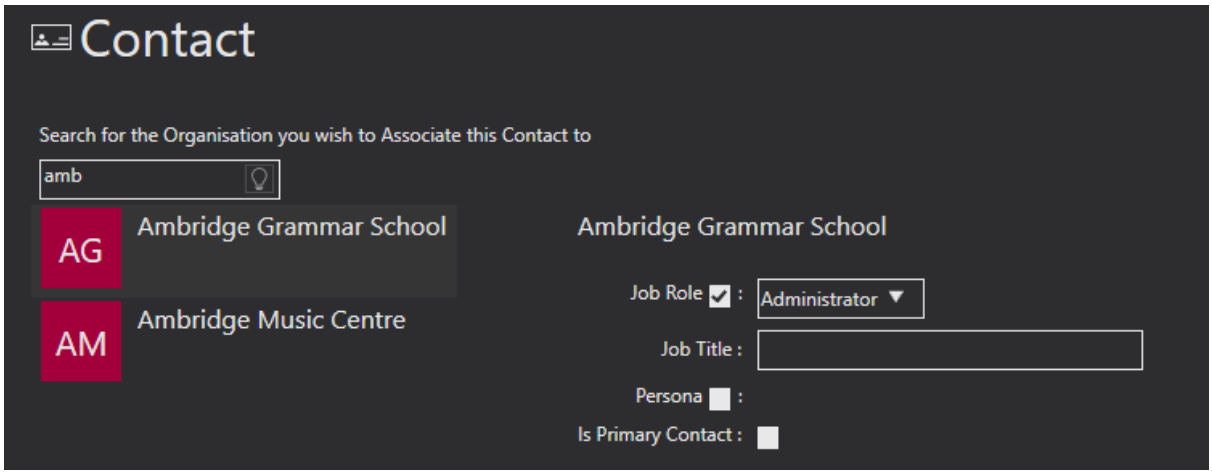
This icon disassociates the Schooble account from the contact record. You will then be able to go back to the record that you wanted to associate with a Schooble account and send the contact an invitation.

Associating Individuals with Organisations

Xperios allows you to associate any number of individuals with an organisation. Individuals can be associated with more than one organisation. A person associated as a Head Teacher at one school can also have an association with other schools.

There are two ways in which you can associate an individual with an organisation: via the individual's contact record or the organisation's contact record. You must locate the individual or organisation within your contacts to edit their record.

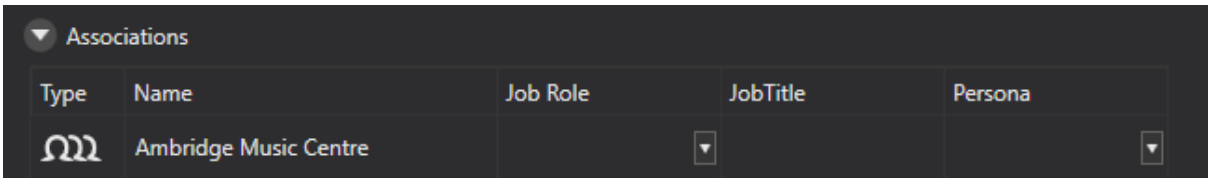
You will find the “Associate Contact Icon” under your chosen record. When clicked, you will be given the option to search for the organisation or individual depending on what type of record you are accessing.



There is also the option to add Job Titles as well as a Job Role and Persona. Job Roles and Personas can be defined in your Settings.

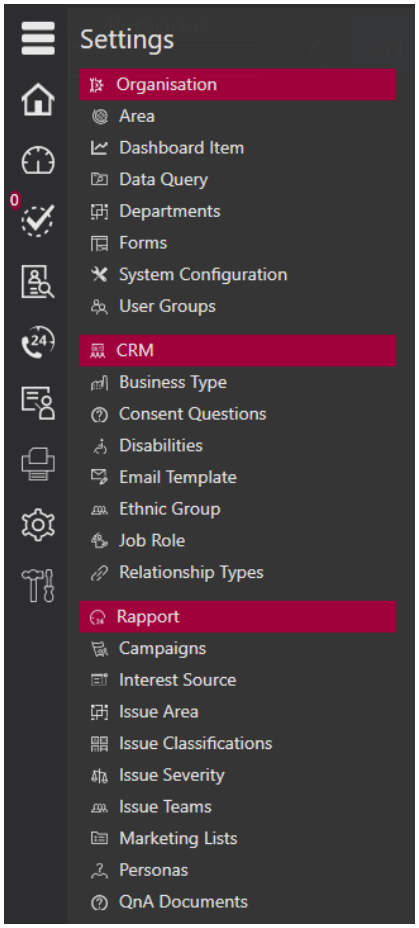
Once you have chosen the organisation or individual that you want to associate the contact with, and once you have chosen the Job Roles, titles, and Personas you want, you can click the “Add Association” icon to Save your changes.

You can go back and add or adjust any Job Roles and Personas after you have associated the contact via a drop-down menu after selecting the Edit icon. A list of Job Roles and Personas are generated from your input under Settings. You can also change a contact’s Job Title by clicking on the corresponding cell.



When associating an individual, you can assign their Job Role from a set list of Job Roles. In addition, you can add a Job Title.

For example, you may have defined one of your standard Job Roles as Head Teacher and can assign that role to all associations where the individual performs that role. Where the person prefers to be addressed with a different title such as CEO or Principle you can add that as their “Job Title”.



The Xperios system allows you to add specific titles while at the same time categorising all individuals who perform the same role. This is useful when you want to extract all individuals who perform a defined role such as Head Teacher.

If there is more than one individual associated with an organisation there is the option to mark which one is regarded as the primary contact. This contact will become your default correspondence when sending a message to that organisation. To add Job Roles and Personas go into your Settings tab. You can Edit Job Roles in the “Job Role” section under CRM. You can edit “Personas” under Rapport. Be aware that you can only alter your “Personas” options if you hold a rapport licence.

Select CRM or Rapport followed by the “Add a New Record” icon to create a record. This will open one of the options below. You can then define your job role or persona and click the Save icon. Once created, these options will appear in any relevant drop-down menus when making associations.

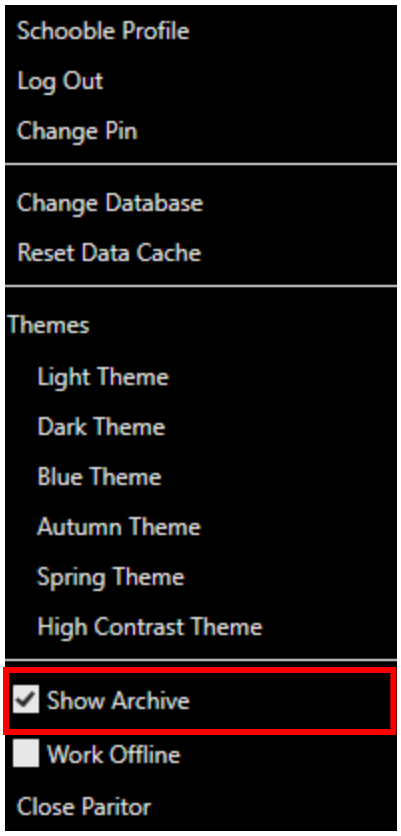
Archiving or Deleting a Contact

To archive or delete a contact record, go to your Contacts and search for the contact that you wish to archive/delete. Then, use the Edit Record icon to enter edit mode. The archive/delete contact icon should now appear as shown here…

To delete/archive the entire contact, they can’t have any contact type associations. Therefore, you will need to open each tab under the contact and use the same icon. If the contact or contact type is used elsewhere in the system or linked to something, then you will only be able to archive the contact as opposed to deleting it.

Once you have archived or deleted the contact types, you will be able to archive or delete the contact. If there is no link for the contact, the option to delete them rather than archive will show.

If you delete the contact, it is removed from the system.
If you archive a contact, you can see all archived contacts by adjusting your settings option for this. To do this, click on your name in the top right-hand corner of the system, and select Show Archive.
All archived contacts will now show with a red icon instead of a white icon.


Schooble Profile
Log Out
Change Pin
Change Database
Reset Data Cache
Themes
Light Theme
Dark Theme
Blue Theme
Autumn Theme
Spring Theme
High Contrast Theme
Show Archive
Work Offline
Close Paritor

Contact
Pupil

Manage User Access to Ensemble

Introduction

Access to the Xperios software is managed through the control of User Records and the optional use of User Groups assigned to those User Records.

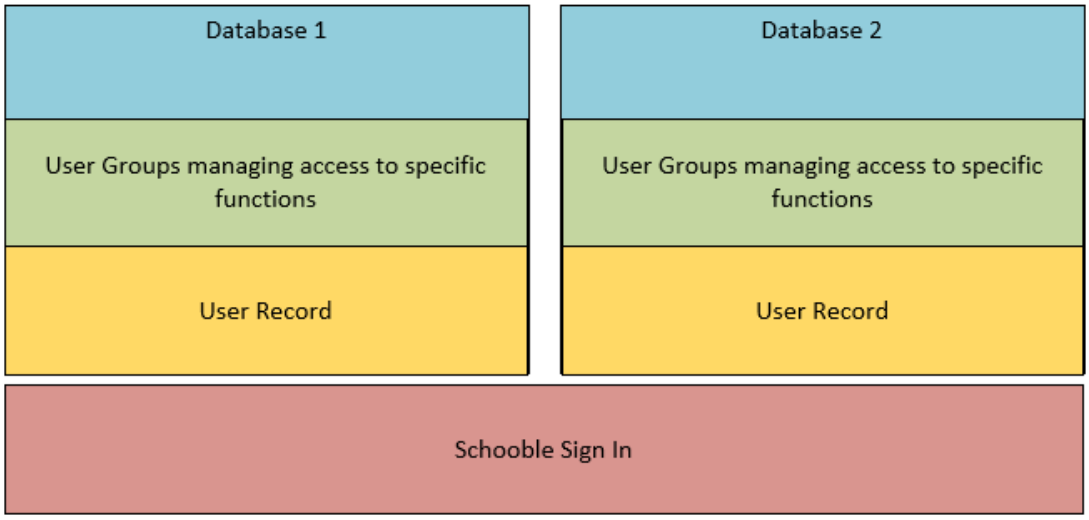
A User Record is a type of Contact within Ensemble, and any existing individual Contact can be made into a User. Alternatively, you can create a Contact Record for a new User.

User Records are associated with a Schooble account. To gain access to the system, the User must first sign in to their Schooble account. It is impossible to access the software and the managed data without being registered as a User with a Schooble account. The User must also have the correct credentials for the Schooble account.

Multiple databases for one person

Each Schooble account belongs to an individual. An individual should only have a single Schooble account regardless of whether they are associated with several organisations.

An individual may be employed by more than one organisation and an organisation may have more than one database. However, the individual only requires a single Schooble account to access the databases. They will also need a User record within each database to access all their databases. Their role as a User and the functions they can access are defined within each database.



Enabling Access for a User

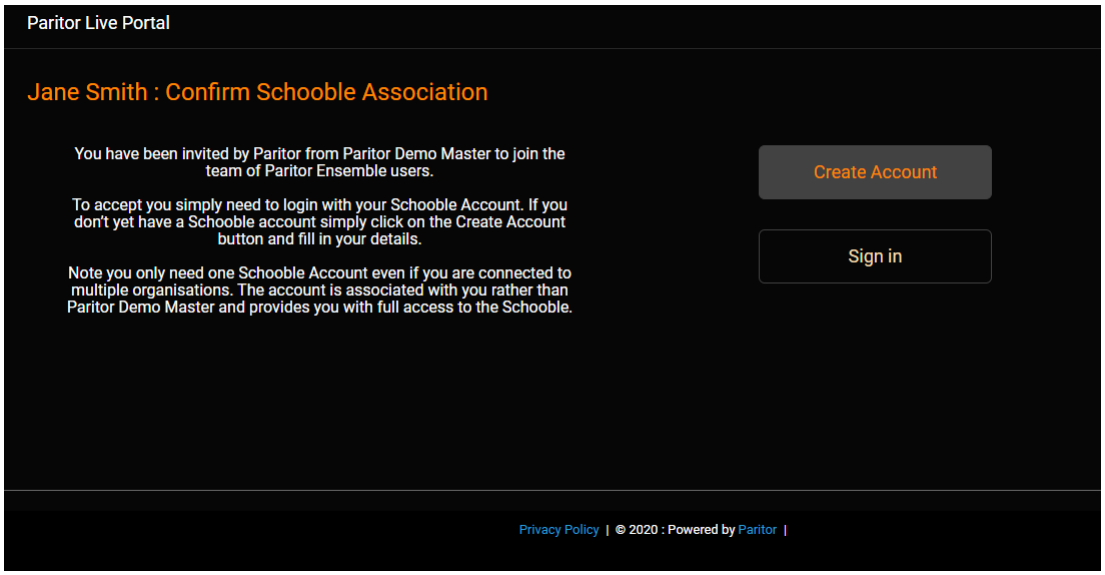
To enable access to Xperios for a User you must first check that you have enough Xperios licences, and you can add more if needed. See the Managing Licences section for more detail. Then define that contact as a User. This is done by creating a new contact or locating a Contact Record. The Contact Record must have a Name and a Work Email defined.

While in Edit mode or Adding a New Contact mode, select the “Make Contact a User” button.

This will add the User attribute to the current contact. A new top-level tab will appear on the screen titled “User”. This tab contains user-specific information including a User Group Membership (where the option to use Group Membership is enabled), Email Signature, and Software Licenses. If Group Membership management is activated at least one User Group must be assigned to the User before they are granted access to Ensemble.

When you save the changes by clicking on the Save button, the system will send an email using the Users Work Email. This acts as an invitation to link the contact’s Schooble account to the User Record you created.

This is done by clicking on a link within the email which takes the recipient to a webpage where their association can be confirmed.



Schooble can be logged into with an existing account or a new Schooble account must be created.

Once completed the User will have access to Ensemble.

Re-Sending User Invitations

It may occasionally be necessary to resend an invitation. This can be easily achieved by opening the Contact record for the User, clicking on the User tab, and from there selecting the Resend Invite button.

User Signature

To edit your User signature, go to your Contact Record and click on the User tab followed by the Signature sub-heading. Next, use the Edit icon in the bottom left-hand corner to reveal the display shown in the example above. The User signature will be displayed at the bottom of all emails sent from this User. The HTML editor is used to edit this. **Details of how to use the HTML editor can be found on page 29.**

Studies

A Study is a collection of Students who take part in a combination of activities over a fixed period. These activities are made up of a combination of core and elective subjects, all of which have a cost. A study can be unique for each pupil, all the elective studies are optional, and so a pupil can select the combination that suites them. The sum of these activity costs makes up the fee charged to the student. A Pupil Study is a predefined pe1riod of tuition that consists of one or more elements of core and elective tuition. A typical Pupil Study will last a year and consist of a core subject such as a weekly thirty-minute violin one-on-one lesson. Plus, additional related elective lessons such as music theory, choir, Xperios work etc. A study is a collection of Pupil Studies that share a common start and end date, Service Type, membership instructions, and core and elective subjects. Typically, music-based Pupil Studies would be grouped under a music Study, and dance-based Pupil Studies would be grouped under a dance Study.

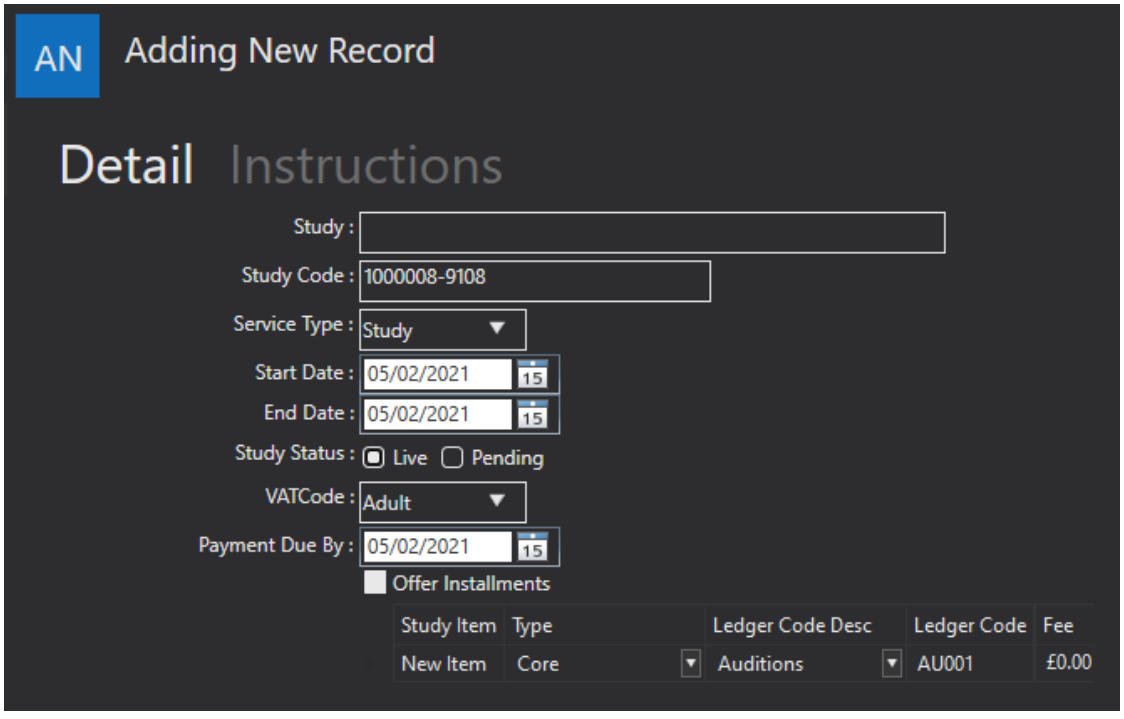
Note: There is no requirement to organise Pupil Studies in this way. It is perfectly acceptable to group all Pupil Studies under a single Study or to have multiple studies for music. For example, one Study for each core instrument type or Pupil Studies grouped by core subject.

Study Service Types

Event Service Types are set up so that the system can track and log the Event services that your institution might manage. Service Types can be found in the Activity Section. To create a new service type, select the plus icon at the bottom of the page. From here you can create an Events service type. Instructions on how to create Service Types can be found on page 53.

Adding a Study

To add a Study, go to the Tuition menu in your side menu bar and select Studies. Then, use the Add a New Record icon to start adding a Study. Your screen should now look like the example below:



The first text box called **Study** is for the name of your study.

The **Study Code** is automated by the Xperios system; however, you can edit this if you have your own study code.
Your **Service Type** should have been created before adding a Study to the Xperios system. The correct Study Service Type should be selected from the drop-down box options.

The **Start Date** and **End Date** are the dates that the study runs to and from.

The **Study Status** allows you to select if the study is "live" or "pending", depending on if you want it available straight away.

The **VATCode** option allows for you to select from your created VAT codes. These can be set up in your system settings. **To see how to do this please see page 63.**

The **Payment Due By** date is the last date for any related payments to the study.

You can then select if you want to **Offer Instalments** for the payments.

There is also an Instructions tab for detailing the instructions that will show when a pupil applies to the Study. These Instructions are also available to view when a pupil or the pupil's payer log into the Live Portal and view their Studies.
Once you are satisfied with the details use the Save icon to Save the record.

Editing a Study

To Edit a Study, go to Studies and click on the one you want to edit. In the left-hand corner you will find the Edit Record icon. Selecting this will open a window like the add record view, however, it should also include the fields you filled in previously, when creating the Study.

When you Edit your record, the back arrow will appear. This allows you to Undo Edit Changes. The back arrow will not work after you have saved the record as your new changes will have replaced your previous save.

Once you have finished adding or editing your Study select the Save button in the left-hand corner. Note: this will not appear until you have added or edited at least one piece of information.

Study Items

The final section of adding a study is to add study items. These are the individual items that make up the study. To add a study item, use the first icon here. To delete a Study Item, use the icon farthest to the right.

You can fist give it a **Study Item** name.

If a Study Item is **Core** it is required, whereas **Elective** studies can be chosen by the pupil.

The **Ledger Code Desc** options are pre-defined within your Systems Settings. **To see how to set these up see page 62.**

The **Fee** column allows you to add a fee for each individual item, a pupil's invoice will then be the total fee of all study items that they are enrolled on.

Edit Study Items

Before you can place a study offer you will need to Edit an applicant's Study Items. To Edit the items allocated to a student click on the "Edit Study Detail" icon. This will display the Edit Dialogue form.

Item	String	Cost	Bursary 1	Bursary 2	Other Disc	Disc Amt	Disc Amt	SubTotal	VAT	Total
Theory		£200.00	£0.00	£0.00		£0.00	£0.00	£200.00	£0.00	£200.00
30 minute lesson		£300.00	£0.00	£0.00		£0.00	£0.00	£300.00	£0.00	£300.00
Chamber Music		£150.00	£0.00	£0.00		£0.00	£0.00	£150.00	£0.00	£150.00
Ensemble		£200.00	£0.00	£0.00		£0.00	£0.00	£200.00	£0.00	£200.00

Type	Item	Cost
Elective	15 minute additional	£150.00
Elective	2nd study	£300.00
Elective	30 minute additional	£300.00

The Edit Dialogue form will list the allocated items. To the right of this list the other items assigned to this Study which are not allocated to this student are displayed. To add or remove items simply drag and drop items between each list.

To add or amend a narrative assigned to each item or to allocate a discount click in the cell and amend the values. When this is edited it is only done for the pupil whose study items you are editing.

When completed click on the Save icon.

Making a Study Offer

Once the Study Items are correct and any discounts are applied you can make the offer by clicking on the "Offer" icon. You can only offer a place to a pupil with the status of evaluating.

This will change the status to "Offered". An email will be sent out to the payer. Once the payer accepts the offer their status will change to "Accepted".

Revoking an Offer

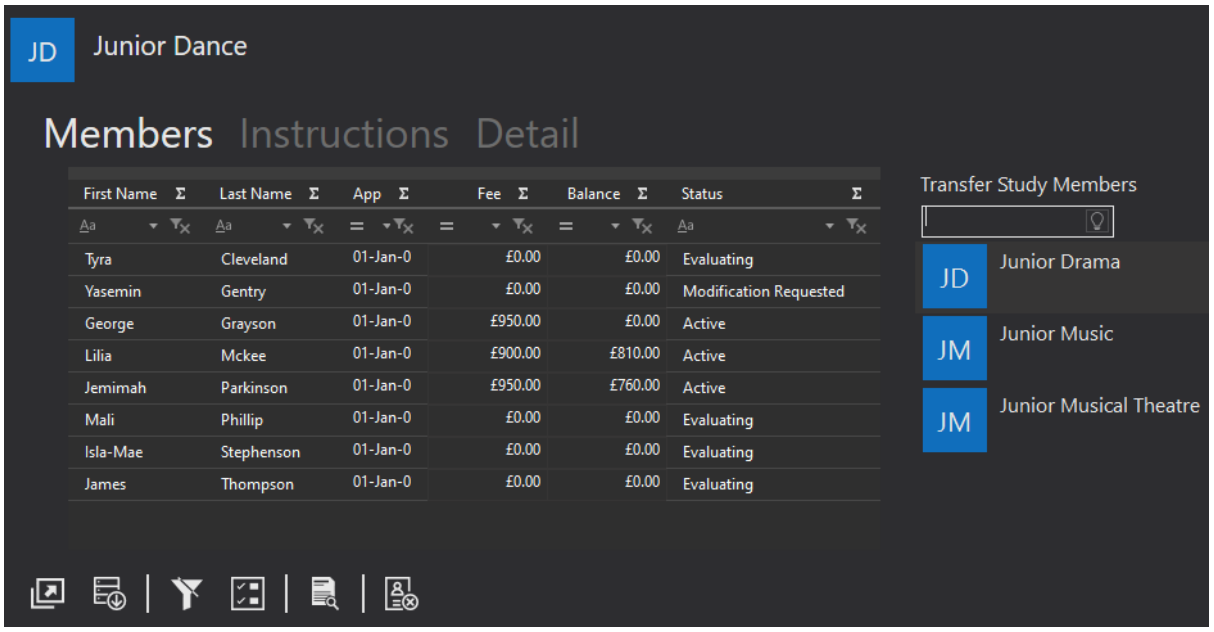
You also have the option to Revoke an Offer.

To Revoke an Offer and change the status back to "Pending" select the pupil whose offer you wish to Revoke and click on the "Revoke" icon.

Transferring Students to another Study

To transfer one or more students to a different Study, click on the “Transfer to another Study” icon.

This will display a list of available Studies to the right of the list of students.



To transfer a pupil, drag the pupil’s name across to the desired Study. As each Study has its own set of assigned Study Item activities, only the student is transferred and not the assigned Study Items. Therefore, it is necessary to find the student in the new Study and Edit the Study Items assigned.

Note: Only entries with a status of “Evaluating” can be transferred. You cannot transfer Withdrawn or Accepted places.

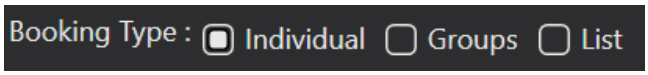
Transferring Multiple Students to another Study

You can transfer multiple students to a Study by clicking on the “Select Items” button. You can then select several pupils and drag them all in one movement to the new Study.

Events

Types of Event

When creating an Event Service Type, you can choose the type of Event or “Booking Type” by selecting one of the available tick box options as shown in the example below:



By selecting “Individual” one invite to the Event is permitted.

By selecting “Groups” a large group, for example a school of pupils can request invitation to an Event.

By selecting “List” a large group can request invitation to an Event if everyone requesting an invite is listed.

Event Service Types

Event Service Types are set up so that the system can track and log the Event services that your institution might manage. Service Types can be found in the Activity Section. To create a new service type, select the plus icon at the bottom of the page. From here you can create an Events service type. **Instructions on how to create Service Types can be found on page 53.**

Adding Events

To add Events, select the Tuition icon from the side menu bar followed by Events. Then click on the plus icon to add a new record.

Your screen should now look like the example below:

The Event field should be filled with the details of the Event being held.

The Event Code field should be filled with an automatically generated identification number for that Event. This can be edited by typing a new code in the correct field.

Your Service Type should have been created before adding an Event to the Xperios system. The correct Event Service Type should be selected from the drop-down box options.

The Centre ID refers to the venue that the Event is taking place. Choose an option from the automatically generated drop-down list. The options available consist of any Centres added to your Contacts list.

Your Venue refers to the venue name that will appear to all Event applicants.

Venue Room is the room in which the Event is held.

Start Date and End Date should include when the Event will begin and end. These dates can be chosen by clicking on the calendar icon beside this field.

Frequency is the frequency with which the Event occurs. Options include “Bi-Weekly” (Fortnightly), “Monthly”, “Weekly”, “Daily”, and “Termly”.

Evidence Required asks the applicant to upload evidence of their skill level, for example, a certificate of achievement.

Applicants Require Approval asks that a teacher’s approval be given for attendance. This is to ensure that the applicant is suitable for the for the Event.

Request Experience asks the applicant for some example of their skill level. This could include a certificate or a video of them playing an instrument.

Request Reason asks the applicant to provide a reason for their request for an invitation to the Event.

The Open Date and Close Date refer to the dates within which applications to the Event will be accepted and NOT the dates between which the Event will be held.

The Cost field should be filled with the price of the Event.

The VAT Code field should include a VAT code for financial purposes.

A Ledger Code is used for the financial tracking of certain departments within an organisation. For example, in a music school, each lesson type might have a different Ledger Code. The corresponding Ledger Code for this Event should be included here.

Capacity refers to the maximum number of guests that can attend the Event.

Threshold refers to the minimum number of guests required for the Event to be held.

Over Capacity should include whether additional guests should be added to the guest list or put on a waiting list. This will become useful should some spaces become available at a later date.

Primary Teacher ID allows you to select the teacher who can authorise Event attendance.

The Event Status can be “Cancelled”, “Live”, or “Pending” depending on the tick box selected. “Cancelled” means the Event has been cancelled, “Live” means that the Event is accepting bookings at this time, “Pending” means that the Event will be taking bookings in the near future.

Created By should include the name of the individual or User who has created/ is hosting the Event.

Approved by should include the name of the teacher or User who authorises the Event to take place.

Offer Instalments gives the option for applicants to pay in instalments for the Event/ series of Events they have applied for. If this option is selected, and a Payment Due By Date is provided, a number of instalment options are given depending on the number of months until the Payment Due By Date.

The Additional Information Form can be created under Settings, followed by Forms. If the tick box for this is clicked, this allows any Additional Information options to be tailored.

Age From and Age To refers to the required age range of attendees at the Event.

The Activity Section tick box should be selected if you wish for the Event to be included in the filtered online catalogue.

Editing an Event

To Edit an Event, go to Events and click on the one you want to edit. In the left-hand corner you will find the Edit Record icon. Selecting this will open a window like the add record view, however, it should also include the fields you filled in previously, when creating the Event.

When you Edit your record, the back arrow will appear. This allows you to Undo Edit Changes. The back arrow will not work after you have saved the record as your new changes will have replaced your previous save.

Once you have finished adding or editing your Event select the Save button in the left-hand corner. Note: this will not appear until you have added or edited at least one piece of information.

Adding Event Extras

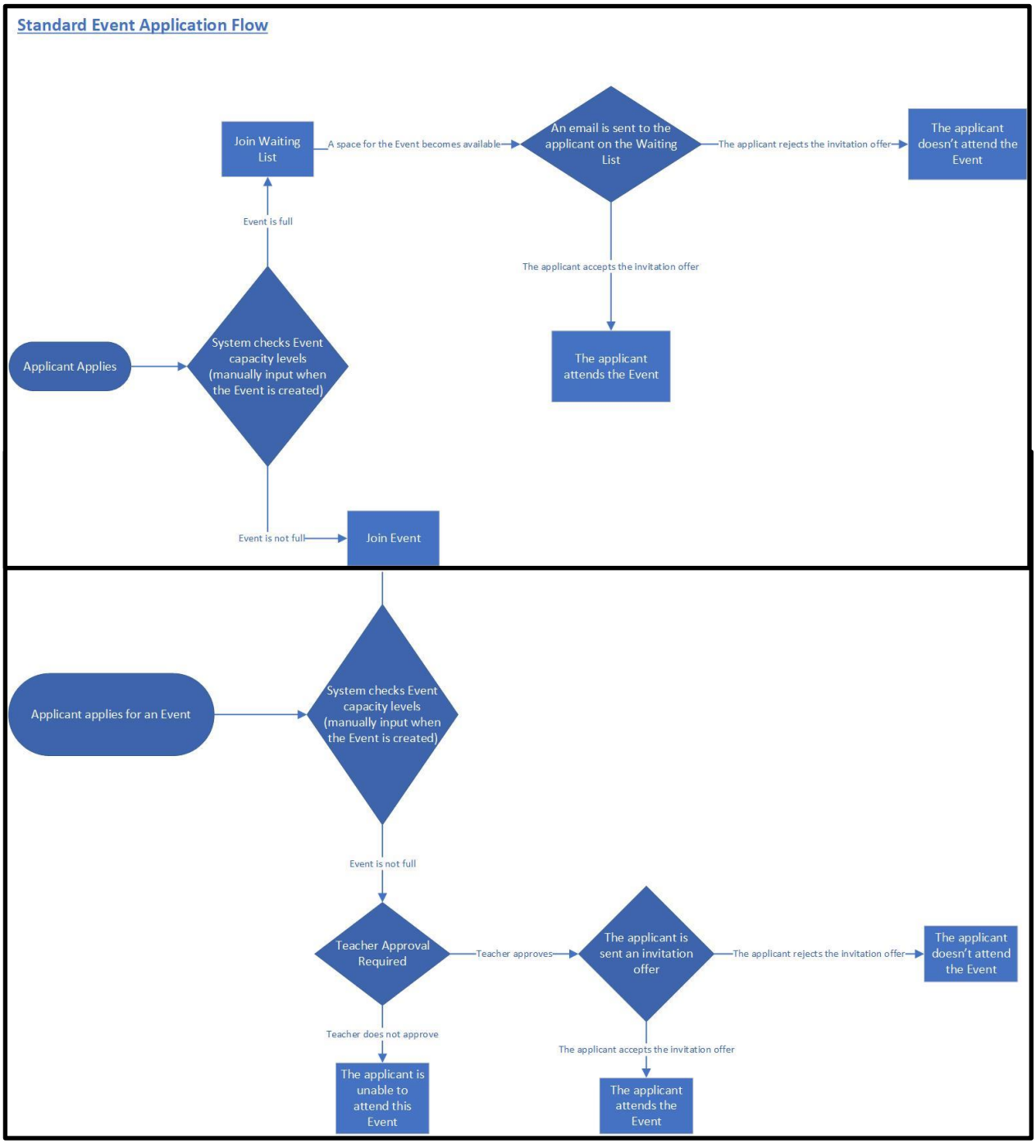
The option to add Event Extras is only available under certain Service Types.

Understanding the Event Application Flow

When an individual applies for an Event, they will undergo either a Standard Event Application Flow or a Two-tiered Event Application Flow depending on the type of Event they wish to attend. An applicant might require undergoing a Two-tiered Event Application Flow if the Event they have applied for is more exclusive and requires verification for attendance.

The Waiting List process shown in the Standard Event Application Flow below is also applicable to the Two-tiered Event Application Flow but, in this scenario, the applicant will need to pass verification from a teacher before they can progress from the Waiting List to receiving an Event invitation offer.

Whether an Event has a Standard Event Application Flow, or a Two-tied Event Application Flow depends on whether Primary Teacher ID is selected in when adding or editing an Event.



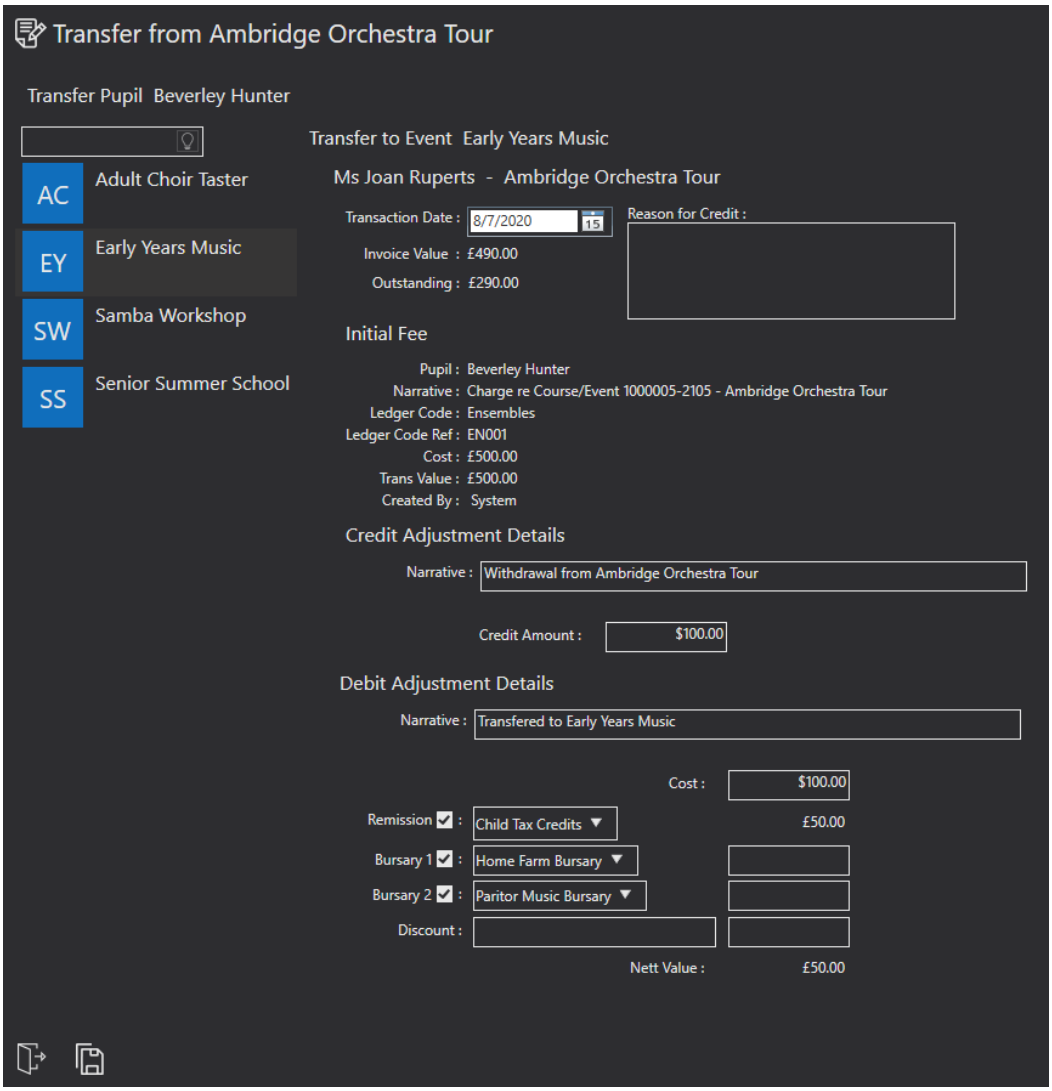
Approving an Application Requiring Evaluation

Event Transfer

To transfer someone from one Event to another you need to locate their record in the current Event. Open the “Delegates” tab with the Event selected and click on the delegate that you are transferring.

This icon will appear in the bottom tool bar. Clicking this icon will open a display like the example shown on the next page.

First, you will need to select the Event that you are transferring the delegate to using the left-hand tool bar. Once you have chosen the Event you can alter the finances for the current and new Event. The “Credit Amount” is how much expense you want to take off the original invoice in response to the change of Event. Next, you can make any adjustments to the invoice for the new Event. The “Cost” is the full cost of the Event. You can also select to add any remissions or bursaries by ticking the tick boxes provided. The “Remission” will be a set value created in your Settings. “Bursary 1” and “Bursary 2” are adjustable. You can also create a discount for them, for example, a late start discount. Once you have altered all the necessary fields you can use the Save icon. You will then need to Save the full record as well. If the individual has an Outstanding amount for their old Event, they will be left with a fee owed. If they have a payment schedule this will still be in place. The system will set up a new payment schedule and separate Outstanding amount for the new Event. Therefore, the individual will have two separate invoices. If the credit on the old Event is equal to the outstanding value, the invoice and payment schedule will be cancelled as no money is owed. A payment schedule for the new Event only will exist. If the credited amount for the old Event is more than the outstanding value, then the remaining money owed after the outstanding balance has been cleared will go towards the new Event as payment. Should the credit cover both the outstanding balance for the old Event and the cost of the new Event then the individual will have nothing left to pay. Finally, there is the case that the credit covers the outstanding value and the cost of the new Event, but there is still credit left over. If this is the case, then both payments will be fully covered, and a refund will be owed. If you have automatic refunds turned off under System Configuration there will be a refund due on the invoice for the old Event and you will need to create the refund. If you have automatic refunds on, the system will automatically create a refund.



Scheduling an Event

Recording Attendance

Recording Achievement

Audition

Audition Service Type

Audition Service Types are set up so that the system can track and log the Audition services that an institution might manage.

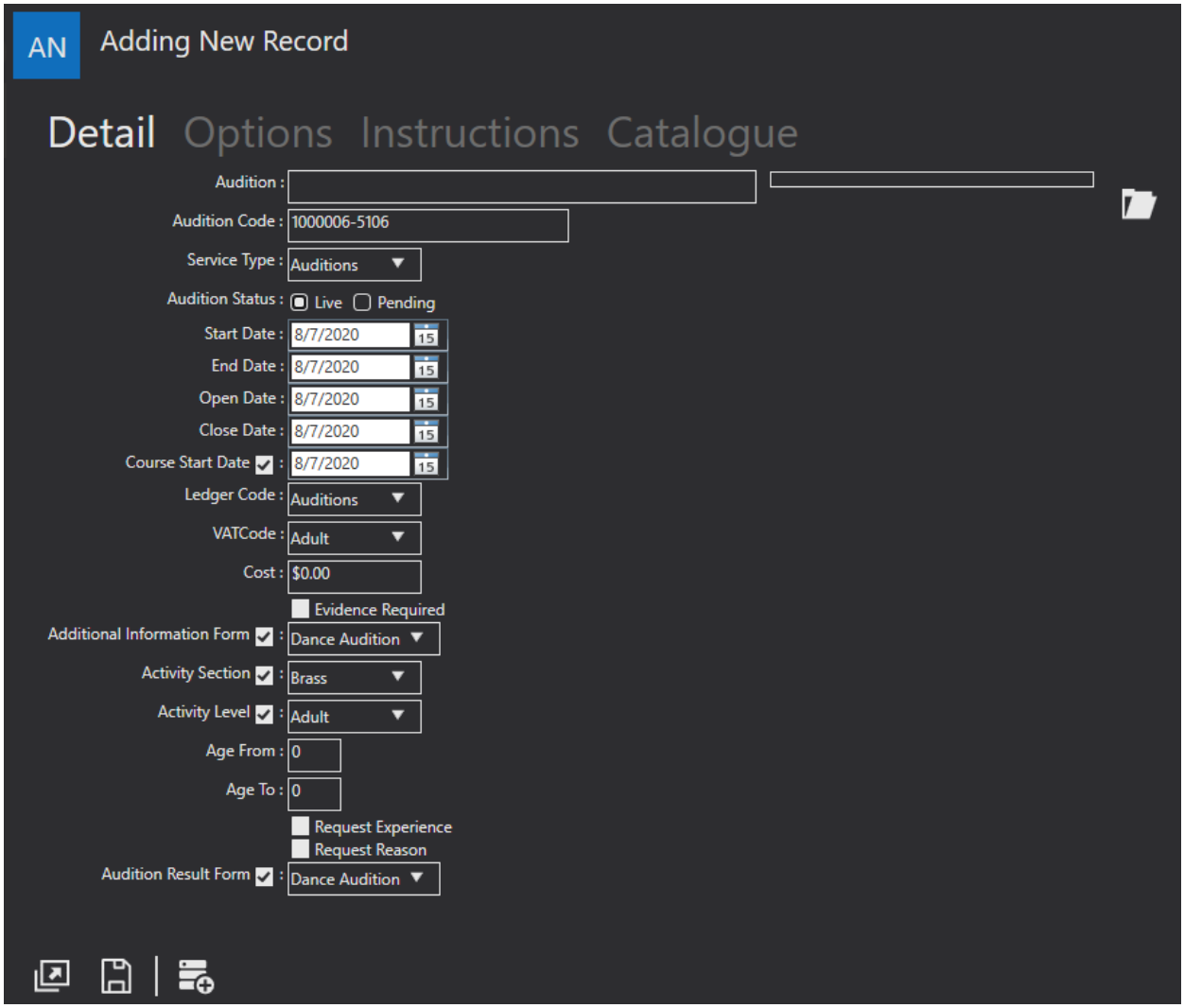
Service Types can be found in the Activity Section under settings. To create a new Service Type, select the plus icon at the bottom of the page. From here you can create an Audition Service Type.
Instructions on how to create Service Types can be found on page 53.

Adding an Audition

Often, potential students or members are asked to Audition to be accepted into a position within an organisation. Xperios manages these auditions for you and guides applicants through the audition process.

To add an Audition, select the Tuition icon followed by Auditions. Then click on the plus icon to add a new record.

A screen like the example shown below should appear…



The **Audition** text box at the top of the form should include the name of the Audition you wish to add.

The **Audition Code** is a unique reference number which Xperios will automatically assign to your new Audition. You can override this number reference if a different code is preferred.

Next, a **Service Type** must be selected from a drop-down list. Your Service Type is the division within your organisation that you wish to assign this Audition to. Each Service Type will ask for specific requirements from your applicants.

An **Audition Status** indicates whether your audition is currently underway or Pending. If an Audition is "Pending" it may be that it is yet to happen or become "Live" for bookings. The system will automatically tick the "Live" check box when creating a new Audition. However, you can select the "Pending" check box if you wish to alter this.

The **Start Date** and **End Date** boxes should be changed to show the start and end dates for auditions to take place.

Open Date and **Close Date** are the dates in which bookings for the Audition are open. These can be adjusted in the same way that the Start Date and End Date can.

The **Course Start Date** should include the date that the audition for the course, performance, etc. will begin if the applicant is successful.

A **Ledger Code** is used for the financial tracking of certain departments within an organisation. For example, in a music school, each lesson type might have a different Ledger Code. The corresponding Ledger Code for this audition should be included here.

A **VAT code** records the amount of VAT applicable to the cost of auditioning. This can vary internationally depending on what the organisation has to offer. The drop-down box beside VAT is intended to record this information.

A VAT code can be created under Settings, then Accounts, followed by VAT Code. From here you can access the VAT Code and VAT rate boxes to set up a VAT option.

Cost refers to the Cost of the Audition.

The **Evidence Required** tick box can be selected if you wish applicants to include a portfolio, qualification, or evidence of skill level with their application.

The **Additional Information Form** check box should be selected if there are further questions that your organisation wishes to ask an audition applicant. An Additional Information Form can be created by clicking on the Settings icon followed by Organisations, then Forms. Select the Add a New Record Icon at the bottom of the page to create a form.

The **Age From** and **Age To** boxes should be filled out with the age range applicable for this Audition.

The **Request Experience** check box is like the Evidence Required check box except the applicant can write a statement when this check box is selected. Click on the box to select or unselect this option for Audition applications.

When ticked, the **Request Reason** check box will allow the Audition applicant to fill out a text box field which explains why they want to be a member of the establishment.

The Audition Result Form is ___ (currently being developed).

Select the save icon once the Audition details are complete.

As a minimum requirement you must complete a Service Type, Ledger Code, and VAT. Including details for Additional Information and Activities is not compulsory.

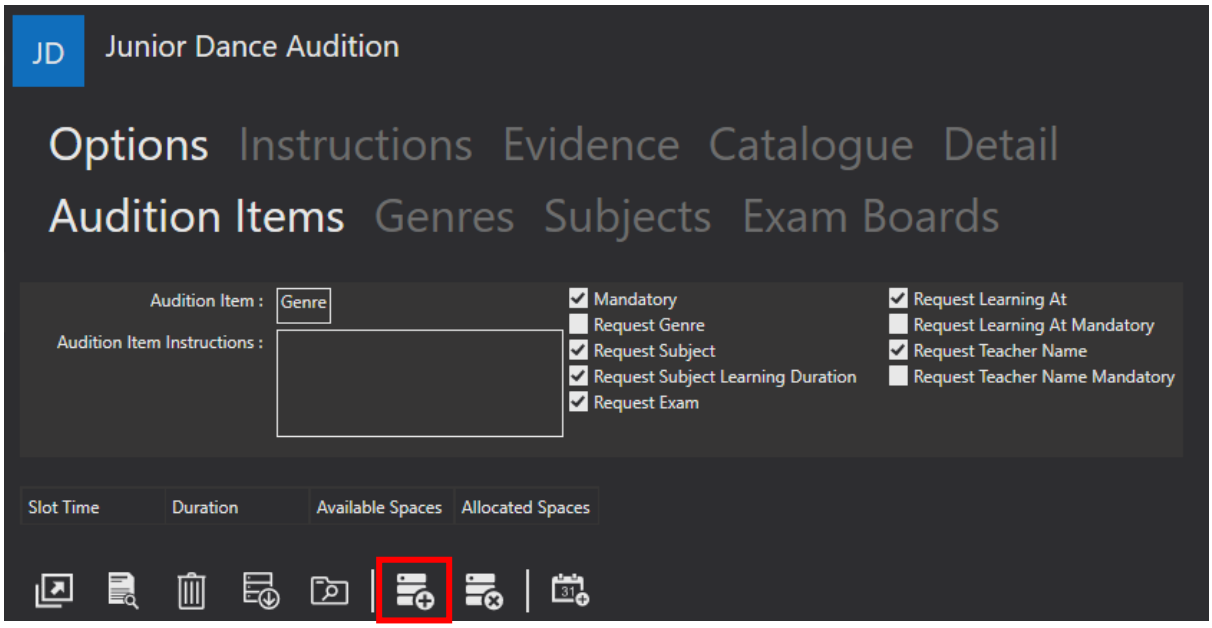
Editing an Audition

To Edit an Audition, go to Auditions and click on the one you want to edit. In the left-hand corner you will find the Edit Record icon. Selecting this will open a window like the add record view, however, it should also include the fields you filled in previously, when creating the Audition.

When you Edit your record, the back arrow will appear. This allows you to Undo Edit Changes. The back arrow will not work after you have saved the record as your new changes will have replaced your previous save.

Once you have finished adding or editing your Audition select the Save button in the left-hand corner. Note: this will not appear until you have added or edited at least one piece of information.

Audition Items (Defining the required information)



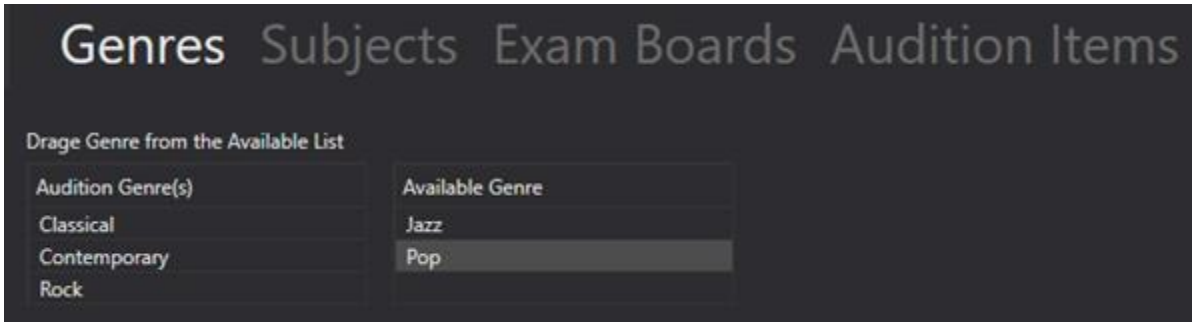
You may wish to add Audition Items so that audition applicants can provide you with certain details. For example, Audition Items could include what instrument they play or how long they have been playing that instrument for. These details will support their application and help the organisation holding the Audition to decide the suitability of the candidate. The “Request Learning Duration” tick box asks the applicant how long they have been studying for. The response options for this request can be altered under Settings.

To add an Audition Item, select the Add Audition Item icon when creating or editing an Audition.

To view all Audition Items for an Audition, select “Audition Items” from the second upper tool bar when the Audition in question has been selected.

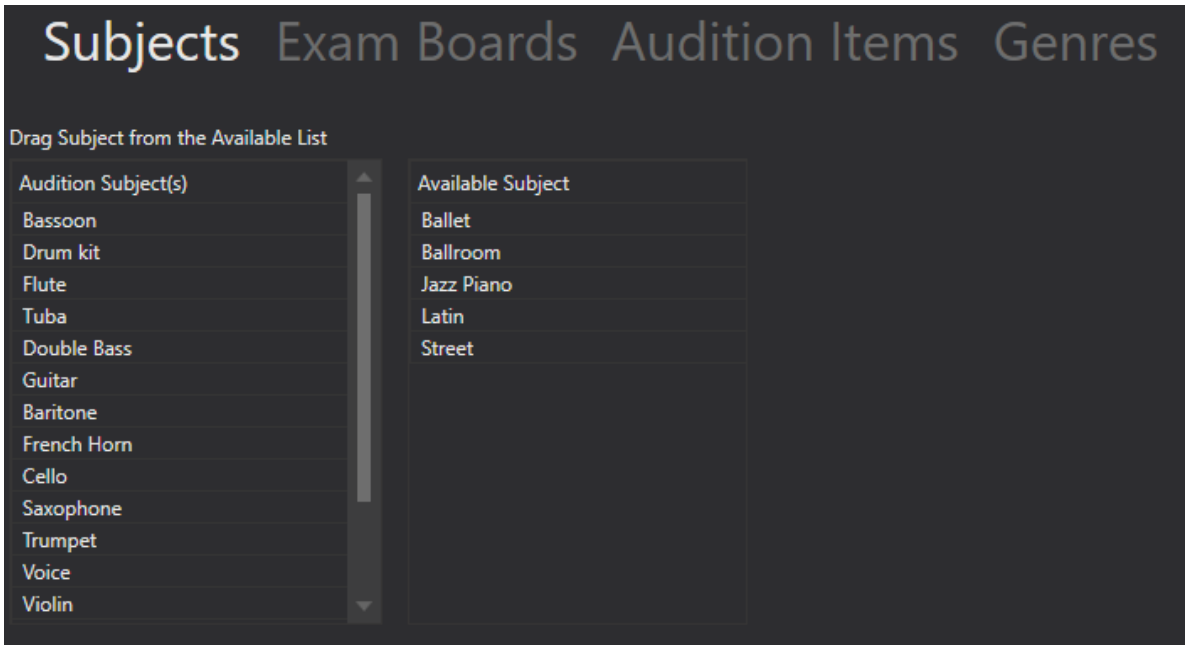
Audition Genres

Under the Options tab in Auditions, you can add genres to your audition. The “Audition Genre(s)” that appear are a list of any audition genres that you have set-up in your System Settings, to see more about setting these up please see page 52.
From this list you can drag and drop genres under Available Genre. These options will appear in a drop-down list for applicants to choose from when filling out an application form.



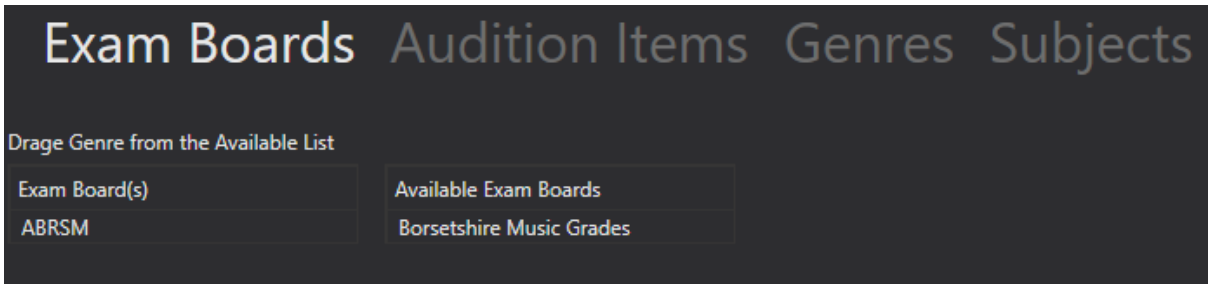
Audition Subjects

The next tab is Audition Subjects. Here, you can add your created subject to an audition form. To see more about creating subjects please see page 55.
Just like genres, you can drag and drop your subjects under Available Subjects. These options will appear in a drop-down list for applicants to choose from when filling out an application form.



Audition Exam Boards

The last tab is the Exam Boards tab. Here, you can select the available exam boards for the audition you are creating. **To see how to set up your exam boards please see page 52.**
Like genres and subjects, you can drag and drop the exam boards to the available list. These options will appear in a drop-down list for applicants to choose from when filling out an application form.



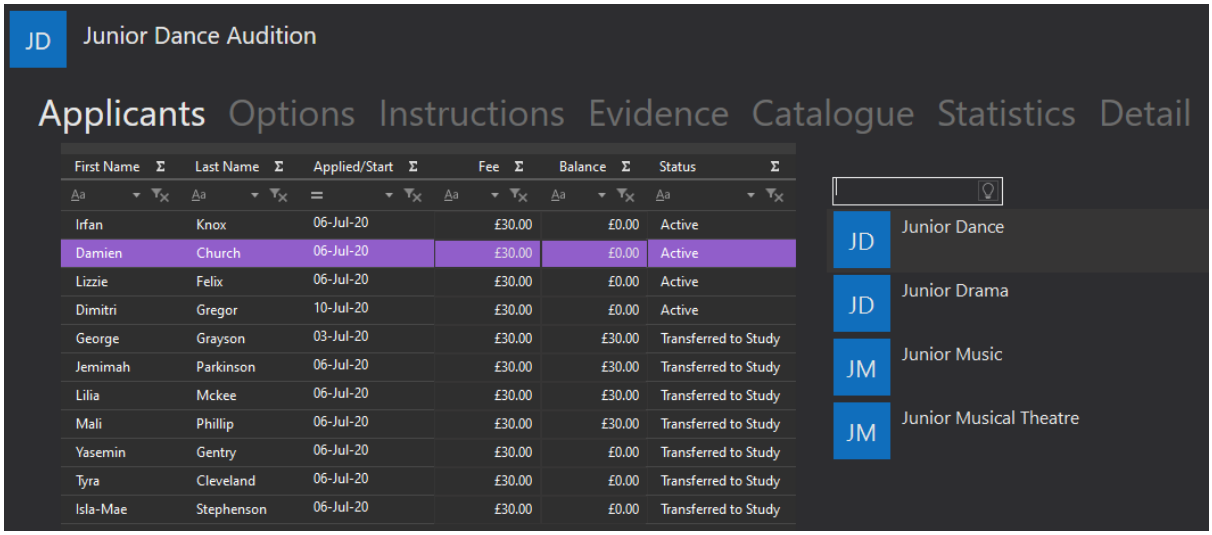
Scheduling Auditions

Recording Results

Transferring Applicant to a Study

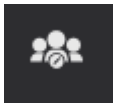
To transfer an applicant to a Study they must have an Active status. An example of a Study might be a series of intensive classes. Transferring an applicant to a Study means they have been accepted and their Audition was successful.

To transfer an applicant to a Study, select the Add this Person to a Study icon. This will open the display below. You can then drag and drop any pupil with an active status to a study. Make sure to save the record once you have transferred them

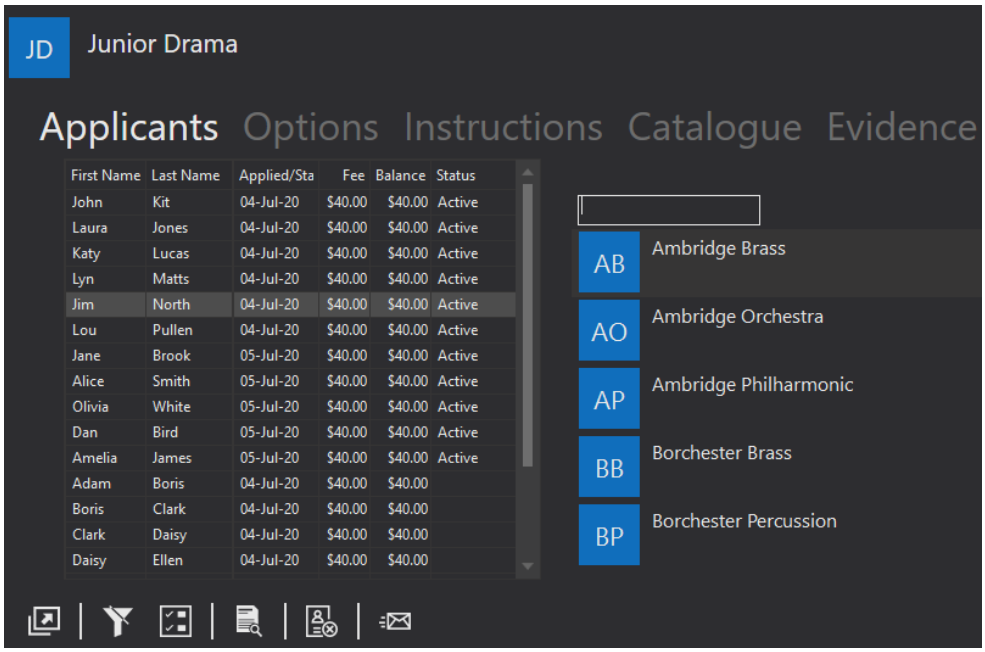


Transferring Applicants to a Group

To transfer an applicant to a Group they must have an Active status. An example of a Group might be an orchestra or band. Transferring an applicant to a Group means they have been accepted and their Audition was a success.



To transfer an applicant to a Group, select the Add this Person to a Group icon. This will open the display below. You can transfer multiple pupils using the toggle select icon.



Exams

Often, students are asked to take an Exam to assess their skill progress and learning advancements. Xperios manages these Exams for you and guides pupils through the examination preparation process.

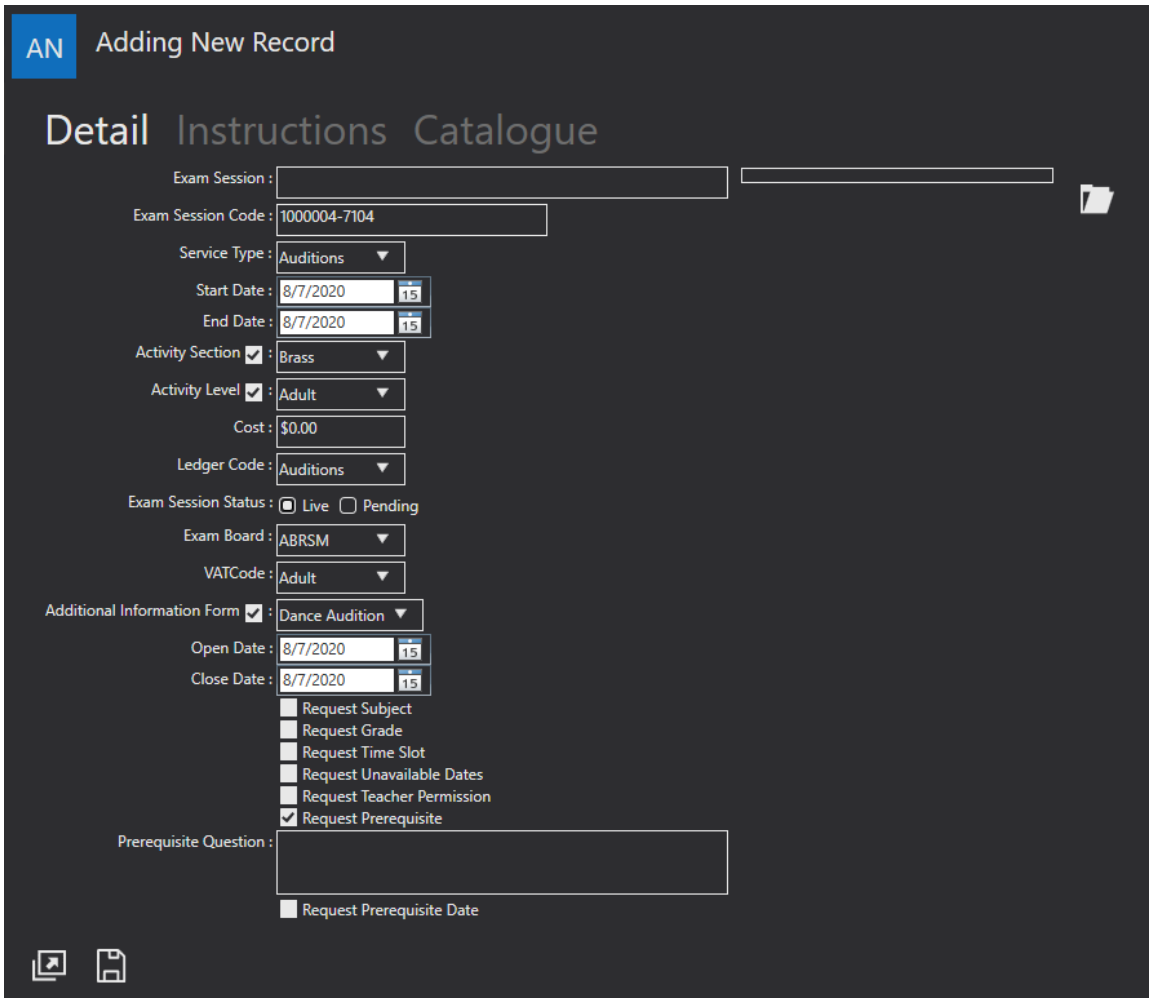
Creating an Exams Service Type

Exam Service Types are set up so that the system can track and log the examination services that an institution might manage. Service Types can be found in the Activity Section. To create a new Service Type, select the plus icon at the bottom of the page. From here you can create an Exams Service Type. Instructions on how to create Service Types can be found on page 53.

Adding Exams

To add Exams, select the Tuition icon followed by Exam Sessions. Then click on the plus icon to add a new record.

Your screen should now look like the example below…



The Exam Session field should be filled with the details of the Exam being taken.

The Exam Code field should be filled with an automatically generated identification number for the Exam. This can be edited by typing a new code in the correct field.

Your Service Type should have been created before adding an Exam to the Xperios system. The correct Exams Service Type should be selected from the drop-down box options.

Start Date and End Date should include when the exam period will begin and end. These dates can be chosen using the calendar icon beside this field. Often, an examiner will be invited into an institution for a set number of days. Within this time frame the pupil will be examined.

The Activity Section is a catalogue in which a pupil can access the activities they have booked onto. Searches in the catalogue can be filtered so that all Exams for their category are listed. By selecting this box, the Activity Section is accessible to pupils undertaking an examination.

The Cost field should be filled with the price of examination. For example, a Level 4 trombone examination might cost £50. Beside Cost, the value of £50 should be typed.

A Ledger Code is used for the financial tracking of certain departments within an organisation. For example, in a music school, each lesson type might have a different Ledger Code. The corresponding Ledger Code for this exam should be included here.

The Exam Session Status can be "Live" or "Pending". A "Live" exam is one which pupils are currently able to book onto. A "Pending" status means that the exam is yet to available for bookings. Either the "Live" or "Pending" tick box should be selected to indicate this.

The Exam Board refers to the board of examination which will be examining pupils. Different exam boards for this drop-down list can be created under Settings. Found on page 52.

The Additional Information drop-down list can be created under Settings, followed by Forms. This allows the Additional Information options to be tailored to your organisation's needs. Information on how to do this can be found on page 26.

Open Date and Close Date refer to the time window a pupil has to book onto an exam.

The tick boxes at the bottom of the page allow you to add further requests and requirements to the Exam booking process.

Request Subject refers to the subject or instrument which the pupil wishes to be examined on.

Request Grade refers to the grade/ experience level the pupil wishes to be examined on.

When selected, Request Time Slot generates a series tick boxes for potential bookings slots which can be ticked to book.

Request Unavailable Dates allows the pupil booking the Exam to stipulate times and dates of unavailability so that the organisation can book them an Exam around these periods.

Either Request Time Slots OR Request Unavailable Dates should be selected for pupils to provide information on.

Request Teacher Permission ensures that the teacher has given permission for the Exam to go forwards as they are under the belief that the pupil is ready to undertake the Exam.

Request Prerequisite allows you to ask the pupil a question to verify their skill level and suitability for the Exam. For example, a prerequisite might ask: "Have you completed your theory examination?". In reference to this example, "Request Prerequisite Date" might ask when the pupil's theory examination was taken.

Editing Exams

To Edit an Exam, go to Exams and click on the one you want to edit. In the left-hand corner you will find the Edit Record icon. Selecting this will open a window like the add record view, however, it should also include the fields you filled in previously, when creating the Exam.

When you Edit your record, the back arrow will appear. This allows you to Undo Edit Changes. The back arrow will not work after you have saved the record as your new changes will have replaced your previous save.

Once you have finished adding or editing your Exam select the Save button in the left-hand corner. Note: this will not appear until you have added or edited at least one piece of information.

Time Slots

Groups

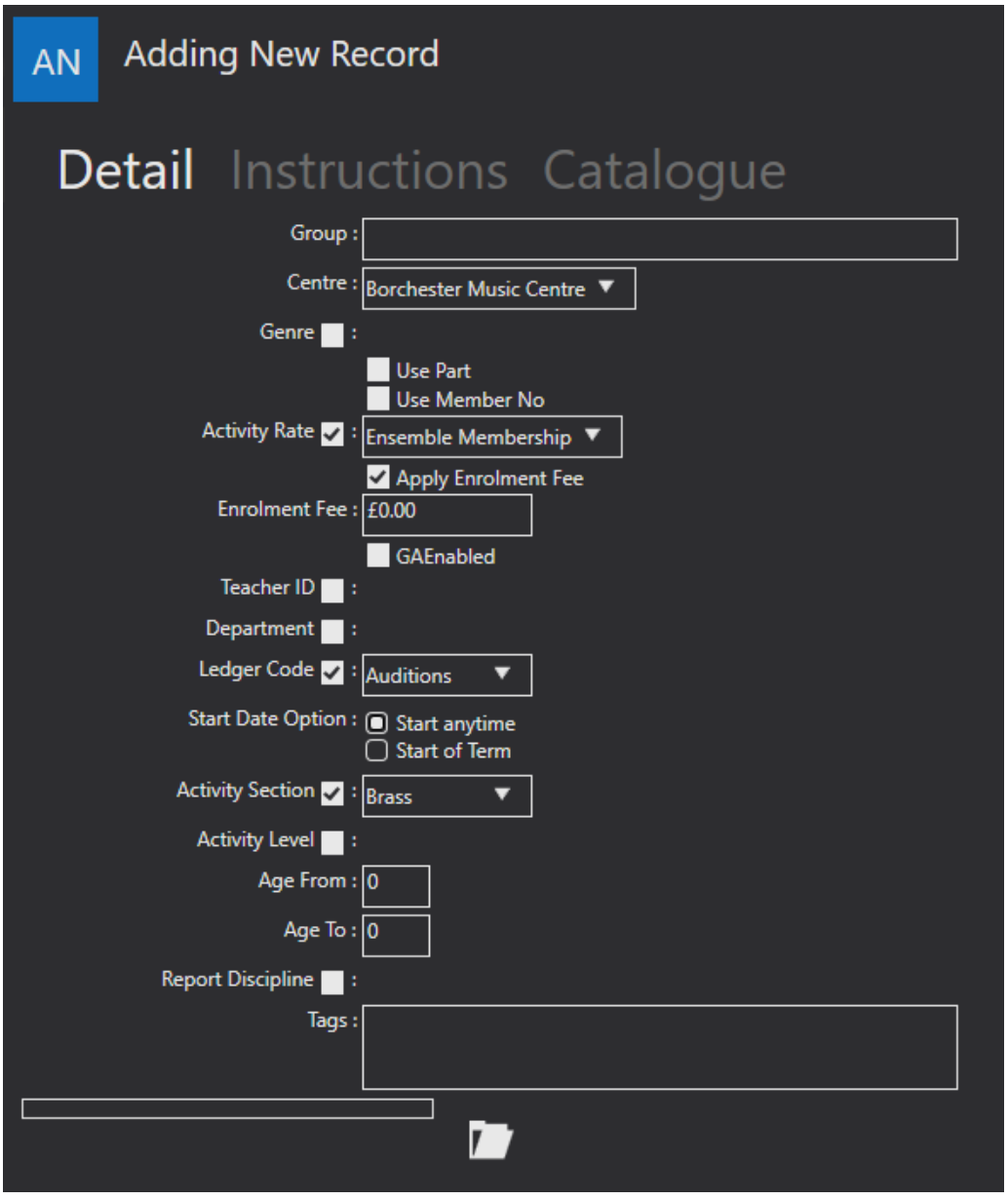
Creating a Group Service Type

Group Service Types are set up so that the system can track and log the examination services that an institution might manage. Service Types can be found in the Activity Section. To create a new Service Type, select the plus icon at the bottom of the page. From here you can create an Exams Service Type. **Instructions on how to create Service Types can be found on page 53.**

Adding a Group

To Add a Group, go to the Tuition menu in the side menu bar, then click on Groups. In the bottom right-hand corner is the Add New Record button.

On selecting this the display shown in the example below should appear.



Here, you can fill in the details for your Group. Some of the fields use drop-down menus. These drop-down menus are pre-defined in your System Settings.

The Group field should define the name of the Group you are creating.

The Centre field should determine the location at which the Group convenes.

If the Genre tick box is selected the accompanying drop-down menu should provide Genre options for you to choose from. For information on settings these up see page 52.

Use Part is the part a member plays in a Group, for example their role within an orchestra.

Use Member No will allow you to allocate a unique number to each member.

Ticking the Activity Rate box produces a drop-down list from which you can select the kind of activity fee you wish to apply to the Group. For information on settings these up see page 60.

The Enrolment Fee field is used to define the charge for joining. This will only appear if you have apply enrolment fee ticked.

The GAEnabled tick box allows you to enable gift aid.

The Teacher ID tick box defines which teacher is responsible for the Group and triggers a drop-down box selection of names to appear.

Department determines the department responsible for the Group. These can be set up in system settings. For information on how to do this see page 25.

Ledger Code allows you to select a ledger code option for financial tracking purposes. This will only appear if you have activity rate ticked. For information on setting up ledger codes see page 62.

Start Date Options include “Start Anytime” which allows new Group members to join at any time, and “Start of Term” which only allows new members to join at the start of a school term.

Activity Sections can be ticked to produce a selection of choices for defining the location of the Group within your organisations online Activity Section or catalogue. Ticking this box will cause the Catalogue tab and its accompanying tabs (Description, Minimum Requirements, and Audience) to appear under your Groups. To see how to set up your activity sections please see page 56.

Activity Level can be ticked to produce a selection of choices for defining the intended skill level of members joining the Group. This option will only appear if you have activity sections ticked. To see how to set up your activity levels please see page 56.

Report Discipline …

Tags…

Once you have finished adding your Group select the Save button in the left-hand corner. Note: this will not appear until you have added or edited at least one piece of information.

Editing a Group

To Edit a Group, go to Groups and click on the one you want to edit. In the left-hand corner you will find the Edit Record icon. Selecting this will open a window like the add record view, however, it should also include the fields you filled in previously, when creating the Group.

When you Edit your record, the back arrow will appear. This allows you to Undo Edit Changes. The back arrow will not work after you have saved the record as your new changes will have replaced your previous save.

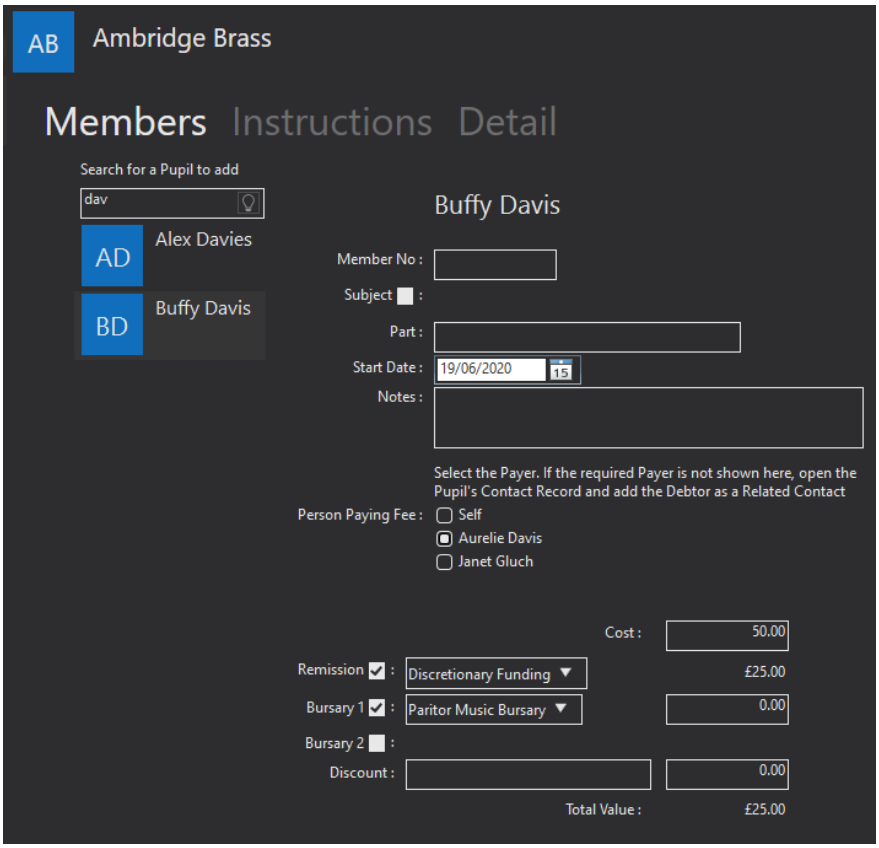
Once you have finished adding or editing your Group select the Save button in the left-hand corner. Note: this will not appear until you have added or edited at least one piece of information.

Adding Members to a Group

To Add a new member to a Group, select the Group you want to Add to, and click on the "Members" heading in the upper toolbar. The Add Pupil icon will appear in the bottom left-hand corner of your screen.

Clicking this will open a similar display to the example provided below. You can then use the search bar to search for the pupil you want to Add. When you click on a pupil their details are shown on the right-hand side.
Member No will only appear if you have use member no ticked under details.
You can add a Subject for a pupil, by selecting from a drop-down list of subjects you have created in your system settings for information on how to do this please see page 55.
The Part option will only appear if you have use part selected under the details tab.
You can then select the Start Date using the calendar option.
You can add any additional Notes to the pupil record as well.
Then you can select the Person Paying from any associated contacts, to the pupil.
The second part of the screen is the finance display. Here you can adjust the Cost of the fee, and add any Remissions or Bursaries, or Discounts.

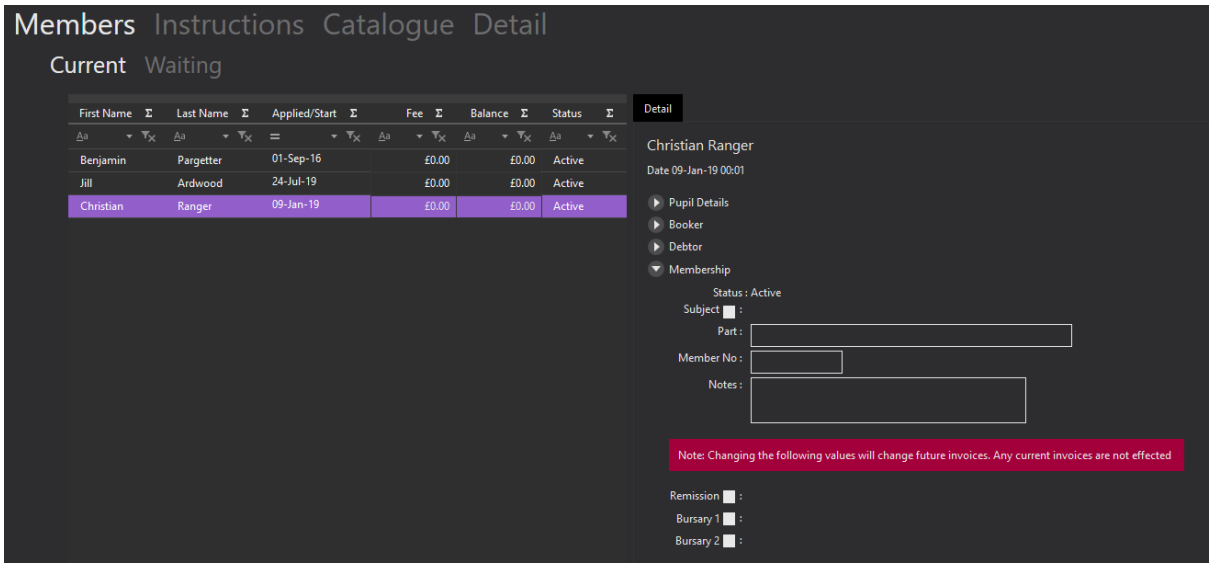
Once you have selected the pupil you want to Add, click on the icon to Add them.



Editing Member Details

To Edit member details, find their Group, then click on the member you want to Edit. In the left-hand corner the example icon shown here will appear. This is the Edit Details icon.

Selecting this will cause a display like the example below to appear. Here, you can Edit the pupil's membership details.



You can edit any information relating to the pupil selected, and their group information. To change the pupil you are editing, just select the pupil from the table. Once you are happy with any changes made use the save pupil icon shown here to save the changes.

Group Waiting List

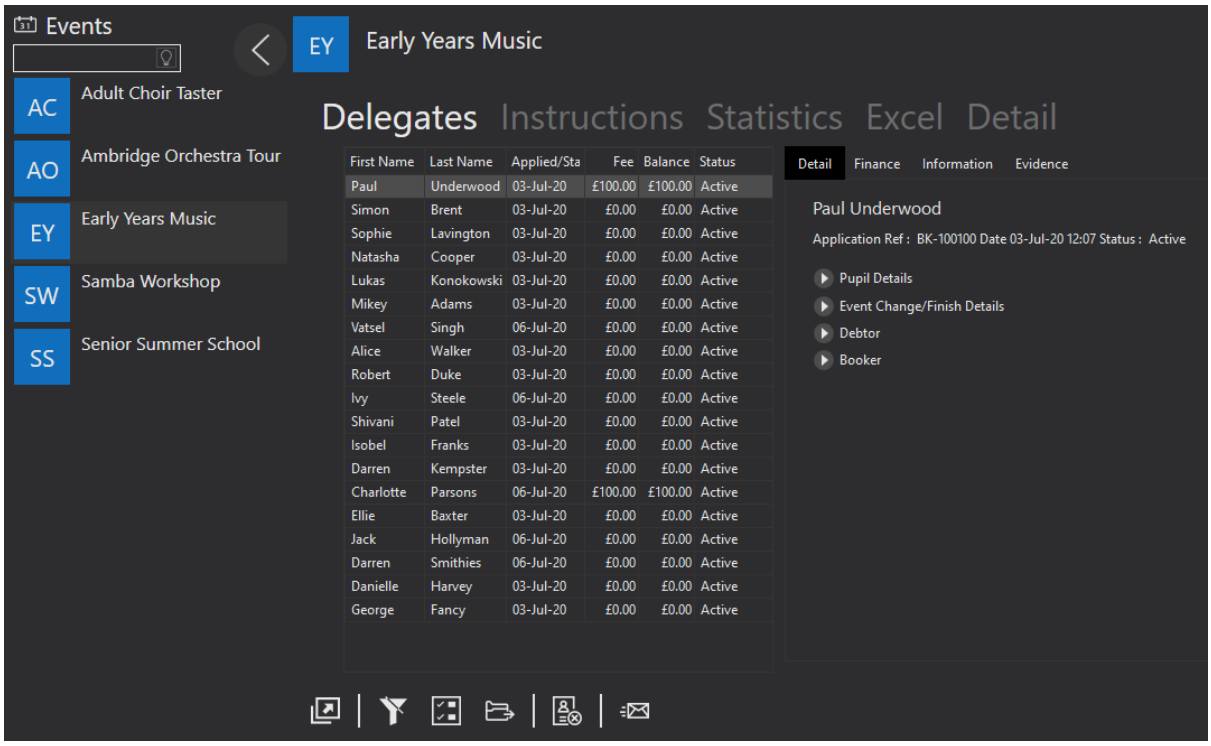
Pupils

Managing Delegates

Managing delegates is similar throughout all tuition.

To find a list of applicants for any tuition select the Tuition icon in the tool bar. From here, select the tuition that you want to see the applicants for.

When you select an applicant, you can choose what you want to do with their application by selecting one of the icons at the bottom of the page. The icons explained below are common in all types of tuition, there are then some extra icons for different types of tuition. The explanation for these one is under the section for each tuition.



This icon is used to Toggle applicants, so that you can select multiple at once. This can be used when sending an email to multiple pupils at once or can be used in transfer mode to transfer multiple applicants.

The Toggle icon will put a tick box beside the name of every applicant. You can then tick the names of any applicants you want to include. A tick box at the top left of the page will allow you to select all applicants. This way, you can untick those who you don't want to send an email to.

The Filter icon allows you to show or not show delegates that don't have a status of "Active". On first clicking the Filter icon it will Show all Items, on clicking it a second time these items will be hidden as they were before.

Contacting Pupils

You can send an email to one or more delegates by selecting Tuitions followed by either Studies, Events, Auditions, Exam Sessions, Groups, or Resources, depending on which delegate(s) you wish to send an email to. In the following screenshot examples, we will be using Groups.

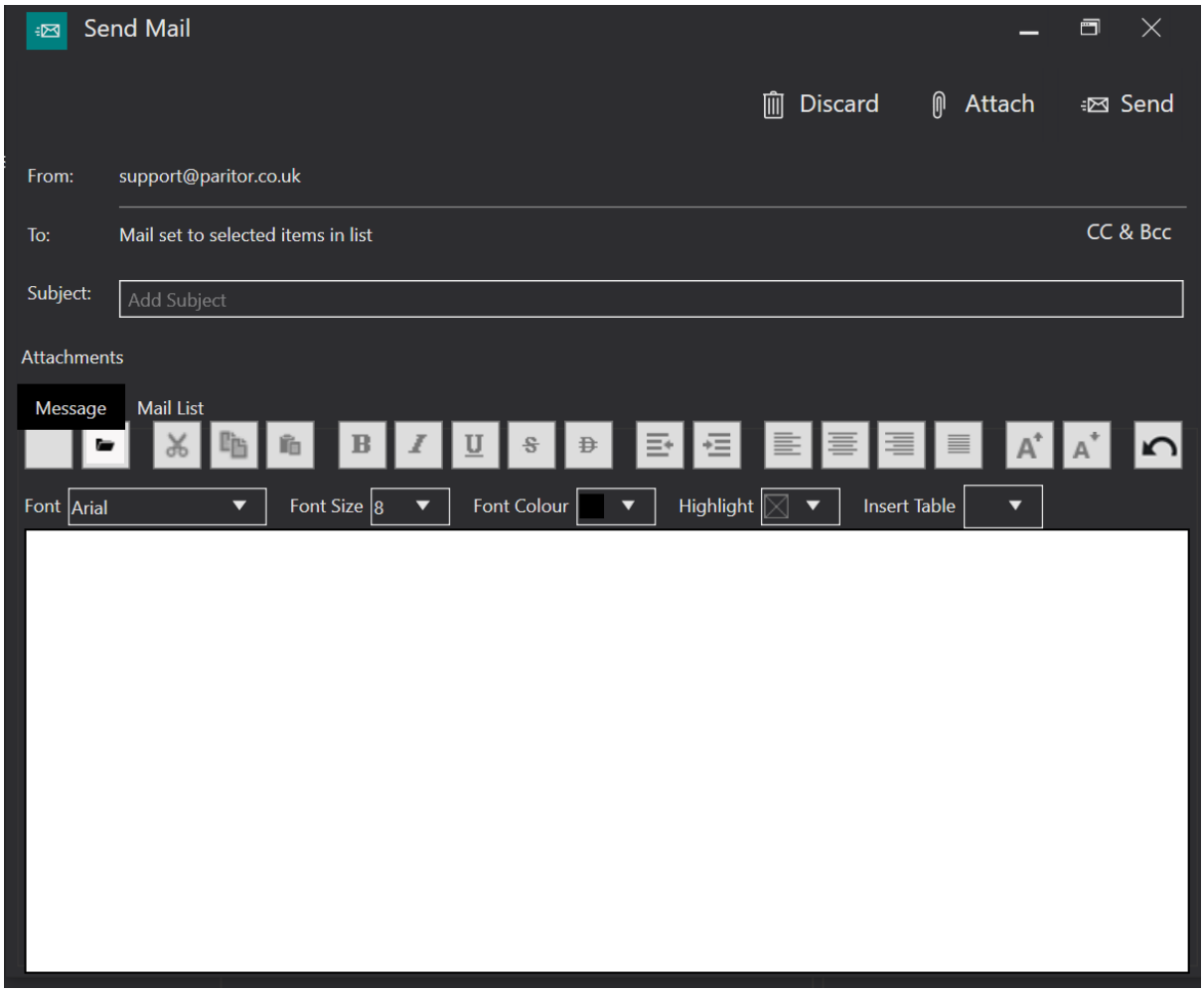
There are two ways in which you can select more than one Delegate to email:

Hold down *Ctrl* on your keyboard whilst clicking on the Delegates you wish to send the email to or

Use the “Toggle Select Items” icon to select multiple Delegates…

Next, select Members (or Delegates for Events and Applicants for Auditions and Exams) followed by the Delegates you are interested in emailing. Only when a Delegate is selected can the Send Email to Delegate(s) icon become available.

Select the “Send Email to Delegate(s)” icon to write your email. This will open the display shown below.



The email message can be typed in the main field. The Subject of the email should be typed into the "Subject" field.

Discard: abandons the typed message.

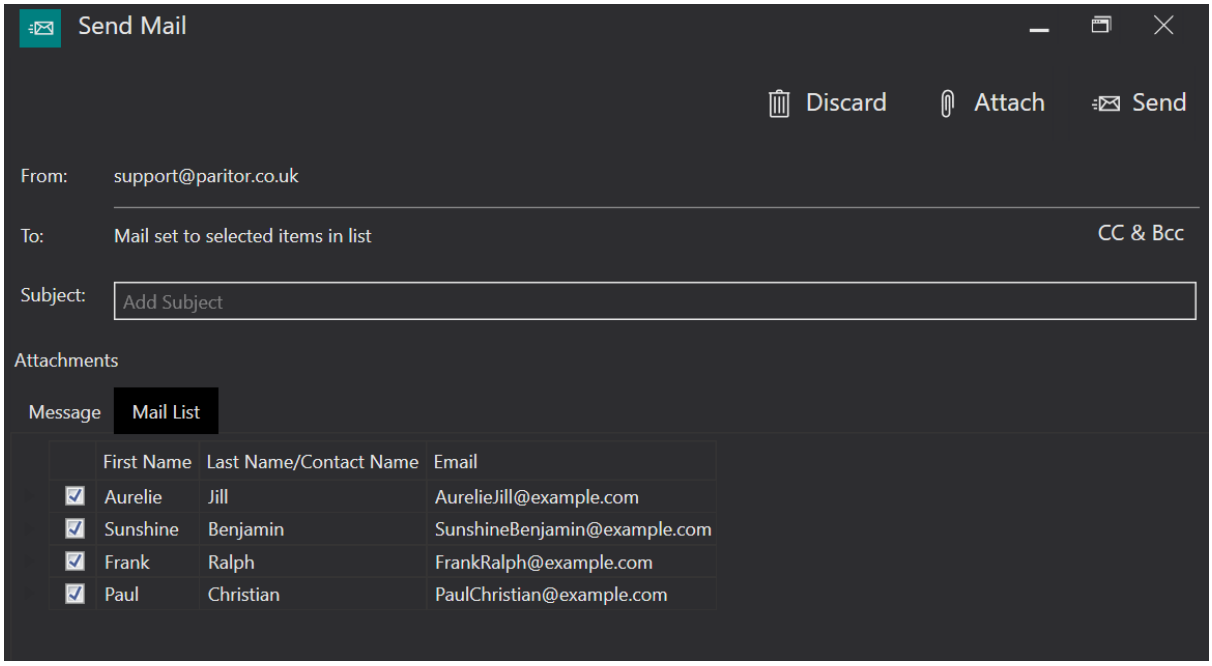
Attach: allows a document to be attached to the email.

To Cc, or Bcc someone in, click on the "Select Contacts" icon.

To remove delegelates from within the message window select the "Mail List" tab and click on the tick boxes beside each name you no longer wish to include in your mailing list.

Note: The "Mail List" tab will only appear if two or more delegates were originally selected to receive the message.

Once you are happy with your message click "Send".



Inviting Pupils from Tuition Waiting List

To invite a pupil from a Waiting List you will need to access a display of all the pupils on the Waiting List. First, open the tuition Waiting List you will be inviting the pupil from e.g. An Event Waiting List.

Then use the Filter icon shown here, to show all items. Selecting this will display all pupils in the list regardless of their status.

Click on the Waiting List pupil that you wish to add to the tuition, and use the icon shown here.

This will send an invite to the debtor for that pupil, inviting them to join the tuition from the Waiting List. The debtor will need to accept the invite to be able to join. Make sure to Save the record when finished.

Managing the Online Catalogue

Xperios generates an online catalogue using the data you put in. The catalogue can include Groups, Events, Exams, and Auditions. You can supply image tiles and service specifics by managing this section of Ensemble.

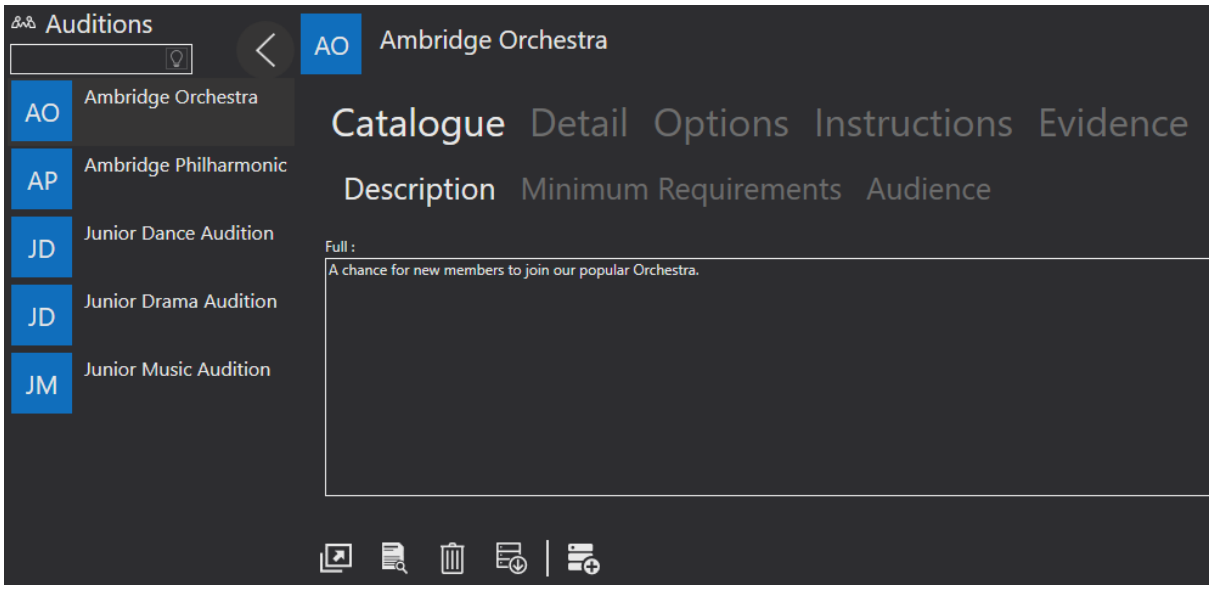
Catalogue

To manage the appearance of your catalogue for Groups, Events, Auditions, Studies, or Exams, go to the Tuition icon in your side menu bar.

After selecting your Group, Event, Auditions, or Exams, management of your online catalogue can be done by selecting the catalogue tab and then selecting the…

Edit Record icon

A display like the one below should appear…



The “Catalogue” heading in the upper tool bar includes a field intended for describing the nature of the Event, Group, Audition or Exam.

Selecting “Minimum Requirements” provides another similar text box field intended for detailing the minimum skill level for those attending the Event. For example, someone attending the Event might require a piano Level 4 grade to be suitable.

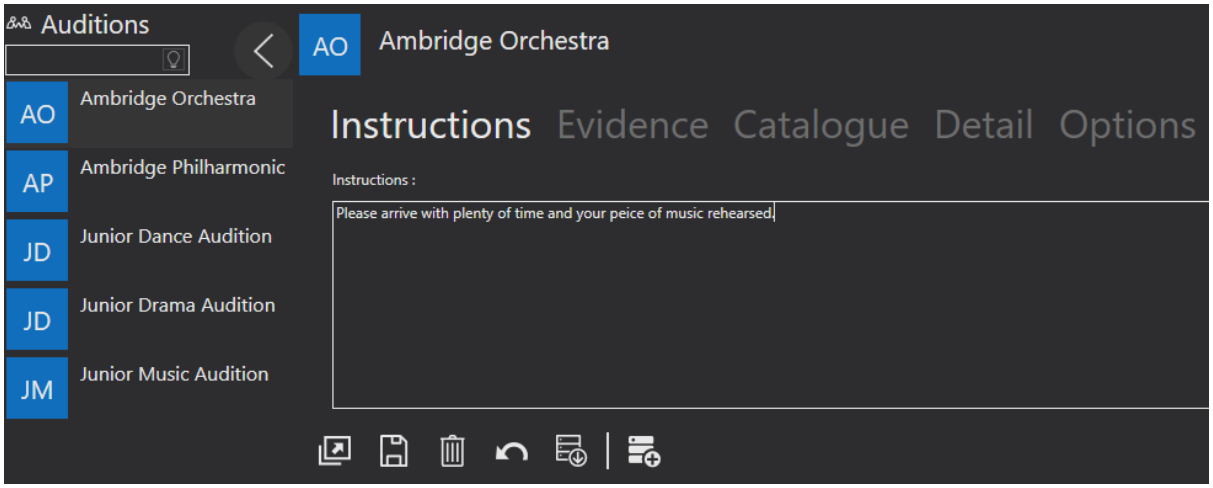
Selecting “Audience” provides another similar text box intended for detailing who the Event is aimed at. This might include what topics an attendee might be interested in.

To undo your changes, select the Undo Changes to Record icon.

To save your changes select the Save icon.

Instructions

By selecting “Instructions” from the upper tool bar. The following page becomes available…



The “Instructions” field should be filled with all the information you want to include in your catalogued page. This might include details such as information about when and where and what participation within a Group should entail.

Image

The section of the screen shown in the example below should allow you to alter how the Event appears in your organisation’s catalogue. The image is the tile image for the Event. This can be edited using the icons to the right.

Find Picture: Allows you to find a suitable image from your device folders.

Import Image: Allows you to import your chosen image from your device folders.

Rotate: Allows you to rotate your chosen image.

Flip: Allows you to flip your chosen image.

Reduce Size: Allows you to reduce the size of your chosen image. If the uploaded image is too big the XPERIOS system will make it smaller.

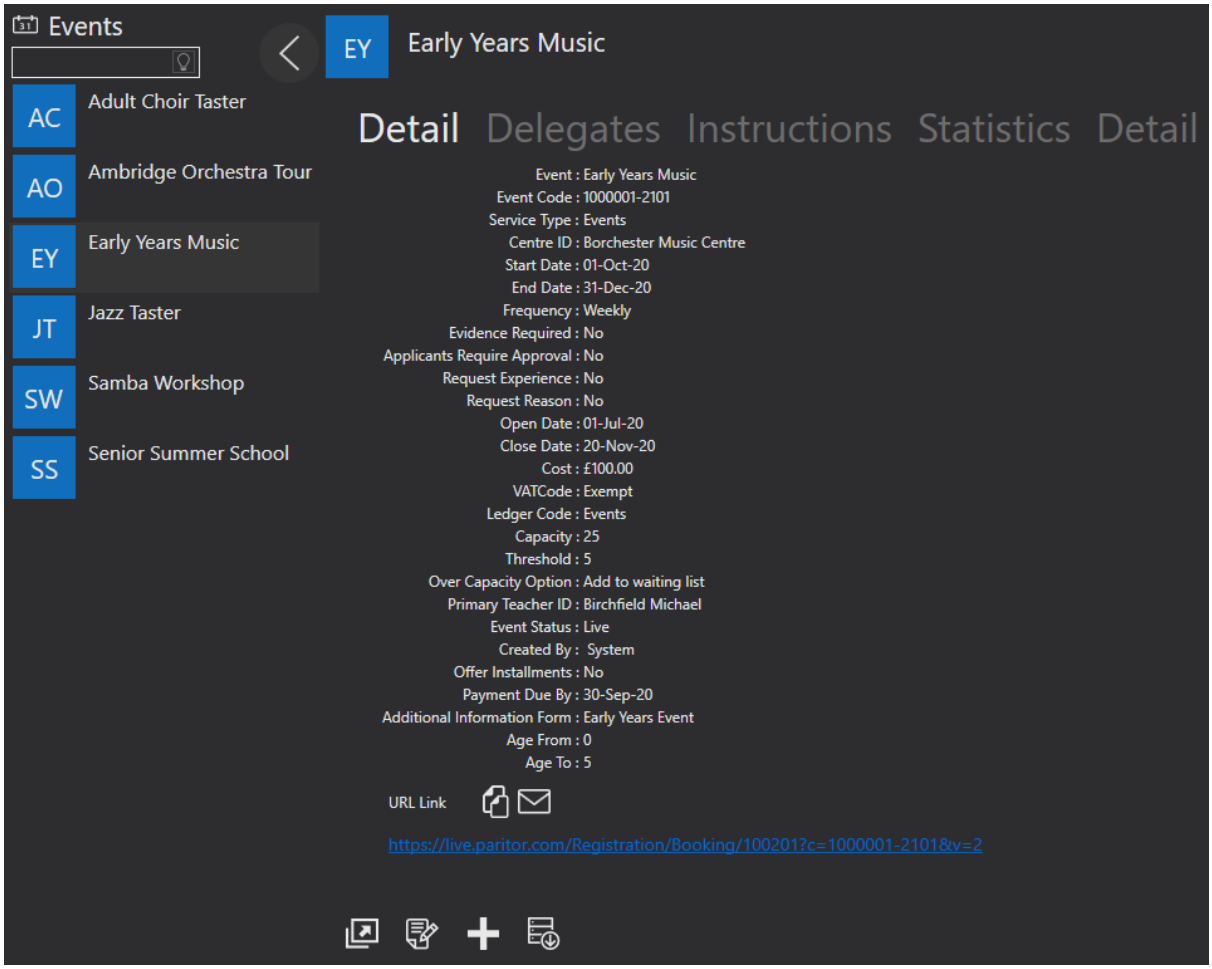
Crop: Allows you to crop your image down.

Clear: Allows you to remove the uploaded image and start again.

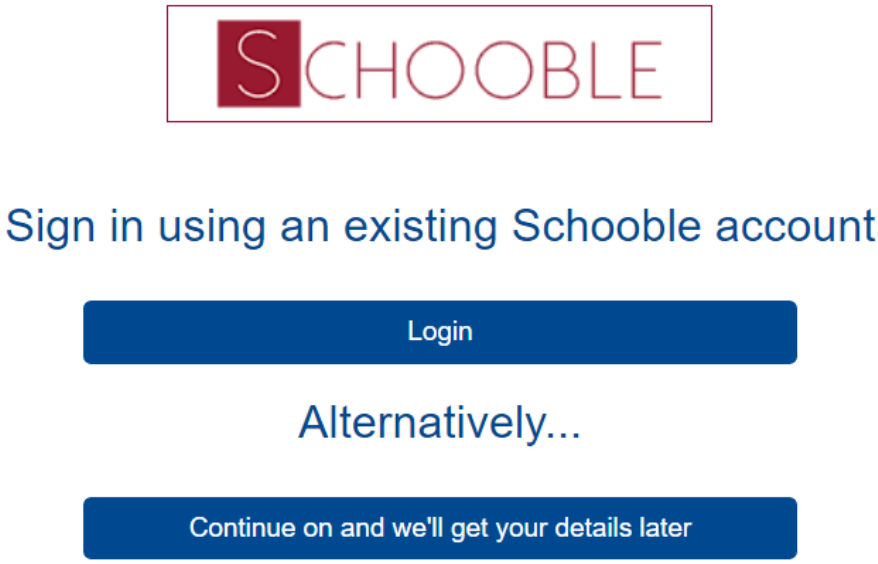
Applying Online

The Xperios system creates online forms for applications for you, when you create any tuition, event, group, exam, or audition. This way applicants can apply easily, and applications can be processed quickly. The flow of the application will depend on what type it is, and what you set up in your service type.

On opening any tuition, a page like the one below should appear, under the “Details” tab is a URL link, this is unique for each tuition. The link can be copied and pasted onto an organisation’s website etc. so that applicants can access the online application forms. By completing the forms an application can be made.



Through the portal applicants can login if they already have a Schooble account, otherwise they will be asked to create one at the end of their application.



The next pages may include:

- An emergency contact page (a second emergency contact can be requested by selecting this option under the Service Type).
- An Additional Information forms.
- A pupil consent form.
- A school information page.
- An additional information page.
- A consent page.
- A Schooble account login page, if the applicant has not already logged in.
- A checkout page.

Most of these pages can be added or removed when editing a Service Type under Settings followed by Service Types. The checkout page will allow the applicant to submit their application. This page will include a link to a credit card provider to pay the application fee, if you are linked to a payment integration system.

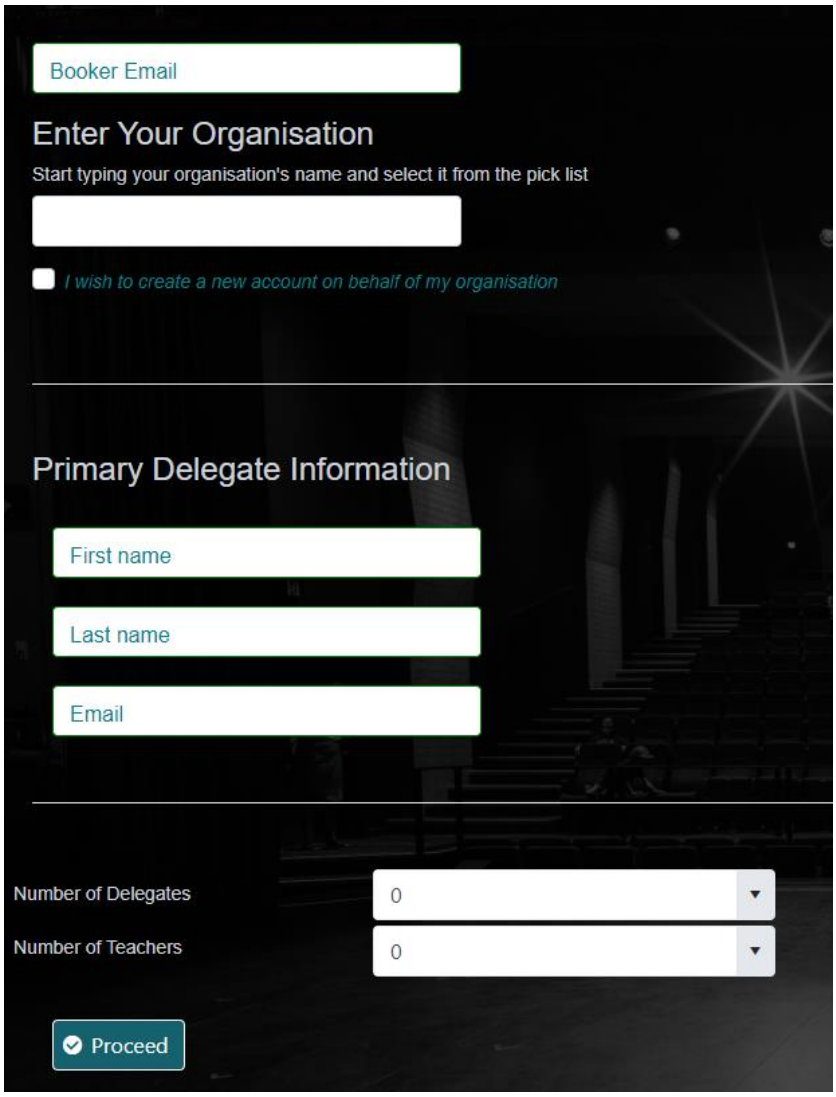
Events

Applicants can book onto Events in one of three ways: as an individual, as a Group, or as a List booking. An individual booking if for a single person who wishes to attend the Event. A Group booking is for a group of un-named people who wish to attend the Event. This kind of booking might suit a school class wishing to attend an Event in which each pupil's name won't have to be entered into the booking process. A List booking is for a group of named people who wish to attend the Event. This kind of booking asks for the details of everyone in the group.

For Individuals, the booking online process is the same for Auditions, Exams, etc…

Booking onto an Event as a Group

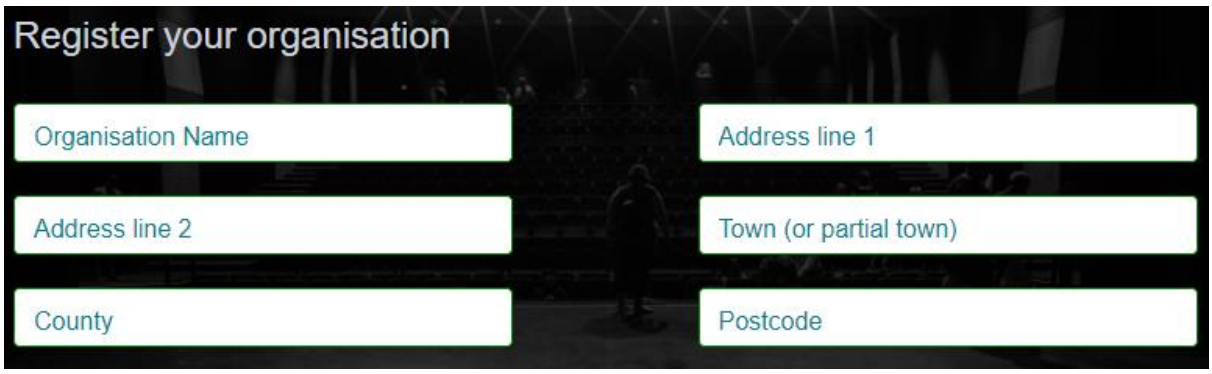
An Event set up for a group will require an Event Service Type with a selected booking type of "Groups". The online forms for a Group booking follow a unique process. Click on "Event Groups" under "Enrol" and select the correct Event. The first screen will look different to a standard booking page, as shown in the example below.



By clicking on the tick box "I wish to create a new account on behalf of my organisation" future bookings with the same Group can be made more easily. By clicking this the form below will appear so that the applicant can enter their details.

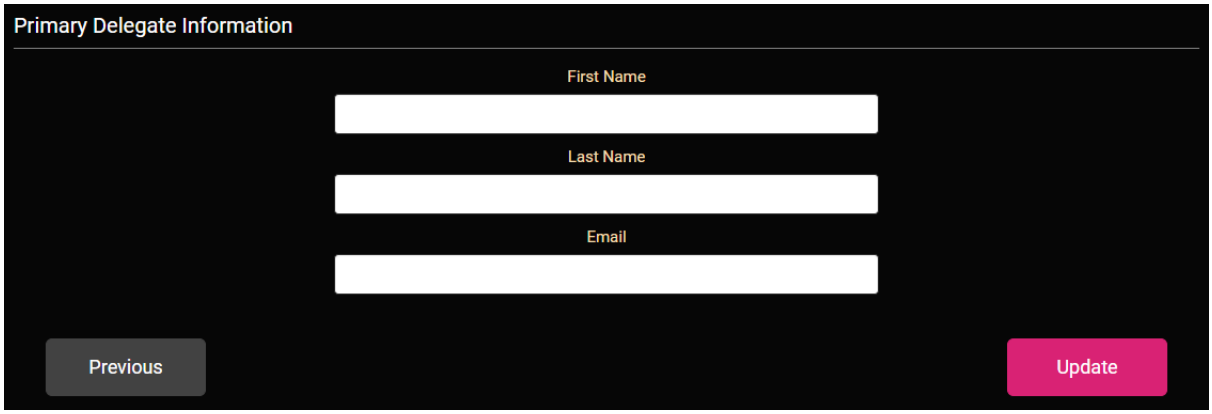
The next part asks for the details of a primary delegate. This is the individual responsible for the Group and the Group booking. The "No of Delegates" refers to the number of individuals in the Group and then the "Number of Teachers" includes supervisors or teachers.

A confirmation page will follow the Delegates Information Pages. On clicking Confirm a final checkout page completes the booking process.



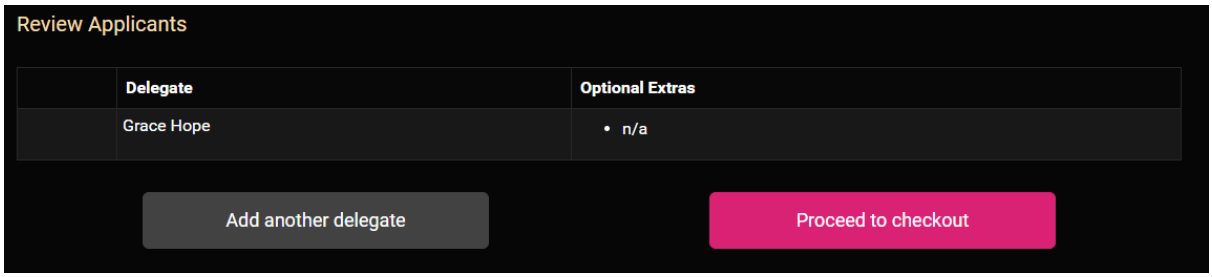
Booking onto an Event as a List Booking Type

An Event intended for a List booking will need an Event Service Type that has a List booking type set up. The online forms for a List booking follow a unique process. Go to the Event and use the link for online applications. The first screen is the same as the display for booking a Group.



This page should include the bookers contact email and their organisation title. Creating a booking account for an organisation makes future applications easier.

The example page above will follow the first application page. The details of the first delegate including “First Name”, “Last Name”, and “Email” should be included here. Select the Update button to Save the information and continue to the next page which is shown in the example below…



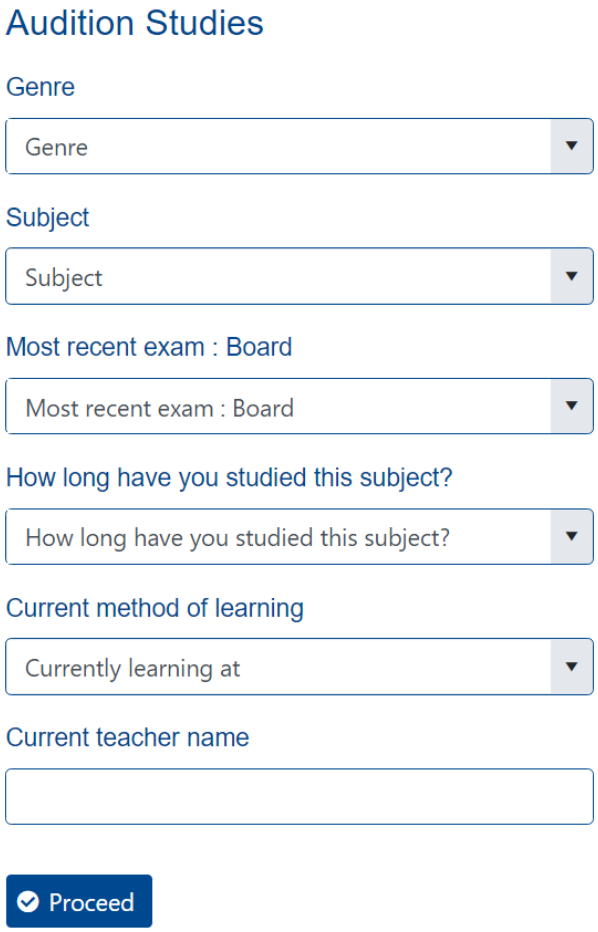
Here, the delegate’s booking is shown under “Review Applicants”. To complete the booking select “Proceed to Checkout”. To add another delegate, select the “Add another delegate” button to the left of the screen. This action will open a Primary Delegate Information page like the one in the previous example. The process of adding delegates will continue by selecting “Update” followed by “Add another delegate” until the booker is satisfied that all delegates details have been included in the booking.

A confirmation page will follow the Review Applicants Page. On clicking Confirm a final checkout page completes the booking process.

Auditions

The differences when booking onto an Audition is the extra page which is shown below.

The first part is where an applicant can explain their reason for wanting to audition as well as their previous experience that may help with their application.



The next part allows the applicant to select their relevant information related to what they are auditioning for.

To see all applicants up for Audition, go to Tuition followed by Auditions and Applicants. Here, you should find a list of all those who have applied to Audition.

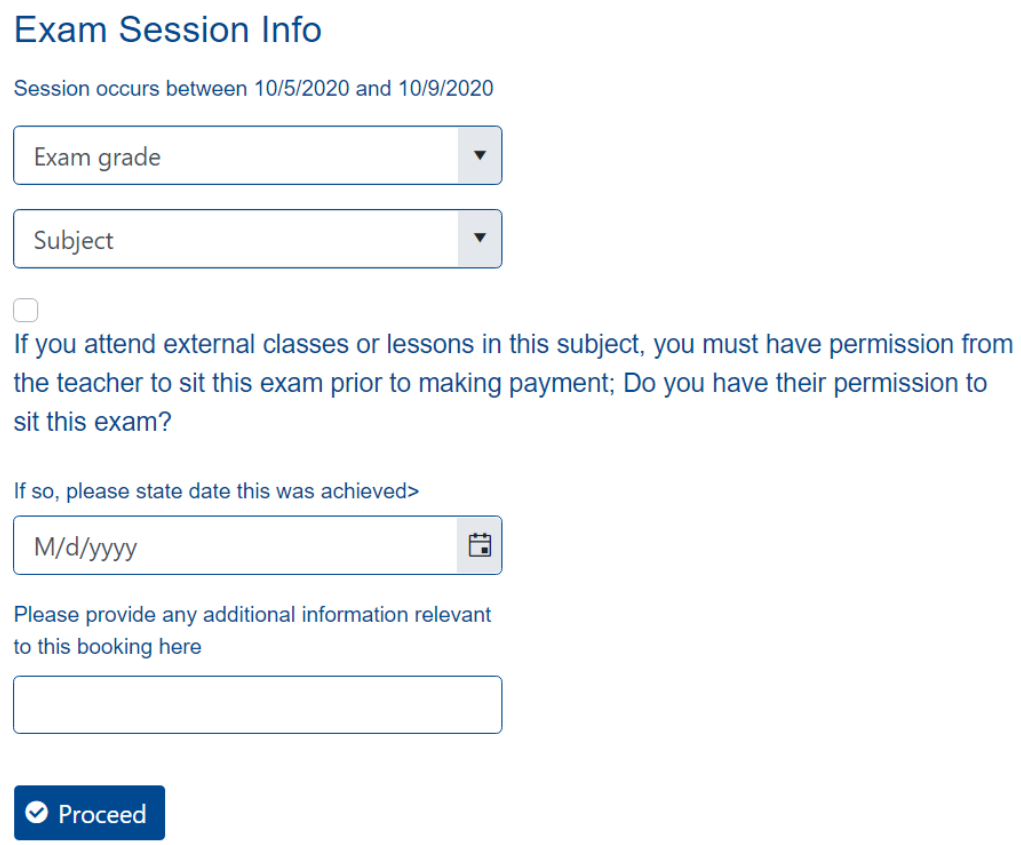
Exams

This is like booking onto Auditions, Events etc... however, there is an extra page as shown below.

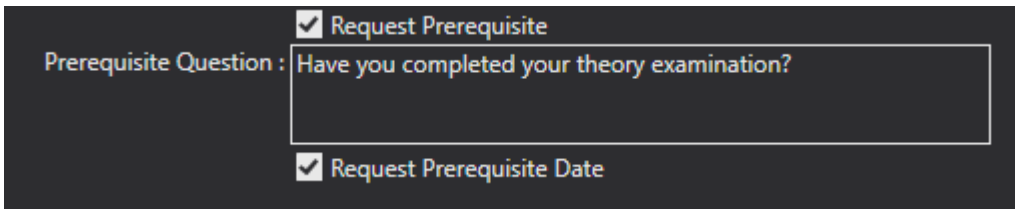
The “Select Grade” field asks the applicant which grade they hope to achieve through examination. This choice is made from a drop-down list. When a grade is selected the relevant price will appear, and if applicable it will give you the option to add an accompanist and the cost for having one.

“Subject” refers to the instrument the applicant will be examined in.

A teacher’s permission may be necessary for the pupil to continue with their exam. This part of the form should provide and Yes or No option to indicate teacher consent.



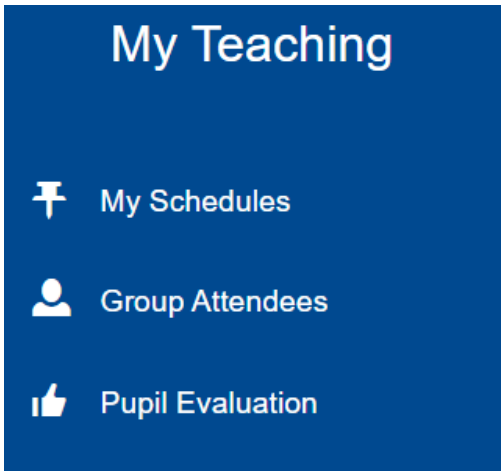
The “Request Prerequisite” tick box option when creating the Exams Service Type generates a prerequisites question beneath the teacher permission response options. An example of the kind of question that may be asked here is shown in the screenshot below.



A prerequisite date box will follow the prerequisite question. This allows the applicant to select the date they completed the qualification stipulated in the prerequisite question field.

A box below this is provided for the applicant to give “Unavailable Dates” (dates at which the applicant cannot commit to taking the exam). Another is provided to give “Additional Information.”

Teacher Online View



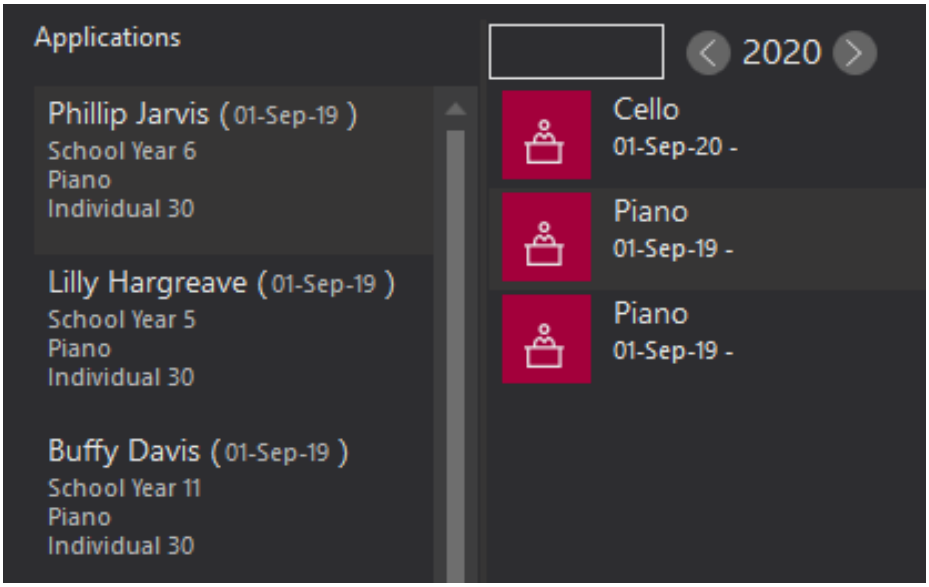
Tuition

Tuition Service Types

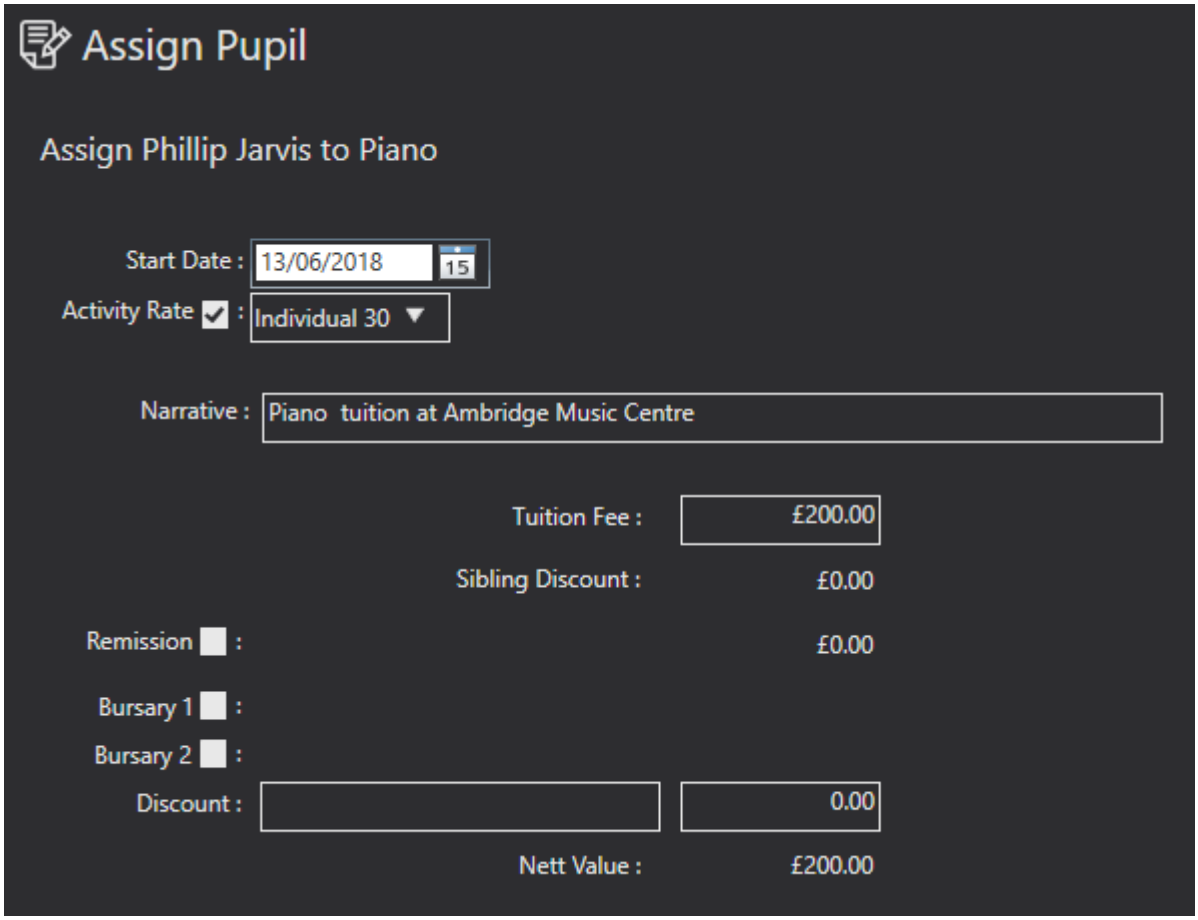
Service Types can be found in the Activity Section. To create a new Service Type, select the plus icon at the bottom of the page. From here you can create a Tuition Service Type. Instructions on how to create Service Types can be found on page 53.

Assigning Pupils to Lessons

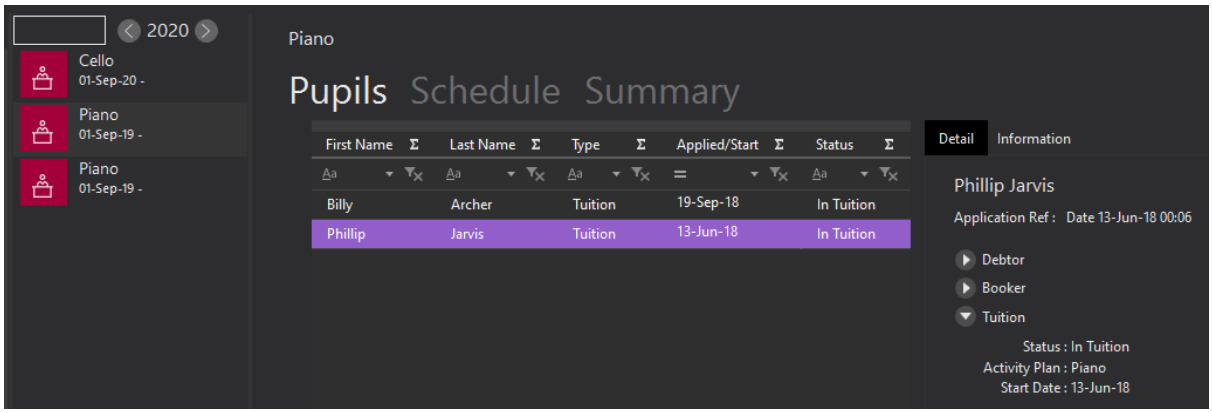
To assign a pupil to a lesson, open your contacts and search for the school or centre where the lessons is taking place. Once you have opened the record click on the “School” or “Centre” tab and open the “Activity” tab. You will see a list of the activities that are taught at that specific school or centre. Select the activity followed by the “Applicant” icon, as shown above…



This icon will display a list of all the applicants for that activity, as shown in the example above. Now, you can drag and drop any applicant from the list into the activity. This will open the next display as shown below…

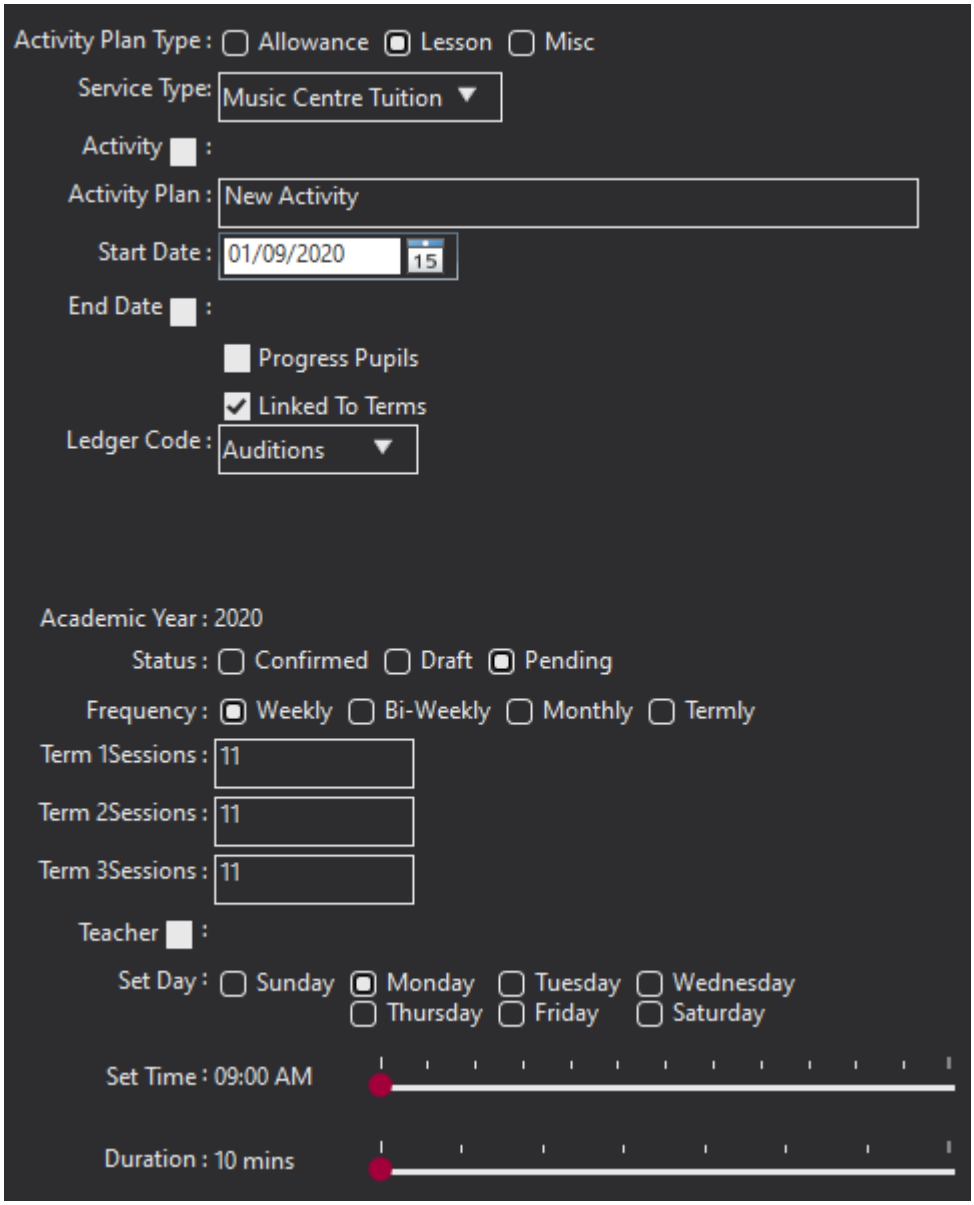


Here, you can select the intended "Start Date" for lessons. You can also choose the "Activity Rate" using a tick box and drop-down list of options.
Please note, that the Activity Rate is used for looking-up the basic cost and can be overwritten as well as undergo further reductions, remissions, bursaries, and discounts. Once you are satisfied with your changes, save the record using the "Save Record" icon. The pupil will no longer appear as an applicant for the activity. They will appear on the" Pupil" tab of the selected activity as shown below. Ensure that you save a second time to apply your changes to the database.



Adding an Activity

To add a new activity, find the school or centre that you wish to create an activity for and select the School/Centre tab. Then, select the Activity tab and use the icon like the example icon shown here. You should find it at the bottom of the screen.

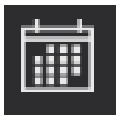


A display like the example shown above should now appear. First, choose your “Activity Plan” Type, followed by the “Service Type” that it is linked to.
Service Types can be set up in your System Settings, see page 53 for more information on how to do this.
Next, is the option to assign a type of “Activity”. These are set up in your System Settings, for more information see page 51 for more information.
The “Activity Plan” text box is intended for the addition of an activity title, this will be displayed on the calendar view.
Next you can select the “Start Date” for the activity. The “End Date” is optional and is only required if necessary. The “Progress Pupils” option allows you to take the pupils in the activity through to the next academic year.

The “Linked to Terms” option, if ticked, will set up the lessons according to how your terms run, and their Start and End date. If unticked, then the activity will run continuously for the number of sessions that you specify.
You then need to assign a “Ledger Code” to the activity, your ledger codes can be set up in System Settings, see page 62 for information on how to do this.
The next field is for defining in which academic year the activity will run, first select a “Status”. “Confirmed” means the activity will start as soon as it is saved (depending on the Start Date), “Draft” saves the creation of your activity without finalizing it, and “Pending” signifies an activity that is complete but is not ready to start yet.
“Frequency” is how often the activity runs. The system will determine the dates between which the activity runs depending on the “Start Date” and “Frequency”, as well as the Term Sessions.
The “Term Sessions” will determine how many weeks the activity runs for each term.
You can then opt to assign a teacher to the activity. If you select the tick box labelled “Teacher” a drop-down list of all the teachers in the system will appear.
Finally, you can select when the activity takes place, using the date, time, and duration.

Once you are satisfied with the information you have included for your activity use the Commit Activity icon shown here to save the activity. You will also need to use the Save Record icon to save the School/Centre record. Your new activity should then appear in your listed activities.

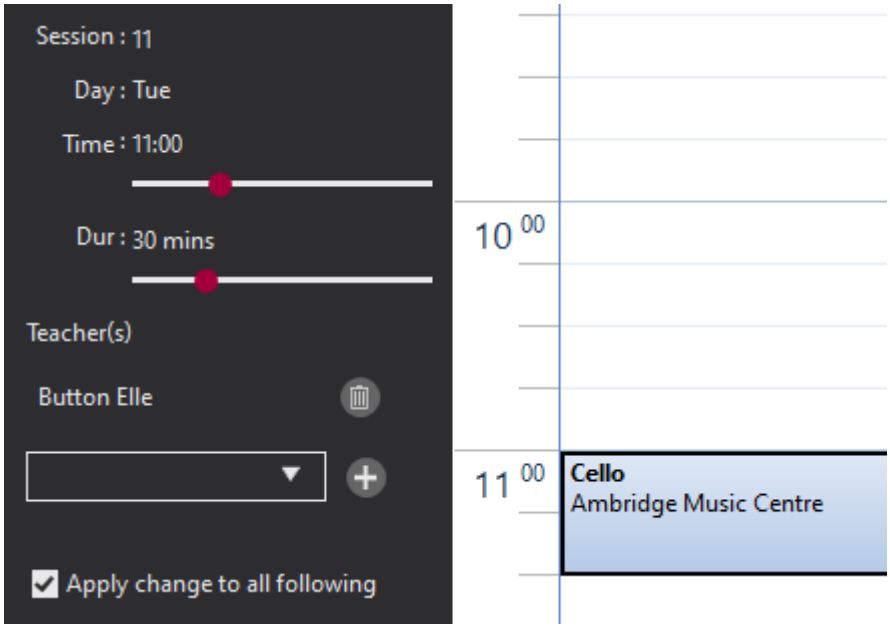
To edit any activity, go to the School/Centre that the activity is in, and click on the Activity tab, under the School/ Centre tab. Then, use the icon shown here. You make any edits that are required to the form that appears. Once you are satisfied with any changes you have made, use the Commit Activity record icon to save changes. Again, make sure to save the School/Centre record as well.



If you make no changes whilst in edit mode, then you can use the View Activity Record icon shown here. This will take you back to view mode without any changes being made.

Editing Activities

You can also make certain changes to an activity in Diary View. To do this go to the Diary tab, under the School/Centre tab and select the activity you want to edit. Then use the Edit Record icon to make changes. Here, you can alter the time and duration as well as the teacher. You can remove a teacher or add a new one. You can choose to have more than one teacher. You can also choose whether these changes are solely for the current date of the activity, or all future dates of this activity. Once you are happy with any changes you have made use the Save Record icon to save.



Attendance

Withdrawing Pupils

Transferring Pupils

Resources

Understanding what Resources are

There are different types of Resource options: instruments, sheet music, costumes, and equipment. These types determine your specific Resources and are assigned a Resource Type and Serial/Reference Number.

Resource Categories

In System Settings on page 63

Resource Groups

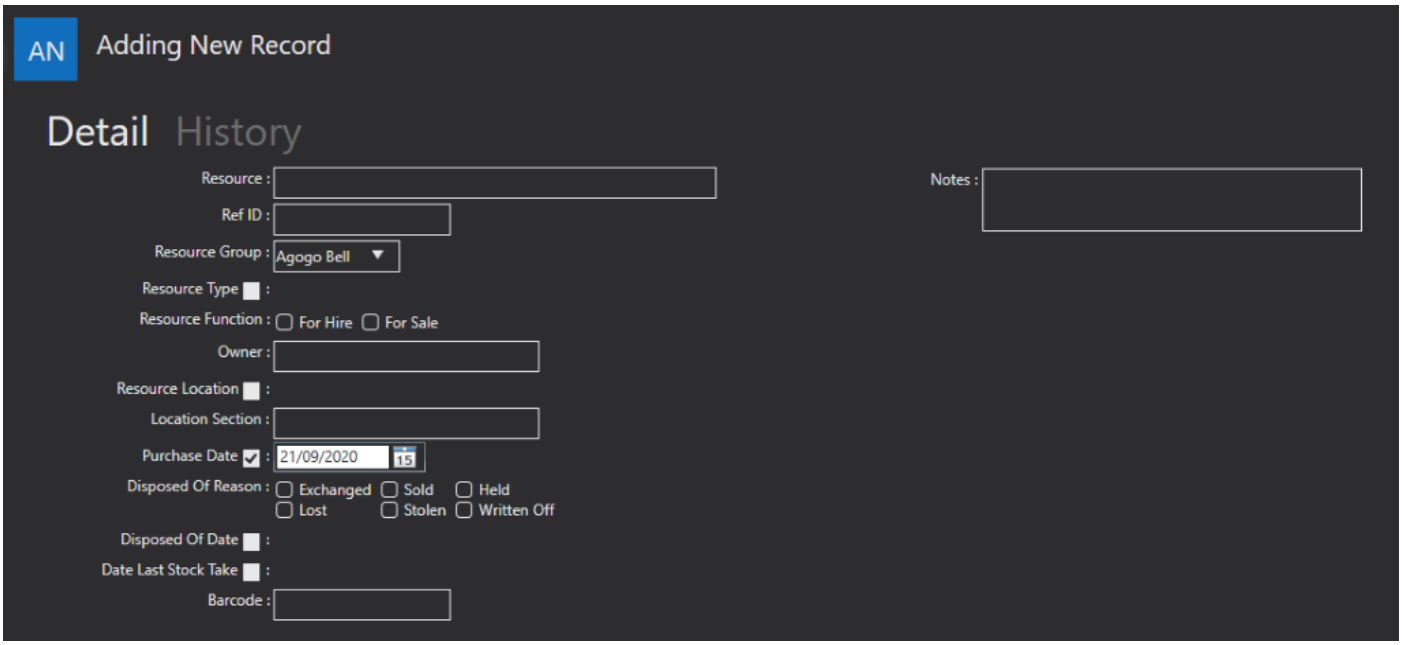
In System Settings on page 63

Resource Locations

In System Settings on page 64

Adding a Resource

To add a Resource, select “Resources” under the Tuition icon in the side menu bar. Click the “Add Resource” button. A display like the example below should appear.



The **Ref ID** is individual for each Resource and helps to identify them.
The **Resource Group**, **Type**, and **Location** are all defined within “Settings”, and will appear here as a drop-down list. Only the resource types that belong under the selected Resource Group will appear.
The **Resource Group** is compulsory whereas the **Resource Type** and **Location** are not.
You can then select if the Resource is **For Hire** or **For Sale.**
You can also provide details of who the current **Owner** is.

The Location Section can help you find the instrument. For example, if the location from the drop-down menu is a warehouse, the section might be the specific aisle in that warehouse.
The Purchase Date allows you to keep track of how long you have owned the resource.
You can include a Disposed of Reason using the tick boxes available. Options include, “Exchanged”, “Lost”, “Sold”, “Stolen”, “Held”, and “Written Off”. The Disposed of Date is optional and should only added by selecting the tick box if you have disposed of the resource.
The Date Last Tested and Date Last Stock Take allows you to record whether the resources are being kept track of.
If your resource has a barcode, then you can add it under the field labelled Barcode.
You can use Accessories and Notes, to add any information about accompanying accessories for the resource and any additional information.

Once you are satisfied with the information included you can use the “Save Record” icon.
If you have added an instrument Resource, when you go back to edit it you may find a few extra options detailed below…

The Instrument Serial No can be used if you wish to keep track of your resources in this way.
The Variation specifies the material of the instrument in question i.e., whether it is metal, plastic, or any other kind of material.
Then, you can include further details such as the Make and Model of the resource, as well as the Supplier and an Invoice and Order Number. This can be helpful if any problems should arise in relation to the resource.
The Original Value and the Current Value allow you to see how the resource is depreciating.
Also, you can include any Insurance information for the resource.

Editing a Resource

To edit a Resource record, find the record that you want to Edit and select the “Edit Record” icon in the bottom left-hand corner. Selecting this will show a similar display to the example screenshot above. Here, you can fill in and Edit all necessary fields.

Allocating a single resource

Setting the charge

Allocating multiple resources

Repairs

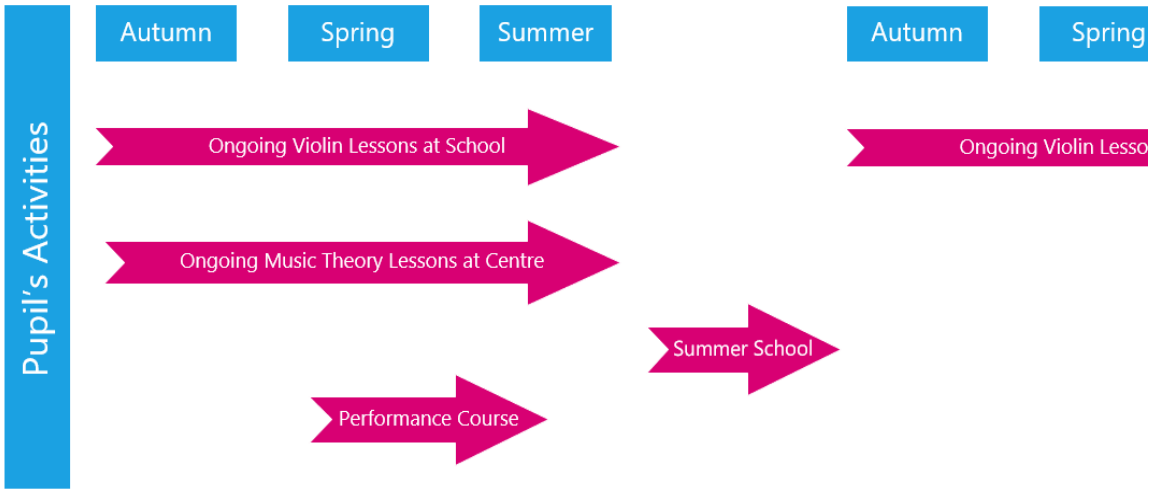
Financial Management

Xperios manages the various services you provide to your customers. These services are broken down into different types of activities, all of which may incur a charge. That charge is derived from several factors including the duration and number of sessions.

Example of different activities: Violin lessons at a school, theory lessons at a centre, choir membership, hire of a violin.

All activities exist for a given period. A violin lesson at a school may exist for the whole academic year, a summer school activity could last just six weeks, or a performance course may last for three months. This period is called the Timespan and can be for any length of time.

In theory, a Timespan could cover several years to describe the ongoing tuition provided to pupils. However, it is advisable to limit Timespans to one academic year and for a new Timespan to be created to define subsequent years.



If necessary, one or more of these activities can be joined into a Study for a more holistic definition of the activities.

Invoicing

Indirect Tuition

Indirect tuition refers to activities intended to cover Tuition in which the provider is not directly connected to the pupil. For example, where a school buys teaching time from the provider for pupils which may or may not be known by the provider. The charge for this time is made to the school who may or may not redirect this time to the pupil.

Invoicing

Once an Activity is confirmed, the system will calculate and produce an invoice for the Activity covering the entire Timespan. Throughout the duration of the Timespan adjustments will be posted to the invoice to reflect any changes to the Activity, e.g., increases or decreases in the duration of the lesson.

The automated invoice adjustments also handle non-delivery of lessons via an automated reconciliation process at the end of the Timespan.

Linked to every invoice produced is a payment schedule describing costs and dates payable. This could be a single entry showing that the total invoice is due by a specific date or three entries showing that payment is required at the start of each term.

Schools can view the Invoices and all adjustments using the Xperios live Portal, this allows them to see

A parent or payer will see a single invoice relating to the Activity or Study of a child with a chronological list of explained adjustments to that invoice reflecting any changes to the activities throughout the year.

The payment schedule may be connected to a payment method such as a debit/credit card or a direct debit system. Where this is the case the system will automatically take payments on the scheduled dates, and manage payment failures or expired cards etc. If a payment method is not connected, the system will contact the payer requesting payment.

Direct Tuition

Direct tuition refers to activities intended to cover tuition where the provider is directly connected to the pupil. i.e. A Payer (often the parent) engages in a contract directly with the provider to deliver tuition to the pupil. The charge for this tuition is made to the payer. Note: an agreement may be in place where part of or all the fee is directed to the school.

Xperios maintains a complete debtors ledger which controls all financial transactions with debtors. It also currently integrates with Sage Pay to make payments and refunds.

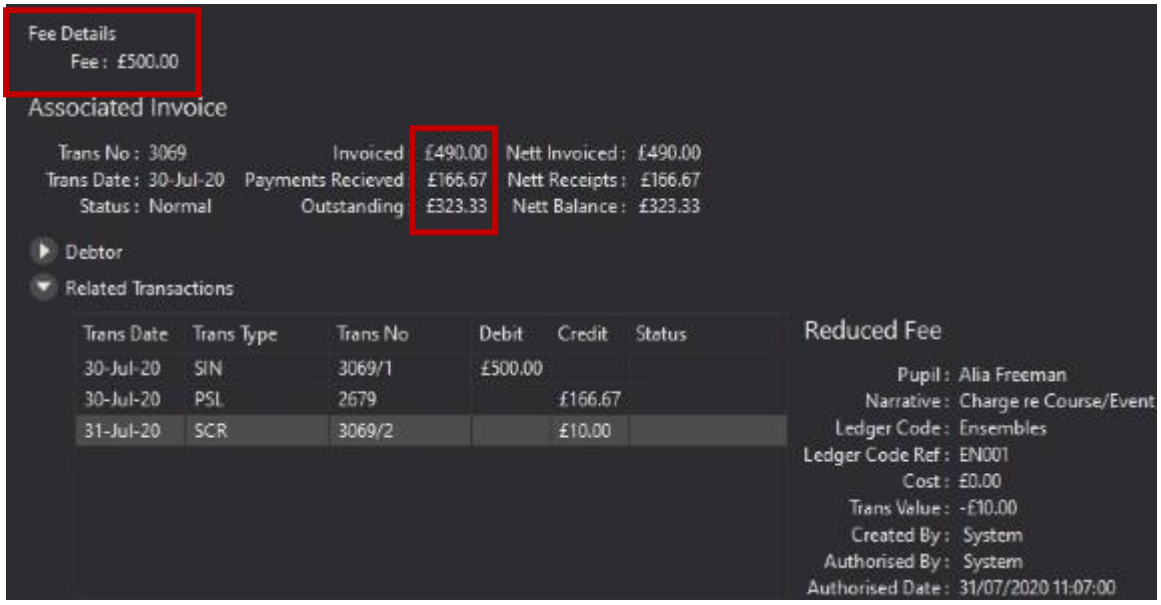
Invoice Summary

In the example below, Alia Freeman has booked onto an Event called “Ambridge Orchestra Tour”. This costs £490. If we look at the Event delegates record, we see the following…

First Name	Last Name	Applied/Sta	Fee	Balance	Status
Beverley	Hunter	30-Jul-20	£490.00	£290.00	Active
Aliesha	Parker	30-Jul-20	£490.00	£427.50	Active
Alia	Freeman	30-Jul-20	£490.00	£323.33	Active
Abel	Howells	30-Jul-20	£490.00	£448.33	Active
Riley-James	Costa	30-Jul-20	£490.00	£390.00	Active

We can see the “Nett Invoices” of £490 and the “Outstanding” of £323.33.

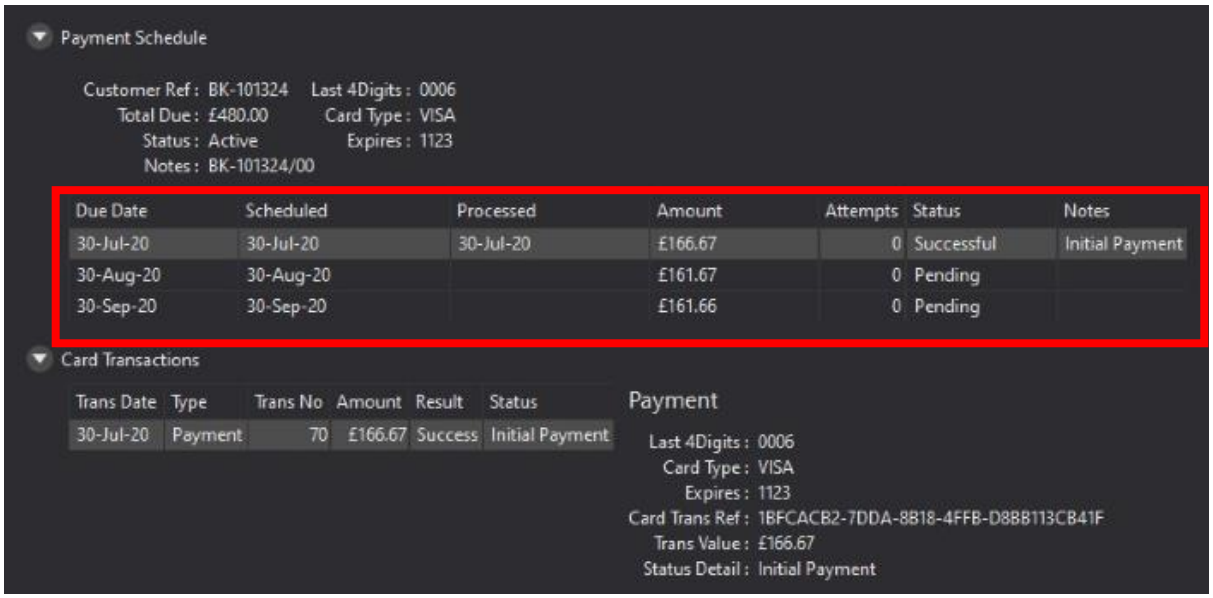
By clicking on the Finance tab to view the financial information we can see the following…



At the top is the fee detail, showing the total fee of £500.

Below this is the Invoice section. When someone enrols, an Invoice covering the fee is created. In most cases this will be the total Event fee. The Invoice sections show the Transaction Number, Transaction (tax point) date, the total value of the Invoice which includes any adjustments that have been made to the fee, and the remaining unpaid balance. In this example, the remaining unpaid balance is £323.33.

Below the Invoice section is the Related Transactions section which displays the total sales invoice at the top. This is followed by the paid for transactions thus far including the transaction type and number for each payment or adjustment.



Under the “Payment Schedule” we can see the card details used to take the payments and the payment schedule. The “Due Date” is the original scheduled payment date. The scheduled date will initially be the same. If a scheduled payment fails it will be re-scheduled with a new “Scheduled Date” up to a maximum of four times.

The “Processed Date” is the date the payment was successfully taken. To the right of this is the scheduled amount to be taken. The Attempts column is the number of attempts made to take the payments.

The Status column shows the status of the scheduled item. “Successful” means that the payment was successfully taken. “Failed” means the last attempt at payment failed. “Pending” means the payment is waiting for the scheduled date. The last column is a notes field. The final section on the page is the “Card Transactions” section. This lists all card transactions relating to the Invoice. This includes any failed transactions and refunds.

Posting a Credit Adjustment

You may need to amend the fee charged to an applicant if a service has not been fulfilled as intended. For example, a piano class may need to be cancelled.

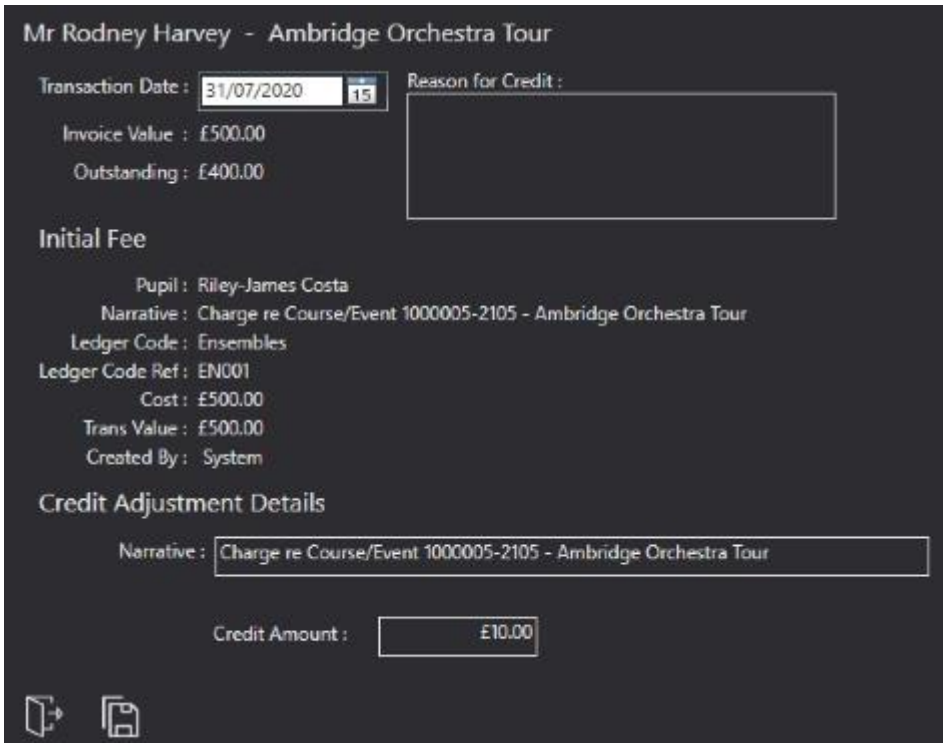
If a payment schedule is associated with an invoice this will need adjusting to reflect a reduced fee. The payment schedule may need to be cancelled if the credit reduces the outstanding fee to zero.

If the credit reduces the fee to less than the amount already paid, a refund needs to be made to compensate for overcharging the customer.

The payment schedule and Invoice will need adjusting to reflect the new fee. To make an adjustment you need to raise a Credit.

To make an adjustment click on the “Post a Credit Adjustment” button. This can be found at the bottom of the screen, under the Finance Tab. You can access your debtors Finance tab via the service they are being charged for or through their contact record.

A new window will pop up displaying the original invoice including the outstanding balance.



You post a credit to reduce the amount originally charged to a customer via an invoice. A credit is therefore directly related to an original invoice and should mimic the original invoice other than the value.

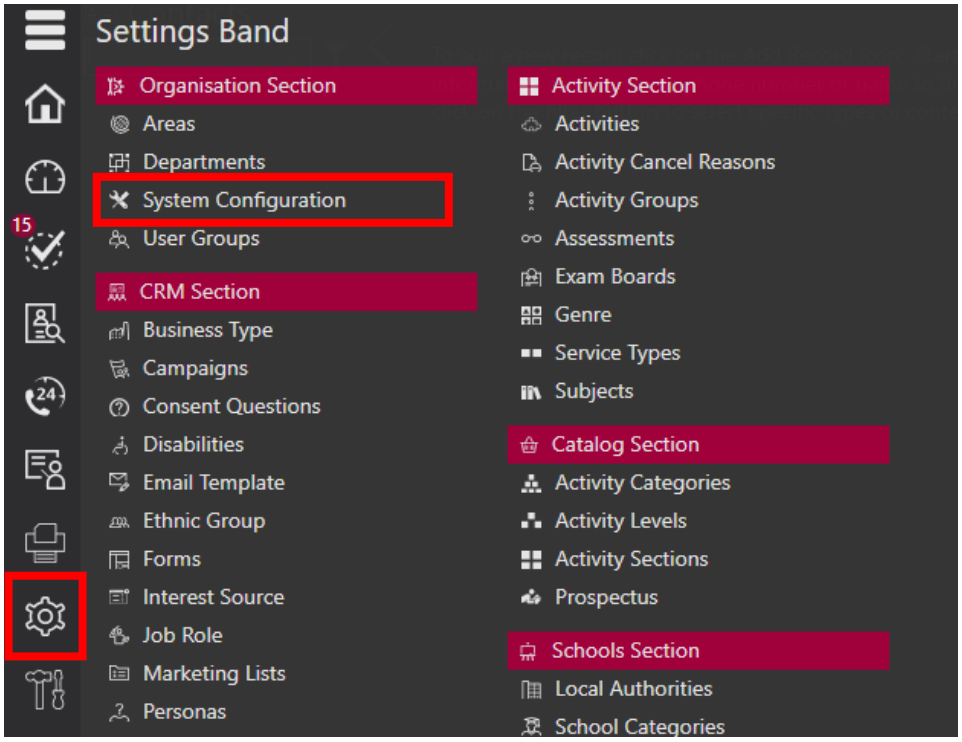
You can add a reason for why you are applying a credit in the "Reason for Credit" field.

Press the Save button to apply the adjustment.

The Finance tab and Ledger section will now show the credit with a status of "Pending" if you have credit authorisations turned on under System Configuration in Settings. The credit adjustments are a request still at this stage and the credit has not been applied to the debtor's account. Therefore, the outstanding debit still shows as £316.00. To apply the credit to the account it must first be authorised.

Authorising Credits

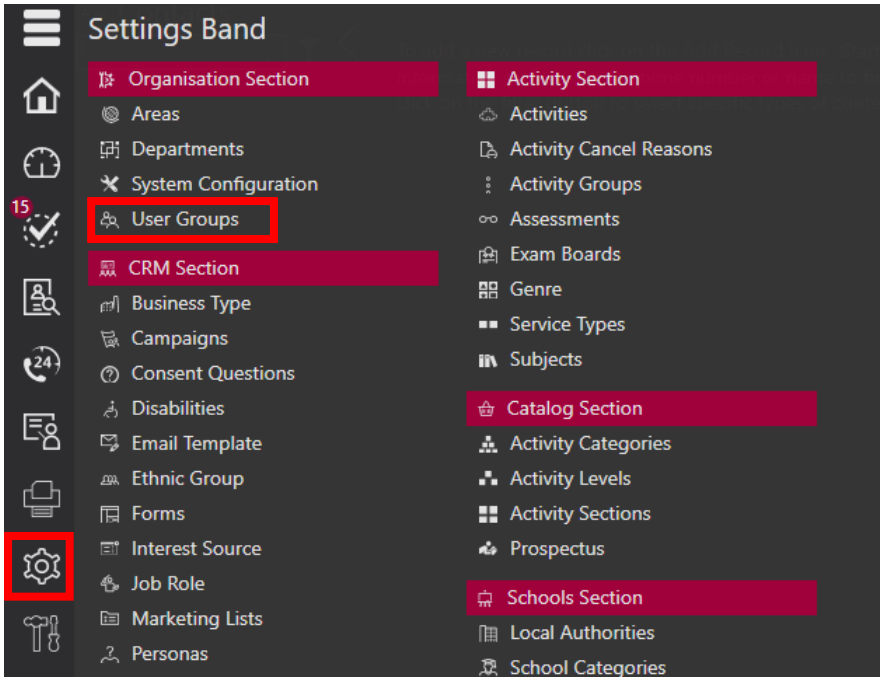
"Credit Authorisation" is a Setting that can be changed within Ensemble. To do this click on the "Settings" cog icon in your side menu bar and select System Configuration.



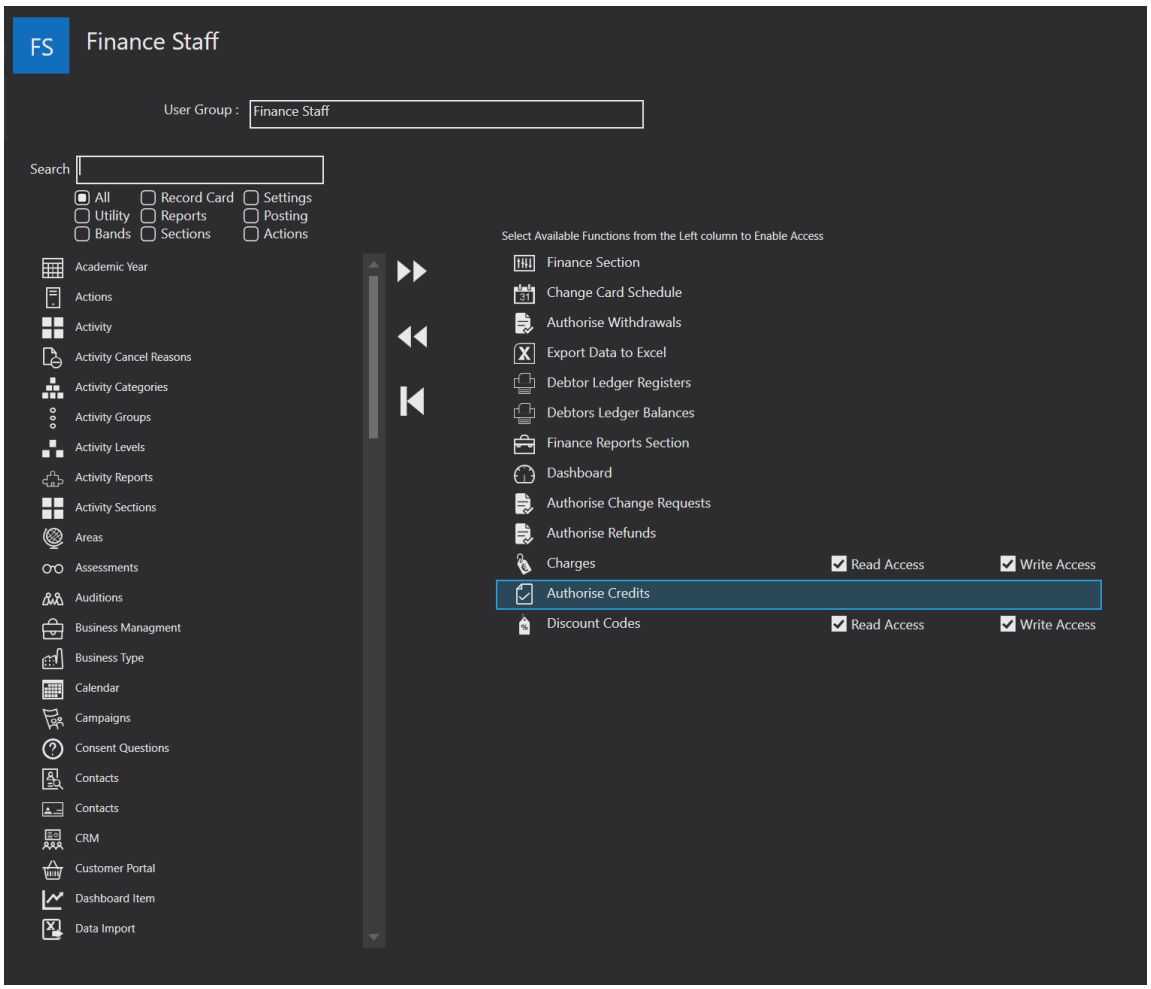
Then select the Edit record button.

Enable or disable Credit Authorisation by ticking or un-ticking the field labelled "Credits Require Authorisation".

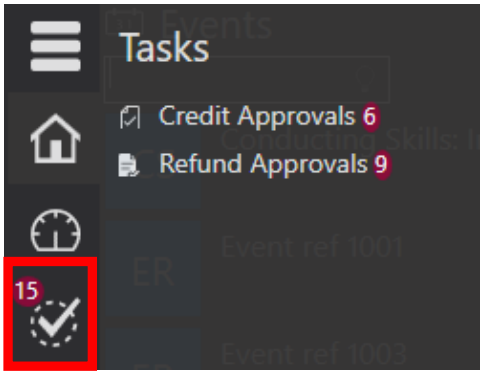
By keeping this box ticked only Users with the "Authorise Credit" User Group role can authorise credits. The "Authorise Credit" role can be added to the User Group. To add this authority to your User Group, select "Settings" from your side menu bar followed by User Groups.



Select which User Group you want to be able to authorise credit. Then, select “Authorise Credits” and assign this role using the top arrow icon labelled “Click to Allocate Access to selected items”.



With the Role assigned to the User Group, Credit Approval notifications will appear under the Tasks list. “Tasks” is found by clicking on the Tasks icon. The number of Credit Approvals to be completed is displayed beside the Task.



This display shows the details of the pending credit with information about the debtor. This includes the total account balance i.e., the amount owed by the debtor, any other invoices, the value of scheduled payments, and a refund value provided a refund is required.

The User has the option to “Reject” or “Accept” the credit. They can also click on Icons to open the associated activity, the pupil’s details, or the debtor’s details.

The first Icon will exit the authorisations without confirming an adjustment.

The second Icon will authorise the adjustments made.

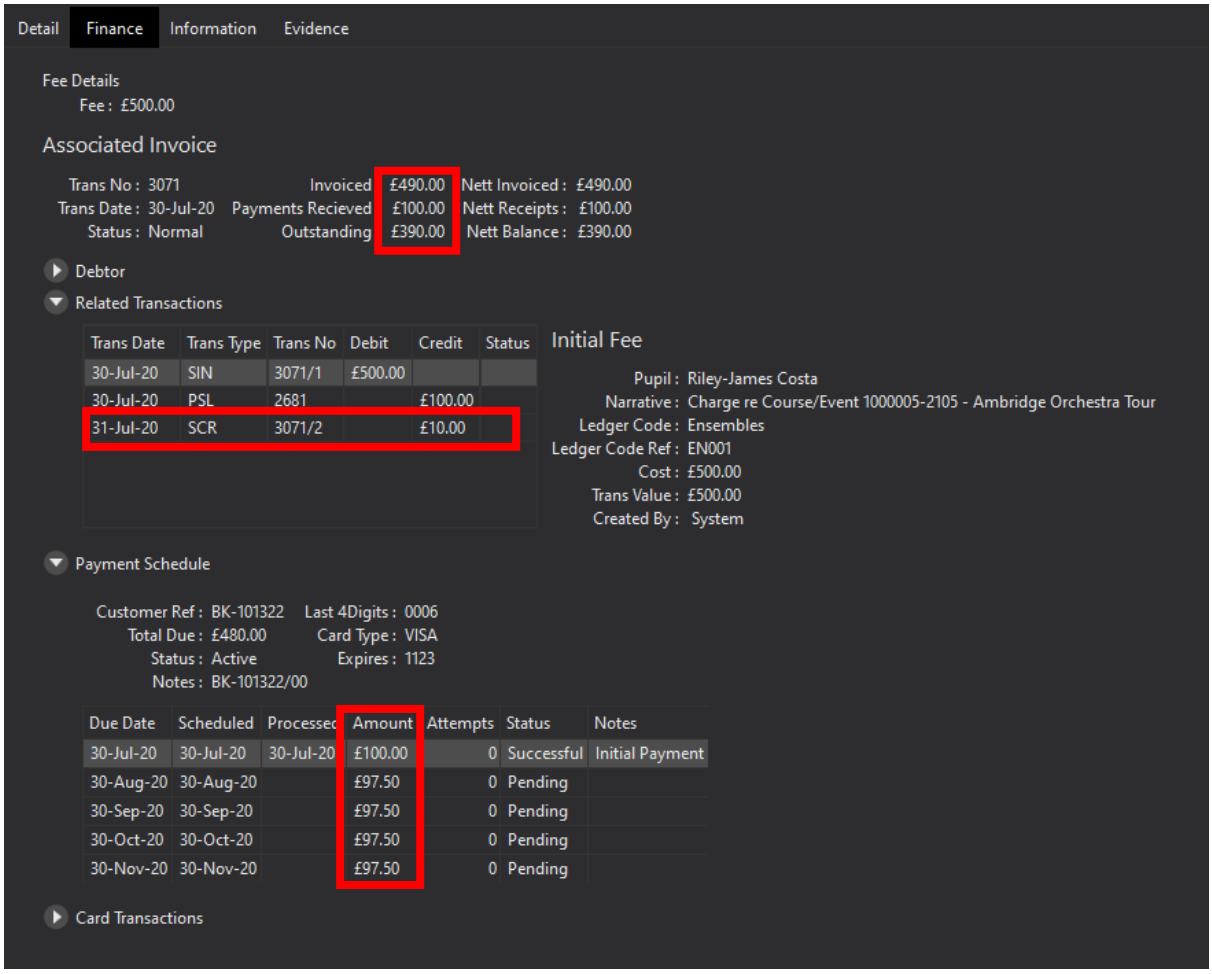
The third Icon will reject the adjustments.

The fourth Icon opens associated activity.

The fifth Icon will allow you to access the pupil’s details.

The sixth Icon will allow you access to the debtor's details.

If the adjustments are rejected the credit is marked as rejected and will not be applied to the account. If the adjustments are accepted the amendment is authorised and applied to the account. In the example below, the credit has been accepted. By revisiting the financial summary for the activity, we can see several changes.



The outstanding balance has been reduced by £10 and the Credit shown in the list of Receipts and Refunds is now marked as "Authorised". The Payment Schedule shows the reduced remaining scheduled payments which reflect the reduced Outstanding balance.

Cancel Adjustment

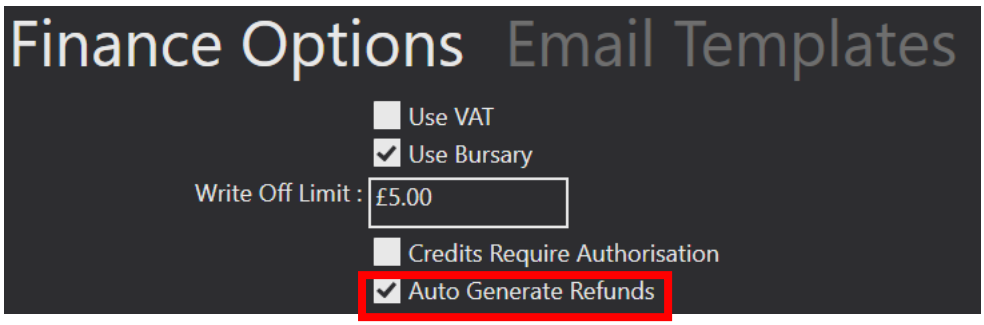
Sometimes you may want to cancel an adjustment that has been posted on a pupil's record. To do this use the "Cancel Adjustment" icon. This will cancel the adjustment and change the status of that adjustment to "Rejected". You will need to Save before you exit the record.

Auto-Generate Refunds

If Auto Generate Refunds is enabled, refunds will be automatically processed into the bank account the debtor used to pay.

If this feature is disabled, the credit appears on the account and the administrator manually decides on the Credit i.e., to make a cash or cheque refund.

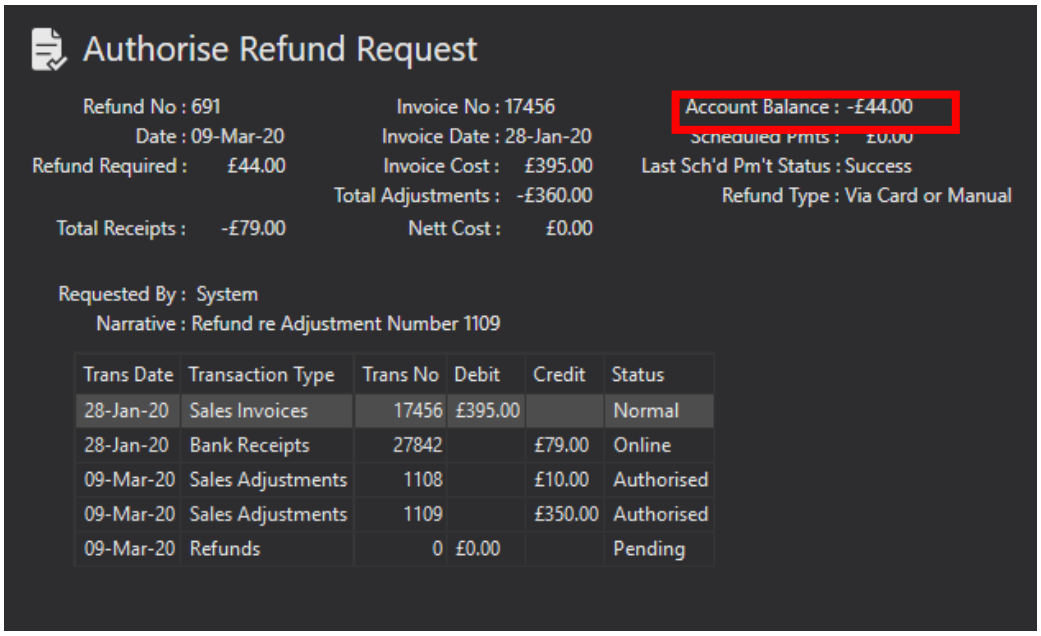
You can configure this setting within select “Finance Options” under the “System Configuration” menu.



Creating a Credit Refund

In some circumstances a Credit will reduce the net fee below the value of payments made to date. In such cases a refund will be owed.

If we take the previous example and follow the same procedure but apply an adjustment of a further £350, we will reduce the net fee to £44. As soon as the credit approval is authorised a refund request is made. This is because the credit amount is more than the outstanding balance.



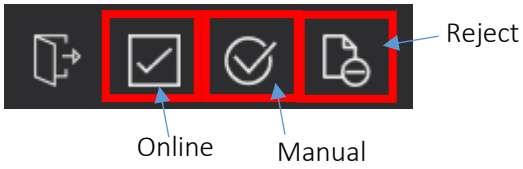
Like credits, refunds must be authorised by a person belonging to a User Group with the “Authorise Refunds” role assigned.

Refunds requiring authorisation also appear in the User’s “Task” list in the side menu bar.

Included in the display is the “Refund Type” which shows how the refund will be made. There are two possible options:

Manual: The refund to the debtor will be made manually outside of Xperios e.g., the debtor will be given cash, a cheque etc.

Online: The refund will be actioned from within Xperios by the connected card system.



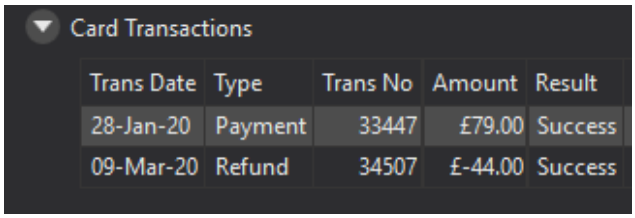
If the User rejects the refund, it is marked as rejected and will not be applied to the account. If the User accepts the refund, it will be marked as authorised and the refund will be applied to the account. Where the refund type is “Online” a refund will also be posted to the payment provider(s).

If there is a problem with the refund via the payment provider(s) the system will display a notification that leaves the refund in a “Pending” state.

If we assume the example refund was accepted successfully and look at the financial summary, we will see the following…

The “Outstanding” balance is now £0.00 meaning that the debtor owes nothing. The £350 credit has been authorised and applied, and £44 has been applied as a refund. In the Payment Schedule section, the future payment schedule has been removed as there is no money to collect.

Under the “Card Transactions” section of the Invoice the authorised refund is displayed. Click on the arrow button beside “Card Transactions” to view the related financial information.

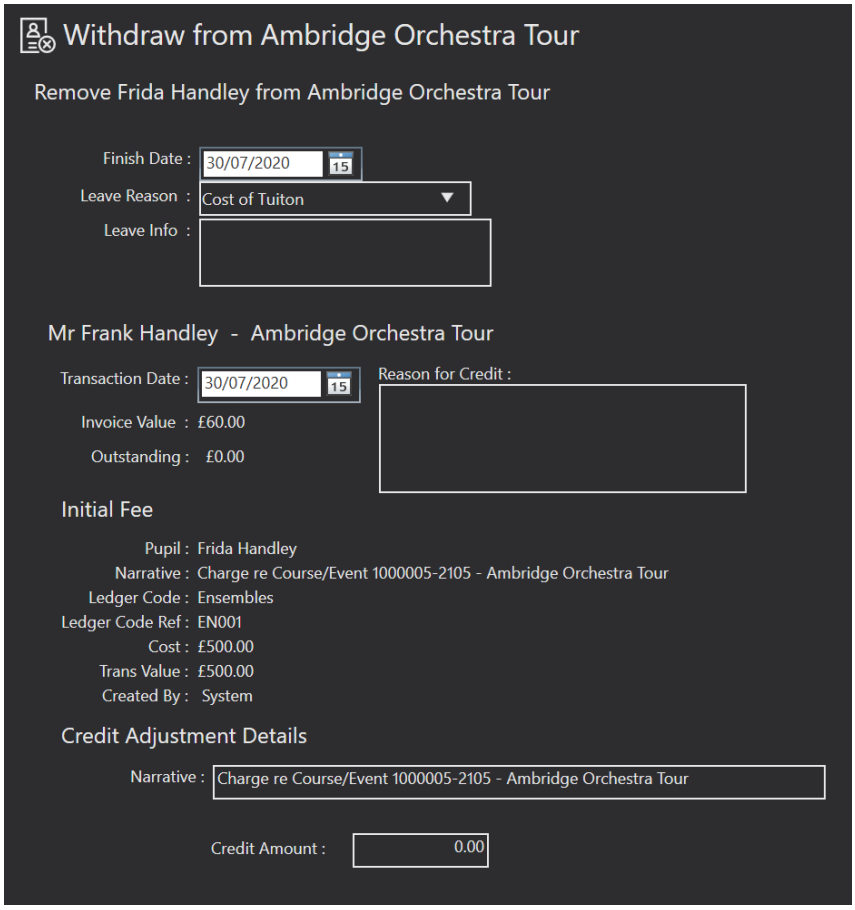


Withdrawing a Person from an Activity

Sometimes, you may want to withdraw a person from an activity. This will have financial implications. Depending on your withdrawal policy, you may need to credit part of or all fees.

To withdraw a person, click on the record for the person you want to withdraw followed by the Withdrawal icon. The record can be found by clicking on the service the individual wishes to be withdrawn from.

This will display the Withdrawal dialogue box.



This form is used to enter information about the Withdrawal, including information of the Credit to raise. The lower half of the form resembles a credit display and is used to make alterations to the invoice.

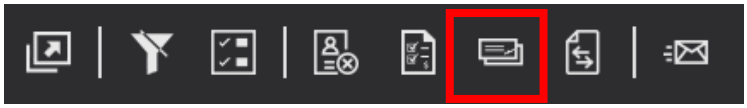
By default, the "Credit Amount" will be set to the original invoiced value. You can reduce this value if required. You can also include a "Leave Reason" from the drop-down menu provided. "Leave Reason" should include more information about the Withdrawal and a service end date.

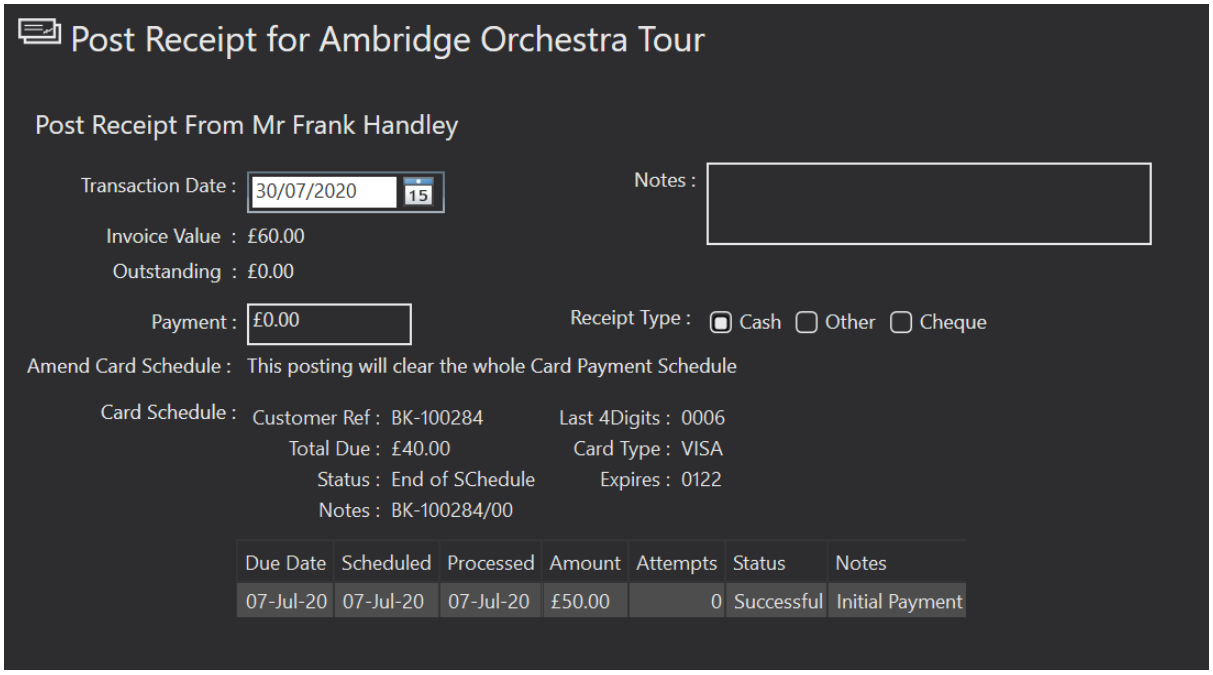
Once you have clicked the Save icon, the system will treat the Credit in the same way as an adjustment to a fee. Thus, it will create a Pending credit which must be authorised. If the applied credit results in a net fee less than the amount of money paid to date by the debtor a refund will also be issued.

Posting Manual Receipts

From time-to-time payments from debtors are received via a method other than automatic card payments. For example, a parent may choose to pay in cash or send a cheque via the post.

The receipts will need to be entered into the system and allocated to an invoice. To do this, you must first find the activity for which the payment is being made. For example, if a person is paying either in full or in part for an Event (or any other service), you will need to find that person's information within the Event (or appropriate service). Select that person followed by the "Finance" tab and click on the Post Receipts Icon as shown in the example below.





The screen will be pre-populated with data from the Event delegate's record. The amount being paid will initially be set to the amount Outstanding. This can be changed to reflect the actual payment value if it is different.

Amend Card Schedule: allows you to select if the next payment, last payment, or entire payment schedule will need to be amended because of the new payment method.

Notes: should be used to include any additional information regarding the change of payment method, including the expected method of future payments.

Receipt Type: allows you to identify if the payment has been received by Cash, Other, or Cheque. If you select Cheque you can record the cheque number.

When you are happy with the details, click on the Save icon to create the posting. This will create a record of the receipt and allocate the value against the invoice reducing the outstanding amount. There is also an option to choose how this receipt affects the remaining payments.

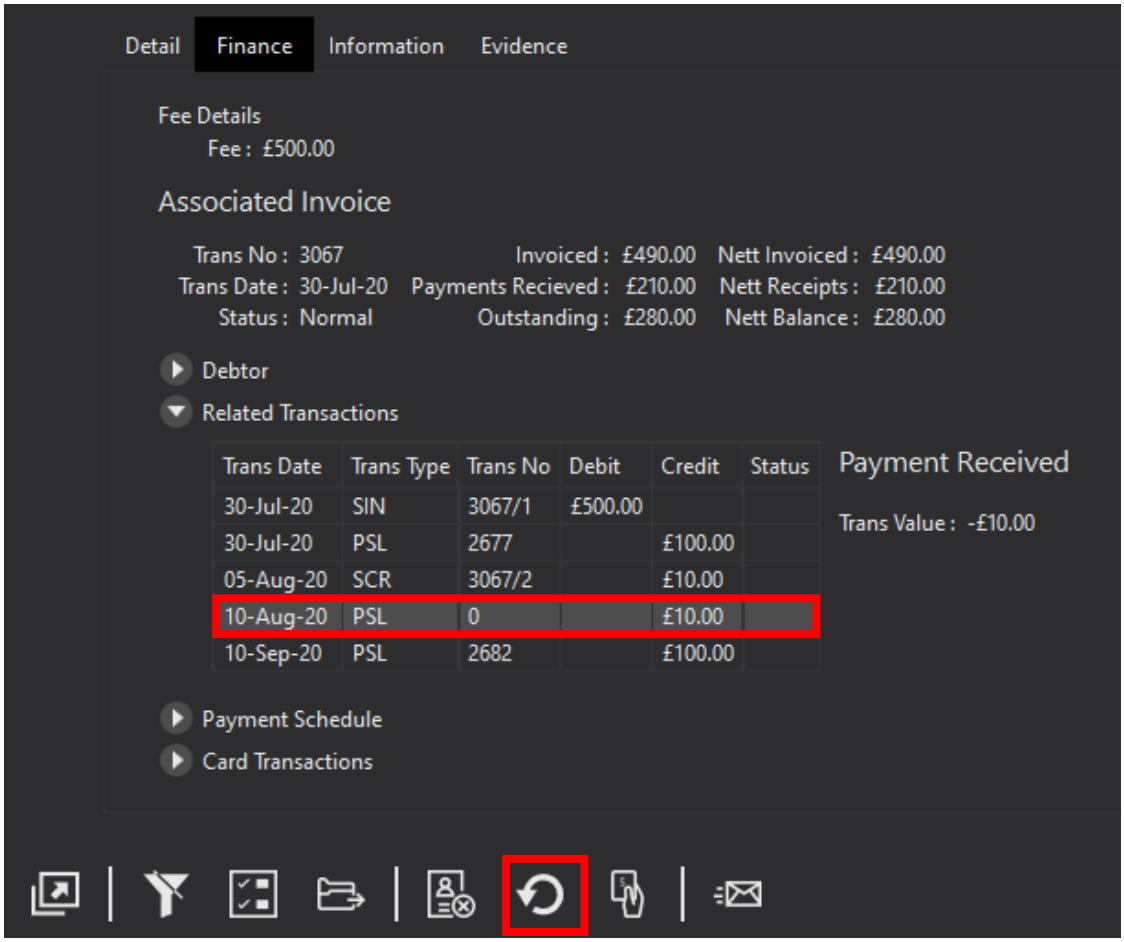
Please note, if the receipt is equal to the outstanding balance the system will clear the entire payment schedule as there is no longer a value owed.

Posting Returned Receipts

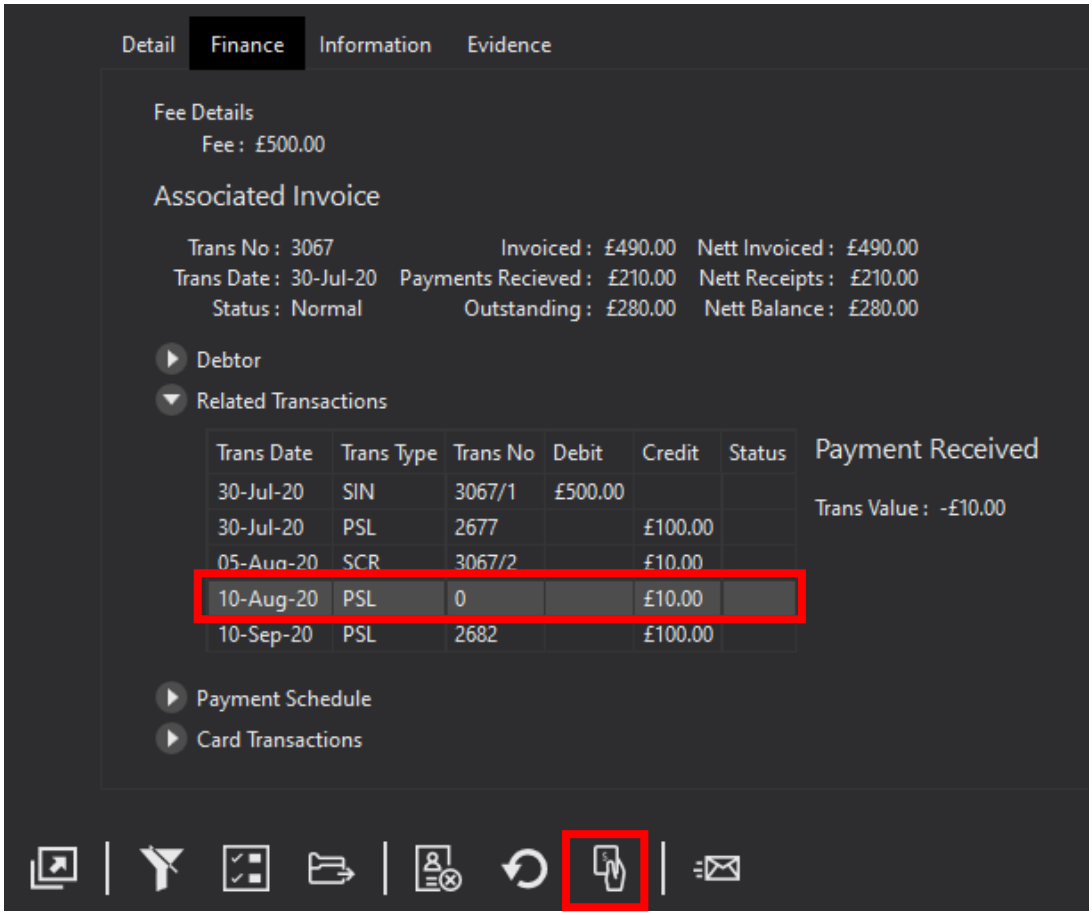
Occasionally you may find that a receipt is rejected, and the ledger must be adjusted. For example, a debtor might give you a cheque which is posted into the system manually. After a period of a few days, the bank has rejected the cheque. In such a case a "Returned Receipt" posting must be completed.

To post a "Returned Receipt" locate the original posting. Find the Delegates record and view the receipts and refunds. Select the receipt and click on the "Post Returned Receipt" icon shown in the example below.

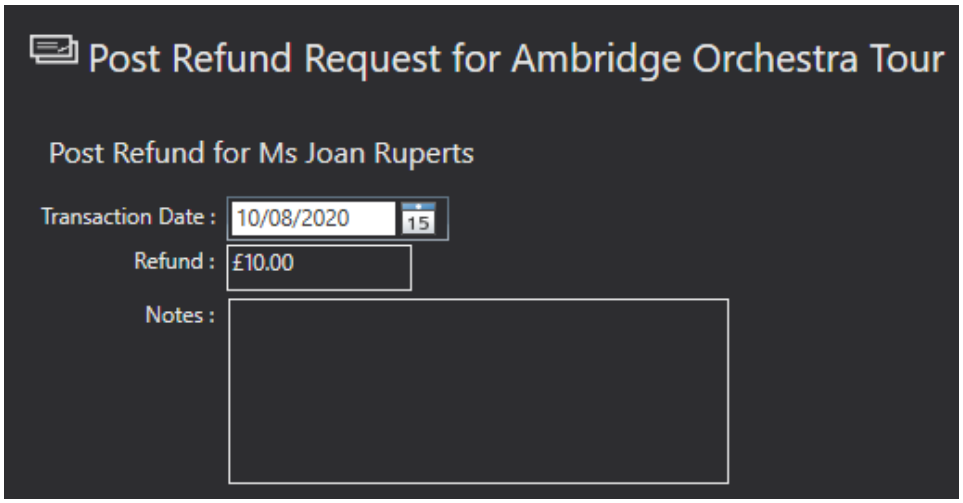
This action will create a refund to be authorised in the same way a normal credit or refund is authorised.



Posting a Refund Request



On occasion you may want to refund a pupil. This may be because they have paid too much, or because they have paid in advance and one of the lessons was not carried out due to illness, etc. To create a refund request, use the icon highlighted above. This will then open the display shown below. Here, you can alter the amount of a refund and create a note which explains the reason for the refund. Then use the Save icon to keep your changes. Please note the "Request Refund" icon will only show if you are clicked on a transaction that has gone through.



131

Writing Off an Invoice

If the remaining balance for an invoice is below the set Write Off Limit the invoice can be cleared by selecting Tuition, followed by the activity or resource being charged for (this will be either Studies, Events, Auditions, Exam Sessions, Groups, or Resources). You can also simply select any Debtors Record with a remaining balance.

Note: The option to Write Off an invoice is dependent on the Write Off Limit determined under Finance Options.

Once you have selected an active invoice/ debtor the following icon should appear alongside any other icons at the bottom of the screen.

The Write Off icon will only appear if the outstanding amount is below the set limit. By clicking on the icon, the remaining balance will be removed for the selected debtor. All corresponding financial information will detail the Write Off having been completed through this function.

Card Payments Schedules

When setting up an Event or Study, you can enable an option allowing customers to spread costs over several payments. When this option is selected, the Event or Study also holds a Payment Due date. This specifies when the cost of the activity should be paid entirely.

A range of instalments are offered but, in all cases, the final instalment is dated before the paid by date.

The system will create a Payment Schedule based on the number of instalments selected. The initial payment will be classed as the first instalment.

An automated process within Xperios manages the process of collecting the scheduled payments. First, it sends out an intention to take payment email three dates before the first scheduled date. This can be a simple note that the payment is to be taken. If the system finds the associated card has expired, it will send out an email asking the customer to use the portal to update their card details.

On the scheduled date, the system will attempt to take the payment.

Note: it will only do this if the intention email was sent in time. It is possible for the customer to change the date of their scheduled payments. This could bring the date forwards so that not enough time has elapsed between sending the email and the due date. In this case, the payment will be deferred for one or two days.

Assuming the payment is successful, an email stating the progress of the payment is sent out to the customer and a receipt is posted to the customer's account.

If the attempt to take the payment at the start of the month failed, the customer will have received a failed payment email. The email states that another attempt will be made in five days' time unless they go online and make a manual payment.

If the second attempt fails, the customer will get another failed attempt email stating that a further attempt will be made in five days. This process repeats four times after which, if the payment was not successful, the system cancels the Payment Schedule.

Three days before the next scheduled payment (For example, the customer's February payment) they will get an email notifying them that the payment will be taken. This gives the customer the opportunity to ensure they have the required funds and can meet the scheduled payment. If the system recognises that the card on file has expired the email will state this and inform the customer

to go online and pay that month's instalment manually. In doing so, the XPERIOS system can update the payer's card details ready for the next scheduled payment in March.

Note: when a payment fails the system will reschedule the next attempt but does not reschedule the whole debt.

Example: A customer is scheduled to pay £50 on the 2nd of each month. If the February 2nd payment fails it will be rescheduled to be taken on the 7th. If that payment fails it will be rescheduled for the 12th. If that fails, it is finally rescheduled for the 19th. If that fails, the whole schedule is cancelled. If it is successful, then payments will resume as they normally would (next month's payment would be due on the agreed date of the 2nd and not one month from the date of successful payment). In such an extreme case the customer will only be twelve to fourteen days between one payment and the next.

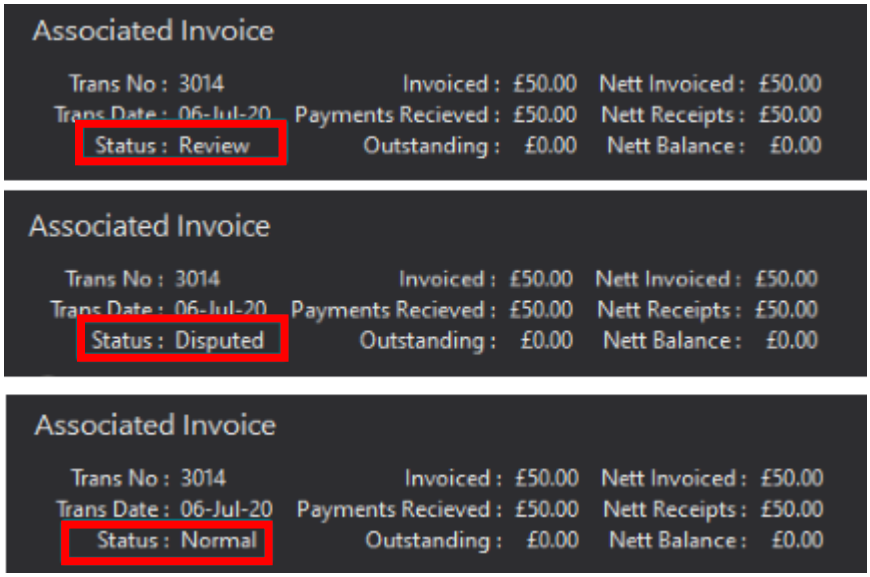
Changing the Status of an Invoice

Occasionally a debtor may dispute an invoice. If this occurs, time is needed to settle the dispute and take any necessary actions to correct an incorrect value.

Other invoices may get to a stage where the normal automatic processes for collecting fees have failed and special attention needs to be made of the debt. These types of invoices will need their status changed to "Review".

To change the status of an invoice, locate the invoice and click on the Toggle status Icon.

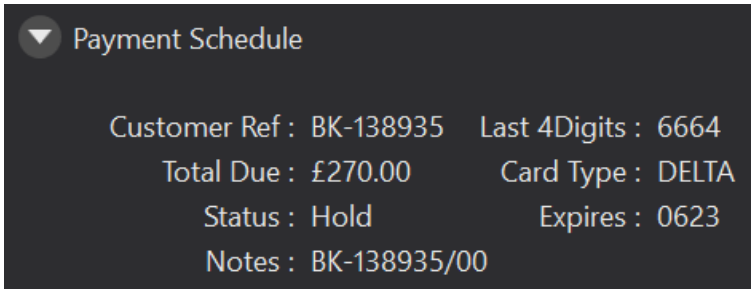
There are three Status options, "Normal", "Disputed", and "Review".



Hold Payment Schedule

You may want to Hold an invoice. This is where all future payments are paused until you activate the invoice again. When the invoice is reactivated it will automatically alter the Payment Schedule. To hold payments, locate the Payment Schedule and then click on the Hold Payment Schedule icon as shown in the example below.

The status on the Payment Schedule will change from "Active" to "Hold".



Once a payment schedule is on Hold you can return its status to “Active”. To action this, click on the Release Payment Schedule icon. This will also change the Payment Schedule to reflect the schedules previous status i.e., on Hold.

View Emails regarding a Scheduled Payment

Three days before a scheduled payment is to be made, the system will send an email to the debtor informing them that their payment will be taken. If the system recognises that the card is no longer valid (e.g. the card has expired) this will be stated in the email. The email will instruct the debtor to log into their account and make the payment manually. This will update the card details for future scheduled payments.

On the scheduled date, the payment will be taken provided the debtor has not manually made the payment beforehand. If the payment is successful, an email will be sent out to the debtor to confirm this. If the payment fails, the system will check how many attempts there have been to make the payment.

If there have been less than four, the system will reschedule the payment to be taken in seven days. The debtor is notified of this via email.

After the fourth attempt to take payment, the system changes the status of the agreed schedule to “Cancelled”. This will prevent the system from taking any more payments. An email stating that the schedule has been cancelled is sent out to the debtor requesting them to make contact and organise alternative payment arrangements.

You can change the status of a Payment Schedule agreement back to “Active” should you want it reinstated.

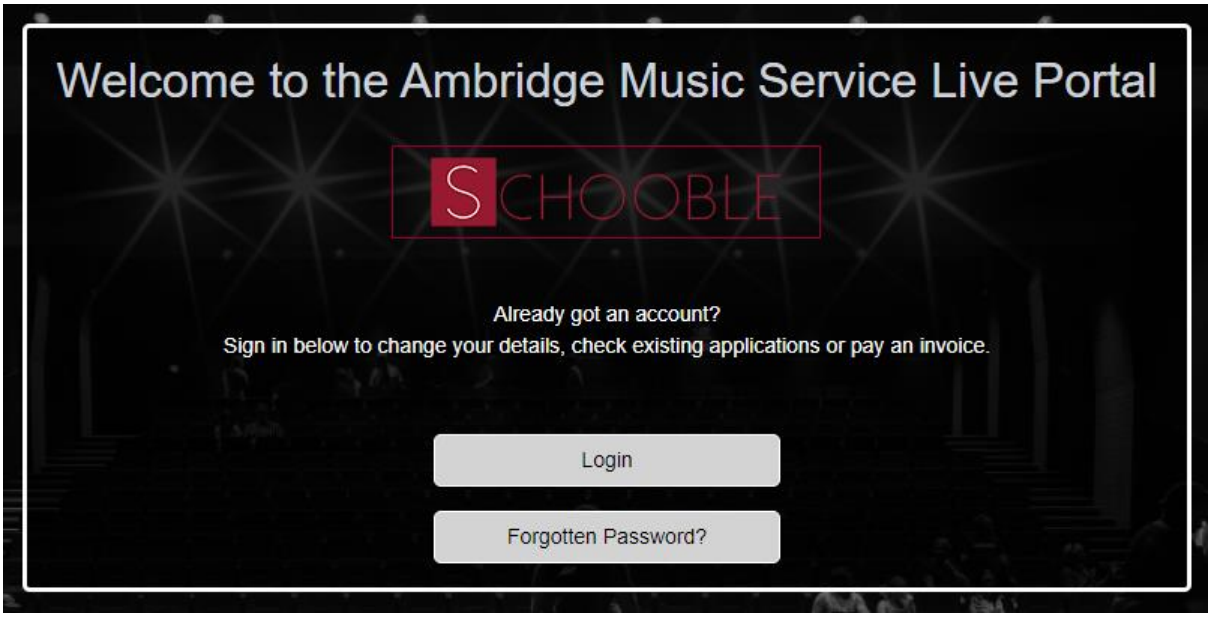
When a payment is selected, the date that each email was sent is displayed in a list to the right of the payment schedule.

An email icon is also displayed which indicates if the email was a notification email, a failed email, a rescheduled email, or a success email.

Clicking on the Icon displays the Email contents.

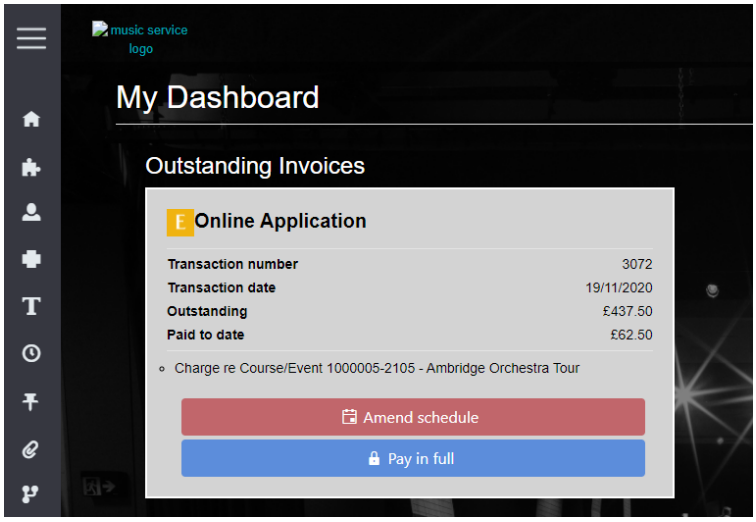
Looking at a Debtors Portal

Debtors can log in to the Paritor Online Portal using their Schooble account.



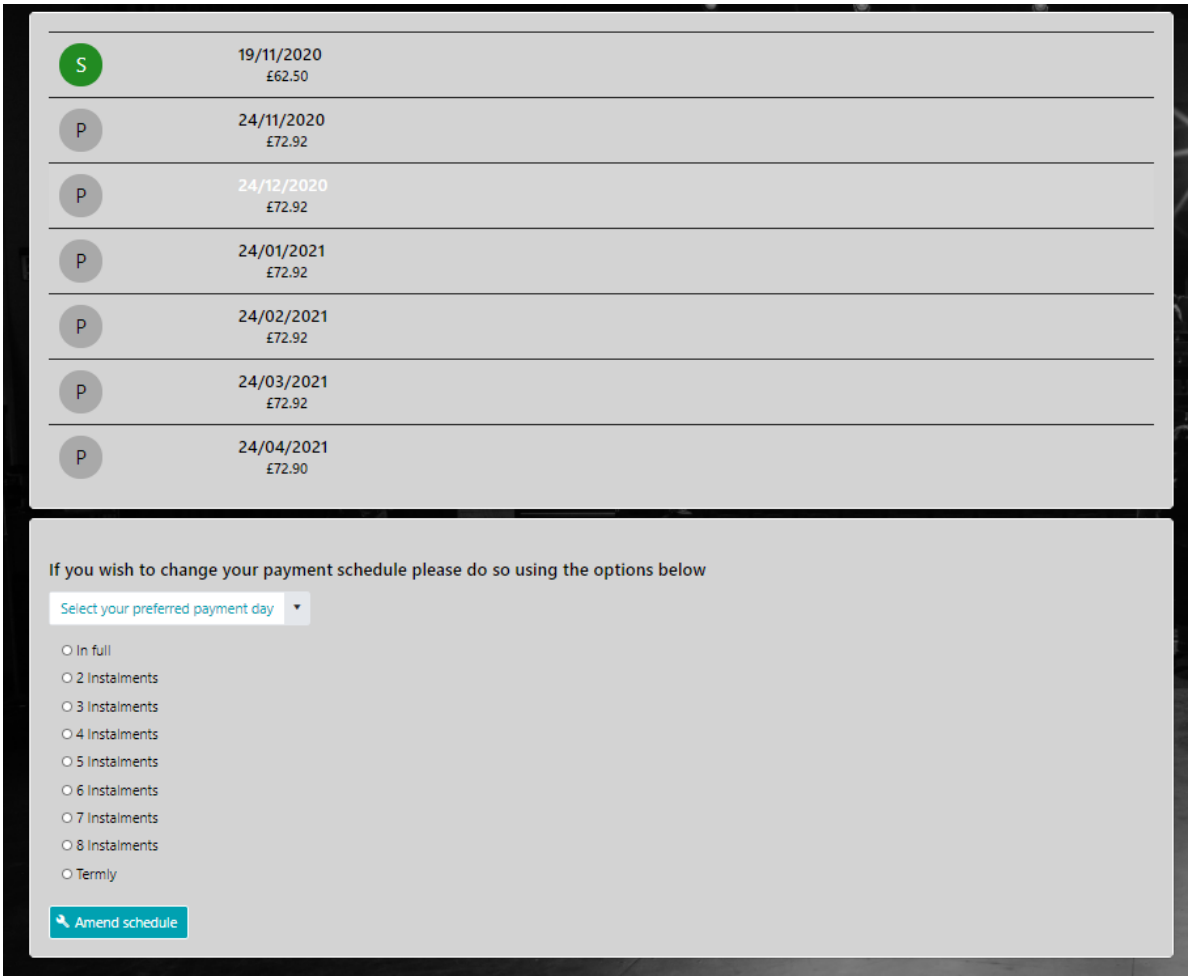
Once logged in, they will be directed to the main portal page. Here, they can view their inbox, alter their details, book onto courses, and view and pay for applications.

To pay an invoice, debtors can open their “Outstanding Invoices”. This will show a list of all their invoices and how much they have “Outstanding” for each. Here, they can view the invoice, pay the outstanding in full, check, and alter their scheduled payments.

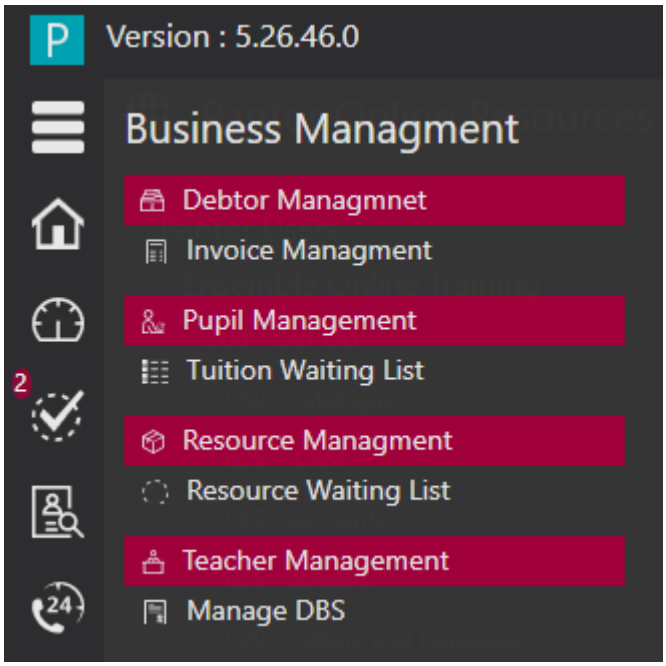


When accessing their schedule, debtors will be able to view and change the payments they have paid and any scheduled payments. Selecting “Make a Payment” will make a payment in advance of the next payment date.

On selecting” Amend Schedule”, the debtor can alter the payment date and how many instalments they want to pay the fee in. The portal will only let them pay the number of instalments up until the date that the full payment is due.



Business Management



Managing Invoices

To manage your invoices, select the Business Management icon on your main dashboard. Then select Invoice Management.

A similar display to the example below should appear on your screen…

Note: You can also access and manage your invoices in different ways depending on the invoice in question. The invoice could be accessed through the individuals Debtor Record or Pupil Invoice depending on their assigned Contact Type/s within the system.

For example, if you were looking for an invoice for an Event you could access the invoice by selecting “Tuition”, then “Events”, followed by the “Delegates” tab. By clicking on the desired delegate the same “Associated Invoice” display as shown in the example below should appear.

Invoices can be “Outstanding”, “Pending”, “In Review”, or “Disputed”. You can access invoices under any of these catagories by clicking on the check box beside each option.

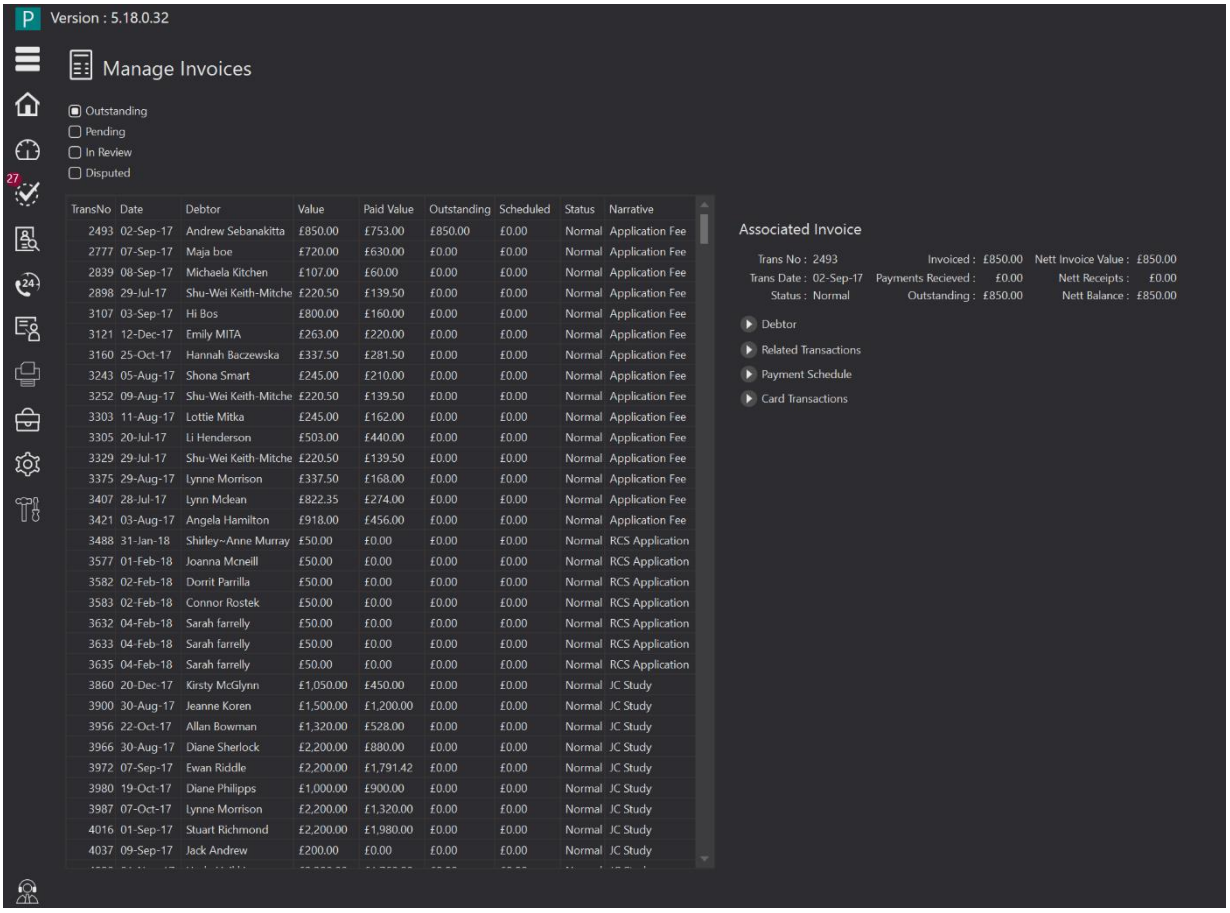
Oustanding: refers to invoices that haven’t been paid partially or in full.

Note: an invoice will not show up as outstanding if there is a payment schedule set up against that invoice.

Pending: means that the invoice hasn’t yet been sent out to the customer.

In Review: refers to an invoice that is currently being disputed or is under review because the customer has raised an issue with the invoice. Once a dispute has been settled the invoice status will be changed to “Normal”.

Disputed: means that the customer has raised a query about the invoice.

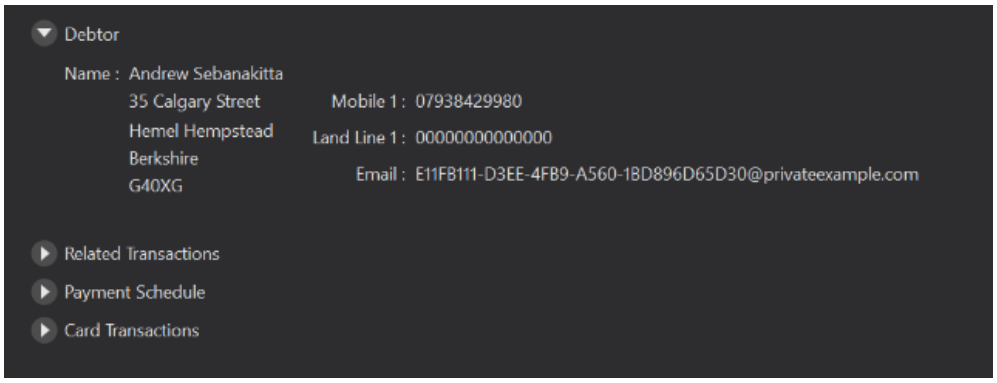


On selecting one of these options a list of invoices should appear alongside an Associated Invoice. The Associated Invoice details the following:

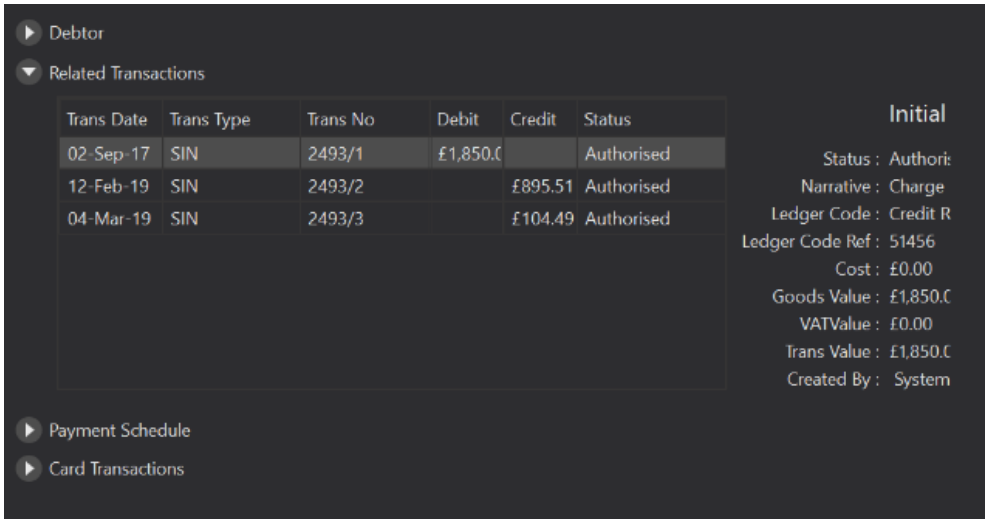
- Trans No: A unique transaction number.
- Invoiced: The total amount of the invoice.
- Nett Invoice Value: The total invoice amount including any pending transactions or pending refunds.
- Trans Date: Transaction date/ when the invoice was raised.
- Payments Received: The amount received.
- Nett Receipts: The total nett value of charges including any pending transactions or pending refunds.
- Status: The current status of the invoice.
- Outstanding: The balance remaining.
- Nett Balance: The balance remaining including any pending transactions or pending refunds.

Below this, further headings can be expanded: “Debtor”, “Related Transactions”, “Payment Schedule”, and “Card Transactions”.

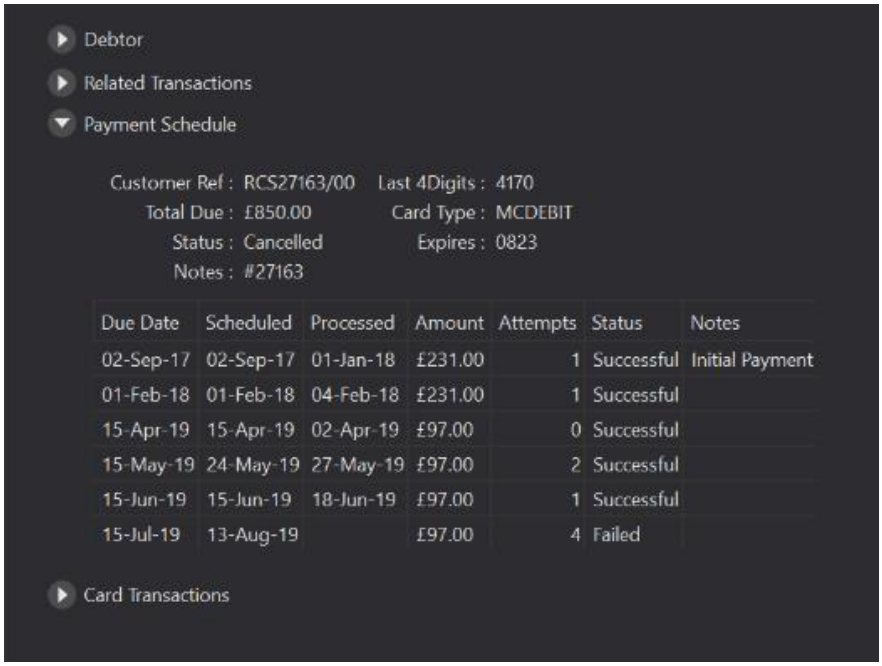
Select the small arrow icon beside these headings to reveal their corresponding details.



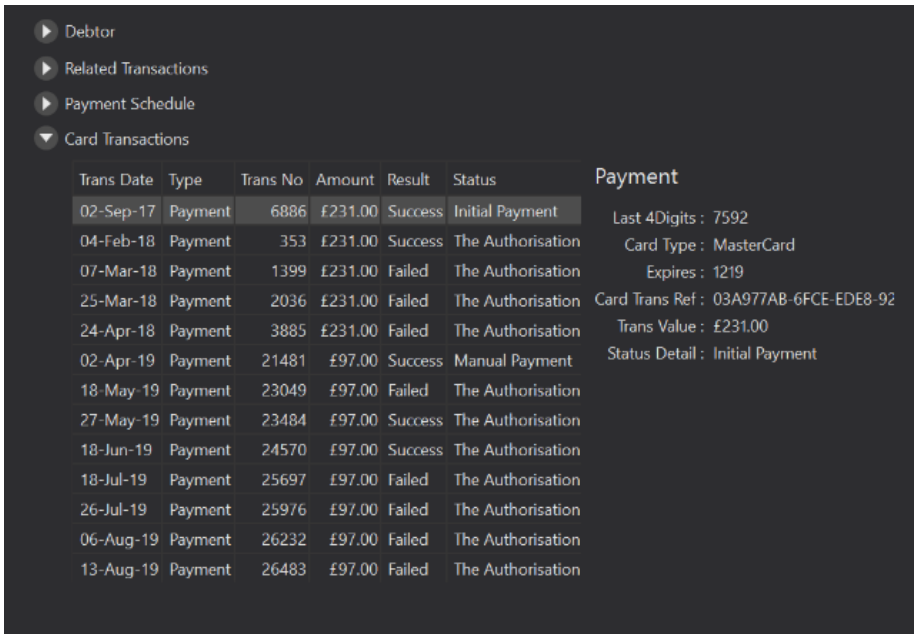
Debtor: displays information on who is paying the invoice selected.



Related Transactions: displays information on any transactions linked to the invoice selected e.g. receipts or credits.



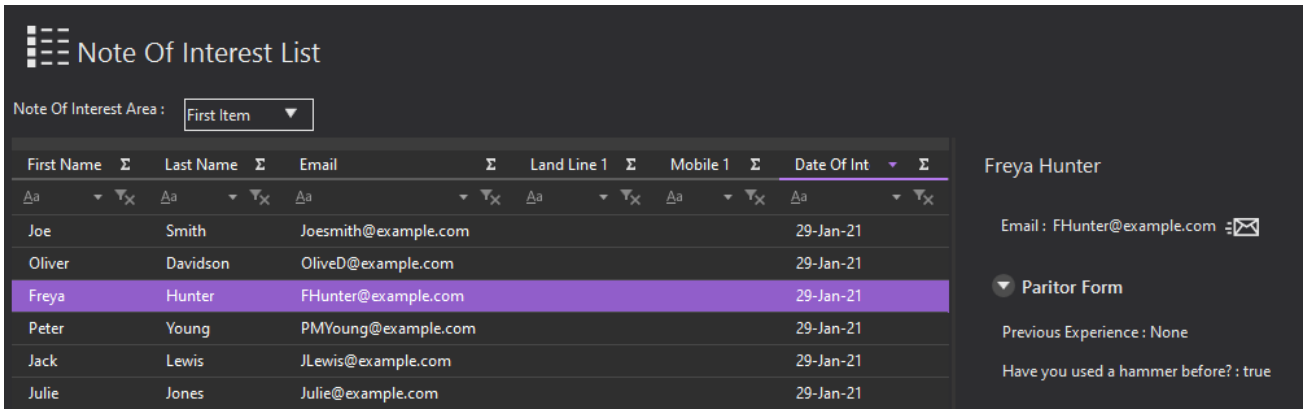
Payment Schedule: displays a log of all previous payments including the success of the payment process. A payment that was successful will have a Status of “Successful” an unsuccessful payment will have a status of “Failed”.



Card Transactions: displays each individual time that a transaction has been attempted including the date of attempt and additional information not provided under the “Payment Schedule” heading.

Managing Notes of Interest List

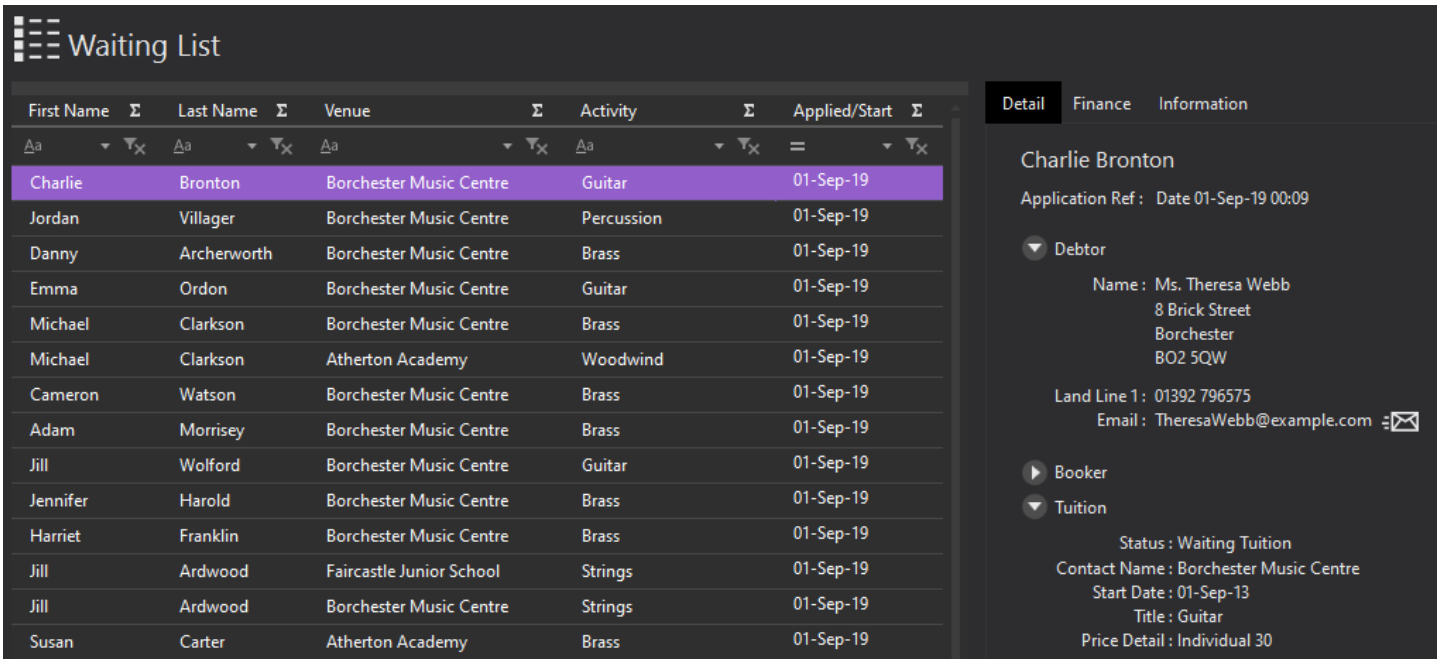
You can view your Notes of Interest List by selecting the Business Management icon for your side menu bar. This is a list of anyone who has completed a Notes of Interest form from the website. You will first need to select the Note of Interest that you want to view the list for. This will open a display like the one shown in the example below. The grid will react in the same way all grids in Xperios do.



Managing Tuition Waiting List

To view your tuition Waiting List, go to the Business Management tab in the home screen side menu bar, and select “Tuition Wating List”.

The Tuition Waiting List shows all pupils who are waiting to be allocated tuition for an activity from a school or centre. This will open a display like the example shown below. This shows all the pupils who are on a Waiting List. You can filter and sum this data in the same way you can within Excel. You can move the pupils out of the Waiting List by finding the record for the school or centre the tuition is held at and adding them to an activity. **To see how to move people out of a waiting list please see page 103.**



You are also able to extract your Waiting List into Excel, to do this use the ‘open in excel’ icon.

Managing Resources Waiting List

Managing DBS

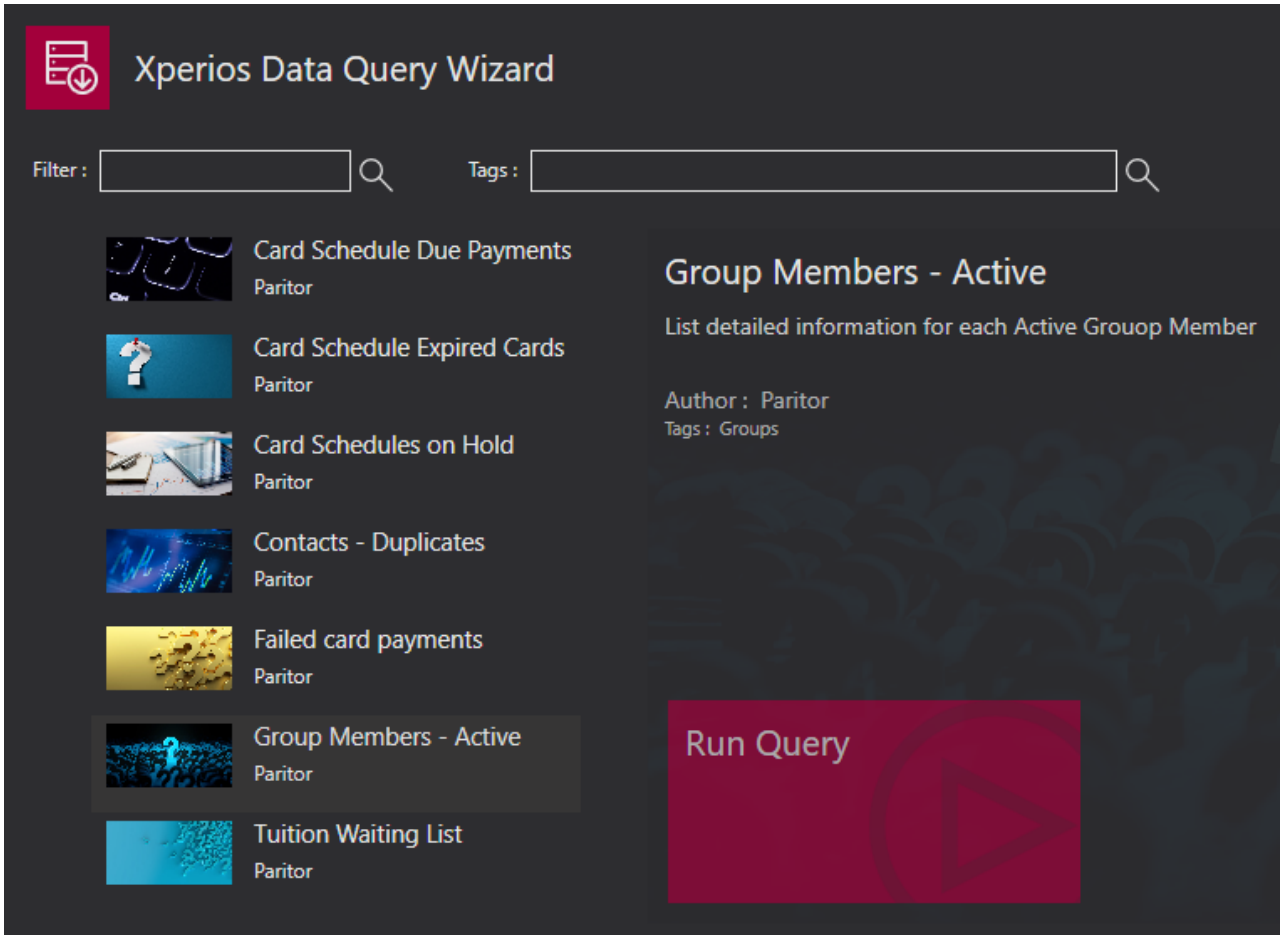
Dashboard

Dashboard View

Within Xperios you can run queries to produce a table of data. To do this go to the Dashboard using the icon shown here, which can be found in your side menu bar.

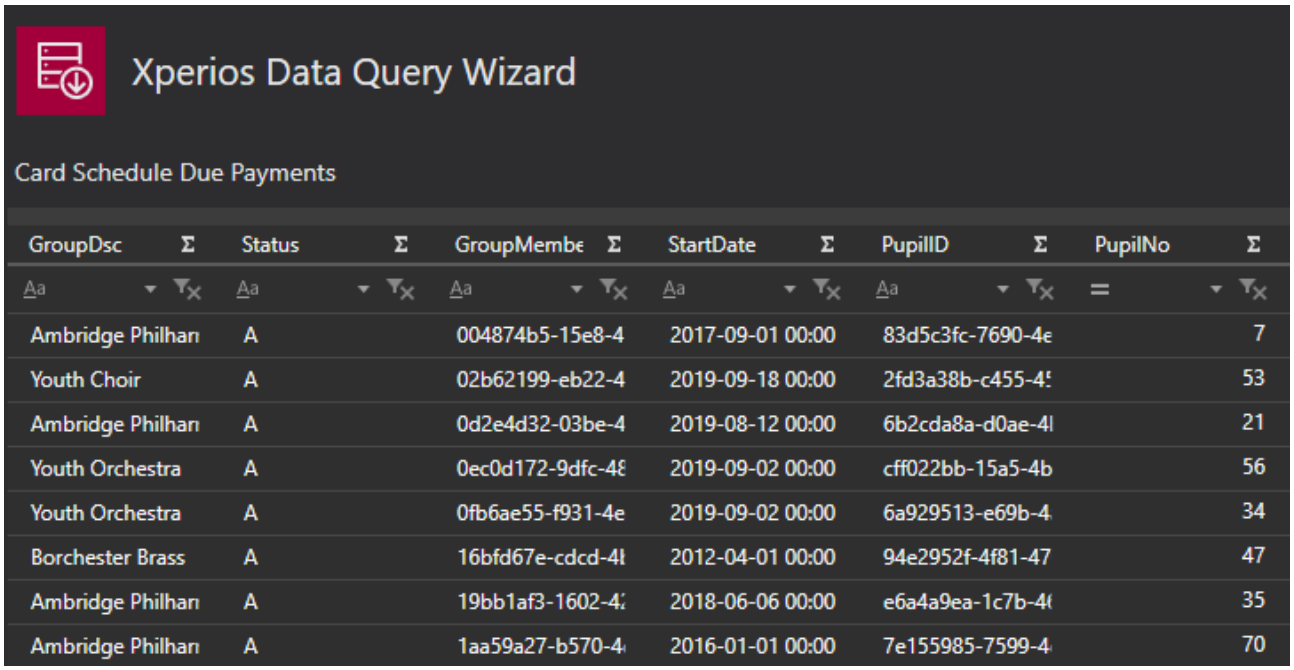
Once you have opened your Dashboard, use the Run Query icon, as shown here, to start a new query. When you click on this icon a list of queries will appear. These include all the standard queries that come with Xperios as well as any queries you have set-up in your System Settings. **For more information on how to do this, see page 25.**

You can also run queries from the Tuition menu. Select the type of tuition you want to run a query for, such as Groups then select the Run Query icon. This will open a display like the one navigated from your Dashboard, however, there will be a tag filter of the tuition you are in e.g., "Tags: Groups". Running a query from here should work in the same way as it would have you ran the query from your Dashboard.



The screen shot above shows the list of the queries that are there as standard. To run a query, select the query that you want to run, and then click on the "Run Query" button. You can filter the queries by their name or use tags to filter them. Some queries will have more tags than others.

When you click on “Run Query” a table will open with all the information for that query. The more data there is for a query, the longer it may take to load. If there is no data for the query, a blank table will be displayed. When clicking on each of the standard queries a description will appear under the name to tell you what each query does.



GroupDsc	Status	GroupMembe	StartDate	PupilID	PupilNo
Ambridge Philhar	A	004874b5-15e8-4	2017-09-01 00:00	83d5c3fc-7690-4e	7
Youth Choir	A	02b62199-eb22-4	2019-09-18 00:00	2fd3a38b-c455-4!	53
Ambridge Philhar	A	0d2e4d32-03be-4	2019-08-12 00:00	6b2cda8a-d0ae-4l	21
Youth Orchestra	A	0ec0d172-9dfc-48	2019-09-02 00:00	cff022bb-15a5-4b	56
Youth Orchestra	A	0fb6ae55-f931-4e	2019-09-02 00:00	6a929513-e69b-4	34
Borchester Brass	A	16bfd67e-cdcd-4l	2012-04-01 00:00	94e2952f-4f81-47	47
Ambridge Philhar	A	19bb1af3-1602-4:	2018-06-06 00:00	e6a4a9ea-1c7b-4(	35
Ambridge Philhar	A	1aa59a27-b570-4	2016-01-01 00:00	7e155985-7599-4	70

When you select one of the queries and select “Run Query” a display like the one shown above will appear. This display will show all data relevant to the query along with all relevant columns.

If you wish to only see certain pieces of data from the query, you can filter each column of the table. You can also extract this data into Excel for more functionality, to save, or to print. This can be done by clicking on the icon shown here. When you extract the data to Excel, it will appear in the same way it does in Xperios. Therefore, if you have filtered the table to only show a certain group, only this group will appear in the Excel spreadsheet. Any of the sums that you have done will also show in Excel if you extract the data.

Grids

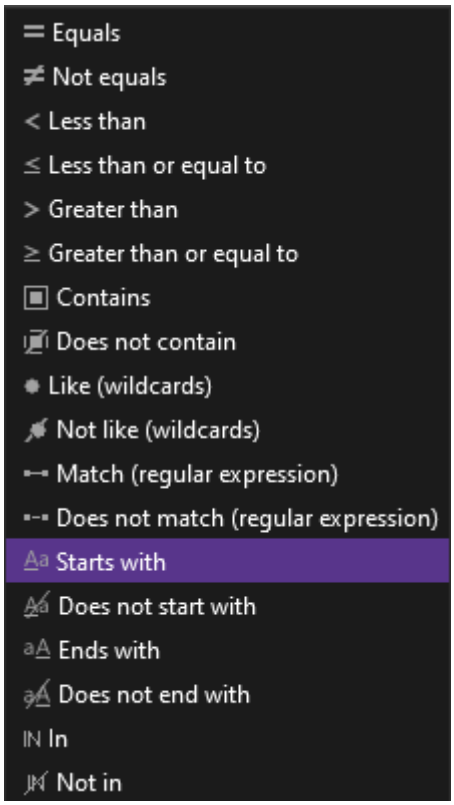
To extract data into a grid within Xperios, go to any grid within the system, and select the extract data icon shown here.

Where you extract your data from will determine what data shows. In any type of tuition such as events, if you are on the main page i.e. the details page, when you use the extract data icon you will get all the data on events. Whereas if you go to the delegates tab under events and select the extract data icon, then all the information on delegates for that event will appear.

Grids appear across Xperios, there are some functions that appear in all grids, and other functions that only appear in some. You can expand or reduce the size of a column on all grids. To do this, hover

over the right-hand gap of a column so that a double arrow appears. Then drag left to reduce the size or right to increase the size of the column.

Filters



In all grids you can filter data. When you click the filter option you can filter by each different item in that column. You are also able to choose how the column is filtered. If you click on the Aa at the top of the column the drop-down menu shown above will appear. Here you can select the best filter option for the type of data within that column. Once you have selected the appropriate filter option, use the drop-down list to select what you want to filter by.

The option at the top of this filter list is the customer filter. The operator column will give you the same options as shown in the list above. However, in the customer version you can add more than one condition and select if they are an **'or'** statement, or an **'and'** statement.

You are also able to Sum your data. There are three options under the Sum icon, which are count, minimum or maximum.

The "Count" option will give you a total of how many records there are in the grid, this will update if you add or remove filters.

The "Minimum" option will give you the record in that column that has the least number of matches, for example, in the date's column, this function will give you the date that is repeated the least number of times. Likewise, the "Maximum" will give you the highest count.

You are also able to increase and decrease the size of a column by hovering over the gap between two columns anywhere in the grid, clicking, and dragging. Doing this will always change the size of the column on the left of where you have clicked.

Sum

You are also able to carry out sum functions on the data. To do this select the sum icon next to a column header. A drop-down menu, like the one shown above, will appear.

The "Average" and "Sum" options only appear for numerical data. The "Count", "Minimum", and "Maximum" appear for all data types. The "Average" will work out the average for all the numerical data, this uses the "Sum" and the "Count".

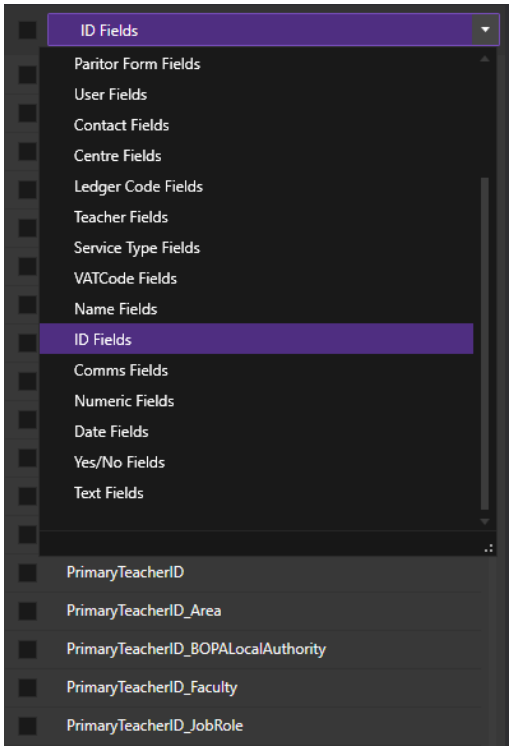
"Count" will give you a total of how many pieces of data there are.

The “Maximum” will tell you which piece of data has the most entries in that column. The “Minimum” will give you the data which has the least number of entries. The “Sum” will total all numerical data.

When selected, these will appear at the bottom of the grid. You can use the Sum option on all grids within Xperios.

Select Columns

Once you are in a grid view from extracting data you will be able to use all these functions and some extras. The first extra, when viewing a grid from the extract point, is the option to add or remove columns. When you extract the data, certain standard columns will show.



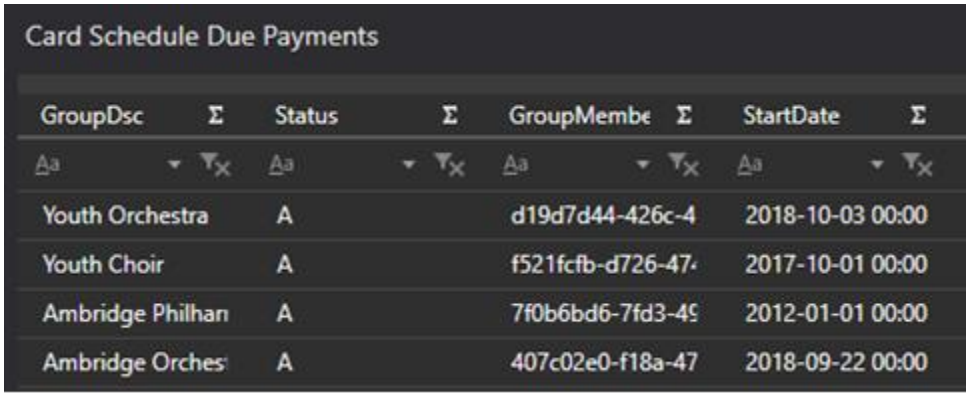
By clicking the Select Columns icon shown here, a list of all possible columns will appear on the right-hand side.

You can tick and untick any columns that you wish to be shown or not shown. There will be different standard columns ticked depending on the date of extraction. You can also filter the columns by type when selecting which columns to tick.

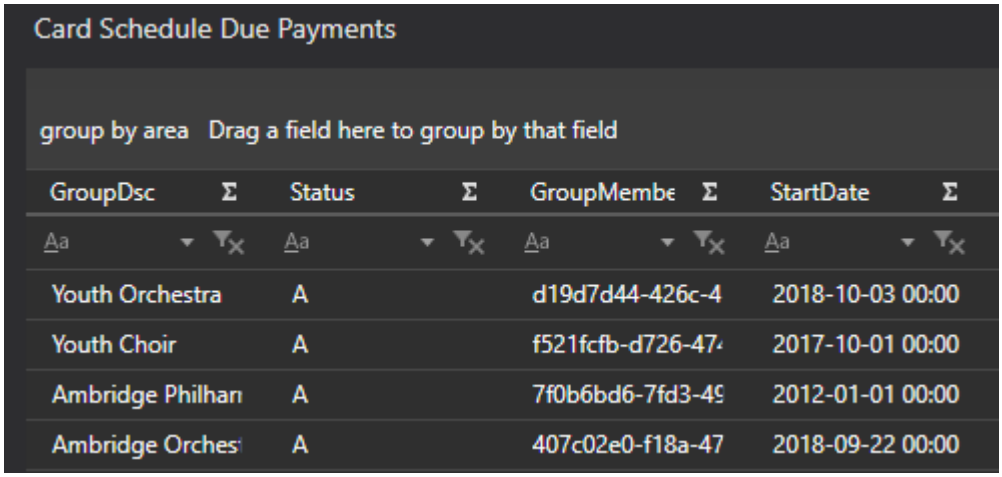
When you extract to Excel, the data will appear as it is before selecting the icon. Excel will only show the columns that you have selected to view. It will also only show data based on your filter selections. In Excel, you will not be able to remove filters to view extra data, however, you can filter the data further.

There are some pieces of data that you will be able to edit when in extract view. Which pieces you can edit will depend on the data you are viewing. You can only select columns on extract data, or query grids.

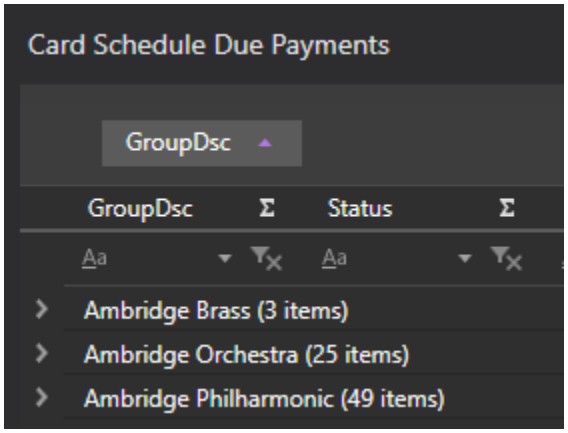
Group Data



Within Xperios you can group your data grids, this can be done by clicking on the grey bar at the top of a grid to expand it.

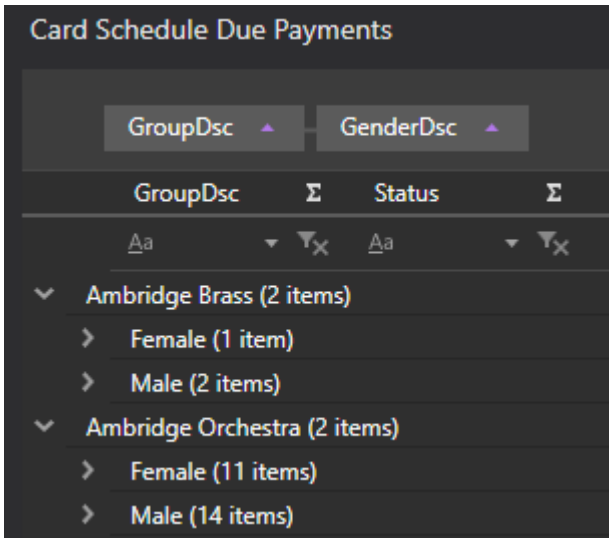


You can then drag any of the header fields into this area and it will group the data using that field. In this example, we will use the “GroupDsc” column.



The data is now grouped by the “GroupDsc”. You can expand each group using the arrow. You are then able to group the data in future using another field such as gender. Whichever heading you put first will be the first subgroup. For example, if you put “GenderDsc” after “GroupDsc” the data will

appear as a list of groups. When you expand the column, it will show the split of gender. You can also put gender first, in this case, the list of genders will show, then the group divisions within that gender.



Doing this will link the two headings together. You will now have two sub-headings within your data. When you extract the data into Excel it will include any subgroups you have made. As shown in the example above, if you extract this grid into Excel, your data will appear with the sub-headings of “GroupDsc”, broken down into “GenderDsc”. To remove the sub-groups, simply drag the header out of the grey bar. You can group data from all grids within Xperios.

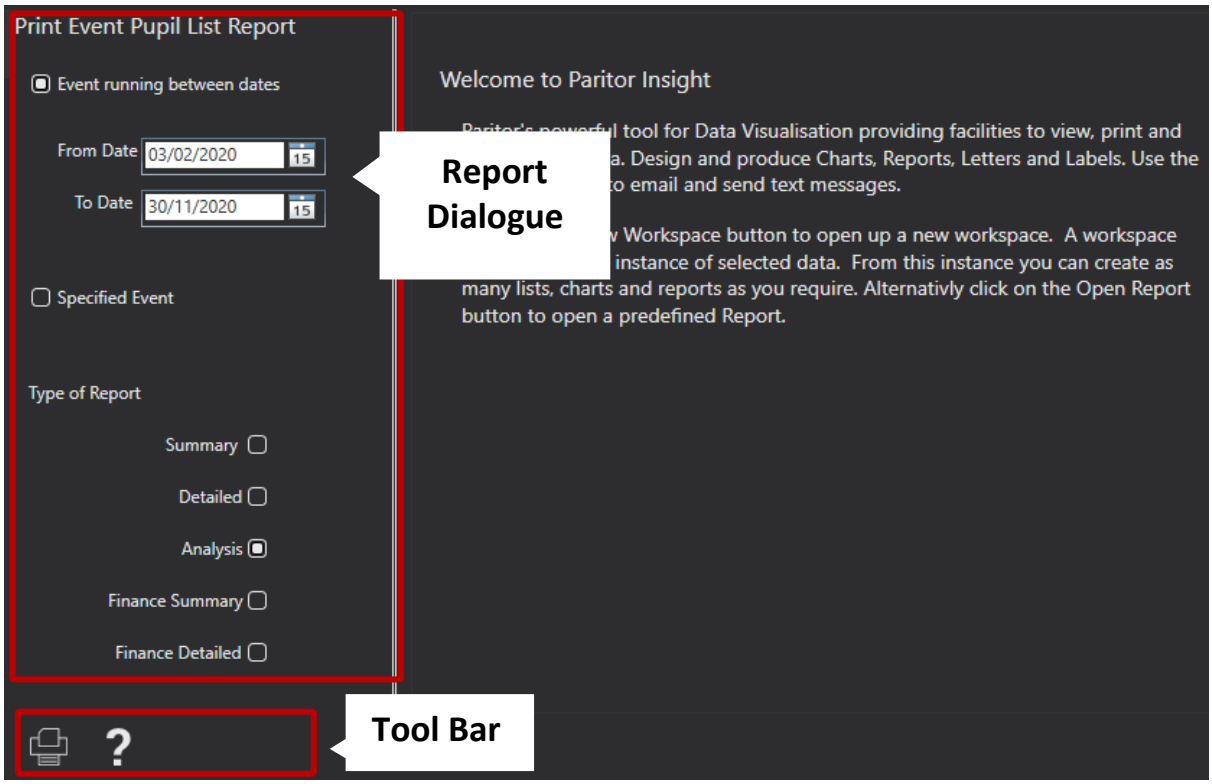
Extracting Data

You can open data from any of the extracted grids into Excel. To do this, use the open in Excel icon shown here. This will open the grid in Excel and display it exactly how it appears in Xperios. Only the data as it appears after selecting your filters will appear in Excel. Using the icon will mean only the columns that you have selected within Xperios will show in Excel. If you want to remove filters or add in columns, this must be done in Xperios. Then use the open in Excel icon again. You can only extract data to Excel from the extract data or query grids.

Report

Report Dialogue

The Side Bar on the Dashboard contains a Report menu item. Selecting this will display a sub-menu of all available reports. Select one of these to display the selection criteria for the report.



Dialogue Panel

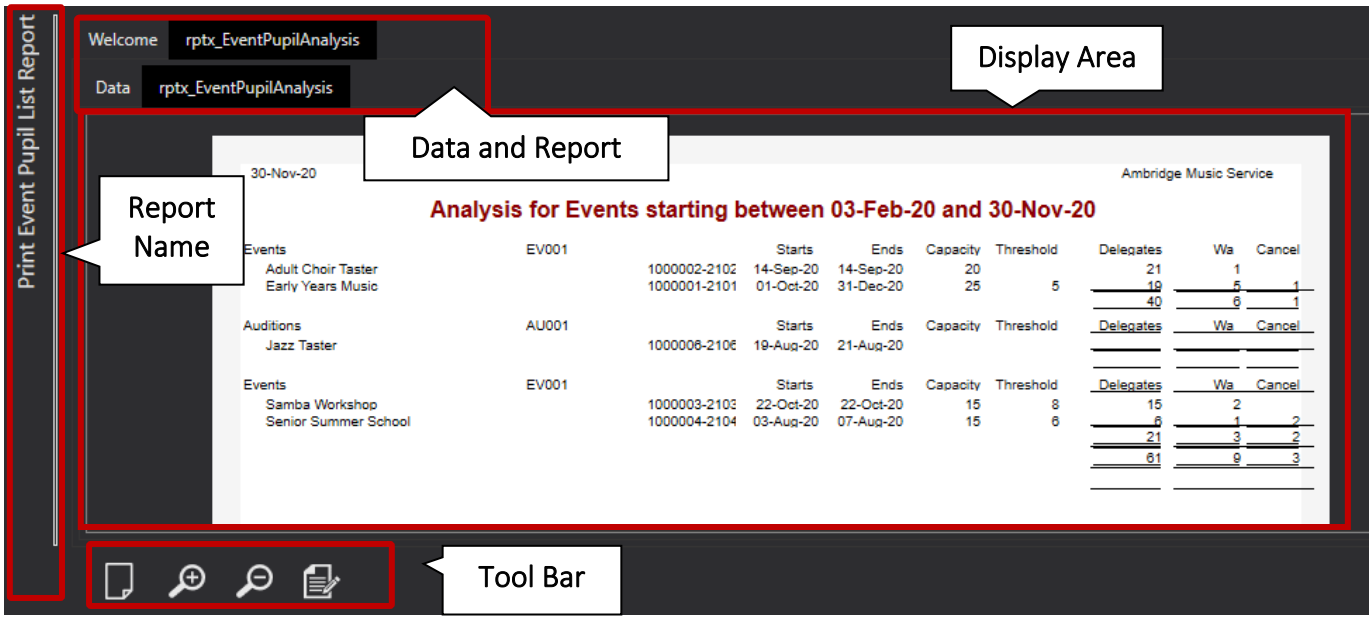
This area is used to display report options and prompt for selection criteria.

Tool Bar

The Tool Bar contains a list of menu options. The list of menu items will change depending on function but will always show a Display Report icon.

Report View

After selecting the Report type, options, and selection criteria, the User can choose to display the report. This will change the display to include a Report View layout.



Display Area

This area is used to display either the report or the report data.

Tool Bar

The Tool Bar contains a list of menu options. These include options such as Print, Zoom-In, Zoom-Out etc.

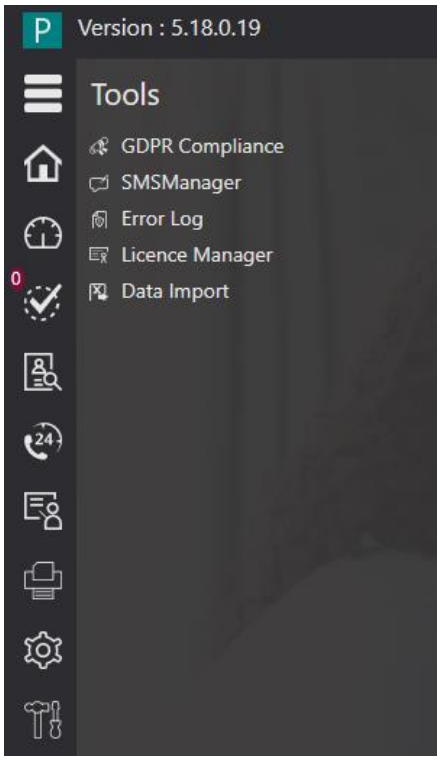
Data and Report Tabs

A report can be viewed as raw data or as a formatted report. Switch between the two by selecting the appropriate tab.

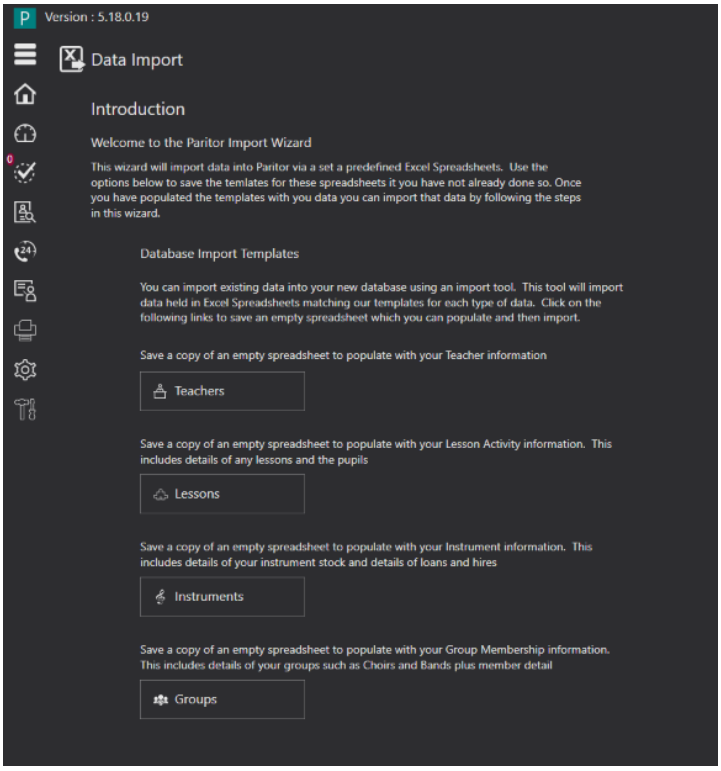
Report Name

Displays the name of the current report. Clicking on the name will re-display the reported dialogue allowing you to change the options and display a new version of the report.

Importing Data

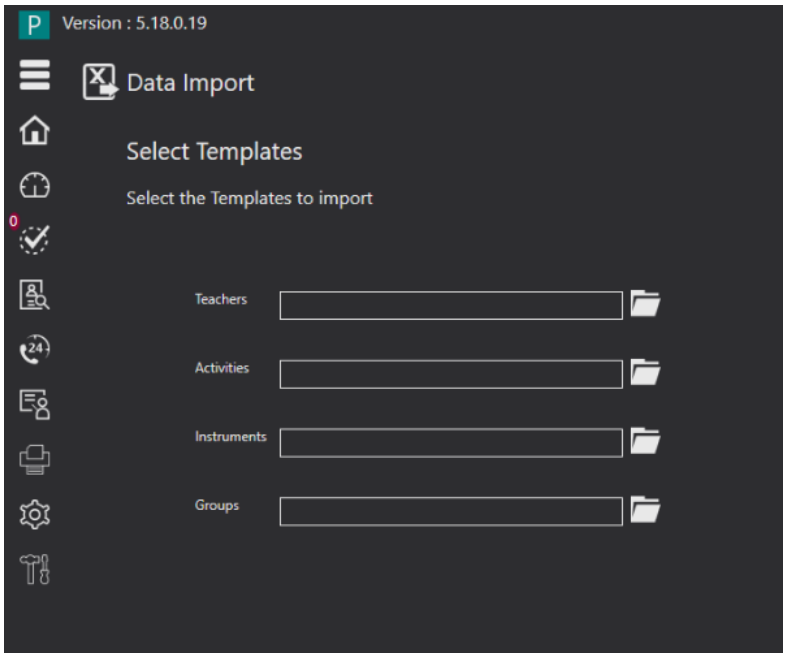


You will find the spreadsheets to import data under “Data Import” under the “Tools” icon in the side menu bar.

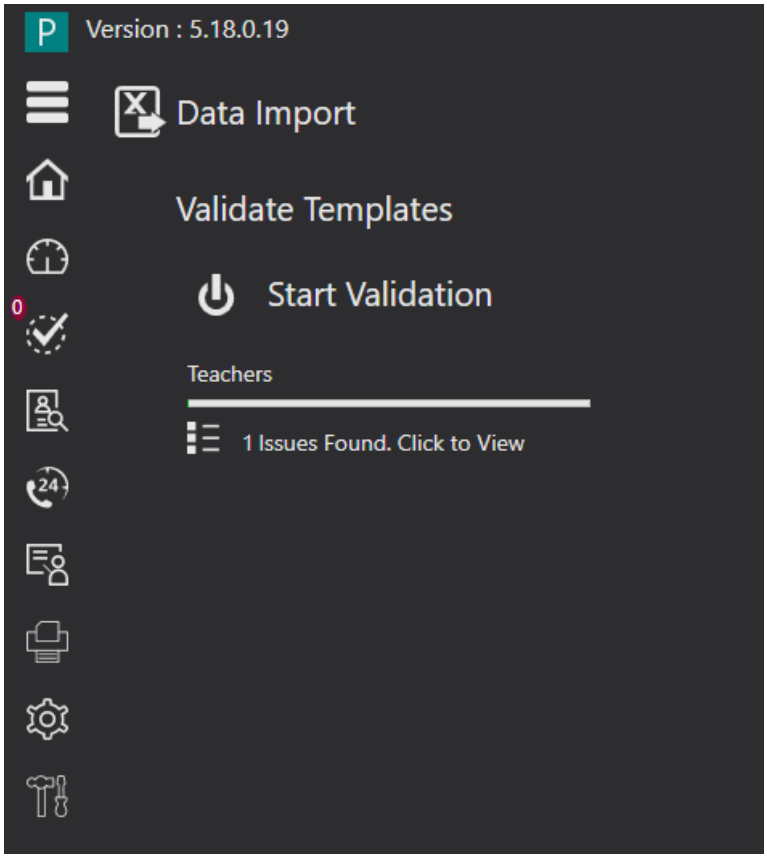


First, download the spreadsheets and input all your data.

Upload the amended spreadsheets by selecting a file from your computer.



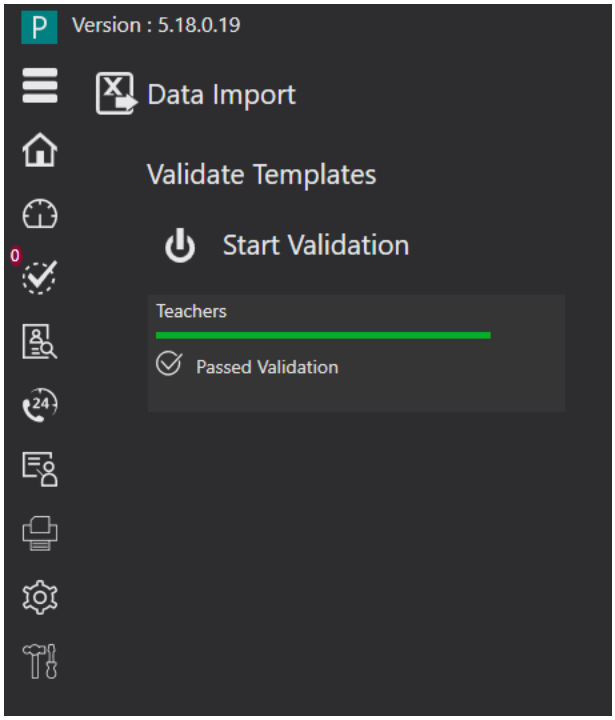
Once you have imported your spreadsheets you will need to validate them. You can validate one spreadsheet at a time or all of them at the same time.



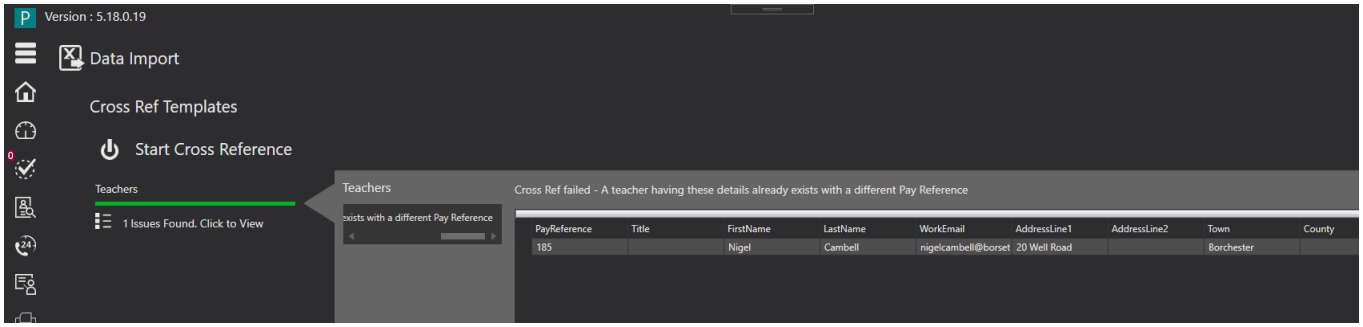
Validating the spreadsheets will involve checking for any errors or missing parts in the data, or any found issues with trigger error messages. You can click on these error messages and open the spreadsheet in question.

By clicking on each error, the system will highlight the cell for you. The columns in red are mandatory columns and the columns in green are a group of mandatory fields. A green column indicates that you need at least one of these pieces of data.

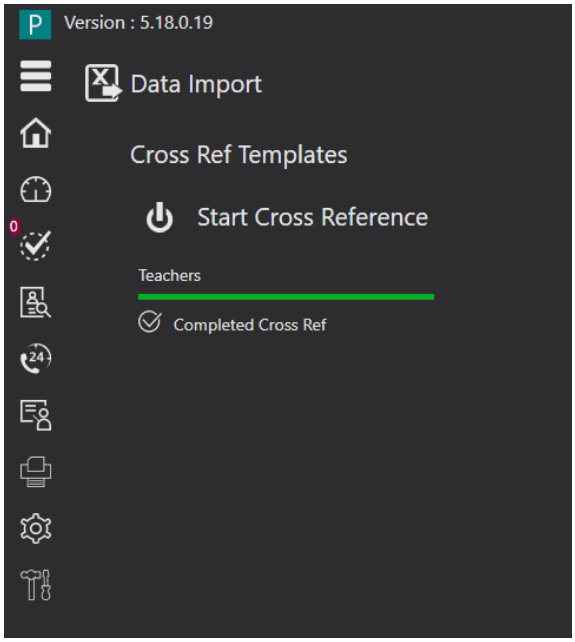
Once you have corrected any errors you can start the validation again until no errors are found.



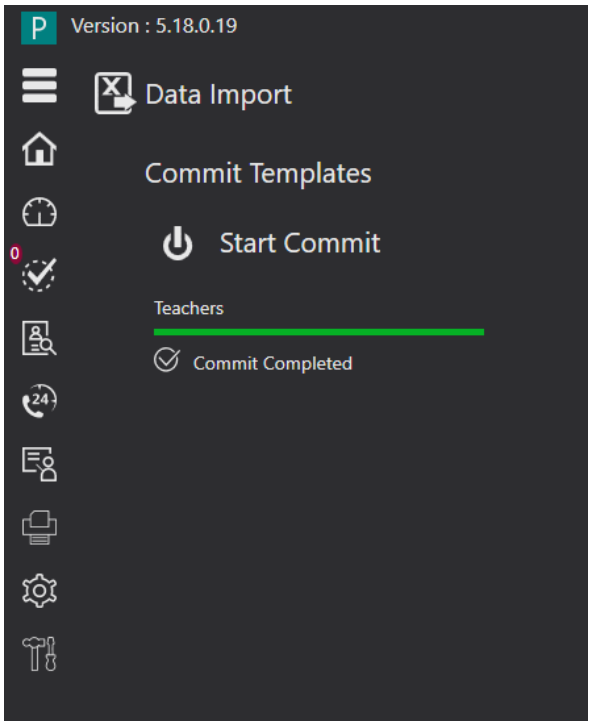
The next stage validates your data against the existing database.



If you already have some existing data that matches the data, you are trying to import you will receive an error. On opening the error window, you can source the data match already in the system.



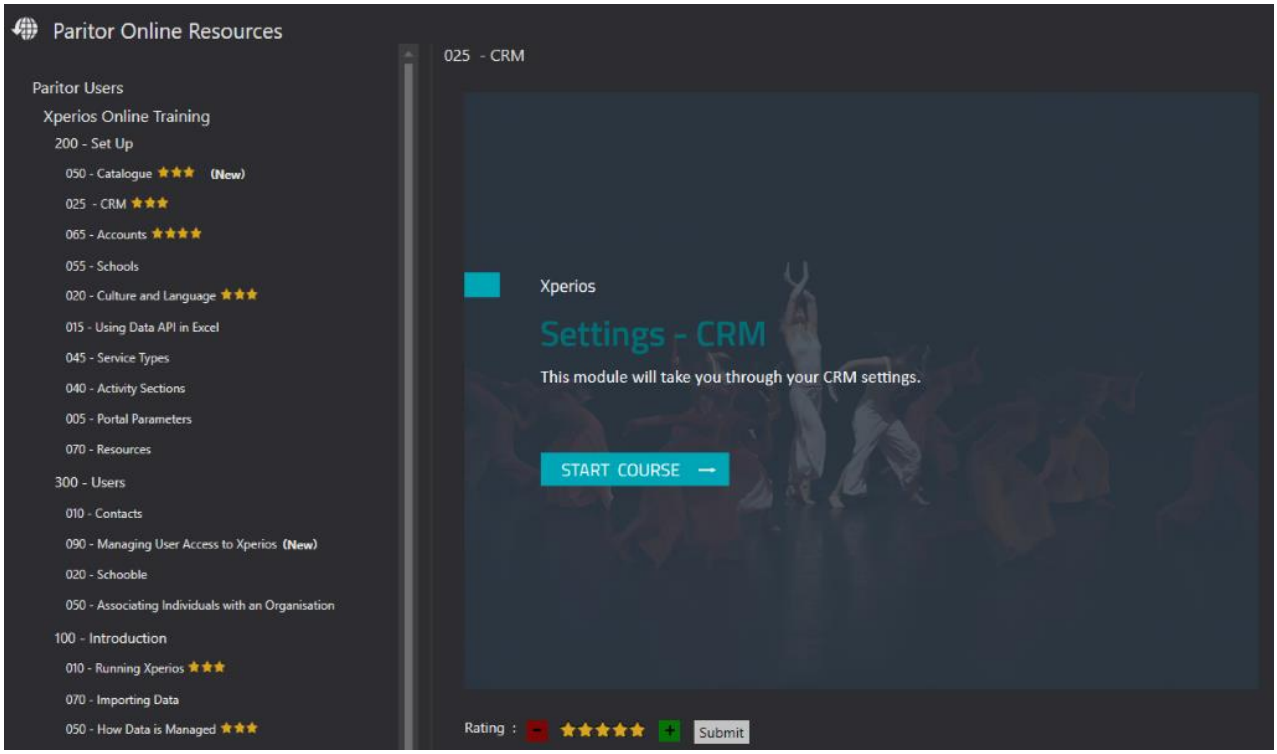
Once you have checked all your data against the current database you can begin importing your data.



Once you have input the data your data import is complete. This process is the same for inputting all teachers, activates, instruments, and groups.

Paritor Online Resources

You can find the Online Resource icon in the menu bar on the left-hand side of Xperios. On opening this, you will see all the resources available to you. This may include some uploaded by your organisation but will also include all Paritor online training resources. Here, you can view and interact with the available resources. Any items that are marked as “Show as New” in library items will show here with (New). This will appear until you go into your library items and deselect the item as “Show as New”. If you leave a resource part-way through, go to another part of the system, or look at another video and then return to it, you will have the option to either resume from where you left or to restart. There is also a star rating for Paritor resources. You can select the star rating that you want to give each course, then click Submit. The star rating that you see next to each resource in the list on the left-hand side is the average rating given by everyone who has viewed and rated it.
For more information on adding and editing library items see page 45.



Appendix

Types of Queries and Their Parameters

Audition Pupil Analysis will display a list of all pupils from an Audition within parameters...

- AuditionPupilAnalysis
- FromDate smalldatetime,
- ToDate smalldatetime,
- Audition UniqueIdentifier

Audition Pupil List Detail will display a list of details of all pupils within an Audition from within the parameters...

- AuditionPupilListDetail
- FromDate smalldatetime,
- ToDate smalldatetime,
- Audition UniqueIdentifier
- IncludeAll as bit

Audition Pupil List Summary will display a summary view of pupils within an Audition from within the parameters...

- AuditionPupilListSummary
- FromDate smalldatetime,
- ToDate smalldatetime,
- Audition UniqueIdentifier
- IncludeAll as bit

Card Failed Scheduled will display all card schedules that have failed. There are no parameters for this query...

- CardFailedScheduled
- No parameters

Card Register will display all cards that are registered with your organisations within the parameters...

- CardRegister
- FromDate smalldatetime,
- ToDate smalldatetime

Card Schedule Due Payments will display the due dates for all card schedules from within the parameters...

- CardScheduleDuePayments
- ScheduleDate smalldatetime

Debtor Balances will display all remaining balances from within the parameters...

- DebtorBalances
- ToDate SmallDateTime

DL Invoice Outstanding will display a list of all outstanding invoices within your systems from within the parameters...

- DLInvoiceOutstanding
- ToDate SmallDateTime,
- IncludeScheduledPaymentDebt as bit

DL Invoice Outstanding Detailed will display a list of all outstanding invoices with all related details within your systems from within the parameters...

- DLInvoiceOutstandingDetailed
- ToDate SmallDateTime,
- IncludeScheduledPaymentDebt bit

DL Invoice Register will display a register of all invoices within your systems from within the parameters...

- DLInvoiceRegister
- FromDate smalldatetime,
- ToDate smalldatetime

DL Receipt Register will display a register of all receipts in your system from within the parameters...

- DLReceiptRegister
- FromDate smalldatetime,
- ToDate smalldatetime

DL Refund Register will display a register with all refund receipts in your system from within the parameters...

- DLRefundRegister
- FromDate smalldatetime,
- ToDate smalldatetime

Event Pupil Analysis will display an analysis of all pupils for the selected Event from within the parameters...

- EventPupilAnalysis
- FromDate smalldatetime,
- ToDate smalldatetime
- EventID UniqueIdentifier

Event Pupil List Detail will display an analysis of all pupils with their details for the selected Event from within the parameters...

- EventPupilListDetail
- FromDate smalldatetime,
- ToDate smalldatetime,
- EventID UniqueIdentifier,
- IncludeEvaluating as bit
- IncludeAll as bit

Event Pupil List Finance will display a list of finances for each pupil for the selected Event from within the parameters...

- EventPupilListFinance
- FromDate smalldatetime,
- ToDate smalldatetime,
- EventID UniqueIdentifier

Event Pupil List Finance Summary will display a list summary of finances for each pupil for the selected Event from within the parameters...

- EventPupilListFinanceSummary
- FromDate smalldatetime,
- ToDate smalldatetime,
- EventID UniqueIdentifier

Event Pupil List Summary will display a list summary of each pupil for the selected Event from within the parameters...

- EventPupilListSummary
- FromDate smalldatetime,
- ToDate smalldatetime,
- EventID UniqueIdentifier,
- IncludeEvaluating bit,
- IncludeAll as bit

Exam Session Pupil Analysis will display all pupil information for the selected Exam from within the parameters...

- ExamSessionPupilAnalysis
- FromDate smalldatetime,
- ToDate smalldatetime,
- ExamSession UniqueIdentifier

Exam Session Pupil List Detail will display a list of all pupil details for the selected Exam from within the parameters...

- ExamSessionPupilListDetail
- FromDate smalldatetime,
- ToDate smalldatetime,
- ExamSession UniqueIdentifier
- IncludeAll as bit

Exam Session Pupil List Summary will display a summary of all the pupils for the selected Exam from within the parameters...

- ExamSessionPupilListSummary
- FromDate smalldatetime,
- ToDate smalldatetime,
- ExamSession UniqueIdentifier
- IncludeAll as bit

List Card Transactions will display a list of all card transactions in your systems from within the parameters...

- ListCardTransactions
- FromDate smalldatetime,
- ToDate smalldatetime