

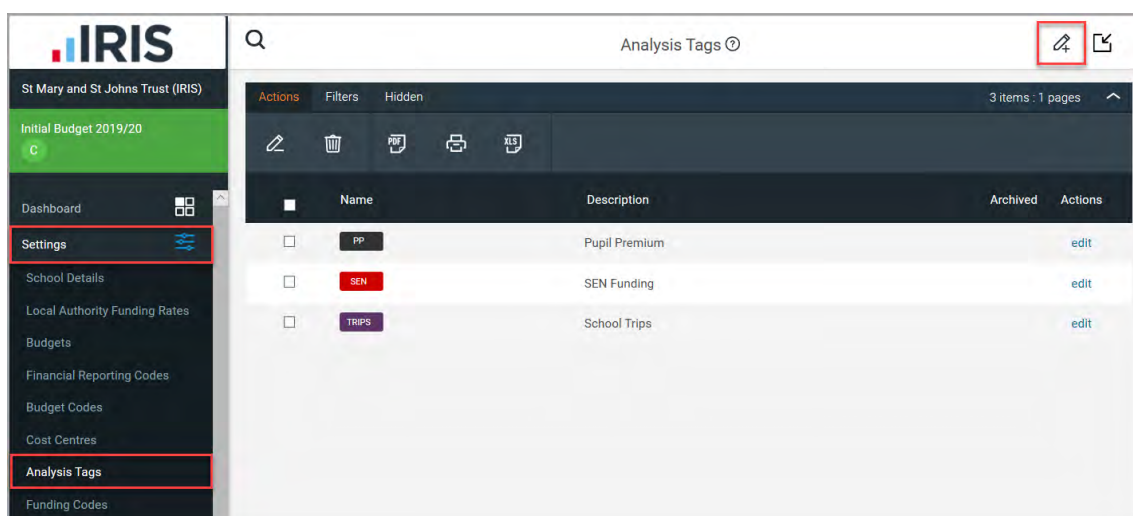


Create & Manage Analysis Tags in IRIS Financial Planner

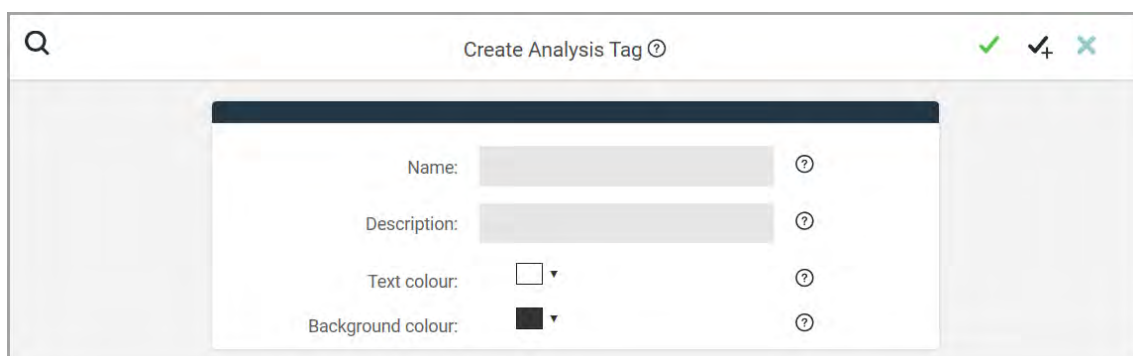
Analysis tags are optional and can form an extremely powerful part of your financial plan. They allow the generation of custom reports based on the criteria you choose, without the need to report on financial or budget code structures. You may for example want to report on Pupil Premium, SEN Funding or School Trips.

Creating Analysis Tags

1. Select **Settings > Analysis Tags** from the sidebar menu to display the **Analysis Tags** page. Click the **Add New** icon at the top of the page.



2. The **Create Analysis Tag** page is displayed. Enter a **Name** for the tag, such as **Year 7**, which will appear on all budget entries and staffing contracts when selected. It will also appear as the name of the report.



3. If required, provide more information in the **Description** field.
4. Select the required **Text colour** and **Background colour** using the colour pickers. These colours determine how the tag is displayed within the software.

5. Click the **Save** icon (green tick) at the top of the page to save the analysis tag. Alternatively, if you have more tags to create, click the **Save and Add New** icon (black tick) to save the newly created tag then create a new record.
6. A message is displayed indicating that the tag(s) have been successfully saved and will then be displayed on the **Analysis Tags** page.

New Analysis Tag 'Year 7' created. ✕

	Name	Description	Archived	Actions
<input type="checkbox"/>	PP	Pupil Premium		edit
<input type="checkbox"/>	SEN	SEN Funding		edit
<input type="checkbox"/>	TRIPS	School Trips		edit
<input type="checkbox"/>	Year 7	Year 7		edit

Adding Analysis Tags to Contracts

1. Select **Staffing > Staff Contracts** from the sidebar menu. The **Staff Contracts** page is displayed.

Current Budget	Contract Name	Employee Number	First Name	Last Name	Type	Service Term	Tags	Fund Codes	Start	End	Budget Count	Actions
✓	MSA.1 NArnaud	E000000	Nicole	Arnaud	Support	Midday Supervisors		REV [100%]	1st September, 2019		3	edit
✓	PPAmbassador.1 NArnaud	E000000	Nicole	Arnaud	Support	TEACHING ASSISTANT	PP [100%]	PUPIL [70%] REV [30%]	1st September, 2019		3	edit
✓	Contract 01	E000000	Nicole	Arnaud	Support	Midday Supervisors					3	edit
✓	MSA.1 GButterwick	E000005	Georgina	Butterwick	Support	Midday Supervisors		REV [100%]	1st September, 2019		3	edit
✓	Contract 02	E000018	Emily	Harvey	Support	Midday Supervisors					1	edit

2. Click the **edit** link adjacent to the required contract. The **Edit Contract** page is displayed.

Note: A contract can exist across multiple budgets. Ensure you review the 'Include in budgets' list before making changes.

Staff member: Arnaud, Nicole - E000000

Contract name: PPAmbassador.1 NArnaud

Contract type: Support

Service term: TEACHING ASSISTANT

Maximum salary scale: 11

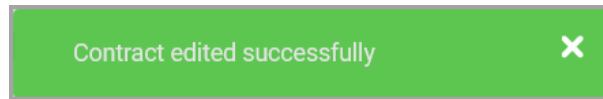
Tags: Add Tags...
PP
SEN
TRIPS
Year 7

Fund Codes: PUPIL [70%] | x REV [30%] | x

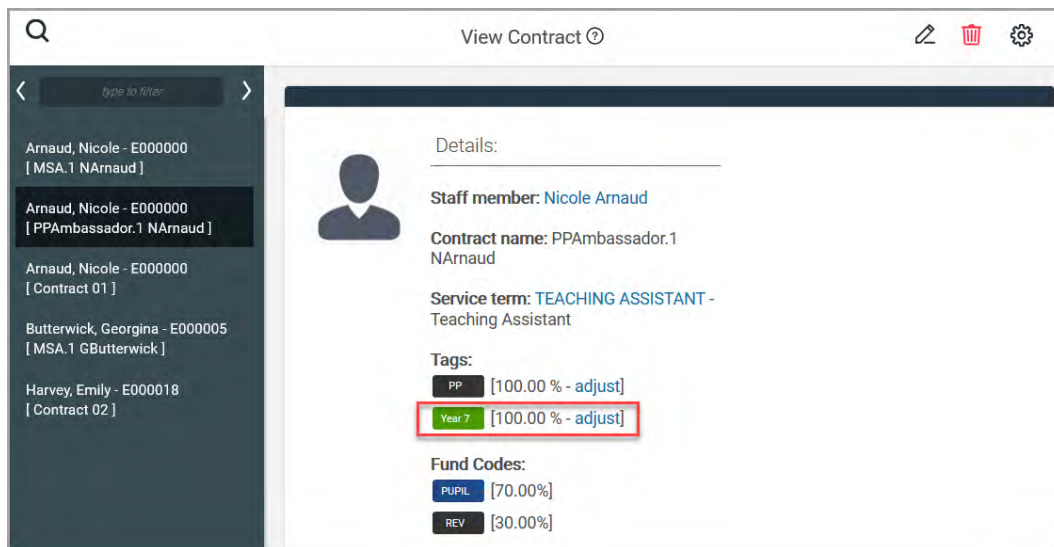
3. Select the required analysis tag from the **Tags** drop-down list. Repeat as required. The tag is then displayed immediately below the drop-down list using the colour scheme specified when the tag was created.

Tags: Add Tags...
PP | x Year 7 | x

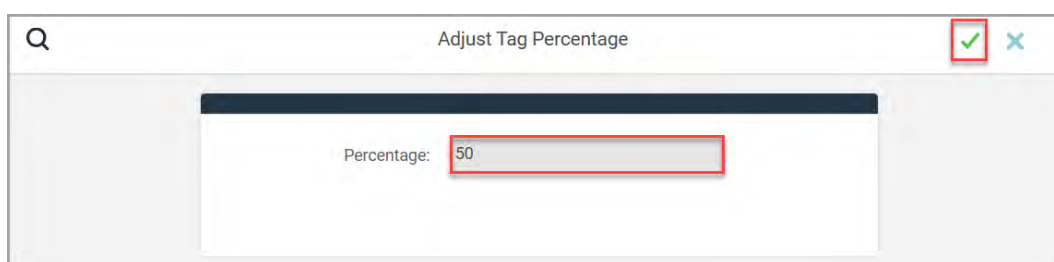
- Click the **Save** icon (green tick) at the top of the page to save the contract. A message is displayed indicating the contract has been successfully edited.



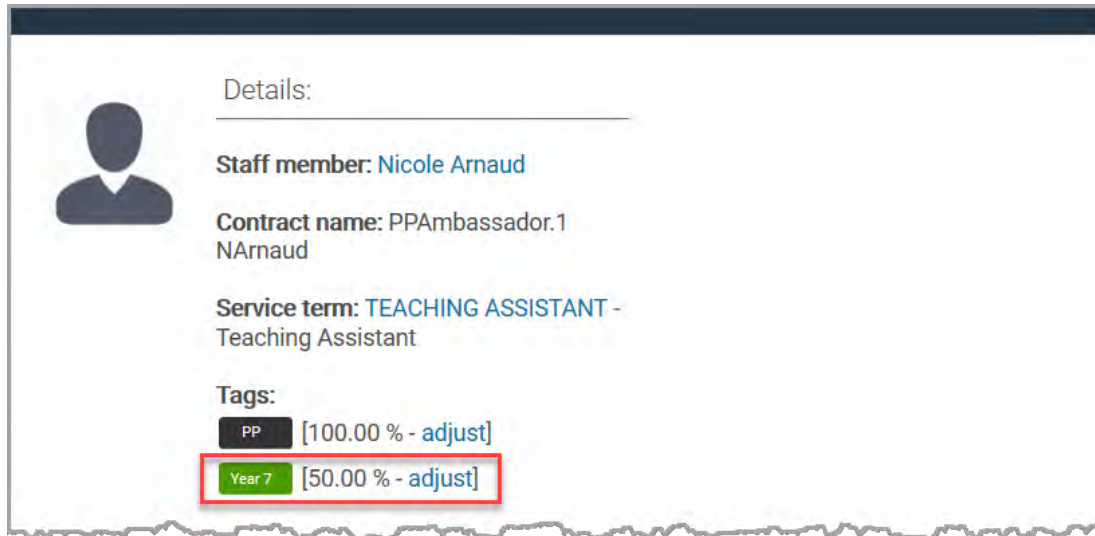
- The **View Contract** page is displayed listing the selected tags under the **Tags** heading.



- If required, you can adjust the percentage allocated to each analysis tag. If for example, you have a teaching assistant who splits their time equally between Year 7 and Year 8, you can tag their contract accordingly, adjusting the percentage for each tag. To adjust the percentage, click the blue **adjust** link (as shown in the previous graphic).
- The **Adjust Tag Percentage** page is displayed. Manually enter the required percentage then click the **Save** icon (green tick) at the top of the page.

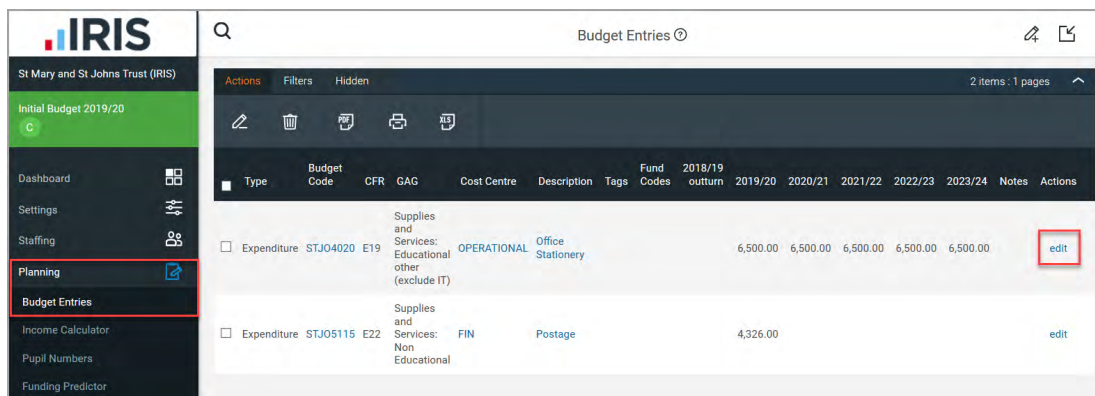


8. The **View Contract** page is displayed with the amended percentage.

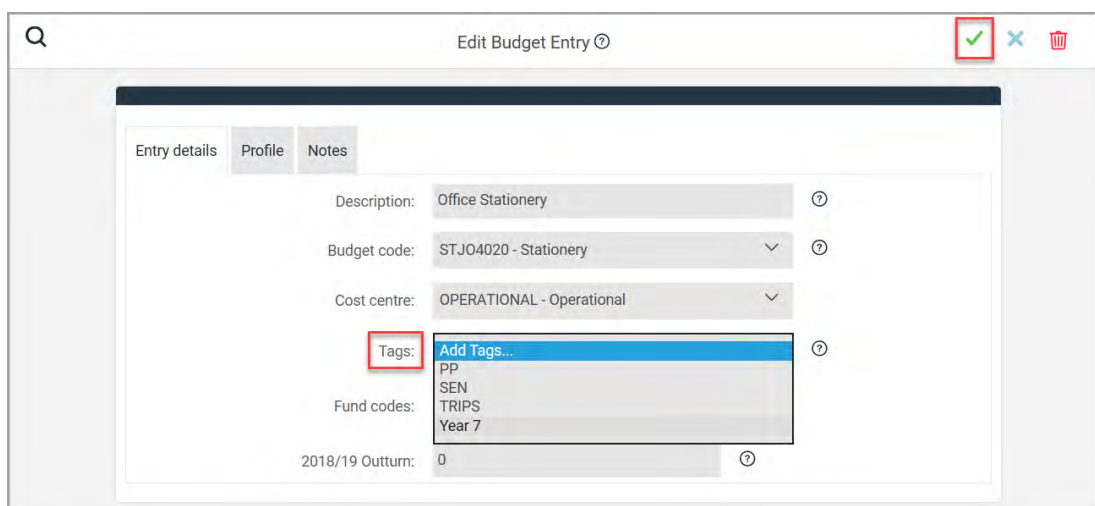


Adding Analysis Tags to Budget Entries

1. Select **Planning > Budget Entries** from the sidebar menu to display the **Budget Entries** page. Click the **edit** hyperlink adjacent to the required budget entry.



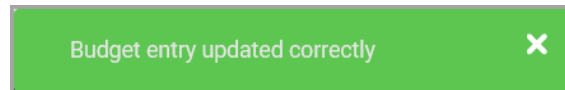
2. The **Edit Budget Entry** page is displayed. Select the required analysis tag from the **Tags** drop-down list.



- The tag is then displayed immediately below the drop-down list using the colour scheme previously selected.



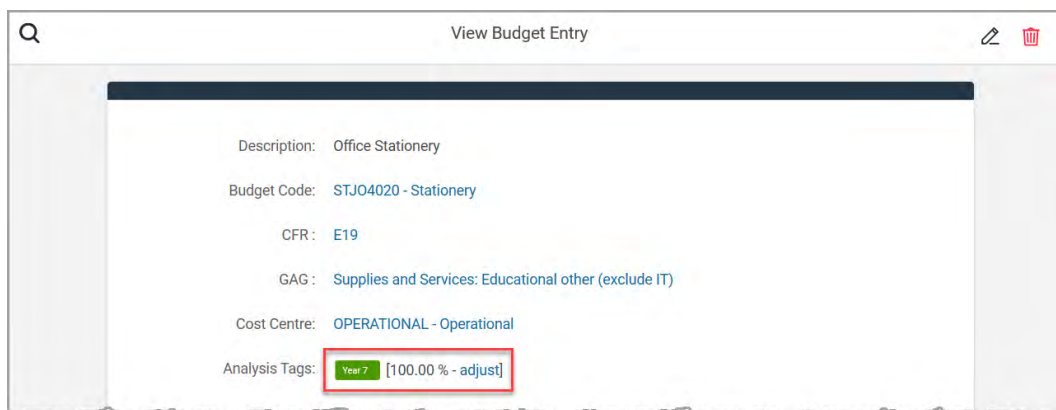
- Click the **Save** icon (green tick) at the top of the page to save the budget entry. A message is displayed indicating the entry has been successfully edited.



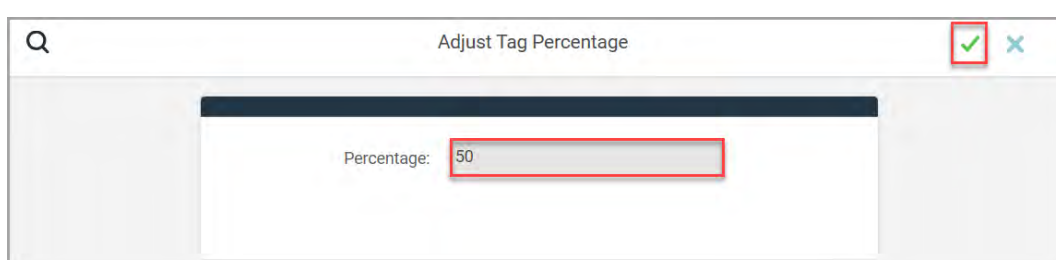
- The **Budget Entries** page is displayed listing the selected tags in the **Tags** column.

Type	Budget Code	CFR	GAG	Cost Centre	Description	Tags	Fund Codes	2018/19 outturn	2019/20	2020/21	2021/22	2022/23	2023/24	Notes	Actions
<input type="checkbox"/>	Expenditure	STJO4020	E19	OPERATIONAL	Supplies and Services: Educational other (exclude IT)	Office Stationery Year 7 [100%]		6,500.00	6,500.00	6,500.00	6,500.00	6,500.00		edit	
<input type="checkbox"/>	Expenditure	STJO5115	E22	FIN	Supplies and Services: Non Educational	Postage		4,326.00						edit	

- If required, you can adjust the percentage allocated to this analysis tag. Click the budget entry **Description** to display the **View Budget Entry** page.



- To adjust the percentage, click the blue **adjust** link. The **Adjust Tag Percentage** page is displayed.



- Manually enter the required percentage then click the **Save** icon (green tick) at the top of the page.
- The **View Budget Entry** page is displayed with the amended percentage.

Description: Office Stationery

Budget Code: STJO4020 - Stationery

CFR: E19

GAG: Supplies and Services: Educational other (exclude IT)

Cost Centre: OPERATIONAL - Operational

Analysis Tags: Year 7 [50.00 % - adjust]

Viewing Analysis Tags Reports – Example Revenue Report

- Select **Reporting > Revenue Report > GAG Revenue Report** from the sidebar menu. The report is generated then displayed on the **GAG Revenue Report** page.

Code	Description	2018/19 Outturn	2019/20	2020/21	2021/22	Notes
Revenue Brought Forward						
	Balance Brought Forward	Brought Forward forecast	0.00	0.00	-51,470.93	-112,776.38
	Balance Brought Forward		0.00	0.00	-51,470.93	-112,776.38
	Total		0.00	0.00	-51,470.93	-112,776.38
Revenue Income						
	Total		0.00	0.00	0.00	0.00
Revenue Expenditure						
STJO2200	Salary forecast - Teaching Assistant - Basic Salary	0.00	9,240.86	9,425.71		9,534.76

- Select the required analysis tag from the **Select analysis tag** drop-down list.

Code	Description	2018/19 Outturn	2020/21	2021/22	Notes

- The report is then regenerated based on the selected tag and percentages, with figures updating accordingly.

Code	Description	2018/19 Outturn	2019/20	2020/21	2021/22	Notes
Revenue Brought Forward						
Balance Brought Forward	Brought Forward forecast	0.00	0.00	-10,213.05	-20,629.87	
Balance Brought Forward		0.00	0.00	-10,213.05	-20,629.87	
Total		0.00	0.00	-10,213.05	-20,629.87	
Revenue Income						
Total		0.00	0.00	0.00	0.00	
Revenue Expenditure						
STJ02200	Salary forecast - Teaching	0.00	4,620.13	4,712.85	4,767.38	

Where to Get More Help and Information



Our currently available documentation can be found at the following address:

<https://psfinancials.zendesk.com/hc/en-us/categories/360000797219-User-Documentation>

You can also utilise information on our Support Portal at the following address:

<https://psfinancials.zendesk.com>

Providing Feedback on our Documentation

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



documentation@psfinancials.com

DOCUMENT REFERENCE	DESCRIPTION
TM-171219-CMA-IFP-1.0	Initial release