

## Update School Details in IRIS Financial Planner

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

### Updating Leadership Information

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

The screenshot shows the dashboard interface. On the left, the 'Leadership' panel is highlighted with a red border. It displays the school logo 'your logo' and the name 'St Mary and St Johns Trust (IRIS)'. Below this, it lists the 'Head Teacher' as Mrs M Smith with her name, email (mrsmsmith@stmarystjohnexample.sch.uk), and telephone number (01234 567890). It also lists the 'School Business Manager' as Mr I Brown with his name, email (mribrown@stmarystjohnexample.sch.uk), and telephone number (01234 567897). The main dashboard area shows 'Updates & News' (No news available...), 'Monitoring' (Payroll Reconciliation and Budget Monitor) with monthly view buttons from Sep to Aug.

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

The screenshot shows the 'School Details' page. At the top right, there is an edit icon (pencil) and a settings icon (gear), both highlighted with red boxes. Below the page title, there are five tabs: 'Details', 'Child Schools', 'Leadership', 'Report Settings', and 'Users'. The 'Leadership' tab is selected and highlighted with a red box. The main content area shows the following information:

- Head teacher: Mrs M Smith
- Head teacher email: [mrsmsmith@stmarystjohnexample.sch.uk](mailto:mrsmsmith@stmarystjohnexample.sch.uk) (highlighted with a red box)
- School business manager: Mr I Brown
- School business manager email: [mribrown@stmarystjohnexample.sch.uk](mailto:mribrown@stmarystjohnexample.sch.uk)
- School business manager phone: [01234 567891](tel:01234567891)

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

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

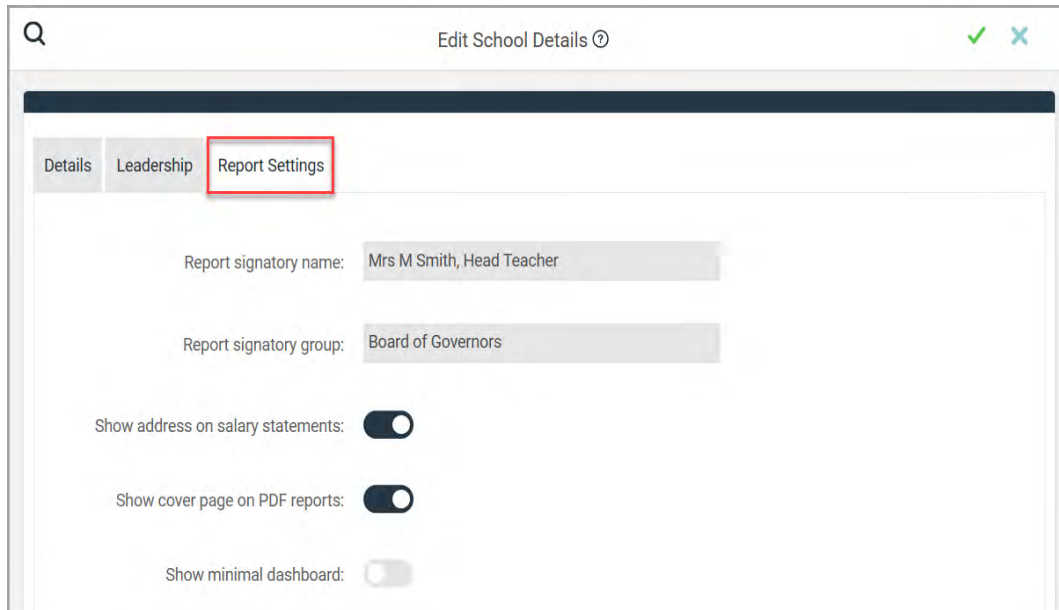


## Updating Report Settings

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

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

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



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



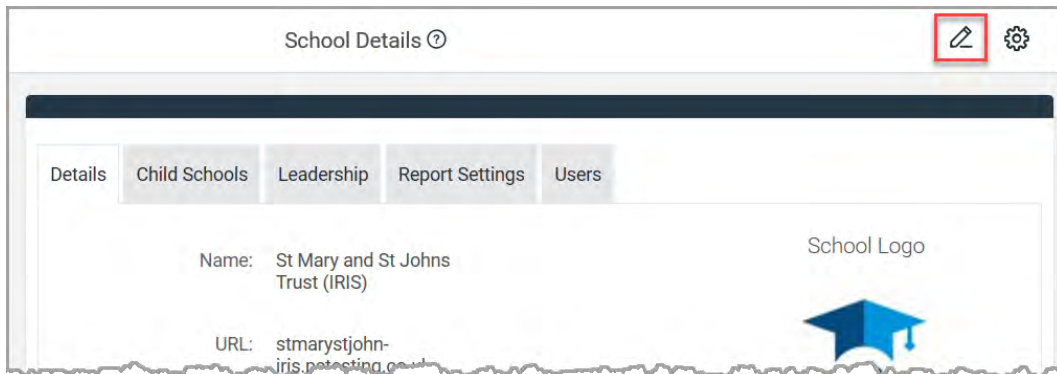
**Note:** *If both signatory fields are left blank, the salary statement signatory line will either be blank or omitted from certain reports.*

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

School updated. ✕

## Updating the Address on Salary Statements

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



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

3. The following four fields can be edited:

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



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

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



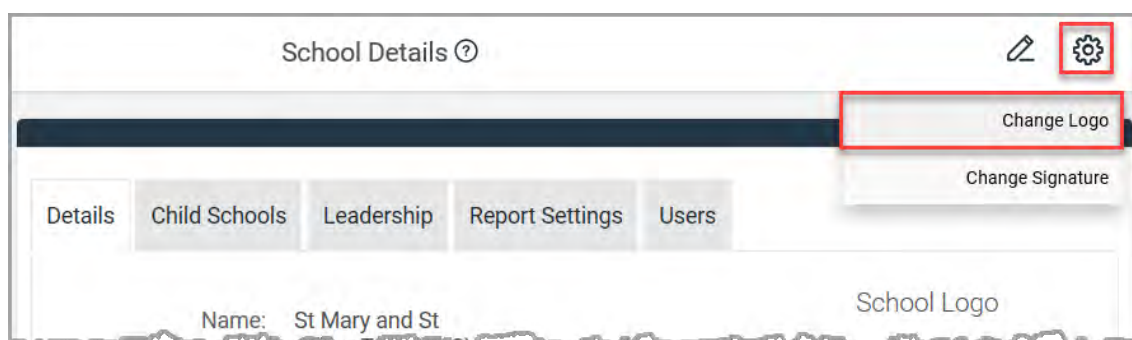
## Updating/Uploading Your School Logo or Signatory

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

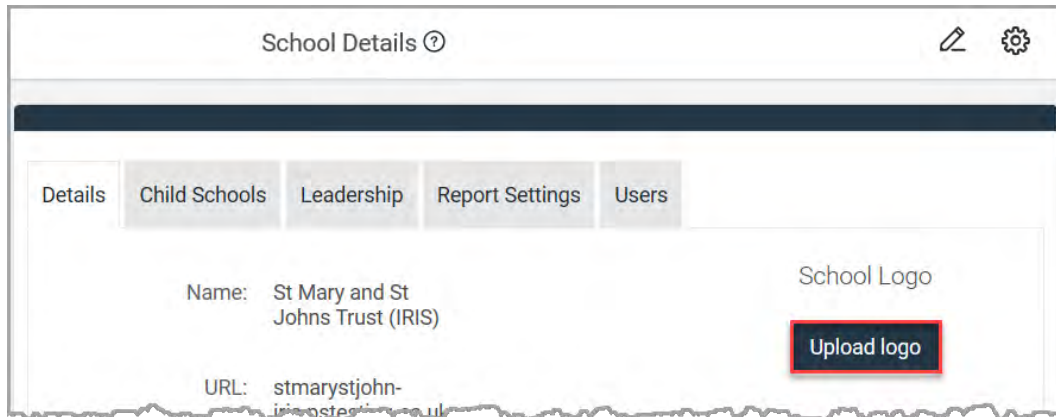
In addition, you can upload a signature of the person who signs off salary statements and reports. The uploaded signature will then be displayed in applicable places when the statements/reports are produced. For more information, please see [Uploading a signature on page 7](#).

### Updating/Uploading the School Logo

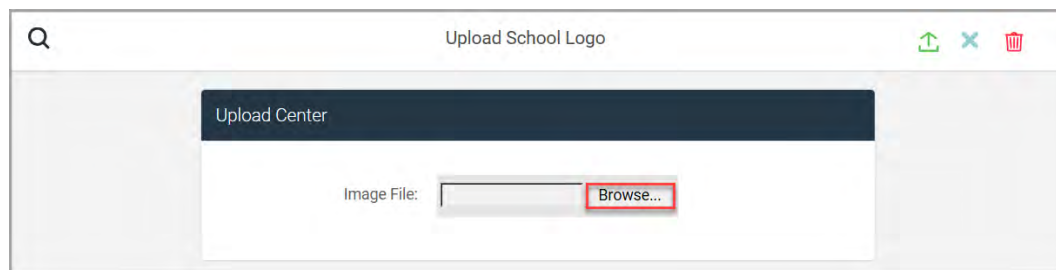
- Select **Settings > School Details** from the sidebar menu. The **Details** tab is displayed by default with the school details displayed in view mode. If you want to change the existing logo, click the **Manage Settings** icon at the top of the page, then select **Change Logo** from the drop-down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



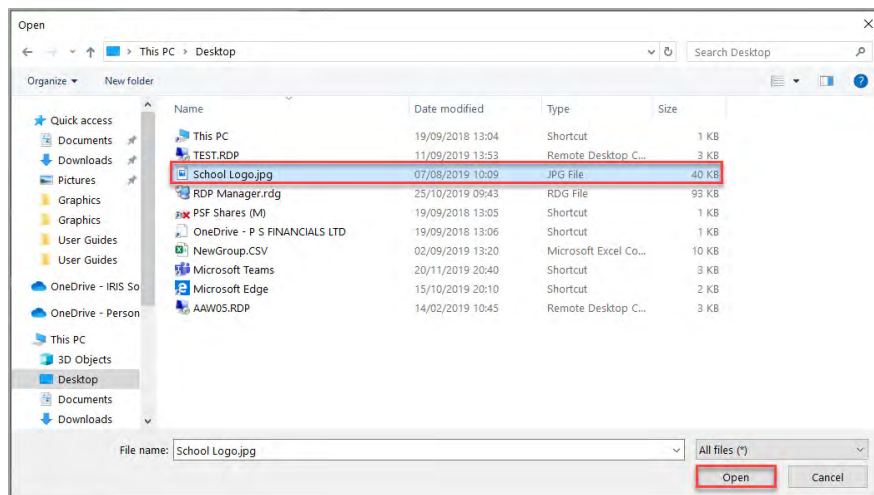
- If no logo currently exists, click the **Upload Logo** button positioned where the logo would normally be displayed.



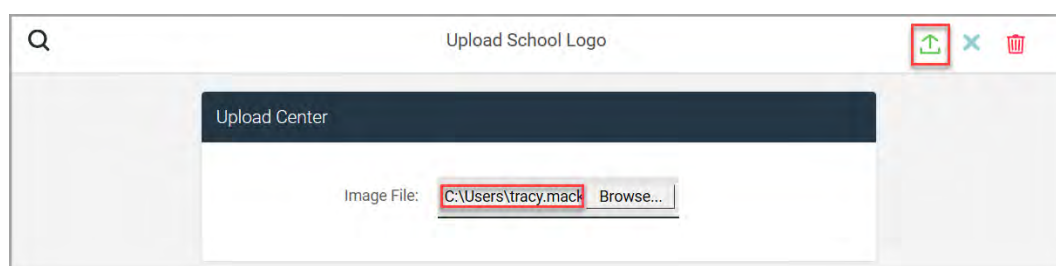
- The **Upload School Logo** page is displayed. Click the **Browse** button.



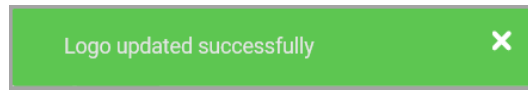
- From the **Open** dialog, navigate to the required school logo file and click the **Open** button.



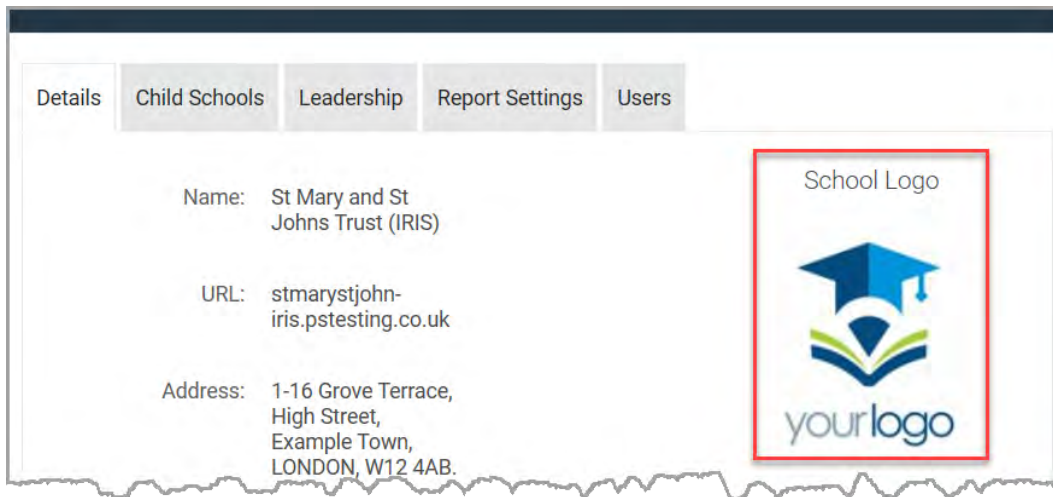
- The file name is displayed in the **Image File** field. Click the **Upload** icon at the top of the page as shown in the following graphic:



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



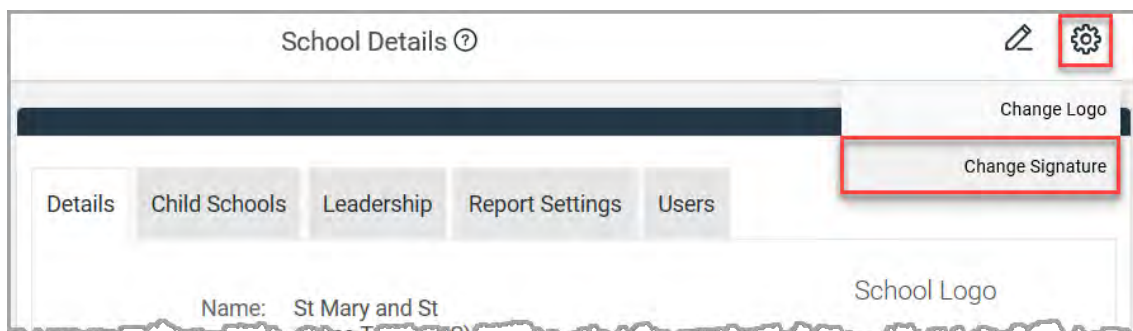
- The logo is then displayed on the **Details** page and will appear in applicable statements and reports when produced.



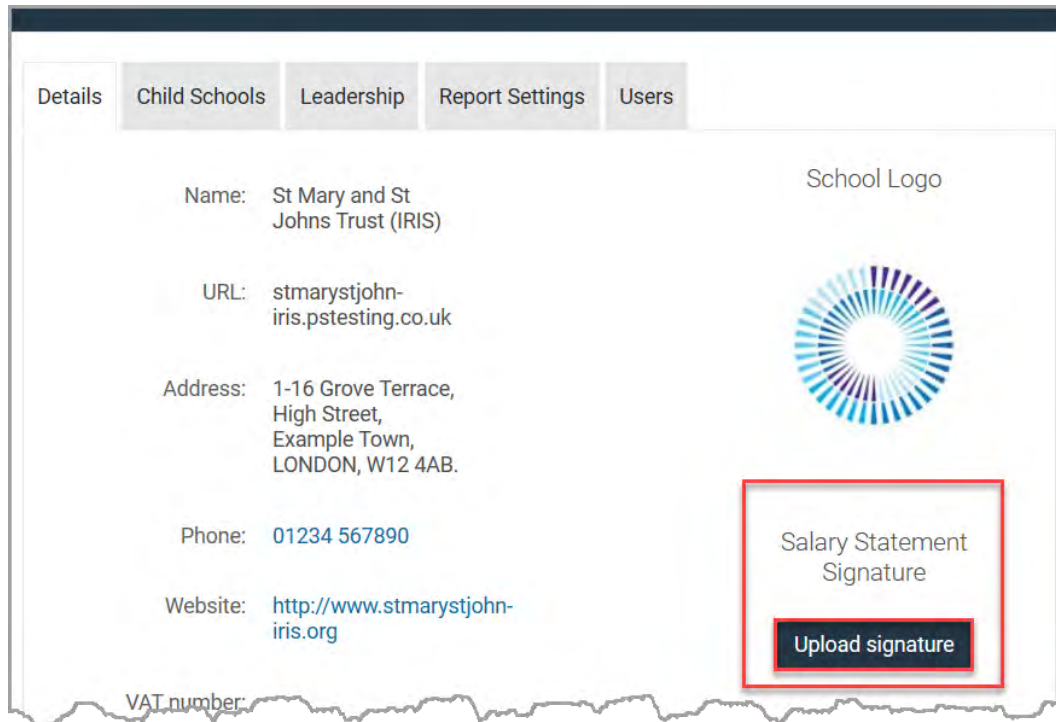
## Uploading a Signature

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

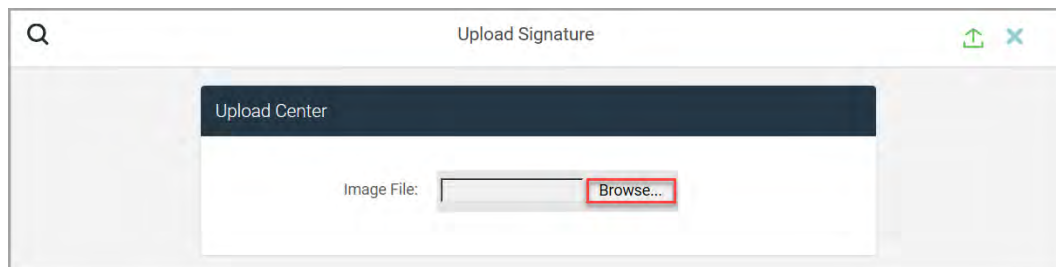
- Select **Settings > School Details** from the sidebar menu. The **Details** tab is displayed by default with the school details displayed in view mode.
- If you want to change the existing signature, click the **Manage Settings** icon at the top of the page, then select **Change Signature** from the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



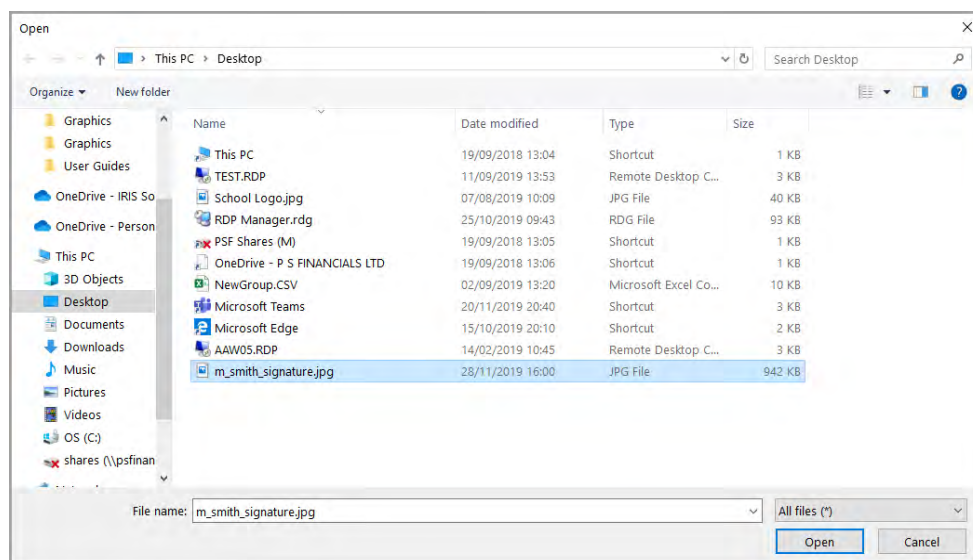
- If no signature currently exists, click the **Upload signature** button positioned where the signature would normally be displayed.



- The **Upload Signature** page is displayed. Click the **Browse** button.

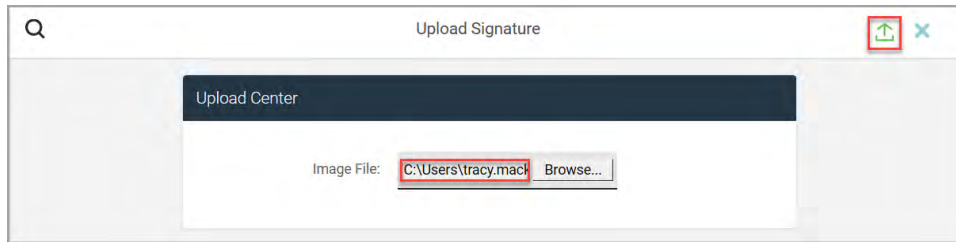


- From the **Open** dialog, navigate to the required school signature file then click the **Open** button.

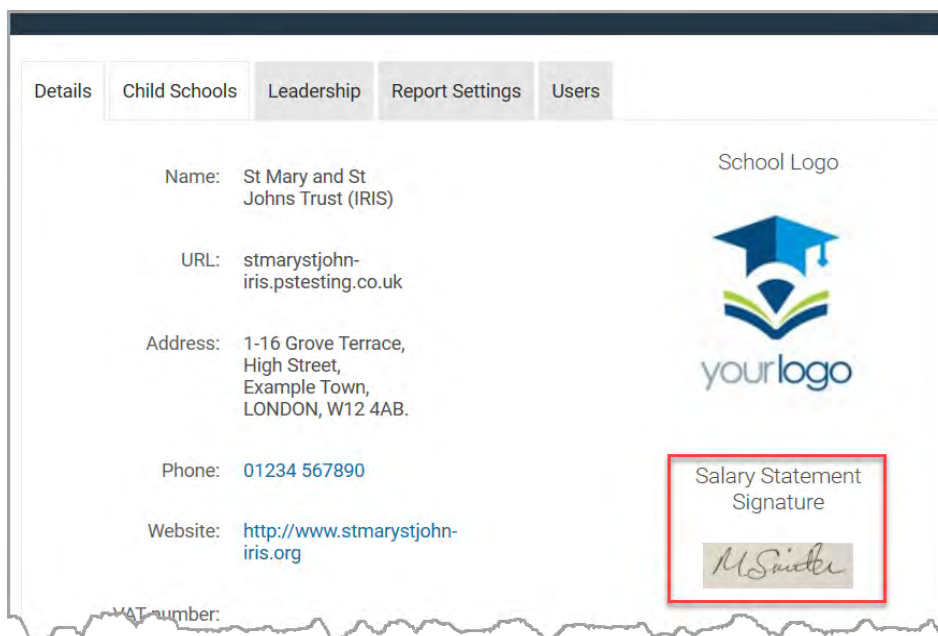




- The file name is then displayed in the **Image File** field. Click the **Upload** icon at the top of the page as shown in the following graphic:



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



## 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](mailto:documentation@psfinancials.com)

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