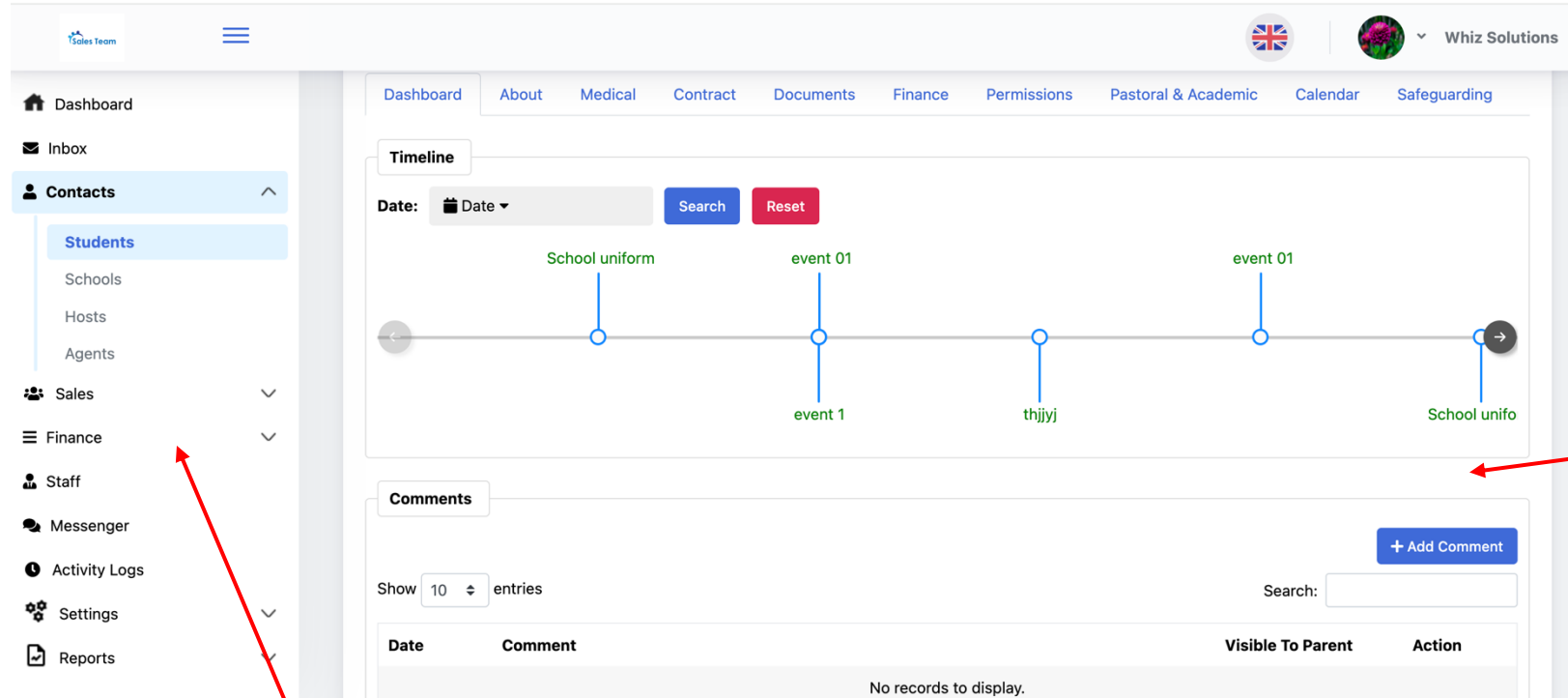


Dashboards needs to reflect key activities including travel & host bookings

The system was designed to use RAG status to reflect activities undertaken and timelines in which they were to be completed eg a traveling booking for a host stay needs completed 5 days prior or it turns red from amber and if completed 14 days prior that activity will remain green.

This needs to be transparent at all levels whether student / coordinator/ admin or Super Admin / Manager. The following is the dashboard views required for the different levels. This will also need to include live messaging and email

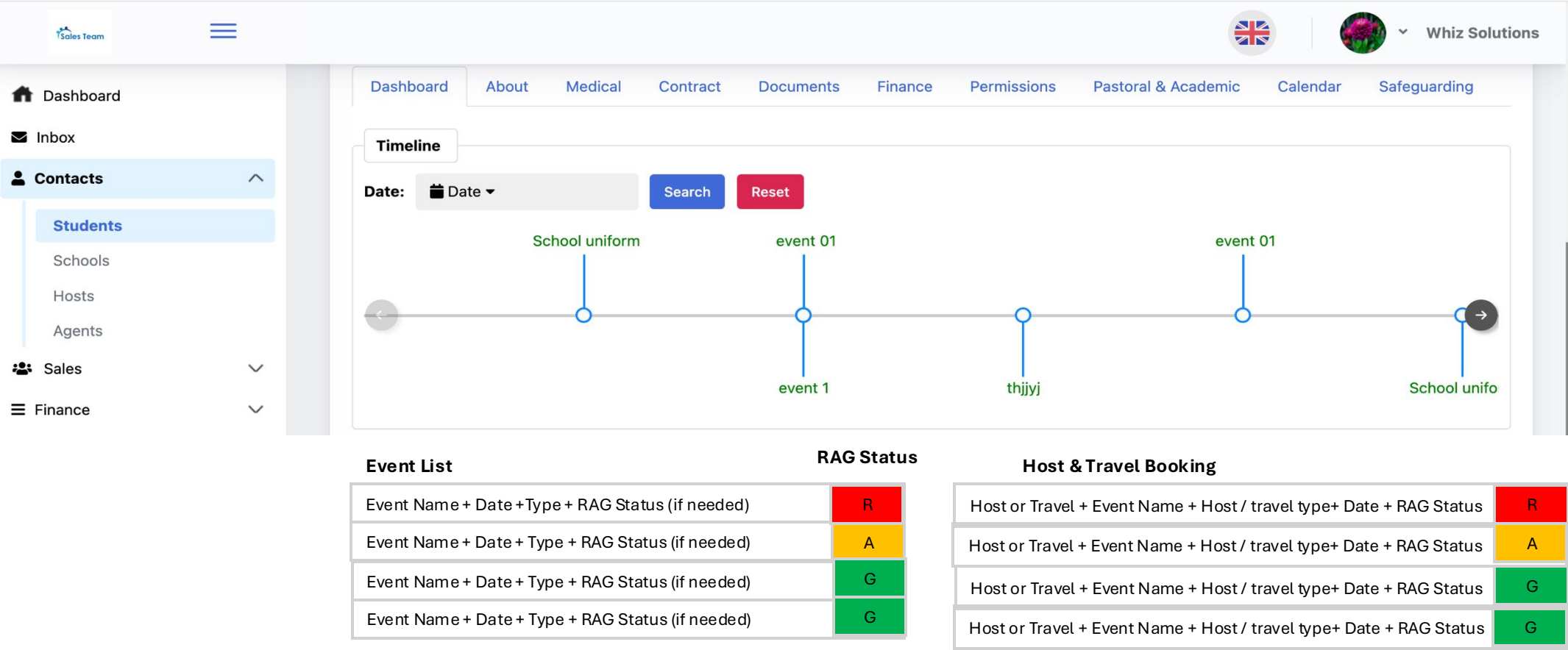


All of the following boxes need to go between the Timeline box and the Comments box

THIS MENU STRUTURE IS FOR A COMPANY LOGIN NOT FOR PARENT WILL NEED TO BE CHANGED

Dashboard for Student / Parent view - login

The Student / Parent view would be for anyone looking at the system at the Student Parent Level including parents and students logging in

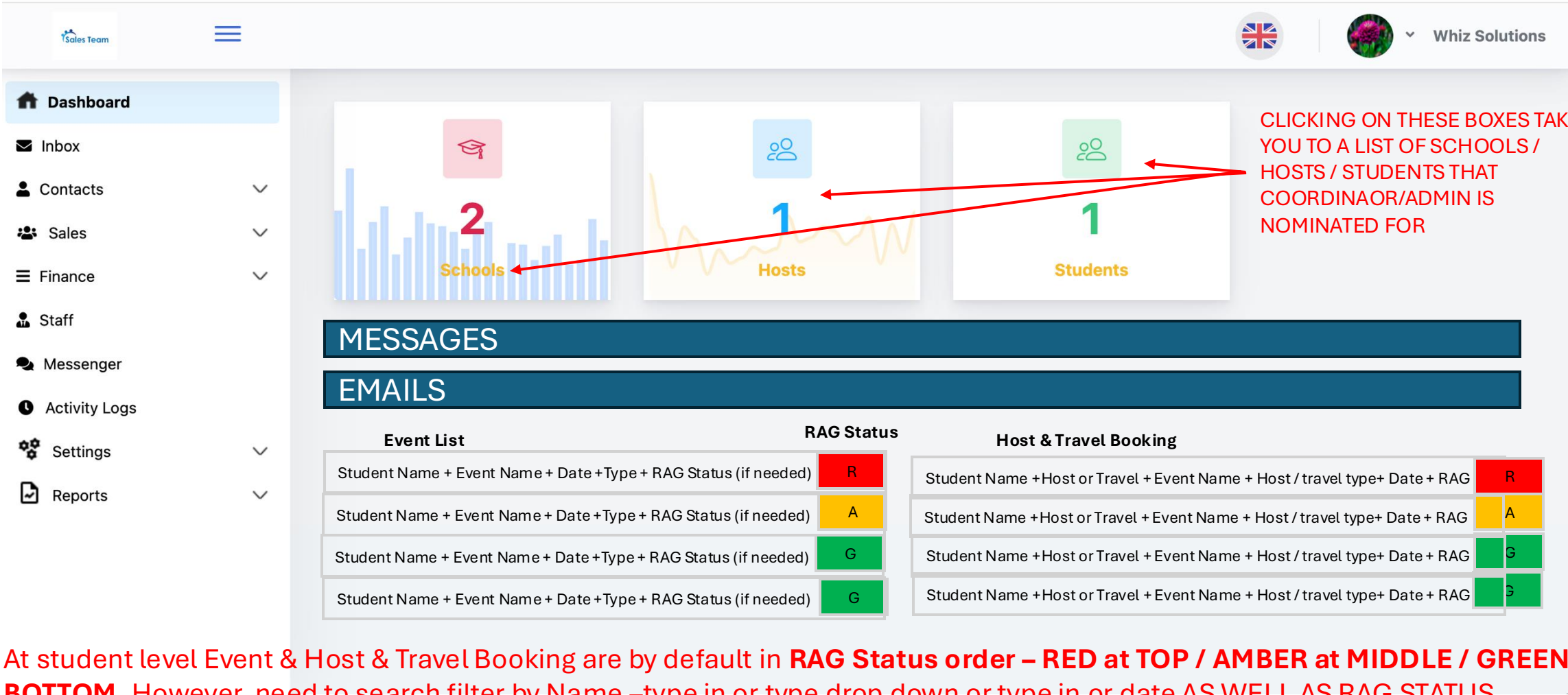


At student level Event & Host & Travel Booking are by default in **date order**. However, need to search filter by Name –type in or type drop down or type in or date **LASTLY BY RAG STATUS**.

Secondly the view should allow user to change to a date range or number of lines 5 or 10 or 20 or 40 or all

Dashboard for Coordinator / Admin

The Coordinator/Admin has the same view but sees all of their students' events and bookings

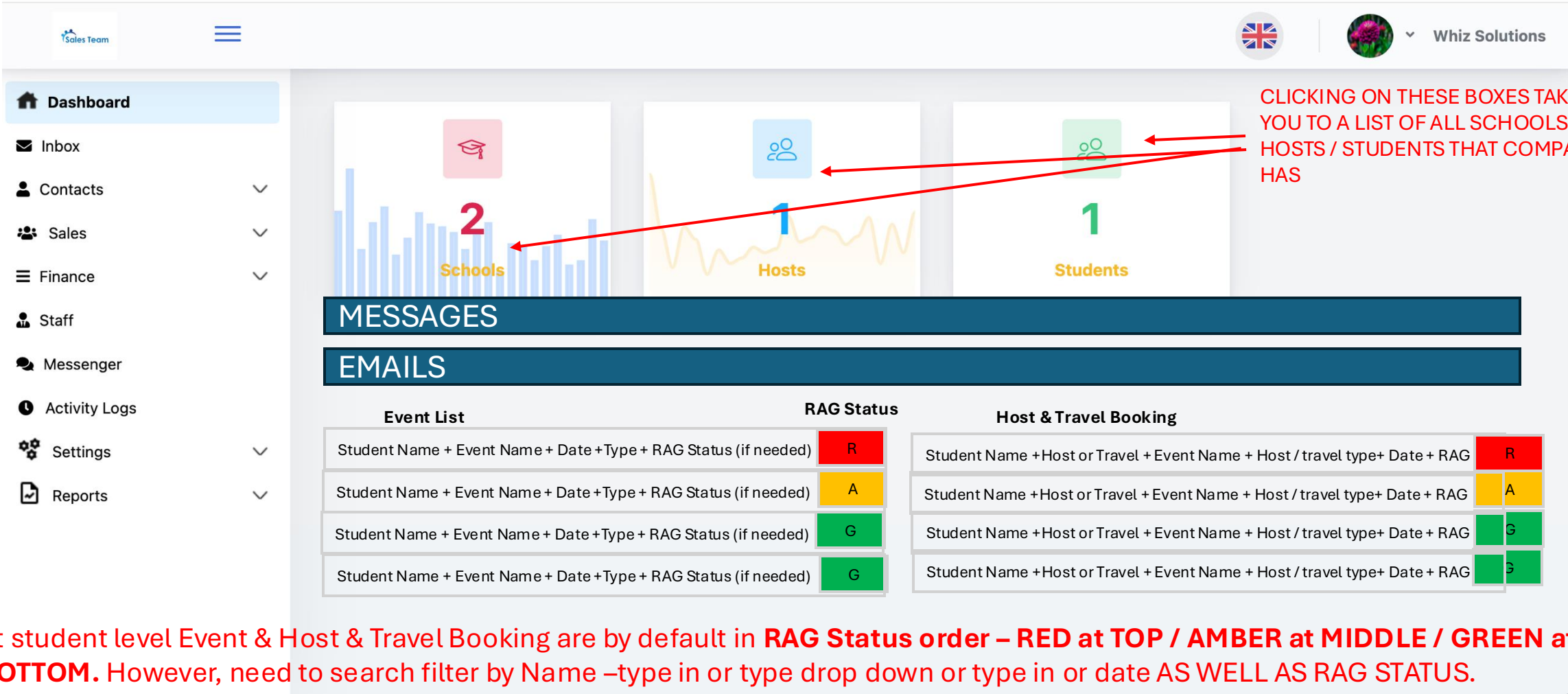


At student level Event & Host & Travel Booking are by default in **RAG Status order** – **RED at TOP** / **AMBER at MIDDLE** / **GREEN at BOTTOM**. However, need to search filter by Name –type in or type drop down or type in or date AS WELL AS RAG STATUS.

Secondly the view should allow user to change to a date range or number of lines 5 or 10 or 20 or 40 or all

Dashboard for Manager / Super Admin

The Manager / Super Admin has the same view but sees all of the students' events and bookings in the company



At student level Event & Host & Travel Booking are by default in **RAG Status order – RED at TOP / AMBER at MIDDLE / GREEN at BOTTOM**. However, need to search filter by Name –type in or type drop down or type in or date AS WELL AS RAG STATUS.

Secondly the view should allow user to change to a date range or number of lines 5 or 10 or 20 or 40 or all
CONTINUES NEXT PAGE

Dashboard for SUPER ADMIN / MANAGER /FINANCE

To manage the business the Management need to have an overview of the finance position in anyone calendar year – this is an aggregation of the numbers contained in the fees and expenses reports for **THE CURRENT YEAR UNLESS ALTERED IN THE OVERVIEW**

CURRENT YEAR / CHANGE YEAR

IF THIS YEAR IS CHANGED FROM CURRENT YEAR AND LINE IS CLICKED TO TAKE TO REPORT THAT REPORT MUST SHOW THE NEW YEAR CHOSEN

EXPENSES	Expense Payment Received0.00	Total Expense55.00	Balance-55.00	CLICKING ON LINE TAKES ADMIN TO REPORT
PAYMENTS	Payment Received0.00	Total Payment0.00	Balance0.00	
INVOICES	Total Invoice0.00	Invoice Received0.00	Balance0.00	
FEEES	Fee Payments Received0.00	Total Fees2800.00	Balance-2800.00	

message

Activity Logs

Settings

Reports

Show10entries

Search:

+ Add Comment

Date	Comment	Visible To Parent	Action
No records to display.			

FINANCE REPORTS for SUPER ADMIN / MANAGER /FINANCE

THE PREVIOUS SLIDES REPORTS ARE THE AGGREGATION OF THE FINANCE RERORTS FOR EACH CATEGORY IN THE **THE CURRENT YEAR UNLESS ALTERED IN THE OVERVIEW**

Feas Reports

Select Student Select Year Select School Country of Origin Select Status Select Fees Type

Show 10 entries

Reset Export

#	First Name	Preferred Name	Full Name	Family Name	DoB	Origin	School	Coordinator	Registration Date	Student Status	Total	Balance
1	William		William Sherry		03 Dec 2008	United Kingdom	St Benedict's School		11 Sep 2024	Active	2,800.00	-2,800.00

total of 1 entries to show (1 to 1)

Previous 1 Next

THE DEFAULT YEAR IS ALWAYS THE “CURRENT ACTIVE YEAR” – IF CHANGED AND CLICKED THROUGH IN MANGER VIEW IT SHOULD SHOW THAT YEAR CHOSEN

Expenses Reports

Students in a range of positive balance Active/Inactive Expense by category

Select Status Select Category

Show 10 entries

Reset Export

#	First Name	Preferred Name	Full Name	Family Name	DoB	Origin	School	Coordinator	Registration Date	Student Status	Total	Balance
1	William		William Sherry		03 Dec 2008	United Kingdom	St Benedict's School		11 Sep 2024	Active	440.00	-440.00

total of 1 entries to show (1 to 1)

Previous 1 Next

THESE REPORTS NEED TO HAVE YEAR TOTALS FOR BOTH “TOTAL” AND “BALANCE”

THE SAME REPORTS NEED TO BE AVAILABLE FOR INVOICES AND PAYMENTS????