LEARNING
FOUNDATION
Inspiring education through technology

DMS Portal

An introduction to your DMS Portal

Welcome to our DMS Portal, designed to give you up to date access to information about all of your donors who are contributing to your 1:1 programme(s). With any 1:1 programme there is a vast amount of information stored and the DMS Portal is designed to give you easy access to exactly what you want to know, when you want to know it.

We hope you will find the Portal provides all the information you require but we welcome your feedback and any suggestions for future development.

GETTING INTO YOUR PORTAL
Because of the sensitivity of the data we only give access to the portal to the school DMS administrator that has been approved by the Headteacher.

When you first login you will be using a temporary password. Once in you will be asked to change this password - make it something memorable - but equally secure. If you should forget it you can request an email reset option from the login page.

For data protection reasons it is important that you do not share your login with any other staff. If someone else in the school needs to have access then we can create a login for them - once we have the authorisation from your Headteacher.

THE REPORTS
There are 7 reports available. These have been developed in consultation with a number of schools to ensure that you can find the information you need in the format you want to see it. In addition to the 7 reports you can also access all of your quarterly statements.

You can view the reports on screen or download them as Excel spreadsheets, allowing you to further manipulate the data, import it into other spreadsheets or reports and print it out. You don't have to download the data at all of you don't want to as it will always be available online, even after your cohort programme has completed.

Most reports will display wider than your screen will allow you to view at one time. To accommodate this, there are right & left scroll arrows at the top of the report and a vertical scroll bar on the right of the report to allow you to see all of the data.

THE REPORTS

Here is a quick reference to the different reports available in the portal, you will find a fully detailed profile of each report on the following pages.

FINANCIAL ANALYSIS

If you need a quick way to check if payments have been made or which payments have been rejected then this report will show you every transaction for every donor in the selected criteria.

LAPSED DONORS

A list of all lapsed donors in the selected criteria and how much they have donated to date. A lapsed donor is one who has missed 1 Credit card or 2 consecutive Direct Debit donations - at which point we do not attempt to collect any further donations until instructed to do so.

COMPLETED DONORS

A list of all completed donors in the selected criteria , showing how much they have donated.
A completed donor is one that has either completed their agreed number of donations or who are known to have permanently terminated their donations.

ACTIVE DONORS

All your active donors in the selected criteria, their donation agreements & how they are progressing.

DONOR STATEMENTS

Your donor's promised donation amounts & term, the amount donated to date & potential end total.

MISSED DONATIONS

This report shows donors that have missed donations & their donation record to date.

EXPIRED CARDS

This report identifies donors with credit cards that have expired, or are due to in the selected number of months.

STATEMENTS

Access the most recent and historical quarterly statements as PDFs.

EXPLORING & EXPORTING

At the top of each report there is a bar of symbols that give you some powerful searching options within the data you have selected.

PAGE VIEWING

Many of the reports have more columns than can be seen at one time on your screen. To allow you to view them all you can use the left & right arrows located either side of the report title at the top of the page.

PAGE NAVIGATION

This option allows you to move back & forth through the pages of data quickly using the (▶) or the (◀) symbols. Alternatively you can go from the first page (⏮) to the last page (⏭). You can also jump to a specific page by typing the page number in the box and hitting 'return'.

You will see two black arrows just under the report title. These allow you to scroll left & right to enable viewing of all

QUICK SEARCH

A very powerful function of the portal is the Quick Search facility. Simply type in the box whatever you are looking for and it will take you to the first occurrence, wherever it is in the report. You can type in a URN (our unique record number) a donor or child's name, a cohort or even a date and it will find it! Once it is showing the first occurrence you can click the 'next' option to see the next one, and so on.

REPORT REFRESH

If you have been working on the data for some time and want to see if any new transactions have come in since your original search just click the symbol above to update the report with the latest data.

EXPORTING REPORTS

If you wish to have a hard copy of the report or be able to manipulate the data you can do this by downloading it in Excel. Simply click on the down arrow next to the symbol shown above and select Excel .

FINANCIAL ANALYSIS

The key function of this report is to show every transaction within the selected criteria. If there is any dispute or mix up this will give the information needed to track it back. When a donation has to be removed (usually because the bank rejected it or their Credit Card had expired) it is referred to as an 'Expenditure' then a negative entry is made into the ledger which appears in brackets in the 'Amount' column and is removed from the total.

SELECTION OPTIONS:
This report allows you to select data by:
- ► Date range *(leaving dates blank will select all dates recorded)*
- ► Cohort *(leaving dates blank will select all cohorts)*

DATA DISPLAY & SORTING:
This report shows every transaction by every donor, in the selected date range & cohort.
- ► When you search by a specific cohort the data will be sorted by name.
- ► When you search by all cohorts the data will be sorted firstly by cohort and then by name.
- ► TOTALS – There is a total amount of all transactions for the selection *(Expenditures are deducted)*

DATA FIELDS:
- ► URN *(the e-Learning Foundation Unique Reference Number)*
- ► Donor Name
- ► Child Name
- ► Cohort
- ► Date *(of the transaction)*
- ► Type *(of transaction – Donation / Expenditure – where expenditure means cancelled or rejected donation)*
- ► Receipt Number *(our unique reference)*
- ► Reason *(donation type or reason for rejection)*
- ► Payment method
- ► Description *(how payment was made)*
- ► Amount *(of the transaction – Expenditures are negative income and shown in brackets)*

LAPSED DONORS

The key function of this report is to provide a list of all lapsed donors within the selected criteria and how much they have donated to date.

A lapsed donor is one who has missed 1 Credit card or 2 consecutive Direct Debit donations - at which point we do not attempt to collect any further donations until instructed to do so.

SELECTION OPTIONS:

This report allows you to select data by:
- ► Date range *(leaving dates blank will select all dates recorded)*
- ► Cohort *(leaving dates blank will select all cohorts)*

DATA DISPLAY & SORTING:

This report shows every donor, their donation history & when they lapsed.
- ► When you search by a specific cohort the data will be sorted by name.
- ► When you search by all cohorts the data will be sorted firstly by cohort and then by name.
- ► TOTALS – There is a total amount donated for the selection

DATA FIELDS:

- ► URN *(the e-Learning Foundation Unique Reference Number)*
- ► Donor Name
- ► Child Name
- ► Cohort
- ► Donation value *(the regular donation amount agreed)*
- ► Amount donated *(the total they have donated so far)*
- ► Start date *(of donation period)*
- ► End date *(of donation period)*
- ► Lapsed date *(date of last payment received)*

COMPLETED DONORS

The key function of this report is to provide a list of all donors that have completed their agreement within the selected criteria.

A completed donor is one that has either completed their agreed number of donations or who are known to have permanently terminated their donations.

SELECTION OPTIONS:
This report allows you to select data by:
- ► Date range *(leaving dates blank will select all dates recorded)*
- ► Cohort *(leaving dates blank will select all cohorts)*

DATA DISPLAY & SORTING:
This report shows every donor, their donation history & when they completed.
- ► When you search by a specific cohort the data will be sorted by name.
- ► When you search by all cohorts the data will be sorted firstly by cohort and then by name.
- ► TOTALS – There is a total amount of the amount donated for the selection

DATA FIELDS:
- ► URN *(the e-Learning Foundation Unique Reference Number)*
- ► Donor Name
- ► Child Name
- ► Cohort
- ► Amount donated *(the total they have donated)*
- ► Start date *(of donation period)*
- ► End date *(of donation period)*
- ► Completed date *(date of last payment received)*

ACTIVE DONORS

The key function of this report is to provide a list of all active donors within the selected criteria, the details of their donation agreements and how they are progressing.

SELECTION OPTIONS:

This report allows you to select data by:

► Cohort *(leaving dates blank will select all cohorts)*

DATA DISPLAY & SORTING:

This report shows every transaction by every donor, in the selected cohort.

► When you search by a specific cohort the data will be sorted by name.

► When you search by all cohorts the data will be sorted firstly by cohort and then by name.

► TOTALS – There is a total amount of the amount donated for the selection

DATA FIELDS:

► URN *(the e-Learning Foundation Unique Reference Number)*

► Donor Name

► Child Name

► Cohort

► Amount donated *(the total they have donated)*

► Start date *(of donation period)*

► End date *(of donation period)*

► Gift Aid *(Indicating those that are eligible for Gift Aid - Y or N)*

DONOR STATEMENTS

The key function of this report is to show donor's promised donation amounts, the potential value if they continue to the end and the amount donated to date.

SELECTION OPTIONS:

This report allows you to select data by:
- ► Cohort *(leaving dates blank will select all cohorts)*
- ► An option to include lapsed donations
- ► An option to include completed donations

DATA DISPLAY & SORTING:

This report shows every donor's donation history in the selected date range & cohort.
- ► When you search by a specific cohort the data will be sorted by name.
- ► When you search by all cohorts the data will be sorted firstly by cohort and the by name.
- ► TOTALS – There is a total amount of Donations promised and Donations to date for then selection

DATA FIELDS:

- ► URN *(the e-Learning Foundation Unique Reference Number)*
- ► Donor Name
- ► Child Name
- ► Cohort
- ► Start date *(of donation period)*
- ► *End* date *(of donation period)*
- ► Donation frequency
- ► No of donations promised
- ► Donation value *(the amount they promised to donate per donation)*
- ► Total promised *(if all donations are made at the promised amount)*
- ► Donated to date *(the total amount donated so far)*
- ► Gift Aid *(Indicating those that are eligible for Gift Aid - Y or N)*

MISSED DONATIONS

The key function of this report is to show you donors that have missed donations and it gives you a lot of options to allow you to focus on a particular group if required.

SELECTION OPTIONS:

This report allows you to select data by:

► Date range *(leaving dates blank will select all dates recorded)*
► Payment type *(all / Direct Debit / Continuous Credit Card)*
► The number of donations missed *(from 1 to 12+)*
► Cohort (*leaving dates blank will select all cohorts*)
► An option to include lapsed donations *(where donations have ceased prematurely)*
► An option to include Completed donations *(where all the promised donations have been made)*

DATA DISPLAY & SORTING:

This report shows every donor with missed donations & how many, in the selected date range & cohort.

► When you search by a specific cohort the data will be sorted by name.
► When you search by all cohorts the data will be sorted firstly by cohort and then by name.
► TOTALS – For: 'No of donations promised', 'Total promised' and 'Donated to date'.

DATA FIELDS:

► URN
► Donor Name
► Child Name
► Cohort
► Start date *(of donation period)*
► End date *(of donation period)*
► Method *(of payment)*

► Donation value *(the amount they promised to donate per donation)*
► Donations promised *(total number of)*
► Total promised *(if all donations are made at the promised amount)*
► Payment made *(total number of)*
► Donated to date *(the total amount donated so far)*
► Missed payments *(total number of)*

EXPIRED CARDS

The key function of this report is to identify donations by continuous credit card where the card has expired, or is due to expire.

SELECTION OPTIONS:

This report allows you to select data by:
- ► Expiry status *(either only those that have expired or to include those with between 1 - 6 months remaining)*
- ► An option to include lapsed donations

DATA DISPLAY & SORTING:

This report shows every donor with a card that will expire or is due to expire in the selected period.

DATA FIELDS:

- ► URN *(the e-Learning Foundation Unique Reference Number)*
- ► Donor Name
- ► Child Name
- ► Cohort
- ► Card expiry date
- ► End date *(of donation period)*

THE DMS PORTAL

The DMS Portal is owned and managed by:

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