Managing APT - Webinar #2

Questions & Answers

Glenys - *For a great staff roster, set up staff as you would a child - setting status as staff. Print a week of rosters on one page. Simple and efficient.*

Clever idea!! Might be a bit of extra work, as you still have to transfer the information into the roster afterwards, but I could see it working where staff rosters are reasonably static from week to week.

I am assuming you enter the staff into Children's Details, set their status to 'Staff'[1] and then record their roster as you would a child's booking. The Attendance Register report (Staff Only option) would give you their booked times. It'd be nice if APT dropped the 'Absent' designation when printing future weeks - that would allow staff to put in their actual times and sign.


An interesting work-around though! Thanks.

Chamila - *Emergency contacts can be loaded into APT in first tab "Details F2" or "Notes F8". What is the difference between those two process and which is the most reliable way to enter emergency contacts?*

Probably a matter of personal choice. The advantage when using the Details tab is that the phone numbers for the child are all picked up in the Client List > Phone List report - giving us a single document with all the phone numbers on it for family and emergency contacts.

You can print emergency contact details entered in the Notes tab by using the Notes by Category report, but it won't contain all the other family contact details.

Personally I would enter emergency contact details in the child's Details tab.

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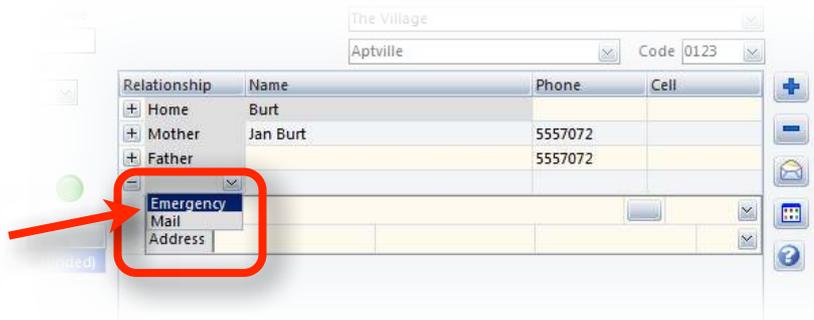
[1] This feature is normally used with APT's scanning module - it allows staff to use the scanner to record their actual times of arrival and departure.

Rebecca - *Can you e-mail only part of your invoices? eg Some parents that don't have internet access?*

Absolutely. When emailing invoices you select the families you want to email to - in fact APT lets you (in Print Invoices) just select only those families with email addresses (and you can manually select too by checking or unchecking their tick box).
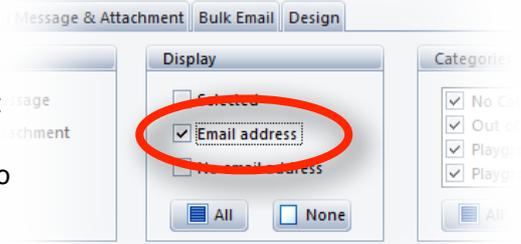
Frances - *I printed out a reconciliation report but it listed the parent's full names, and not the names of the children. This took me some time to match the names of the children to the parent's names. What do I need to change to produce an easier report? i.e. by child's name?*

I am not certain what you use the Reconciliation report for, but in the context of the question I am assuming for looking at payments. And unfortunately we don't have the option of altering the layout. If you can use the Aged Debtors list to monitor payments (say weekly) you can have it list the children's names under the family name (it's a tick box in the setup screen for this report).
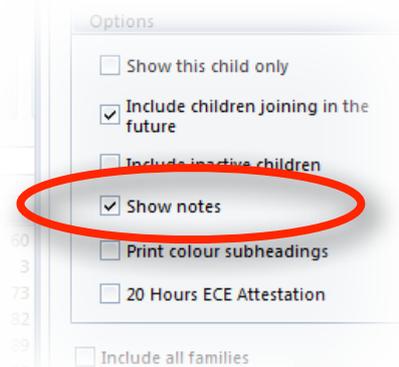
Megan - *Advanced Billing, could his be used to 'invoice' out a family contribution expectation? We have a contribution expectation (donation) for those attending 20 ECE and wondering if this could be used for reminding parents?*

No, I don't think so. The Advance Billing module will bill the child for their permanent booking - and I don't know of any way to turn that off and only bill for an optional extra or addon. You could check with APT, but I suspect the whole experience of using Adv. Billing would not be worth the effort! :)

Yvonne - *Notes in the Details section will appear when printing out the Family Details report - I don't use the notes.*

Quite right! If you put a note in the a child's Details tab, it can be made to print on the Family Details report, but the note is pretty-much buried on the second page! I think the value of notes often is in being able to get a full listing of them - and that's where the Notes by Categories report comes in. The Family Details report is child by child, and a lot of paper if you do the whole centre!

Frances - *The aged debtors report in our childcare has all debts back to 2009. How do I get rid of old debtors?*

Go to each child's Payments tab and do an Adjustment for the balance you wish to remove (debit or credit). Personally I would enter a comment that it is a debt or credit write-off - so anyone coming later can understand what has been done.

Megan *- How do we transfer data from timesheets to MYOB?*

- Go to Miscellaneous > Parameters, select Payroll in the left hand column and select MYOB.
- In the staff roster, Reports section choose Payroll Hours.
- Select the period you wish to export, and click Load Hours.
- Click Save Hours as CSV.

You will need to go to MYOB for instructions on how to import a CSV file. You will also need to make sure you have entered in APT the correct staff and payroll codes (the same ones you use in MYOB). You can do that in the 2nd and 3rd tabs on the Payroll Hours screen.
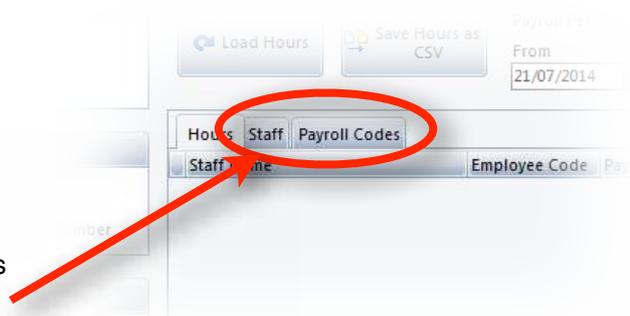
Lara - *Can you produce a report sorted by booking e.g. We are a sessional kindergarten and would like to export a list of children in certain sessions?*

I think your best bet would be to put the children in each session into a separate Category. Once you have done that you have multiple options. You could print the Weekly Enrolments report sorted by Category, or the Vacancy Enquiry Daily Bookings report or perhaps the Client List, again sorted by Category. It does depend on what other data you want. The Client List won't include detail on the booked times, but it will allow you to export the names to a spreadsheet. Weekly Enrolments has the export feature too.

Lara - *Is there a report which would consolidate key performance areas (KPA) e.g. number of children leaving, number of new enrolments, number of children added to waiting list, reasons for leaving, average age of children in different session etc within a certain date range?*

Sorry! Not that I know of. You could consider setting out the report columns you would like, then forward it on to APT - the info will be in APT and generally creating a report is not a big job. They may be able to do it for you (and we'll all get the benefits!).

Thanks for your questions everyone.

Craig & Coral

PS. These are the reports for next week if you want to have your own copy at hand.

- Vacancy Enquiry (Weekly Bookings) - *click the Reports button, choose any day*.
- Vacancy Enquiry graph (Permanent Booking > Booked, and Funded Bookings > Booked)
- Frequent Absence Report
- Vacancy Enquiry graph (Projected to Attend > Attended,)
- Staff Hours Day Summary
- Discretionary Hours
- Display Log Files - *Located in Parameters*
- Account Summary - *Tick 'Print time details by day' and 'Suppress Opening Balances'*
- Attendance Details