

LCC Document Portal – Participant User Guide

Internal User

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Date	22 May 2015

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1. Background

The portal will act as a document repository for all child protection reports to child protection conferences and core group meetings from professionals within both Children's Social Care and from external agencies. It is also the mechanism by which child protection conference outcome forms and minutes are distributed, replacing the need for hard copy / email distribution to professionals.

Professionals are also able to access report templates and supporting documentation via the portal. Prior to attending the initial child protection conference and core group meetings external professionals will upload their report onto the portal for review or downloading by other attendees.

Children's Social Care reports will be uploaded by the conference administration team.

Administration of the LCC Document Portal

The LCC Document Portal is administered by a small team of conference administrators within Lancashire County Council. For each child protection conference, this team is responsible for:

- Creating a conference space on the LCC Document Portal.
- Adding all the invitees to the conference space so they have access to the space.
- Copying relevant Children's Social Care documents into the conference space prior to the conference. This includes the social worker's report to the conference which must be completed using LCS at **least 24 hours** in advance of the conference.
- Making a conference space read only 24 hours prior to the child protection conference or core group meeting.
- Copying outcome forms and minutes into the conference space after the conference.
- Copying all reports, minutes, outcome forms and invites to Documentum so they can be viewed as a 'pack' once the minutes of a conference have been agreed.
- Closing the conference space a short time after a child protection plan has ceased.

Professionals from external agencies are responsible for:

- Loading their agency report into the conference space at least 24 hours prior to the child protection conference or core group meeting.
- Reading the outcome reports, conference and core group minutes once they have been loaded into the conference space after the meeting.
- Downloading all relevant reports and documentation in the conference space for storage in line with their agency retention policy.

Benefits of the LCC Document Portal

The portal provides a number of benefits as follows:

- Making the administration of child protection conferences more efficient.
- Providing a secure facility to share all conference reports and documentation.
- Providing professionals attending a child protection conference or core group meeting with the opportunity to read all the reports in advance of the meeting so they are better informed and prepared. This should result in the discussion in the meeting being more focused, allowing more time to discuss the child protection plan and steps being taken to safeguard the child(ren).

Access to the LCC Document Portal

Access to the LCC Document Portal is secure. New users of the LCC Document Portal require authorisation from the conference administrator before gaining access to the portal.

LCC Document Portal users are only given access to the conference spaces that they are involved in, ensuring that users only see the data they need to.

All reports loaded into the LCC Document Portal are **read only** to maintain the integrity of the reports. If a report subsequently requires amendment, a new version has to be loaded to replace the original version to ensure that only the latest versions of reports can be viewed by conference invitees.

Conference invitees receive email alerts when a new report is loaded into the conference space.

What happens when the child protection plan ceases?

When a child protection plan is ceased all the reports and documentation for the conference series are available on the LCC Document Portal for two months before being removed. This provides agencies with the opportunity to read/download relevant reports and documentation.

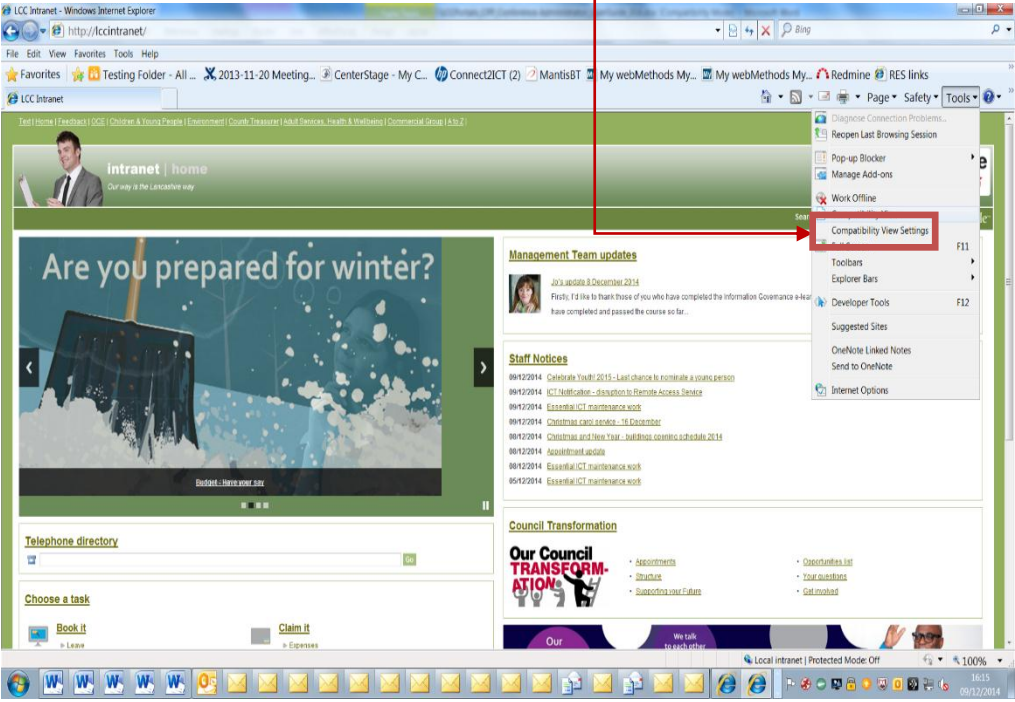
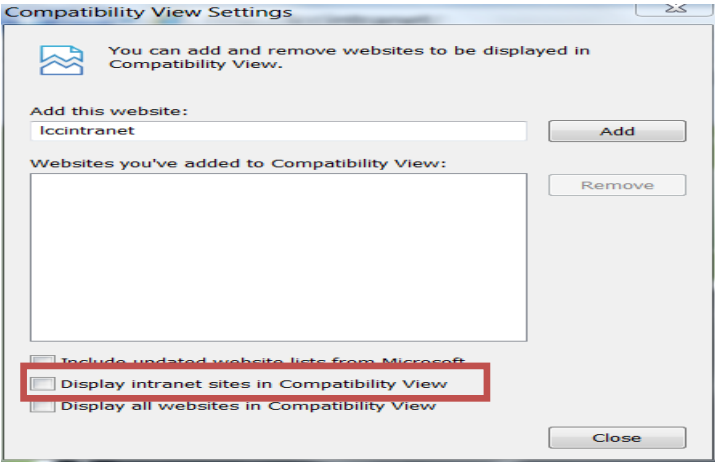
Once a conference series is removed from the LCC Document Portal, a user will lose their access to the LCC Document Portal if they are not a member of another conference space.

2. Scope

This user guide provides internal users with guidance for:

- Logging in to the LCC Document Portal
- Using the LCC Document Portal including:
 - Navigating round the LCC Document Portal
 - Accessing the relevant conference space
 - Viewing reports in the conference space
- Troubleshooting.

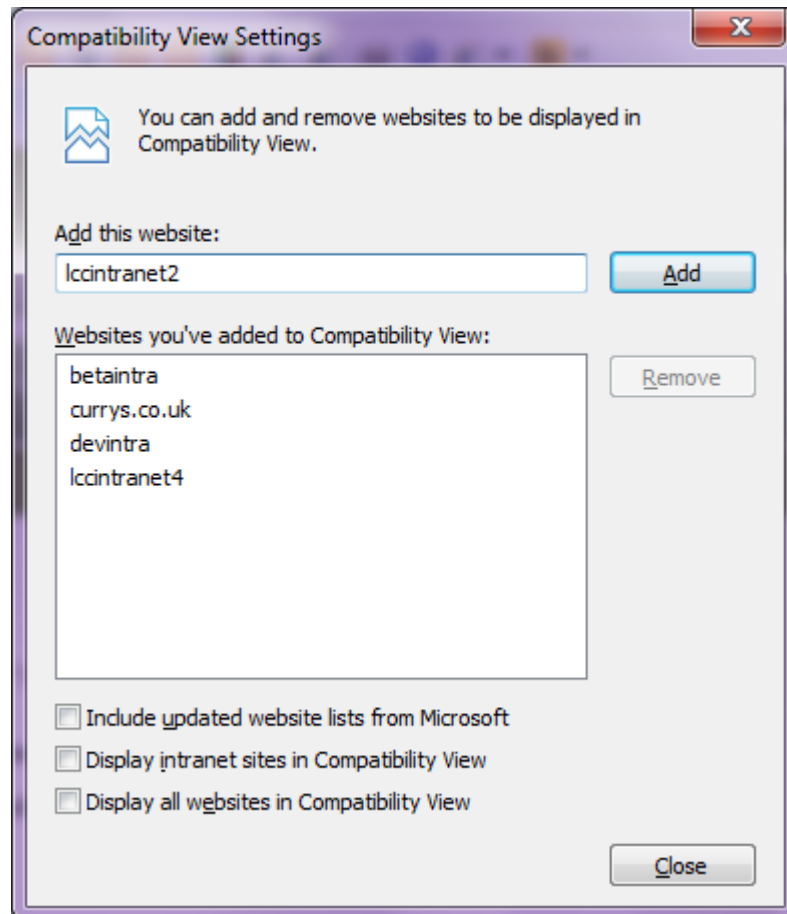
3.1 Check your Browser Setting

Step	Action
3.1.1	<p>Before you start, please check that the "Display intranet sites in Compatibility is View" is unchecked.</p> <p>Your will be able to check this by opening your Intranet and Select Tools, then Compatibility view Settings menu</p> 
3.1.2	<p>"Uncheck" the Display intranet sites in Compatibility is View is checked, if not, Click Close</p> 

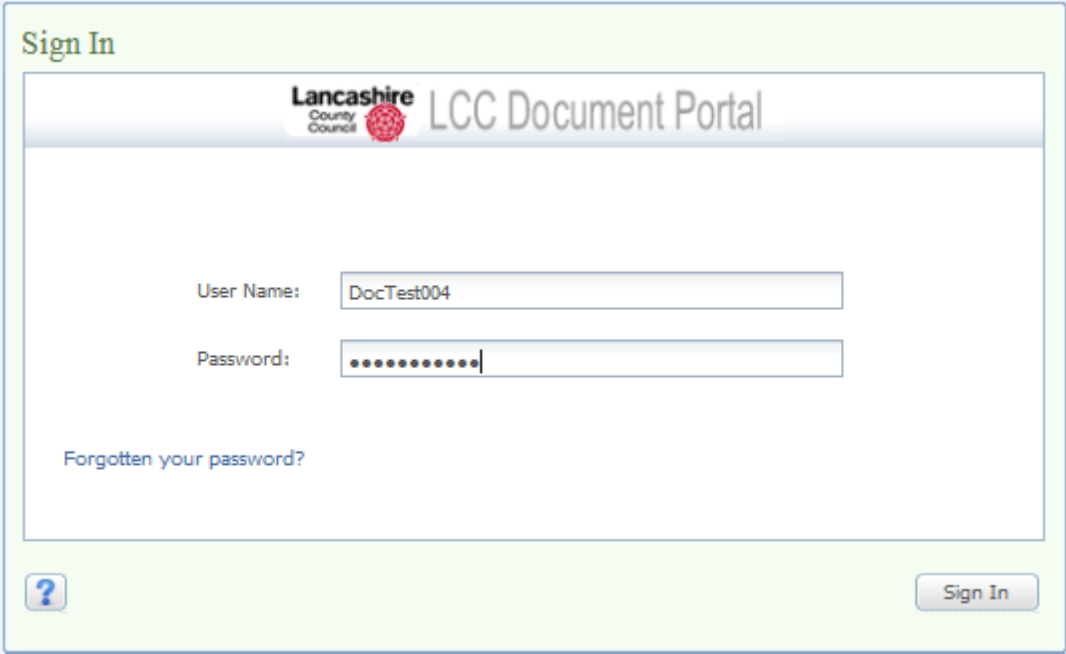
3.1.3

To add individual intranet sites that need to be displayed in Compatibility view such as Minute Taking System (http://lccintranet2/acs/minute_taking/login/login.asp) open the page in Internet Explorer, select Tools, then Compatibility View Settings menu option.

In the Compatibility View Settings pop up window that appears check the site (in this case 'lccintranet2') is showing in the 'Add this website:' field and click the Add button.

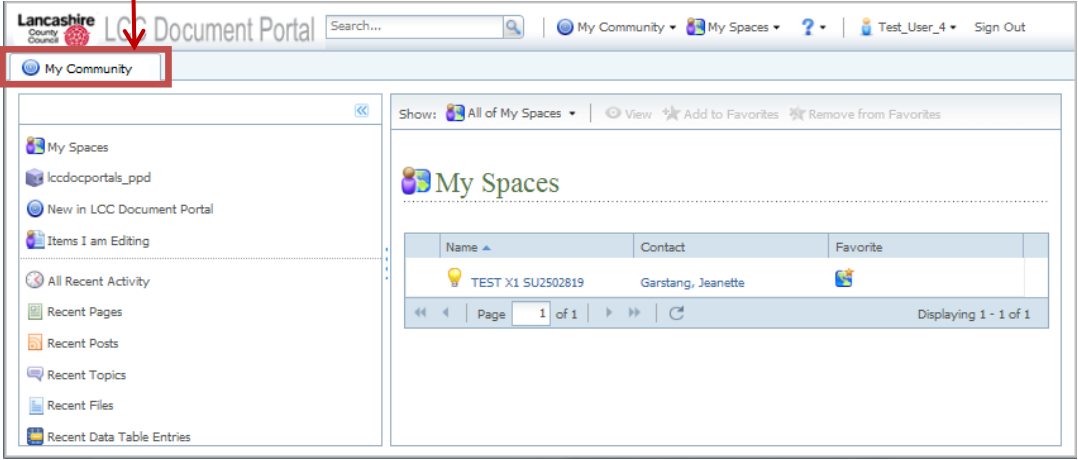
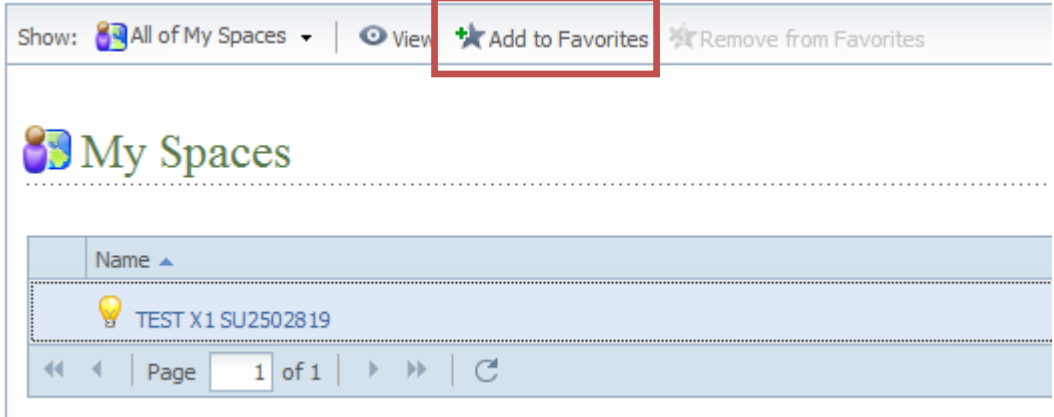


3.2 LCC Document Portal Login Process

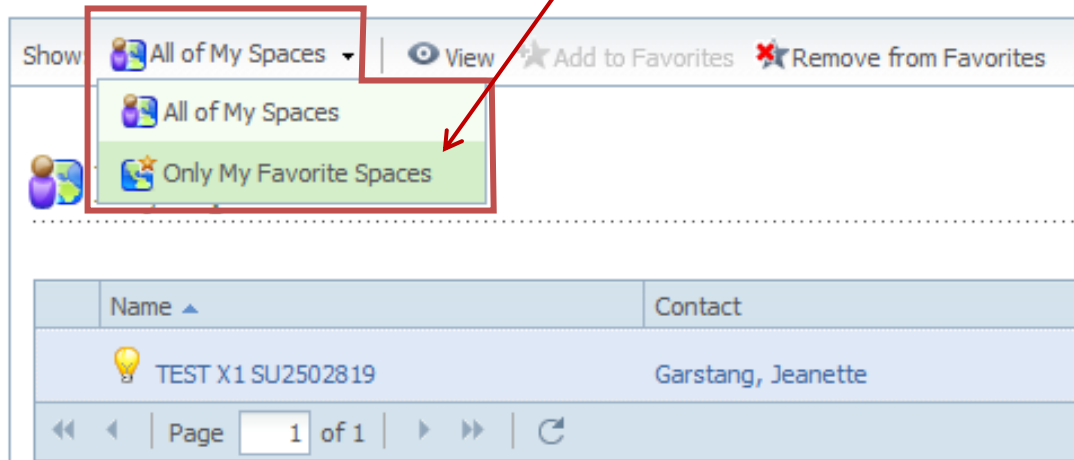
Step	Action
3.2.1	<p>You will be able to access the LCC Document Portal by following the relevant link which is included in the invitation email.</p> <p>Please note: There are currently two links on the invitation, one for each of the groups listed below:</p> <p>Internal users who are Lancashire County Council employees on the corporate network who have the '@lancashire.gov.uk' email address (excludes schools).</p> <p>External users who are all users outside of Lancashire County Council.</p> <p>It is important that you use the correct link to access the LCC Document Portal. If you are unsure about which link to follow, guidance about the links can be found on the LSCB Website: http://www.lancshiresafeguarding.org.uk/resources/child-protection-meetings.aspx</p>
3.2.2	<p>The LCC Document Portal homepage will be brought up automatically. Sign in using your AD Username and Password and click on the 'Sign In' button which will un-grey itself once you type into the password text box:</p> 

4. LCC Document Portal Activities

4.1 Navigating through LCC Document Portal

Step	Action
4.1.1	<p>Once you have logged in successfully, you will be presented with the following screen.</p> <p>In the 'My Community' tab you will have a list of the conference spaces you have been invited to and to which you have access.</p> 
4.1.2	<p>For professionals who are invited to many conferences, the list of conference spaces will be long. It is possible to search for spaces (see Section 4.5). It is also possible to add spaces to a favourites list by highlighting the conference space and clicking on the 'Add to Favourites' tab.</p> 

The list of conference spaces that are displayed can be restricted to conference spaces on the favourite list by clicking on the '**All of My Spaces**' tab and then clicking on the '**Only my Favourite Spaces**' option.

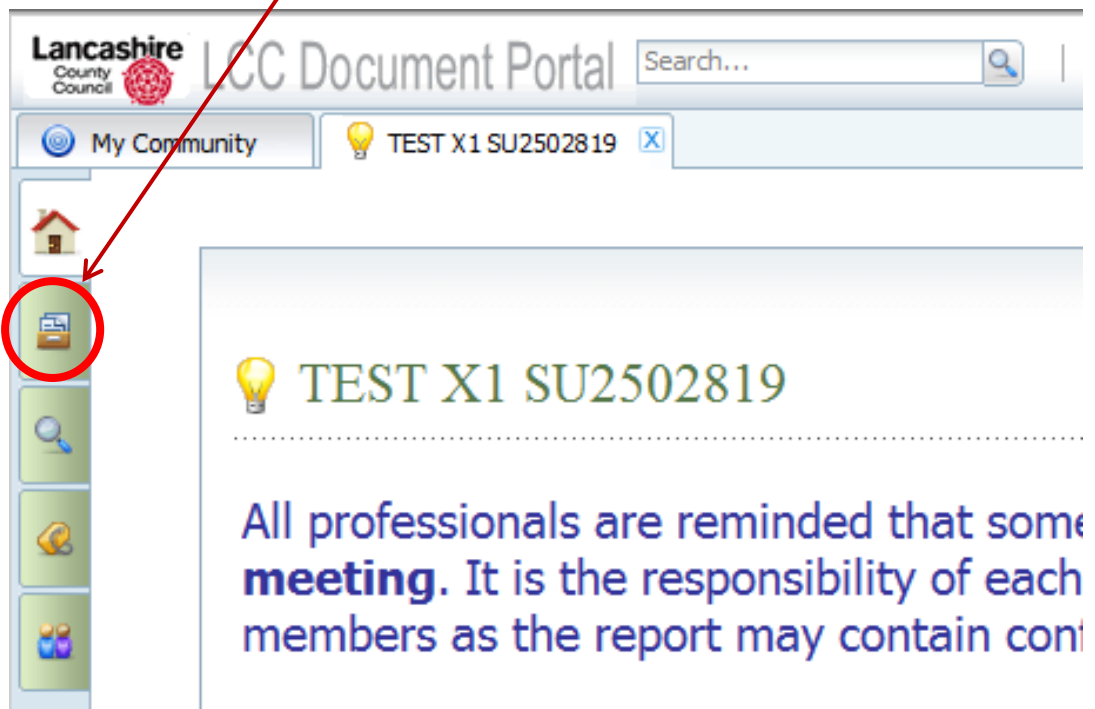


4.1.3

To navigate to the conference space you require, click on the conference space name. This can be found in your conference invite.

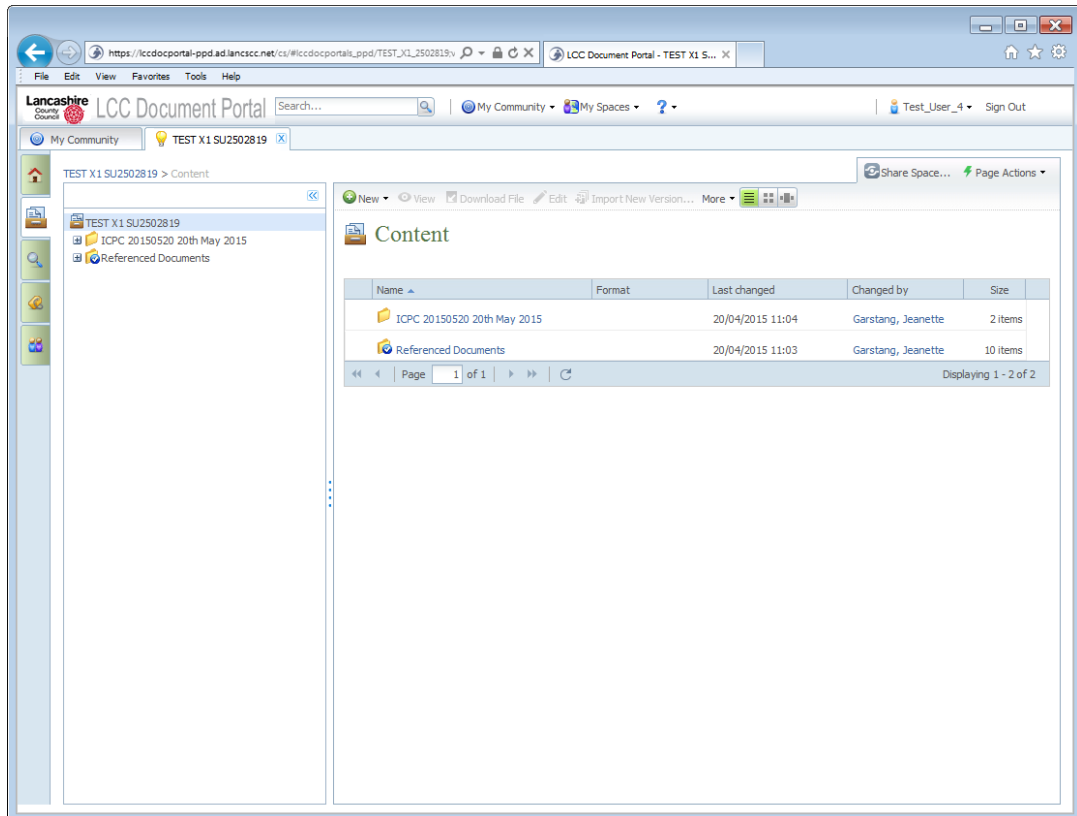
The screen below will be displayed and will show all the folders and documents that are currently in the conference space.

Click on the '**Browse content**' tab to display the Conference Space.

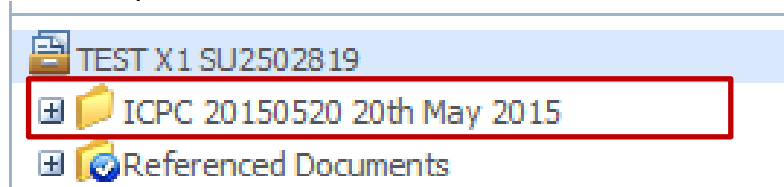


4.1.4

The screen below will be displayed.



Each conference space will have the same folder structure which is:



Space name

ICPC 20141120 20th November 2014
Core 20141130 30th November 2014
RCPC 20141218 18th December 2014

The folders are named by meeting type followed by the date in YYYYMMDD format and then date again in a more descriptive format.

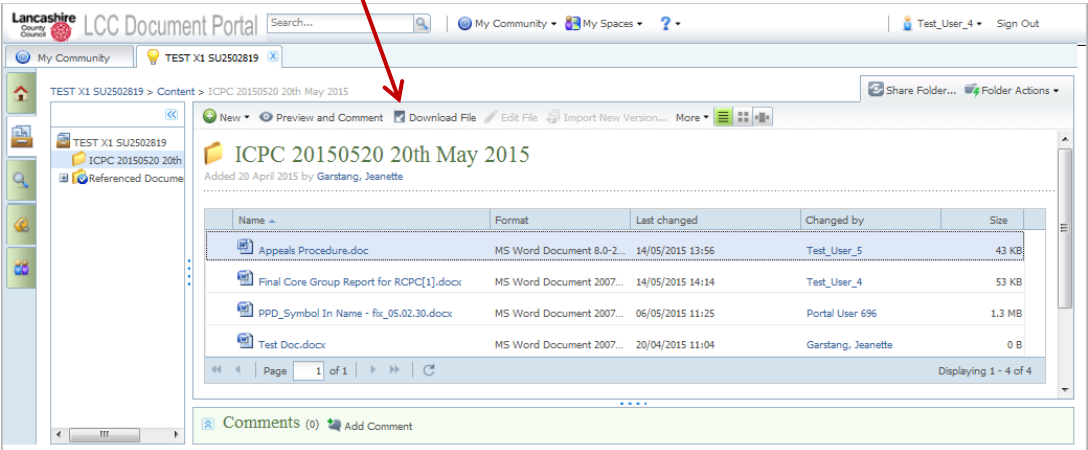

The '**Referenced Documents**' folder contains reference information about the child protection process; agenda template and conference report templates.

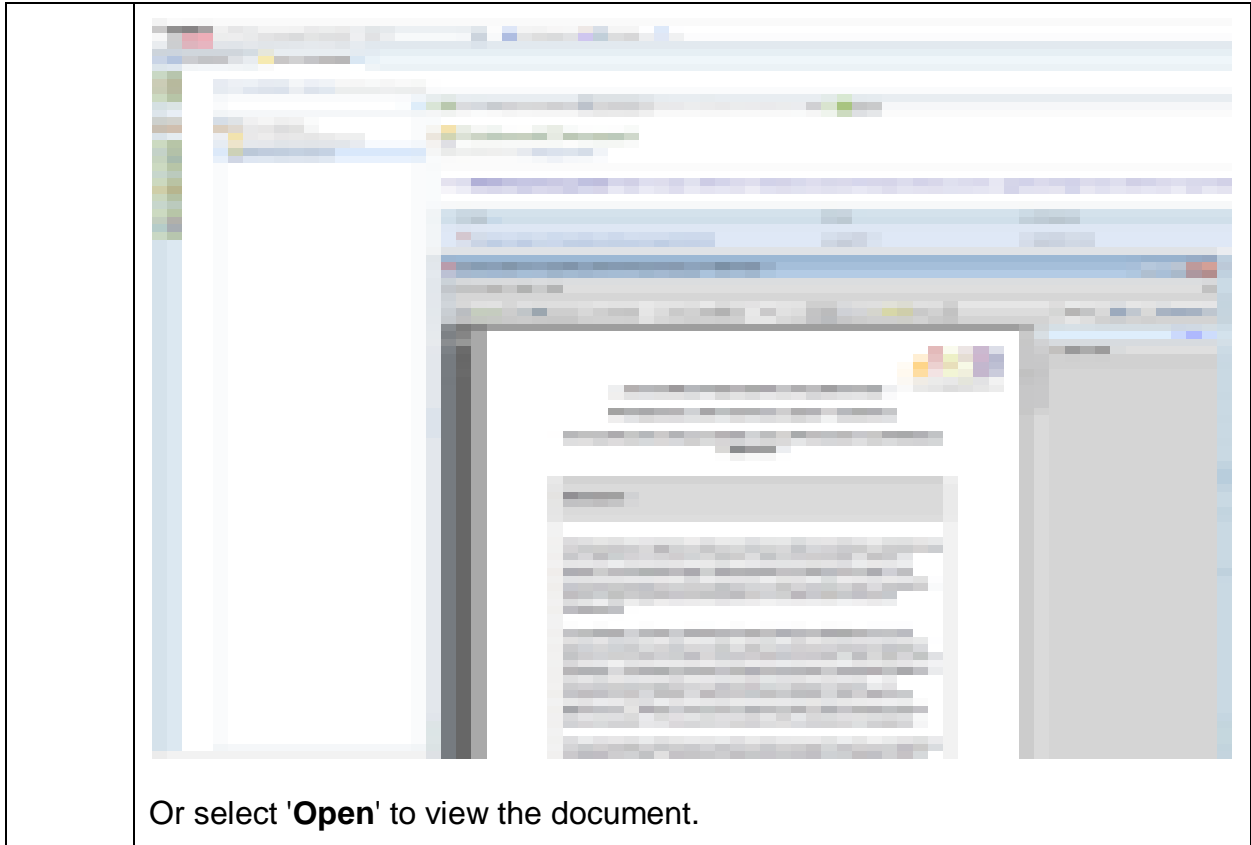
4.2 To Download a Document

This section provides information about downloading documents from the conference space.

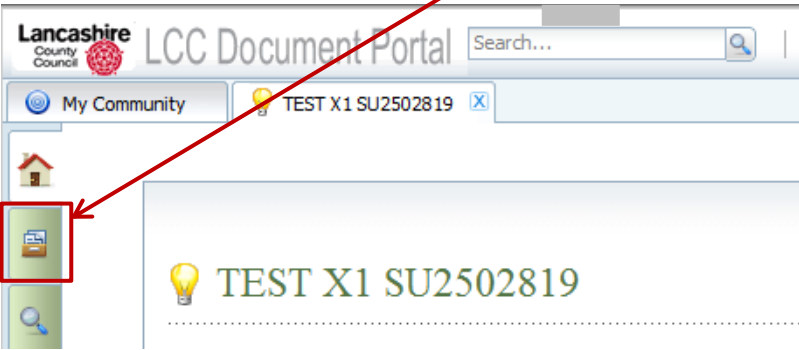
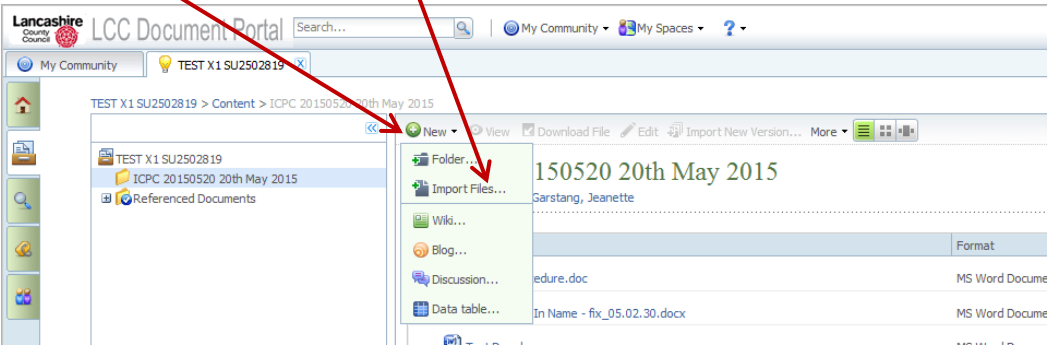
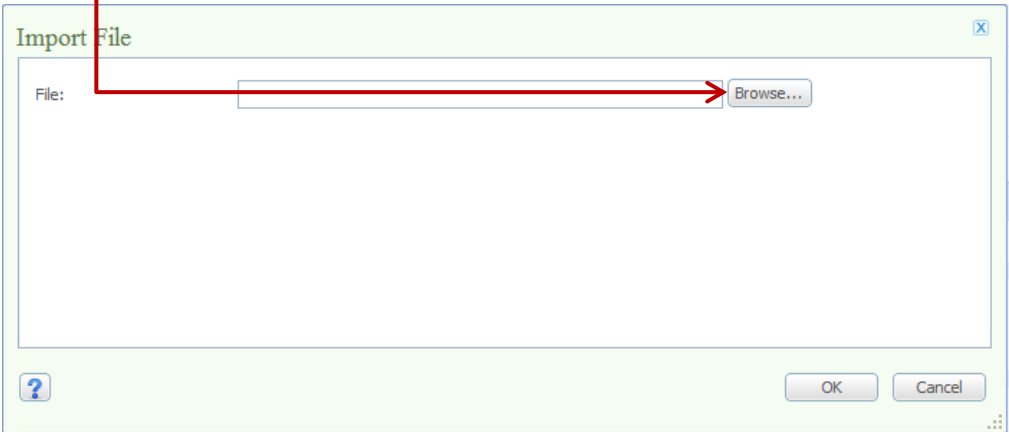
Prior to the conference, professionals may find the conference report templates useful to download. Documents providing information about completing reports, conference agendas, abuse categories, the appeals process etc. are also available to view and/or download.

Professionals are able to view and download other agency reports if necessary.

Step	Action																									
4.2.1	<p>There is the option to download reports from conference spaces for reading and storing.</p> <p>To download a document, first locate and open the folder where the document is held.</p> <p>Select the document you want to download by highlighting the document. Then select 'Download File':</p>  <table border="1" data-bbox="523 1211 1369 1384"> <thead> <tr> <th>Name</th> <th>Format</th> <th>Last changed</th> <th>Changed by</th> <th>Size</th> </tr> </thead> <tbody> <tr> <td>Appeals Procedure.doc</td> <td>MS Word Document 8.0-2...</td> <td>14/05/2015 13:56</td> <td>Test_User_5</td> <td>43 KB</td> </tr> <tr> <td>Final Core Group Report for RCPC[1].docx</td> <td>MS Word Document 2007...</td> <td>14/05/2015 14:14</td> <td>Test_User_4</td> <td>53 KB</td> </tr> <tr> <td>PPD_Symbol In Name - fix_05.02.30.docx</td> <td>MS Word Document 2007...</td> <td>06/05/2015 11:25</td> <td>Portal User 696</td> <td>1.3 MB</td> </tr> <tr> <td>Test Doc.docx</td> <td>MS Word Document 2007...</td> <td>20/04/2015 11:04</td> <td>Garstang, Jeanette</td> <td>0 B</td> </tr> </tbody> </table>	Name	Format	Last changed	Changed by	Size	Appeals Procedure.doc	MS Word Document 8.0-2...	14/05/2015 13:56	Test_User_5	43 KB	Final Core Group Report for RCPC[1].docx	MS Word Document 2007...	14/05/2015 14:14	Test_User_4	53 KB	PPD_Symbol In Name - fix_05.02.30.docx	MS Word Document 2007...	06/05/2015 11:25	Portal User 696	1.3 MB	Test Doc.docx	MS Word Document 2007...	20/04/2015 11:04	Garstang, Jeanette	0 B
Name	Format	Last changed	Changed by	Size																						
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PPD_Symbol In Name - fix_05.02.30.docx	MS Word Document 2007...	06/05/2015 11:25	Portal User 696	1.3 MB																						
Test Doc.docx	MS Word Document 2007...	20/04/2015 11:04	Garstang, Jeanette	0 B																						
4.2.2	<p>The 'File Download' prompt will appear.</p>  <p>Select 'Save' to save a copy of the document to the 'My Downloads' folder on your computer.</p>																									



4.3 To Upload a Document

Step	Action
4.3.1	<p>Locate, navigate and open a conference space.</p> <p>Once in the conference space, select the 'Browse Content' tab:</p> 
4.3.2	<p>Navigate to the folder you want to upload your document into.</p> <p>Select 'New' then 'Import Files...'</p> 
4.3.3	<p>The 'Import File' dialog will appear.</p> <p>Select 'Browse' then navigate and locate the document from your computer.</p> <p>Once the document is located, select it, then click on 'Open' where you will return to the 'Import File' dialog with your chosen document in the 'File' text box:</p> 

4.3.4

Check you are uploading the correct document into the conference space then open the drop down menu beside '**Please confirm Service User ID is correct**' and select '**Confirmed**':

Select '**Ok**'



A prompt will be displayed asking if you want to import another file. Select '**No**' to close but if you wish to upload another, choose '**Yes**' and repeat steps [4.3.3 – 4.3.4](#).

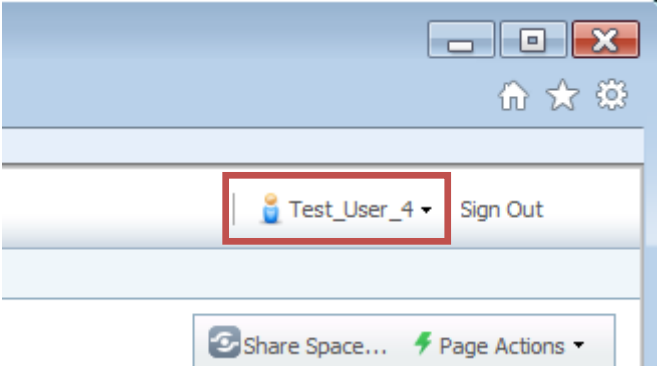
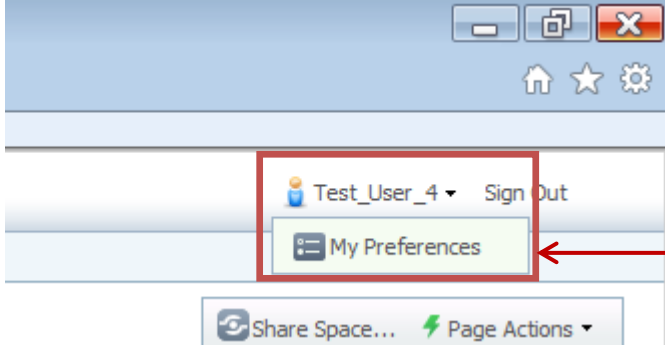
4.3.5

Your document(s) will have been added into the location:

Name	Format	Last changed	Changed by	Size
Appeals Procedure.doc	MS Word Document...	14/05/2015 13:56	Test User 5	43 KB
Final Core Group Report for RCPC[1]...	MS Word Document...	14/05/2015 14:14	Test_User_4	53 KB
PPD_Symbol In Name - fix_05.02.30.d...	MS Word Document...	06/05/2015 11:25	Portal User 696	1.3 MB
Test Doc.docx	MS Word Document...	20/04/2015 11:04	Garstang, Jeanette	0 B

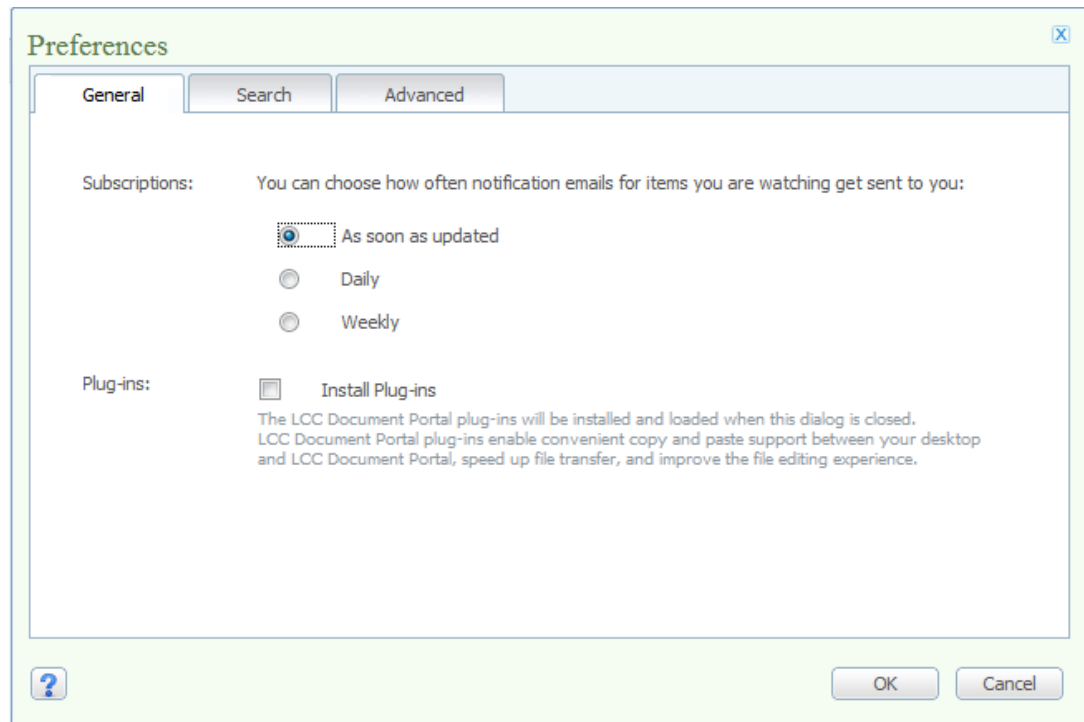
4.4 Setting Preferences and Watching Content

Setting your preferences and watching content will ensure that you will be alerted when new reports are loaded into the conference space. This will need to be done for each conference space to which you have been invited.

Step	Action
4.4.1	<p>Setting your preferences and watching content will ensure that you will be alerted when new reports are loaded into the conference space. This will need to be done for each conference space to which you have been invited.</p>  <p>Click on the Username and a drop down menu to appear and select 'My Preferences':</p> 

4.4.2

From the Preferences prompt, it will have the following tabs which allows the user to customise their settings:

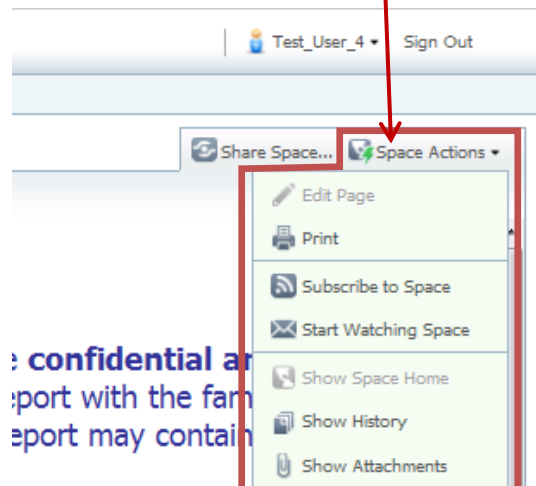


Setting your Subscriptions allows you to change how quickly you want to receive email notifications. This will inform you when any new content is added to the Conference Space.

4.4.3

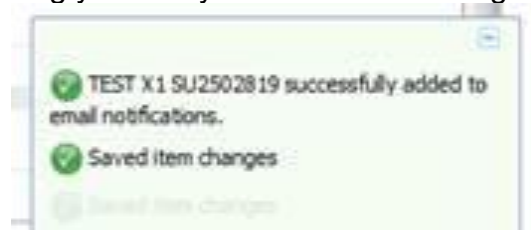
Watching a conference space means you are kept up-to-date, if any documents, objects or files are uploaded into a conference space. You will be sent an email informing you of the changes (the time of when the email is sent to you depending on your Subscription Settings see [Step 4.4.2](#)).

To watch a space, open the conference space you wish to watch from your **'My Community'** tab. Then select **'Space Actions'**, a drop down menu will display:



4.4.4

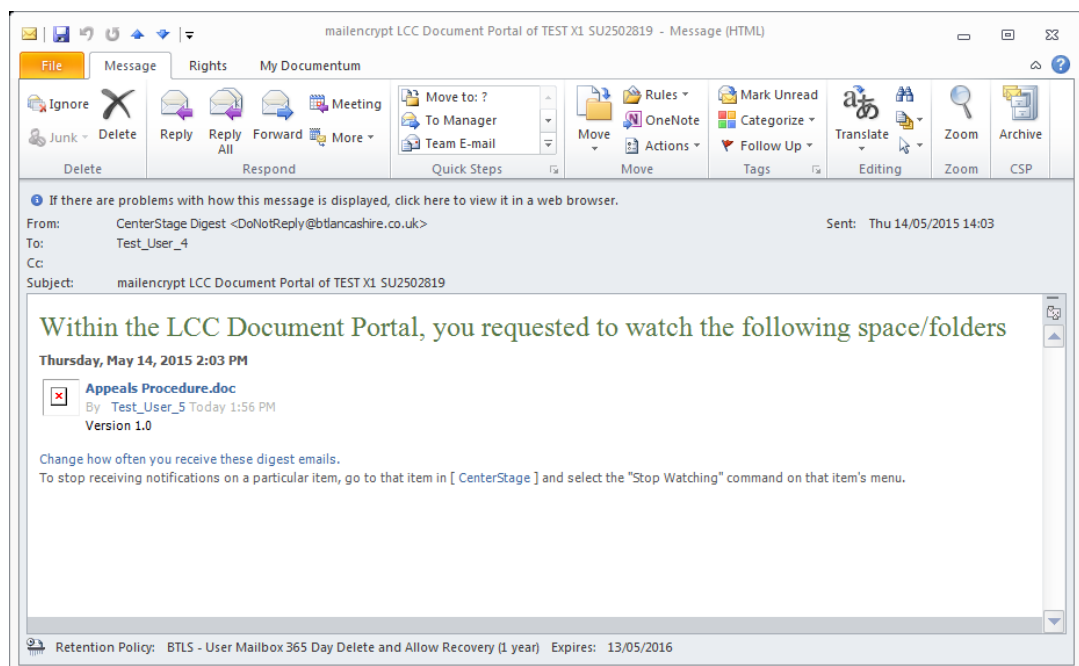
Select **'Start Watching Space'** and a prompt will appear at the bottom right of the screen informing you that you are now watching the space:



4.4.5

Once any changes are made or documents added to a Conference Space you will then receive emails informing you of the update to the Space.

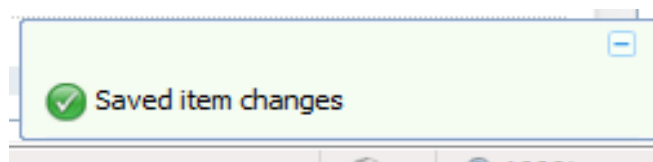
See example of the email below:



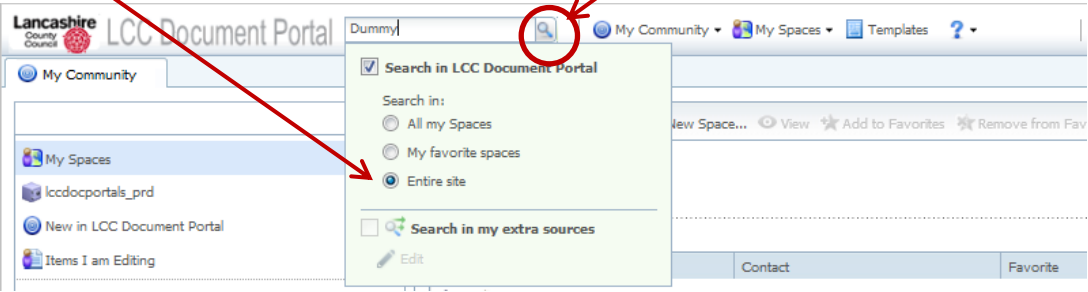
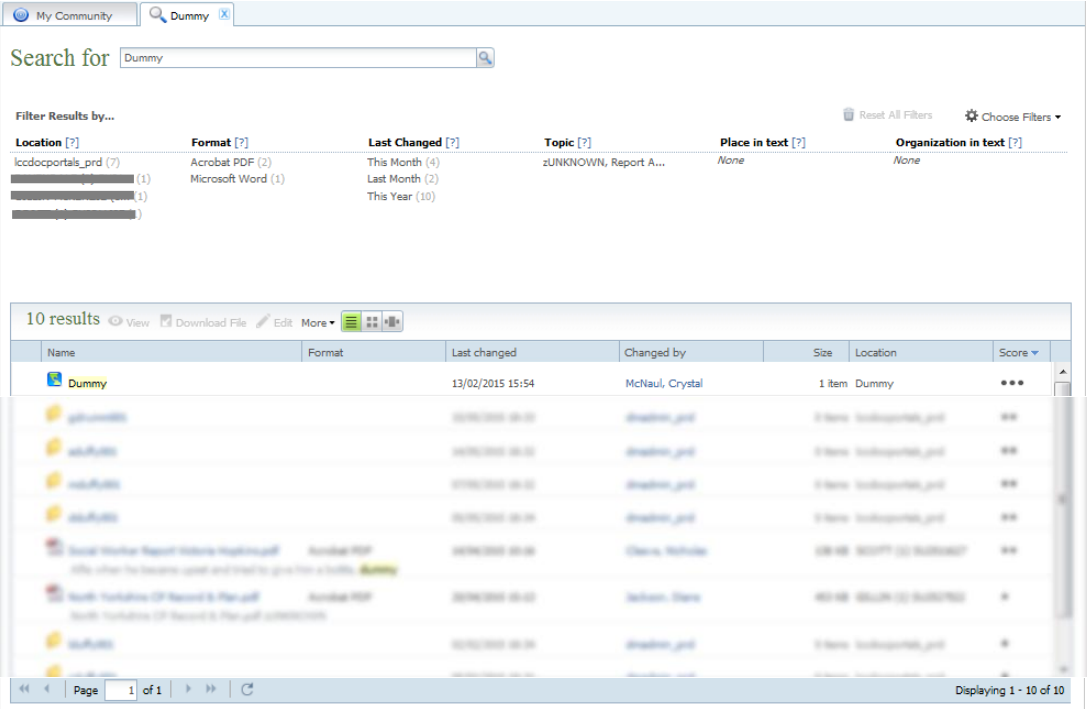
4.4.6

To stop watching a space, open the conference space you have started watching.

Select **'Space Actions'** then **'Stop watching space'** and you will get a prompt informing you of the change:



4.5 Searching in the Portal

Step	Action
4.5.1	<p>To Search, enter a value within the Search Bar, making sure that the 'Entire Site' option is selected, and then click the Magnifying Glass icon.</p>  <p>A new tab will open with the searched term as the tab name and a list of results including folders and documents will be displayed below.</p>  <p>Immediately, you will be presented with a list of all the current objects within the Conference Space and the results can be filtered by using any of the options above.</p>

4.5.2

You can also use wildcards whilst searching for a word (regardless of what method of search you are using). A wildcard is a special character that can represent one or more characters. For example, you enter *child* into the search. You would receive documents with the word *child* but with a wildcard you would enter *child** and the results would return documents with *children*, *child*, *childcare*, etc.

To use a wildcard, enter **"**"** to represent any characters. Wildcards can be used in the middle, at the end, at the beginning of a word or use only a wildcard to find all the objects in the location.

Note: Wildcards can also be used in numbers and searches can also find folders so it is possible to search for folders and numbers using wildcards.

Examples:

Search for Space Name

Search for

10 results [View](#) [Download File](#) [Edit](#) [More](#)

Name	Format	Last changed	Changed by	Size	Location	Score
Dummy		13/02/2015 15:54	McNaul, Crystal	1 item	Dummy	...

Search for Report

Search for

Filter Results by...

Location [?] [Reset](#)

- Dummy (12)
- lccdocportals_prd (43)

Filter applied to show only results from within the 12 documents saved against the Dummy Conference Space

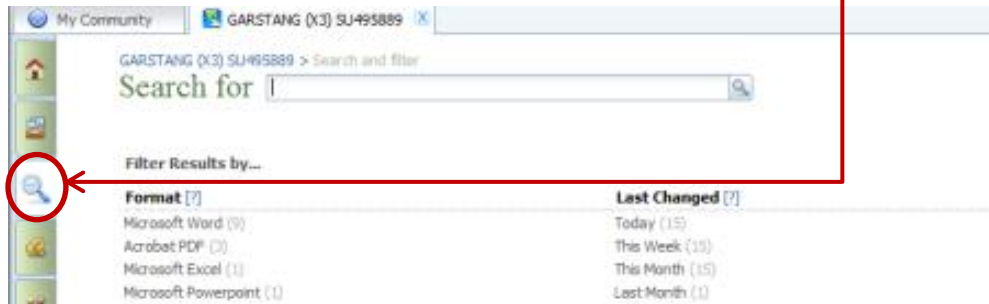
3 results [View](#) [Download File](#) [Edit](#) [More](#)

Name	Format	Last changed	Changed by	Size	Location	Score
Final Core Group Report for RCPC.docx Page of 6 CP-C2 Final Core Group Report for RCPC (Feb 2014) _GoBack LANCASHIRE SAFEGUARDING CHILDREN BOARD CONFIDENTIAL FINAL CORE GROUP REPORT FOR REVIEW CHILD PROTECTION CONFERENCE... VIEWS: PARENT'S/CARER'S VIEWS: FINAL CORE GROUP RECOMMENDATION	MS Word Document 200...	18/05/2015 09:44	Portal User 1213	53 KB	Dummy	...
Final Core Group Report for RCPC.docx Page of 6 CP-C2 Final Core Group Report for RCPC (Feb 2014) _GoBack LANCASHIRE SAFEGUARDING CHILDREN BOARD CONFIDENTIAL FINAL CORE GROUP REPORT FOR REVIEW CHILD PROTECTION CONFERENCE... VIEWS: PARENT'S/CARER'S VIEWS: FINAL CORE GROUP RECOMMENDATION	MS Word Document 200...	13/02/2015 15:57	McNaul, Crystal	53 KB	Dummy	...
Lancashire assessment and planning framework... template for all CP Conferences Final CORE group Report - opportunity... assessment process will replace the current initial and core... Agency not in attendance or part of Core Group to complete... the manager at the point of allocation. Assessment 7 Core Group	MS PowerPoint Presentat...	13/02/2015 15:56	McNaul, Crystal	410 KB	Dummy	..

Page 1 of 1 [Refresh](#) Displaying 1 - 3 of 3

4.5.3

A search can also be performed against the contents of a specific Space. To perform this search open a Space then select the **'Search and Filter Content'** tab represented by the Magnifying Glass Icon



4.5.4

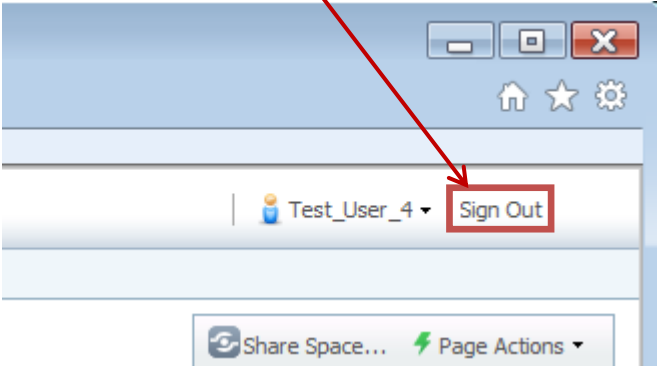
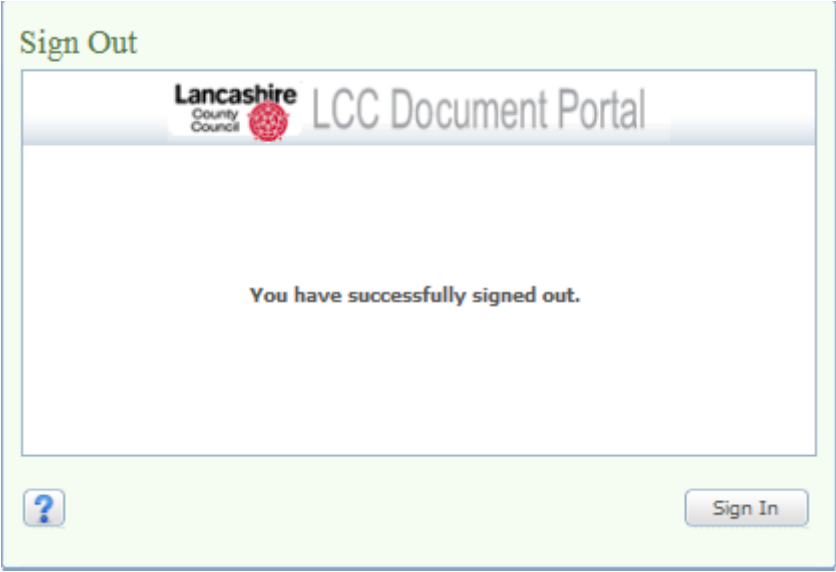
Enter a word into the **'Search for'** text box then click the **'Magnifying Glass'** icon. The results will return documents with the term either being in the name or in the contents of the document:



The returned results will often highlight the searched word.

Name	Format	Last changed	Changed by
Final Core Group Report for RCPC.docx 2014)_GoBack LANCASHIRE SAFEGUARDING CHILDREN BOARD CONFIDENTIAL FINAL CORE GROUP REPORT FOR REVIEW CHILD PROTECTION CONFERENCE...: SECTION to Conference (* - The...) CHILD SERVICE USER NUMBER * SURNAME FIRST NAME DATE OF BIRTH	MS Word Document 2007 / 2010	18/05/2015 09:44	Portal User 1213
Agency Guidance for Completing Conference Reports.pdf LANCASHIRE SAFEGUARDING CHILDREN BOARD PROFESSIONAL OR INDIVIDUAL AGENCY GUIDANCE FOR COMPLETING INITIAL/REVIEW CHILD... Initial Child Protection C	Acrobat PDF	13/02/2015 15:55	McNaul, Crystal

4.6 Sign Out

Step	Action
4.6.1	<p>To sign out of LCC Document Portal, hover towards the top-right corner of the screen and click on Sign Out</p>  <p>You will receive notification that you have successfully signed out</p>  <p>If you wish to Sign back in, Click Sign In and you will be presented with the LCC Secure Login Page (see Section 3.2 Login Process).</p>

Troubleshooting

1. Emails

1.1 Question: I have not received an invitation to attend a Child Protection Conference.

Answer 1: Please contact the Conference Administration Team. Contact details can be found at the end of this document.

1.2 Question: I am not receiving notifications when a new document is uploaded to a conference space I have been invited to.

Answer: Please log into the LCC Document Portal tool. For more information on how to log into LCC Document Portal please refer to [Section 3.2. Login Process.](#)

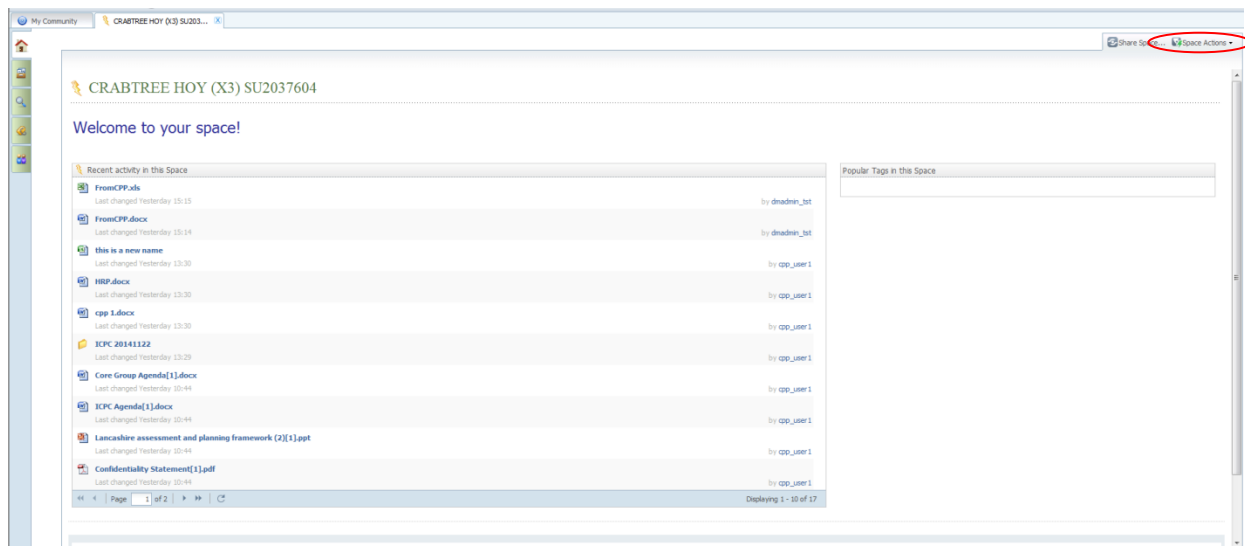
Please navigate to the Conference Space you would like to receive notifications from by selecting the Space from the 'My Space' menu within the 'My Community' Window.

The screenshot shows the 'My Community' window with the 'My Spaces' menu item selected. Below the menu, a table displays a list of conference spaces. The table has three columns: Name, Contact, and Favorite. The row for 'GARSTANG (3) SU49584' is highlighted with a red circle.

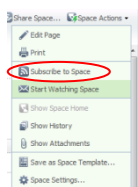
Name	Contact	Favorite
Sarker Smith (x2) SU 123456	McLau, Crystal	
Child Protection This is the template to be used	app_user1	
Child Protection 2 This is a new template used for training	app_user1	
CLOONEY(C) su 237465	Magne, Nicola	
CRABTREE HOY (X3) SU037604	app_user1	
FARMER (2) SU87654 CHILD PROTECTION CASE CONFERENCE	Abbott, Gillan	
GARSTANG (3) SU49584	app_user1	
GREEN (1) SU497596	app_user1	
JOHNSON 1 SCHOFIELD 1 (2)	Schofield, Sarah	
JONES (X3) CHILD PROTECTION SPACE FOR JONES (X3)	Schofield, Sarah	
JONES ROBERTS (X3) SU56789	Magne, Vicky	
JONES SMITH (X2) SU123456 CHILD PROTECTION SPACE FOR JONES SMITH SU123456	McCreary, Debbie	
THOMAS (1) SU87494	app_user1	
TURNER (X2) SU497597	app_user1	
YATES (1) SU435237	app_user1	

You will be presented with the Conference Space details and contents.

Select the 'Space Actions' menu:



Select 'Start Watching Space'.



1.3 Question: *I am receiving the following email: Posted Event: "Transformation" in docbase "lccdocportal_prd"*

Answer: This is a system generated message that is of no concern to you. Please ignore this email. Contact the Conference Administration Team if you continue to receive these emails (contact details can be found at the end of this document).

2. Invitation

2.1. Question: *What if I want to invite a colleague?*

Answer: If you believe that a colleague should also attend the conference, please contact the Conference Administration Team (contact details can be found at the end of this document).

2.2. Question: *What if I cannot attend the conference?*

Answer: If you cannot attend the conference, please contact the Conference Administration Team (contact details can be found at the end of this document).

3. LCC Document Portal

3.1. Question: *I've logged into the Portal, how do I find the right Conference space?*

Answer: Please refer to the [Section 4.1 Navigating through LCC Document Portal](#) for details of how to navigate to the correct conference.

3.2. Question: *I cannot view / download a report from the Portal.*

Answer 1: Please ensure you are following the correct instructions for how to download/view a document from LCC Document Portal (please see [Section 4.2 To Download a Document](#)).

Answer 2: If you are still unable to download/view a document from LCC Document Portal, please contact your Conference Administration Team (contact details can be found at the end of this document).

3.3. Question: *I need to make changes to a document I've already uploaded.*

Answer: Once you have uploaded a document to LCC Document Portal, you lose the permission to edit that document. Please ensure that the document you upload is the finalised document, which you would like the other conference attendees to review.

In the exceptional circumstance where you do need to edit a document, please contact the Conference Administration Team, who will issue a new version of the document on your behalf (If you are still unable to upload a document to LCC Document Portal, please contact your Conference Administration Team (contact details can be found at the end of this document)).

Contact Details.

If you are still experiencing problems, despite following the User Guide Instructions and Troubleshooting guidance, please contact the Conference Administration Team on: MinuteTakingServiceA@lancashire.gov.uk

The team will endeavour to answer your mail as soon as possible within standard Office Hours.

The Conference Administration Team can also be contacted on 01282 471253.