

YPLA Information Management Portal

User Guide for Providers

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Amendment History

Date	Author	Version	Reason for Amendment
21/12/2011	Liz Norman	1.0	This User Guide is just for Providers

Approval History

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1. Introduction

This section provides an introduction to this user guide and identifies who it is designed for, its content and where to go for further help and support.

1.1. Who is this User Guide for?

This guide is aimed at users from Local authorities, education and training providers and other partner organisations.

1.2. What is in this User Guide?

This guide includes details on how to access the YPLA Information Management Portal, and how to process documents which may be found there.

2. Accessing the Information Management Portal

The YPLA Information Management Portal is a secure and efficient means by which the YPLA and its partners can share documents and information.

The YPLA Information Management Portal can be accessed directly using the URL <https://gateway.imservices.org.uk>.

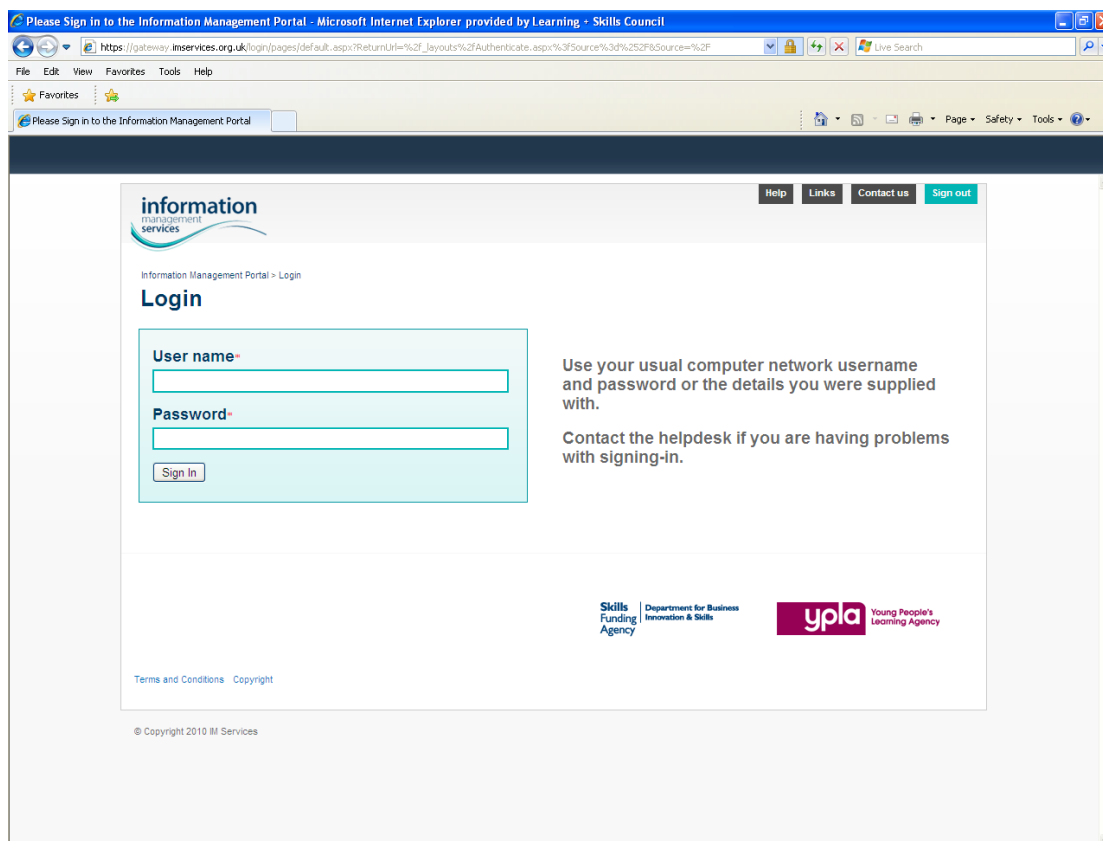
3. Types of Pages

The following pages will be available to users:

- Log-in to the IM Portal – section 4
- User specific Front Page – section 5
- Document Centre – section 6
- Categories – section 7
- Help, Links and Contact us – section 8
- User Settings – Alerts – section 9

4. Log-in to the IM Portal

This screen is the way into the Information Management Portal. The user name and password entered are validated and, according to the user's security settings, the front page is then displayed.



4.1. How to Log on

Enter the user name and password allocated to you.

If you are external to the YPLA, use the short user name preceded by 'isp\' and your password.

If your log-on is rejected, or you wish to change your password, or you have forgotten your password, please contact your YPLA territorial office. They will then take the necessary action on your behalf and come back to you with details when the action has been completed.

If your log-on is accepted, your personal Information Management Portal front page will be displayed.

4.2. How to Log off

Leave the Information Management Portal by selecting the Sign Out button in the top right hand corner of the screen.

5. User specific front page

This screen is the main screen for each user, showing options and documents which are available on the Information Management Portal to this specific user.

These options and documents are related to the:

- organisation to which the user belongs to
- role assigned to the user

This screen has areas containing:

- Workspaces
- Announcements
- Document and reports
- Quick Help

The screenshot displays the Information Management Portal dashboard. At the top, there is a navigation bar with 'Help', 'Links', 'Contact us', and 'Sign out' buttons. The main header reads 'information management services' and 'Information Management Portal'. Below this, there are two primary sections: 'Your workspaces' and 'Your documents and reports'. Under 'Your documents and reports', a workspace for 'Accrington Academy' is visible, featuring a 'Download Allocations Report' button. On the right side, there is an 'Announcements' section with several links and a 'Quick help Documents' section providing instructions on document access.

5.1. Workspaces

This is a list of Information Management Portal workspaces (screens) which are available to this user for further processing.

For Stage 1 of the YPLA Information Management Portal, this will not be populated for providers.

5.2. Your documents and reports

This lists the names of the organisations to which the user has access.

The list is sequenced in order of latest updated first.

Clicking on the provider name will result in the corresponding document centre being opened.

5.3. Announcements

This area will be populated by IM Services with information on forthcoming events which will impact on the Information Management Portal and is visible on every page.

5.4. Quick Help

This area will be populated by IM Services with help text relating to the Information Management Portal screens and processes and is visible on every page.

6. Document Centre

This screen shows the documents available for a particular organisation.

The central part of the screen lists the latest 10 documents lodged on this site.

A full list of all documents can be accessed via the 5 categories on the left of the screen

The screenshot shows a web browser window displaying the YPLA Information Management Portal for Accrington Academy. The page layout includes a navigation menu on the left with categories like Home, Funding and Performance, Strategic Analysis, Finance, LLDD, Young Offenders and ESF, and Educational Improvement. The main content area is titled 'Accrington Academy' and features a section for 'Your latest 10 documents...' which lists documents such as '888-accringtonacademy-oct2011-v4', 'Qualification Success Rate', and 'Open Book Sixth Form Success Rate', each with a 'Download File' button. Below this is a 'My Submissions' section. On the right side, there are 'Announcements' and 'How do I get access to other documents?' sections.

6.1. Your Latest 10 Documents

This area will show the latest ten documents added to this site only.

The list is sequenced in order of latest added first.

Clicking on the file name will result in the document being opened.

The documents can be downloaded by clicking on the 'Download File' next to the document.

6.2. Navigation

This area shows the name of the organisation whose document centre this is, together with a selection of document categories, under which all documents will be held.

Users can select a category, which will result in a list of documents in that category being displayed.

See section 7 for processing available when this is selected.

6.3. My submissions

This area is not populated for this phase of the Information Portal.

7. Categories

By selecting a specific category, users will be able to see all the documents stored in that category.

The screenshot shows a web browser window displaying the 'Funding and Performance - Documents' page for Accrington Academy. The page features a navigation menu on the left with options like Home, Funding and Performance, Strategic Analysis, Finance, LLDD, Young Offenders and ESF, and Educational Improvement. The main content area displays a table of documents with columns for Type, Name, Date Published, Approved By, Created, Created By, Region / Division, and Source Organisation. The documents are filtered by Year (2011) and Month (May). The table lists four documents, with the last one filtered by Month (November).

Type	Name	Date Published	Approved By	Created	Created By	Region / Division	Source Organisation
+	ypla-oba-nw-118597-aca-888-accrington-academy-26apr2011-v1	12/05/2011	lsc\glenniep	12/05/2011 08:46	lsc\glenniep	nw	ypla
+	ypla-obs-NW-118597-aca-888-ACCRINGTONACADEMY-26April2011-v1.0	12/05/2011	lsc\glenniep	12/05/2011 10:23	lsc\glenniep	NW	ypla
	ypla-qsr-nw-118597-aca-qsrreport1-21apr2011-v1	12/05/2011	lsc\glenniep	12/05/2011 14:36	lsc\glenniep	nw	ypla
+	ypla-alc-nw-118597-aca-888-accringtonacademy-oct2011-v4	01/11/2011	lsc\straughj	01/11/2011 14:19	lsc\straughj	nw	ypla

7.1. Available options

Documents will be displayed by year and month. User should select the '+' against each item to expand the selection.

A document can be saved locally by clicking the document and selecting 'Save'.

8. Help Links and Contact us

On every screen there will be 3 buttons displayed in the top right corner:

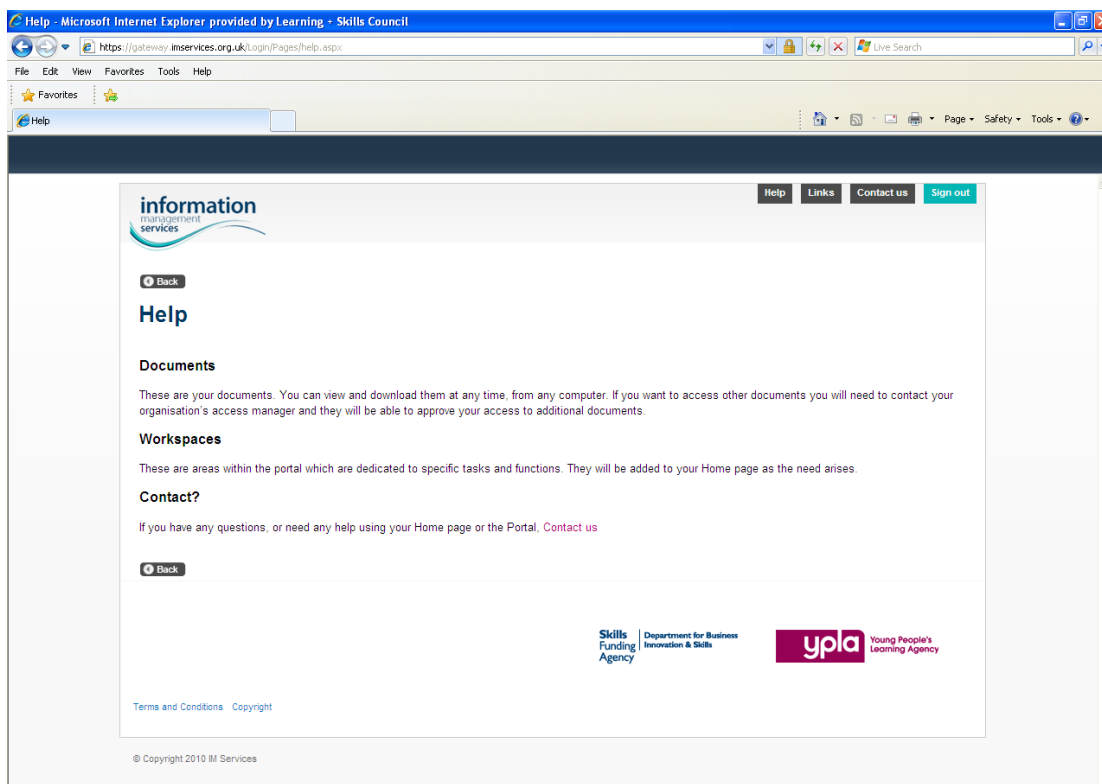
- Help
- Links
- Contact us

8.1. Help

When this button is selected a generic help screen will be displayed explaining Documents, Workspaces and who to contact

More detailed help information, relevant to the screen being displayed, is in a panel on the right hand side of the particular screen.

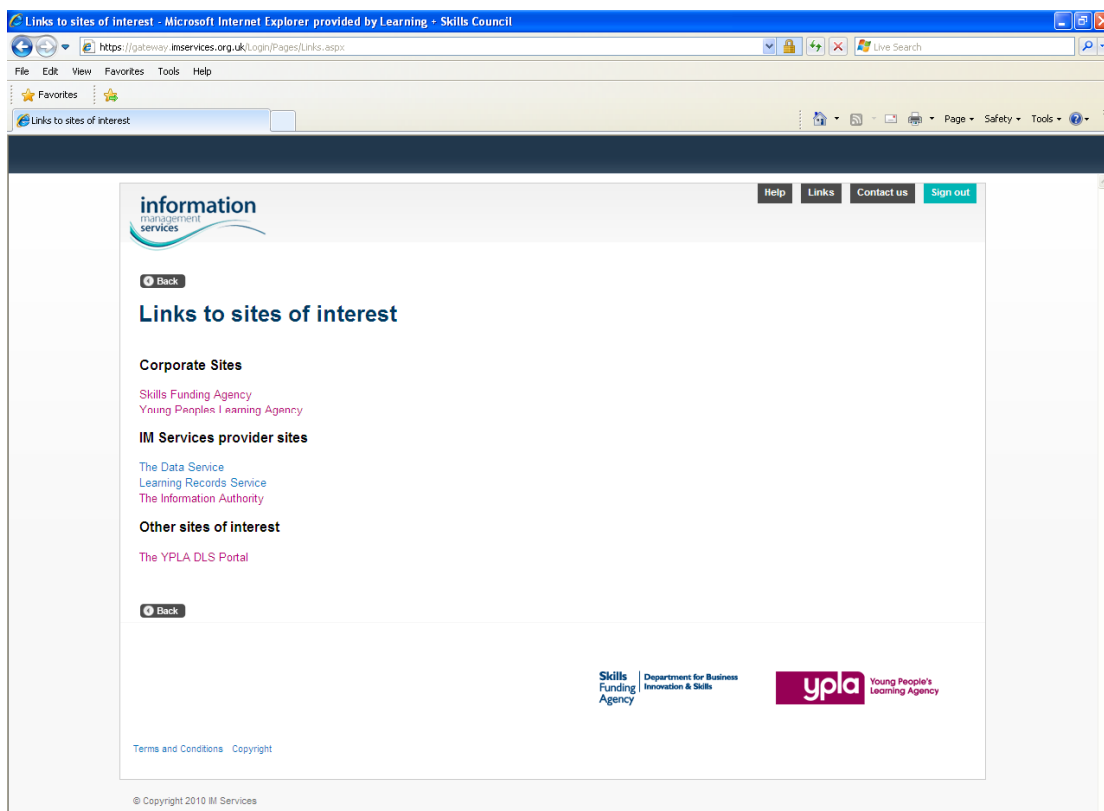
The following screen shot shows an example of the generic help screen



8.2. Links

When this button is selected a screen will be displayed with Links to external sites that may be of interest to the user. When a site is selected from the list, it will open in a new window.

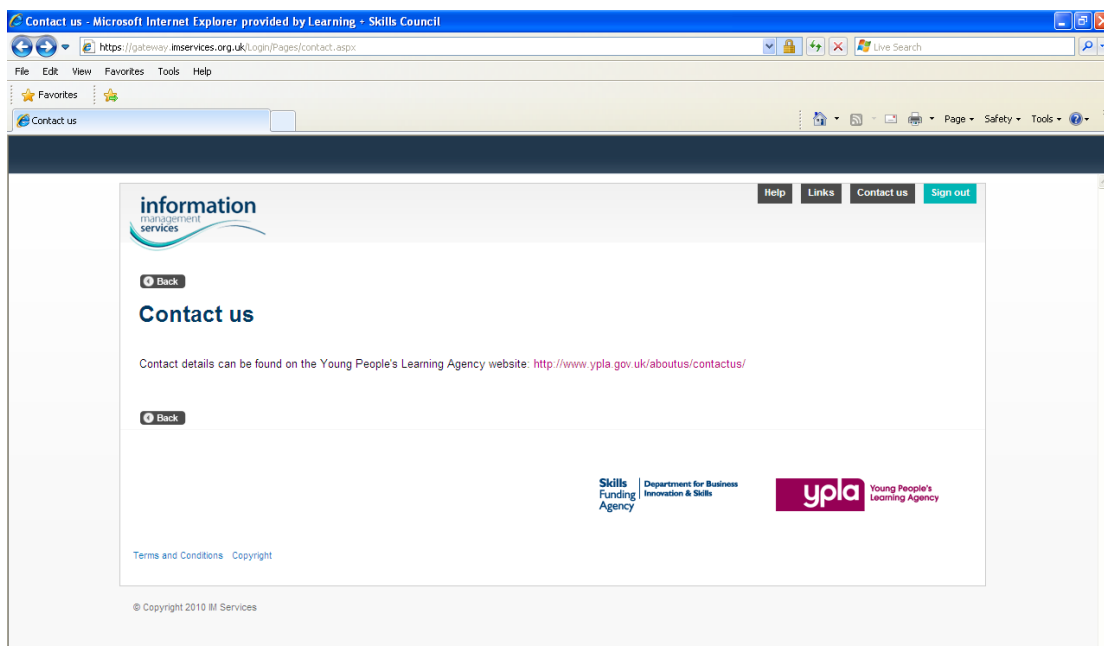
The following screen shot shows an example:



8.3. Contact us

When this button is selected contact details for the YPLA will be displayed, including a link to the 'contact us' page on the YPLA website.

The following screen shot shows an example:



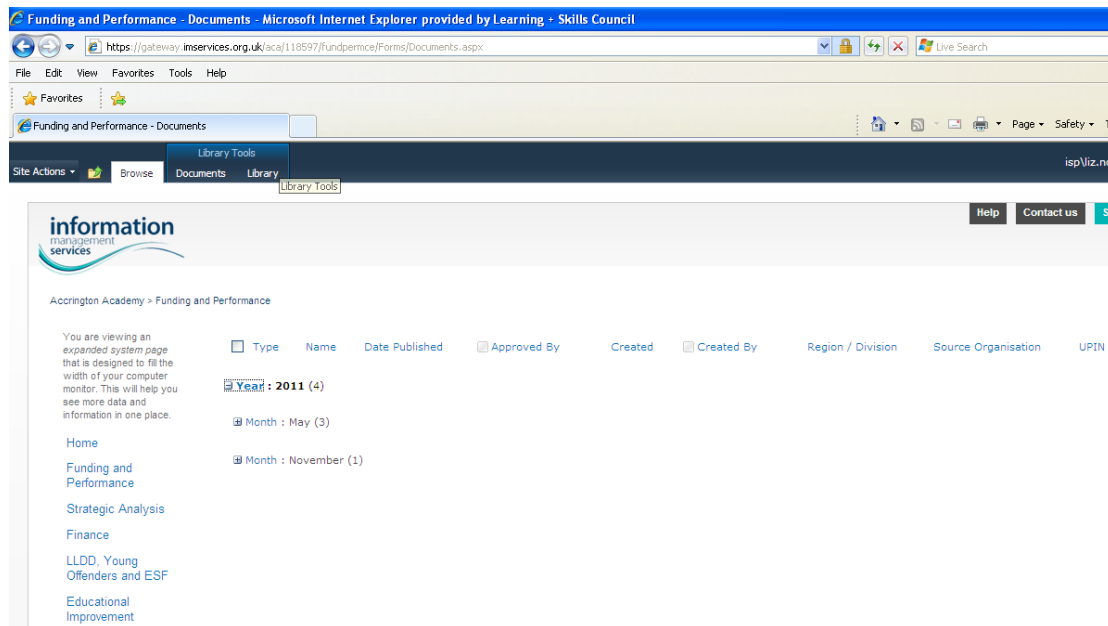
9. User Settings – Alerts

If you wish to be notified of the arrival of documents or changes to a specific document you can set up an alert. This will send an email to notify you, depending on the alert settings you have selected.

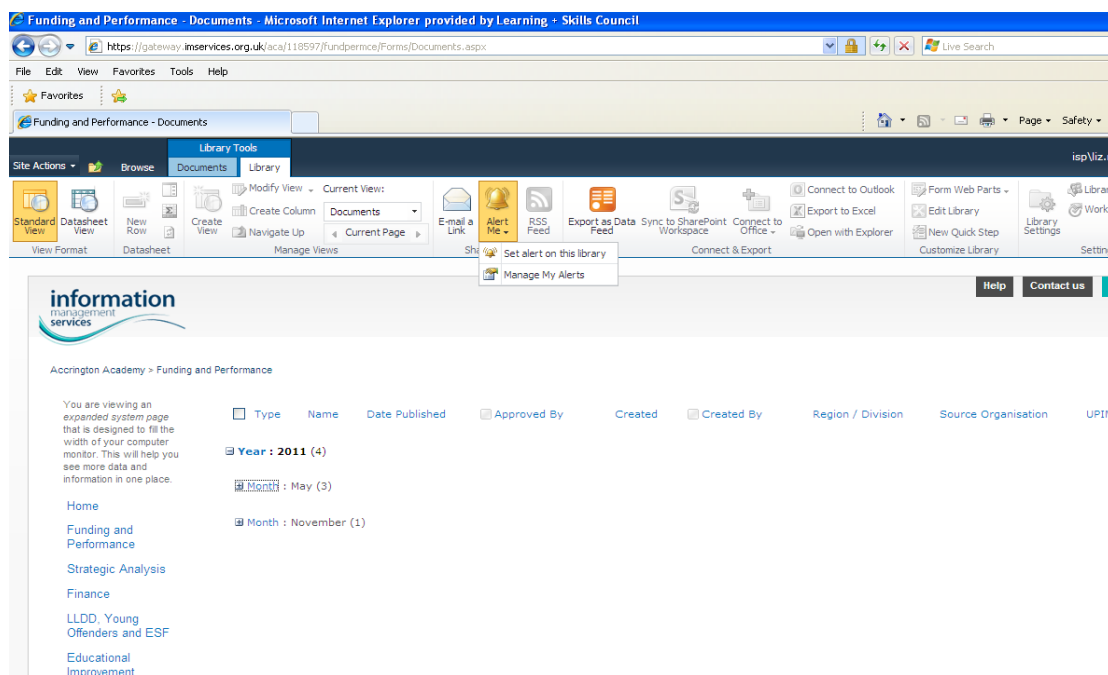
9.1. Setting up Alerts

To set up alerts on a library or document you select the site and folder (for e.g. Funding and Performance).

At the top of the screen you will see the options for Library Tools.



If you wish to be notified of documents within this category select Library. You will see the following toolbar options:



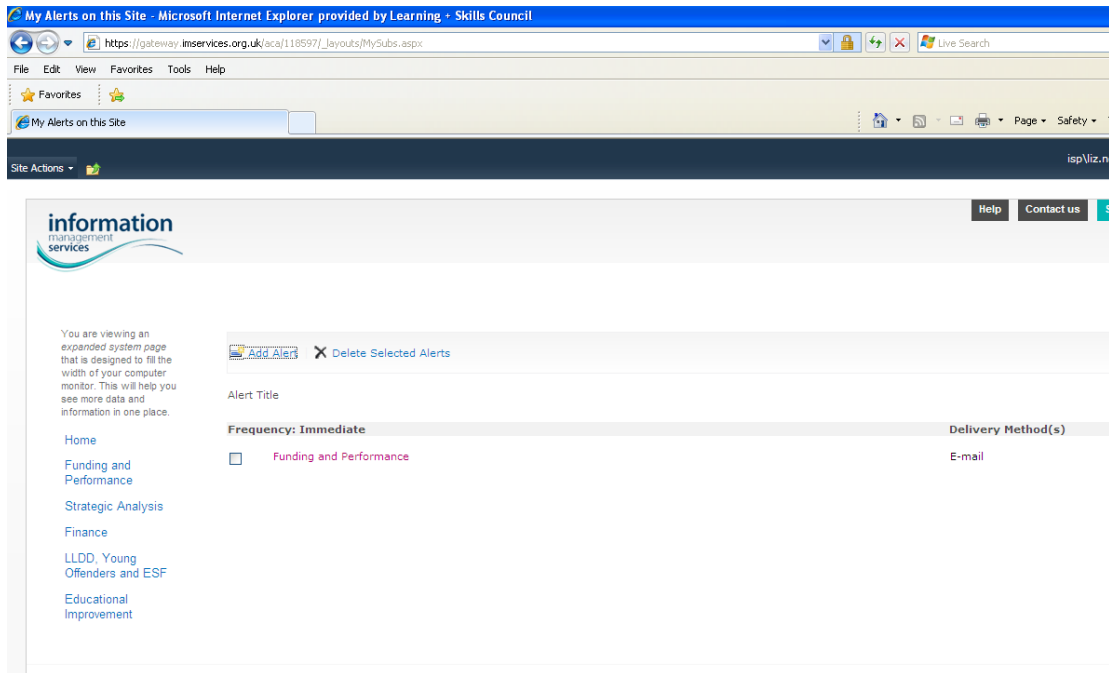
Select 'Alert me' and then choose 'Set alert on this library'. The following screen will be displayed:

- **Alert Title** - You can specify a title for the alert; this is included in the subject of the email notification received for this alert. It will default to the document name or folder name but you can alter this to your own specified wording.
- **Delivery Method** - Currently the only alert mechanism functionality available is by email.
- **Change Type** - Can be selected the types of changes that would trigger an alert
- **Send Alerts for these changes** – Can specify whether to filter types of alerts.
- **When to send alerts** - The frequency of the alert.

Select **OK** to save the changes.

9.2. Managing Alerts

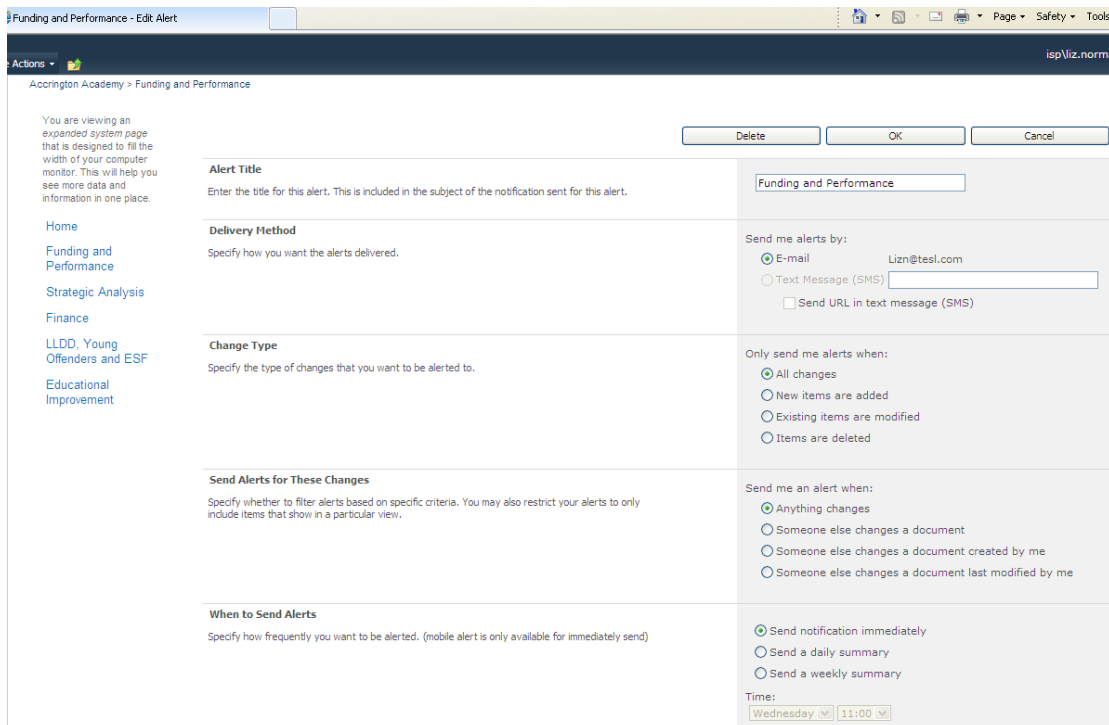
Alerts can be changed or deleted at any time by selecting Manage My Alerts from within the Library Tools option. The following screen will be displayed:



A list of all alerts for the site will be displayed.

Delete alerts – select the alert(s) by ticking the box next to each alert and then select 'Delete selected alerts'.

Amend an alert – click on the name of the alert. The following screen will be displayed:



The options for the alert can be changed and when complete, select **OK**.

The alert can also be deleted from this page.