



S4S guide to updating service content on EGfL

Editing guidance for service managers/editors

Introduction

This is the guide to logging into the EGfL's **content management system (CMS)**, and updating **services for schools information** you are responsible for.

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Important information

- **Status:** Please do not forget to update the **status** of your service page after completing your update
- **Auto log out:** The system will automatically log you out **after four hours of inactivity**, please save your work regularly.

Clear English and Ealing house style requirements: You must follow the Clear English and Ealing's house style when **writing and submitting** your service page.

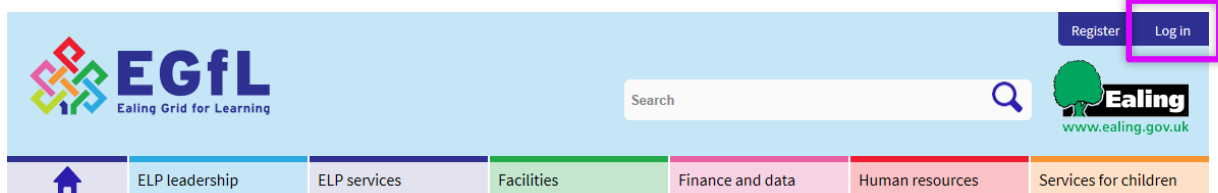
Terms and conditions: Please take note of the [general terms and conditions](#) which are published in the services for schools brochure.

If you do have any terms and conditions specific to your service that you want to include, please add them to your service information.

Step 1 How to log in

You may receive an automated email asking you to review your service information.

To log into EGfL go to <http://egfl.org.uk/user>. Select **Log in** located on the top right hand side of the screen.



Enter your **username** and **password** in the fields and then select **Log in**.

A screenshot of the 'User account' login form. At the top, there are two tabs: 'Log in' (selected) and 'Request new password'. Below the tabs, there are two input fields. The first is labeled 'Username *' and has a placeholder text 'Enter your Ealing Grid for Learning username.'. The second is labeled 'Password *' and has a placeholder text 'Enter the password that accompanies your username.'. At the bottom of the form is a 'Log in' button.

Note: The system will automatically log you out after **four hours** of inactivity, please ensure you **save your work** regularly.

A screenshot of the 'User account' form for requesting a new password. At the top, there are two tabs: 'Log in' and 'Request new password' (selected). Below the tabs, there is one input field labeled 'Username or e-mail address *'. At the bottom of the form is an 'E-mail new password' button.

If you need to reset your password select **Request new password** tab, enter your email address and select **Email new password**.

You will get an email with a link and instructions for resetting your password.

Step 2 How to view and edit your service

Once logged in select the **My services** tab to view services you are responsible for updating.

Home » Ava Baptiste » My services

My services

View Edit **My services**

You have 4 months 1 day left to update 3 services - Deadline 06/01/2017.
These services are listed below with a workflow status of "Needs updating".

Title	Workflow status	Year	Service section	Edit
Local history service 2016/17	Needs updating	Financial year 2017/18	Facilities	edit
Libraries 2017/18	Needs updating	Financial year 2017/18	Facilities	edit

You will only see **services relevant to you**. If you need access to **other services** or can see those which are **not yours** please [contact us](#)

This view includes:

Title A list of services you are responsible for and have access to update. Select the title to view the current published web page.

Status highlights the current status of your service page ie:

Needs updating where you are required to do an update

Save and send for approval once you have updated the service we will review your changes.

Approved where we have reviewed and approved your changes.

Published (live on the website) your updated and approved service information is now live on the EGfL website.

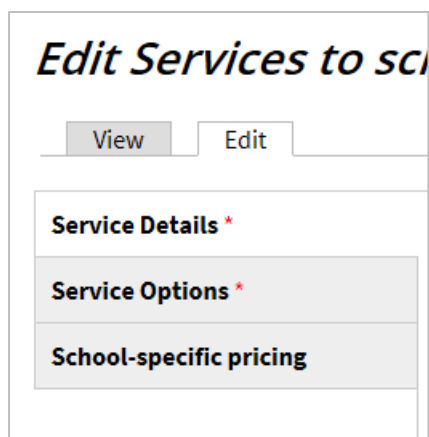
Year: Confirming the year your updated service information will relate to.

Service section: This shows **which section** of the EGfL site your service **appears in** -: facilities, finance, human resources, school effectiveness, and services for children. This field is locked.

Edit is what you select to update the service information.

To review information, select the service title. And go to step 3.

Step 3 How to update a service



Select the **Edit** tab

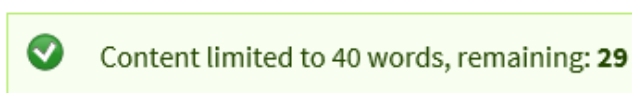
You will need to review **two sections** when updating your service page.

- Service details
 - Service options
- School-specific pricing** will be updated by the service for schools team.

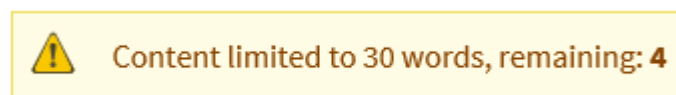
Information is prepopulated with service information from the previous year.

Select the **Service Details** tab to review the information.

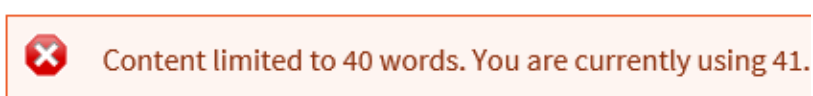
A **word count** function is present in some sections eg:



You are within the limit




You are close to your limit



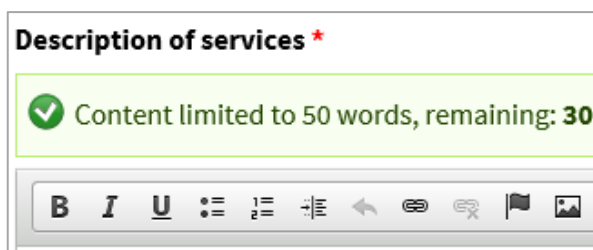
You must reduce your words to be able to save your changes

If you see a red star ***** against a section, this section must be reviewed and updated.

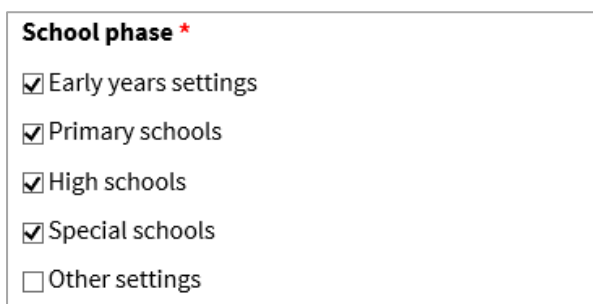
You will be logged out automatically after four hours if not using the system. So 'save as draft' regularly.

The  button is located at the end of the web page.

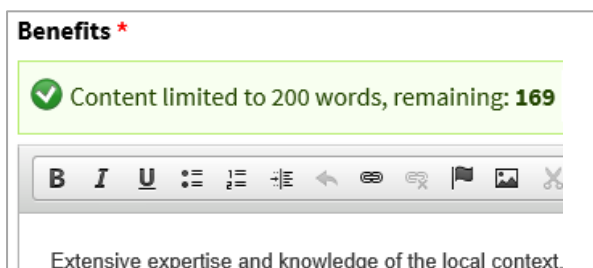
Here are the sections you must review:



Description of services: Review and update your information if necessary.

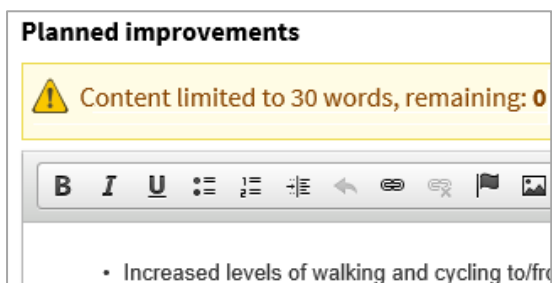


School phase: Review the school phases that your service applies to, this is currently **prepopulated** from last year.



Benefits: Review this information.

It's an opportunity to promote your service.



Planned improvements: Review this information. Please **update** with any planned improvements for your service this coming year.

Provider: This field is for either your **service or team name or external provider company name**.

Service director: This field is **locked**. To make changes please [contact us](#).



Contacts: Review your contacts. To add a contact select **Add another item** and type the **name** of the Ealing staff member in the box.

Select the **name** from the list. If you can't find the contact name you wish to use [contact us](#). To **delete**, select the **name** and select **delete**.

More detailed information (public): Review this information. It is visible to everyone with or without an EGfL user account.

More detailed info text (public)

✔ Content limited to 200 words, remaining: **17**

B I U :≡ ≡≡ ≡≡ ← ↻ ↻ ↻

To encourage schools within Ealing to get involved in

Disable rich-text
 ▼ More detailed info attachments (public)

Add a new file

Browse... Upload

Files must be less than **32 MB**.
 Allowed file types: **txt gif jpg jpeg png pdf doc xdoc csv x**

You can add additional service information or **relevant documents** here as attachments which visitors to the EGfL can **download**.

To add a document, select **browse** and **upload** the document from where you **saved** it.

To update an existing MDI document, **remove** the current one and **upload** the next version.

Note If you want the **information** only to be accessed by **EGfL users** (ie people with EGfL user account/log in), follow [Step 5 for more detailed information under the service option tab](#)

This service includes elements of

Free of charge

Schools forum funded

Pay as you go

Ealing SLA (part of annual buy back deadline)

ELP subsidised

Other arrangements

This service includes elements of: This is **prepopulated** from last years information. You have six options in this category; **select any that apply** to your **whole service**.

You can select **more than one** option. eg if your service is provided free of charge to schools but you provide additional services that are paid for, on a 'pay as you go' basis, tick both.

Office hours *

✔ Content limited to 40 words, remaining: **34**

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Monday to Friday, 8.30am to 5pm.

Office hours: This is **prepopulated with last year's** information. Please advise when your team contacts are available to deal with queries (office hours)? When is your service available?

Additional / buy back services

B I U :≡ ≡≡ ≡≡ ← ↻

Additional / buy back service Review this information if applicable

Additional contact information

B I U :≡ ≡≡ ≡≡ ← ↻

Additional contact information: Review if applicable. Add any special contact arrangement here.

Cost centre code

176112

This field is locked. If you want to change this code, please contact us.

Ledger code

8590

This field is locked. If you want to change this code, please contact us.

Cost centre code: If there are **changes** to your code [contact us](#).

Ledger code: If there are **changes** to the code your income will go into, [contact us](#).

Status *

- Needs updating
- Save and send for approval
- Approved
- Published (live on the website)
- Archived (previous year)

Status: If you need to make more changes later leave the **status** as **Needs updating** and select **Save as draft**

If you have completed all your updates select **Save and send for approval** from the drop down menu and then select **Save and send for approval**

You will be logged out automatically after four hours if not using the system. So save as draft regularly.

Once you have completed the **service details screen**. You need to update the **service options screen** information so select the **Service option** on the **left hand navigation**.

Step 4 How to update service options

In most cases the services options are pre-populated with the previous years information. You must review this information, in particular the cost fields.

Under the **Service Options** tab you can specify which school types and phases your service is suitable for.

When schools are logged in, they will see the service option and details specifically for their type of school.

Service option 1 example:

This service is available to **all Ealing schools** but not **Other schools and settings**.

according to type/phase of school. To do this you can use a number of service options below. In each service option you can specify which types/phases of school exactly the option applies to and tweak the information to suit that type/phase. When a school logs in they will only see the information they will only see the version of information / service options available to them.

Service Options *

+ Service option

The information you provide below will apply to the type of school you specify for this service option.

School type or setting *

- Academies
- Maintained
- Other schools and settings

School phase *

- Early years settings
- Primary schools
- High schools
- Special schools
- Other settings

Core services (ie those services which schools have an entitlement to without charge)

Service Details *

Service Options *

+ Service option

Remove

+ Service option

Remove

Add another item

Save as draft

This is how your service displays when you have more than one **service option**.

You can **save as draft** under the **Service options** tab. Remember to go back to the Service details tab to Save and send for approval once all your updates are made.

Service option 2 example:

In this example the service is only offered to **maintained** school type at **high school** phase:

The screenshot shows a web interface for configuring service options. At the top, there are 'View' and 'Edit' buttons. Below them, there are two tabs: 'Service Details *' and 'Service Options *'. The 'Service Options *' tab is active, showing a list of service options. The first option is 'Service option', which is expanded to show configuration details. The details include a description: 'The information you provide below will apply to the type of school you specify for this service option.' Below this, there are two sections: 'School type or setting *' and 'School phase *'. The 'School type or setting *' section has three checkboxes: 'Academies' (unchecked), 'Maintained' (checked), and 'Other schools and settings' (unchecked). The 'School phase *' section has five checkboxes: 'Early years settings' (unchecked), 'Primary schools' (unchecked), 'High schools' (checked), 'Special schools' (unchecked), and 'Other settings' (unchecked). A 'Hide row' link is visible on the right side of the configuration area.

School type or setting: This is **prepopulated** from **last year's** information. This lets schools know if your service is available to them.

School phase: This is **prepopulated** from **last year's** information also, and informs us which **phase** this service option applies to.

Core services: This only applies to elements of the service that are **free to schools**.

You need to review all the prepopulated information and update the remaining sections under the service options tab for each service option you offer.

This service includes elements of *

- Free of charge
- Schools forum funded
- Pay as you go
- Ealing SLA (part of annual buy back deadline)
- ELP subsidised
- Other arrangements

Note: Under the **service options** tab

This service includes elements of: Check **elements** in your service eg if some is free of charge but there are additional services schools can buy on payg – both free of charge and pay as you go boxes should be ticked.

Cost(s)

B I U [List icons]

- Level 1: 6 days suport, £3,100
- Level 2: 13 days support £5,775
- Level 3: 20 days support£7,600
- Level 4: Support provided accord
- Daily rate £295.

Cost(s): Update with new rates.

More detailed info text (public)

B I U [List icons]

Disable rich-text

✔ Content limited to 200 words, remaining: **17**

▼ More detailed info attachments (public)

Add a new file

[Text input] **Browse...** **Upload**

Files must be less than **64 MB**.
Allowed file types: **txt gif jpg jpeg png pdf doc xdoc csv x**

More detailed information This information will only be visible to people who have an EGfL user account/log in.

Add a file here. This file will only to visible to EGfL account holders.

You can upload additional service information or relevant documents here in a **pdf or word format** as an attachment which people with user accounts will be able to **download**.

To add a document, **save** your document into one of your document folders, select **browse** and **upload** it from where you saved it.

Add another item

Remove

Add another item that isn't currently represented, for example if your service becomes available for academies for the first time but with different costs.

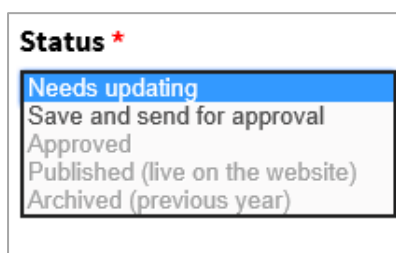
Remove an item that is no longer on offer.

Step 5 How to save your updates

Don't forget to save your changes regularly. Select **Save as draft** to do this.

If you navigate away from the page before selecting **Save** your updates will be lost.

You can update the **status** of your service page from the **Service details** tab. Go to the bottom of the web page under the Status section:



If you need to make more changes later leave the **status** as

Needs updating and select the button

Save as draft

If you have completed all your updates select **Save and send for approval** from the drop down menu and then select the button

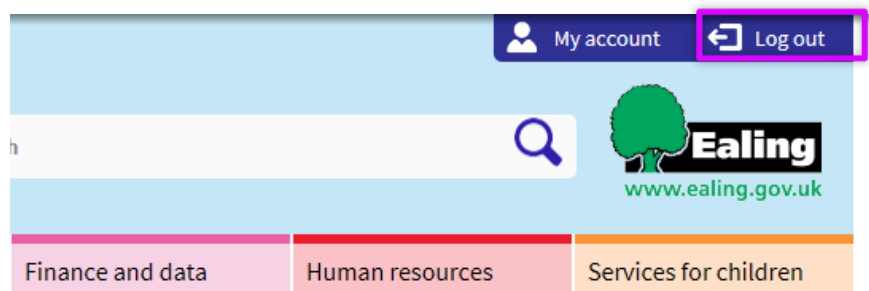
Save and send for approval

Step 6 How to update another service page

Once you have updated an individual service and saved your changes you will be taken **My Services**. This is where you can select another service to edit or return to a service to make more changes.

Step 7 How to log out

To log out, go to the **far right** of the black menu bar and **Log out**.



Contact us

If you have any questions about the services for schools pages or how to make changes to them that fall outside of the scope of this guide, please contact services for schools by email at servicesforschools@ealing.gov.uk.



Appendix 1 General terms and conditions

Please review this information and ensure your individual service terms and conditions are present on your service page if necessary. These general terms below will be included in the services for school brochure and distributed to all Ealing schools.

Availability of the service

You will find this information on the individual service pages.

Cancellation

Where schools sign up for a one-year service there may be no right of cancellation within that year. For other arrangements, schools are required to give a minimum of one school term's notice if they no longer want to receive a buyback service that they have signed up for.

Where it is possible to cancel within the year agreed, as an example, if a service is no longer required from April, notice must be given to the service provider in writing by the end of the previous autumn term (December), otherwise it will automatically continue to the end of August.

Administration charges may be applied for cancellation mid-year and deducted from any pro-rata refund where it is applicable.

Some individual services have no right to cancellation as they match specific council contracts and schools will have had to commit to those for the period of the contract.

Also see individual service pages for terms relating to specific services.

Complaints and disputes

If a school is dissatisfied with the service provided, the school should initially liaise with the nominated service contact. Contact details are on the relevant service web page.

If the outcome of the initial investigation is unsatisfactory or a dispute arises, schools can escalate concerns to the service manager. If concerns are still not addressed then progress them to the assistant director/director of the service, then to the director/executive director. If the outcome is unsatisfactory the school can refer their concerns to the council's chief executive.

Payment of invoices

Payment is required within 30 calendar days of issue of the invoice.

Disclosure & barring service checks

All council staff that work with schools and young and vulnerable people have been subjected to an enhanced check. If a check is pending, a risk assessment will be completed by the service head.

Identity badges

When visiting schools council staff will carry a photo identity badge.

Quality assurance

We provide a high quality, timely and cost effective service to schools and meet the standards of customer care described in service details. Quality is monitored by feedback sought from schools through regular contact with headteachers and service users, through headteacher consultative and network groups and service self-evaluation.

Any perceived failure in the service should be drawn to the attention of the service provider who will carry out an investigation and offer an explanation and ensure prompt remedial action is taken where appropriate.

Email and correspondence

Emails will be acknowledged within 24 hours, Monday to Friday. We will respond within five working days; complex enquiries within 10 working days. If we need more time we will let you know and keep you posted. Also refer to individual service detail for specific quality standards.

School commitment

To enable the service to be efficient, effective and responsive, the school undertakes to provide required information in a timely manner and comply with any deadline set by the service provider.

Academies and schools other than Ealing maintained schools

There may be separate service agreements and contracts applicable to academies for certain services. See specific service details.

Headcount

Staff headcount is based on iTrent data from the January census.