

REPORT MANAGEMENT SYSTEM

REPORT AUTHOR PROCEDURE GUIDE

**THE GUIDE FOR CREATING AND SUBMITTING REPORTS FOR
ALL CABINET MEETINGS**

October 2015

INTRODUCTION

This guide is to assist report authors and reviewers:

1. Submit items for consideration at cabinet meetings
2. Create and draft reports
3. Circulate reports for review prior to their inclusion on the agendas

For assistance contact the following officers within the Committee Services Team:-

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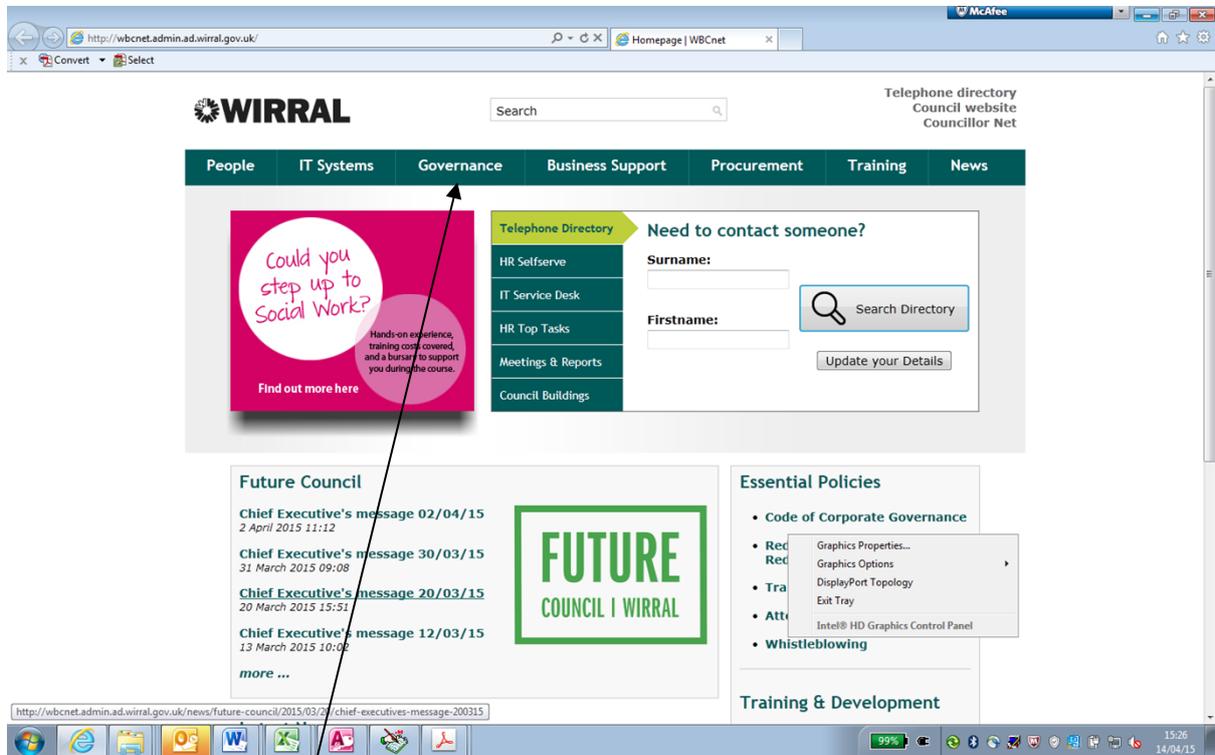
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PART 1 – CABINET WORKFLOW

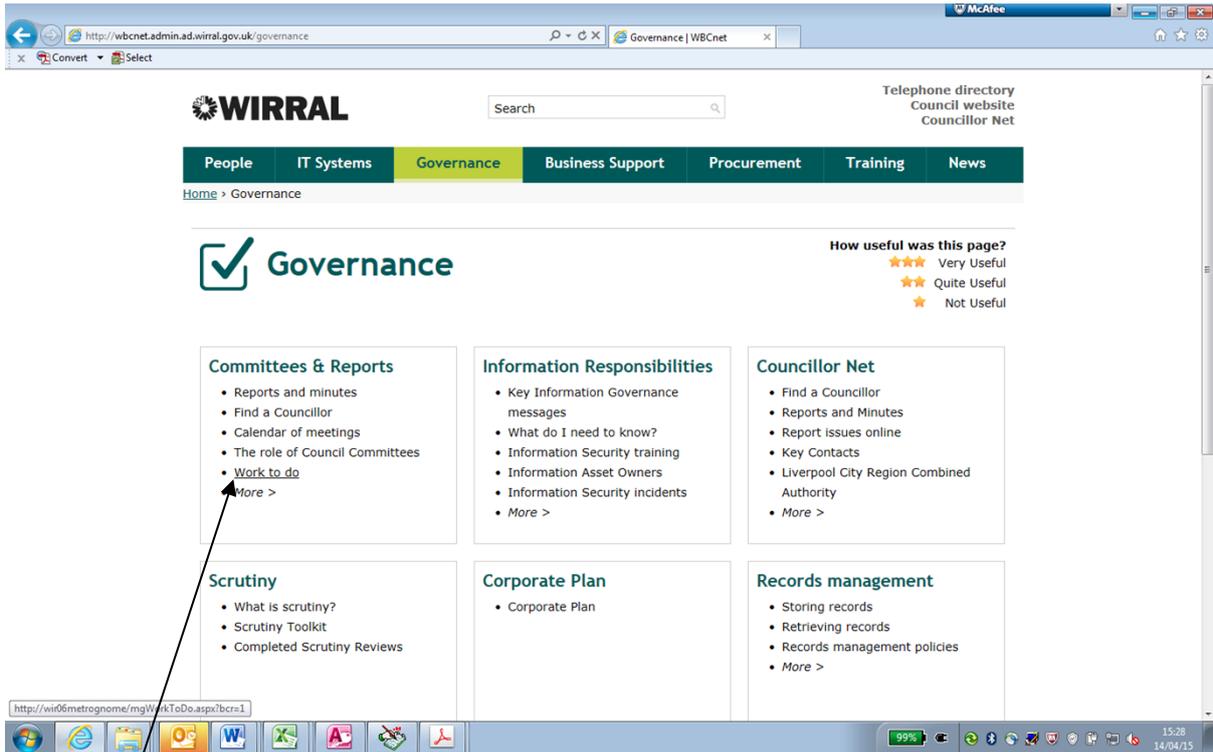
SUBMITTING AN ITEM FOR CABINET

L

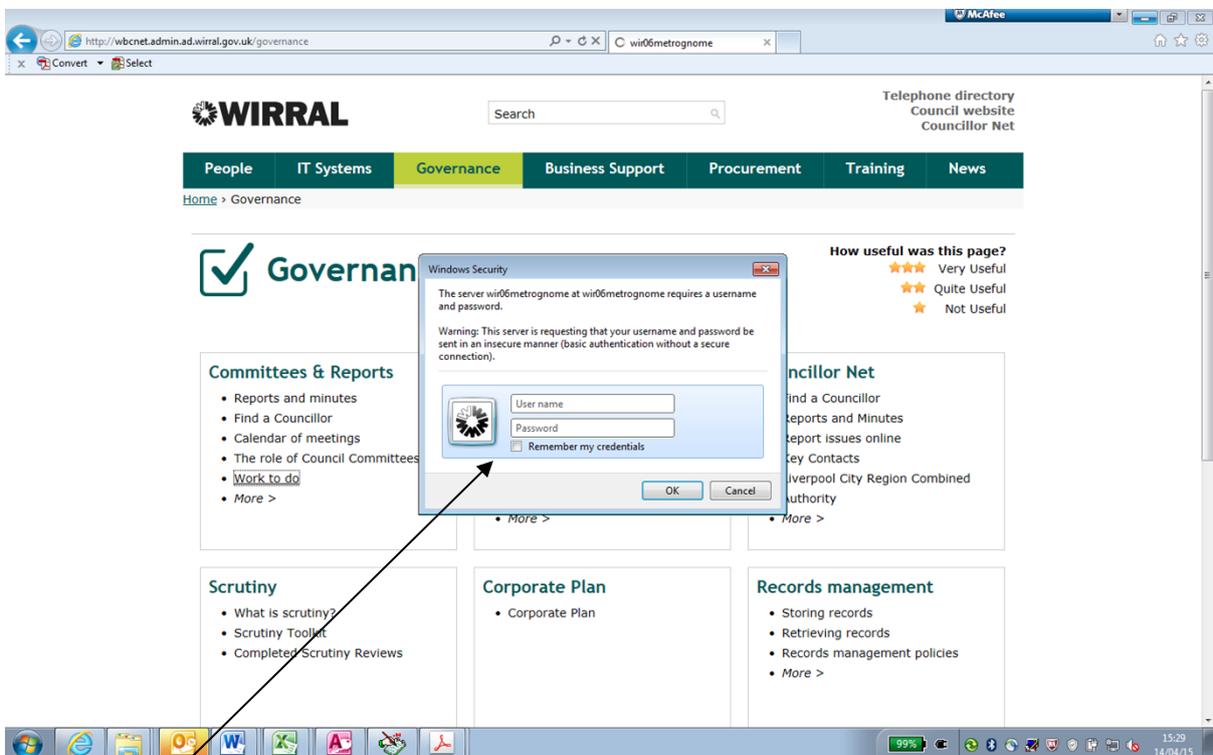


On the Intranet, **Click** on Governance

PART 1 SUBMITTING A PLAN FOR CABINET AND COUNCIL

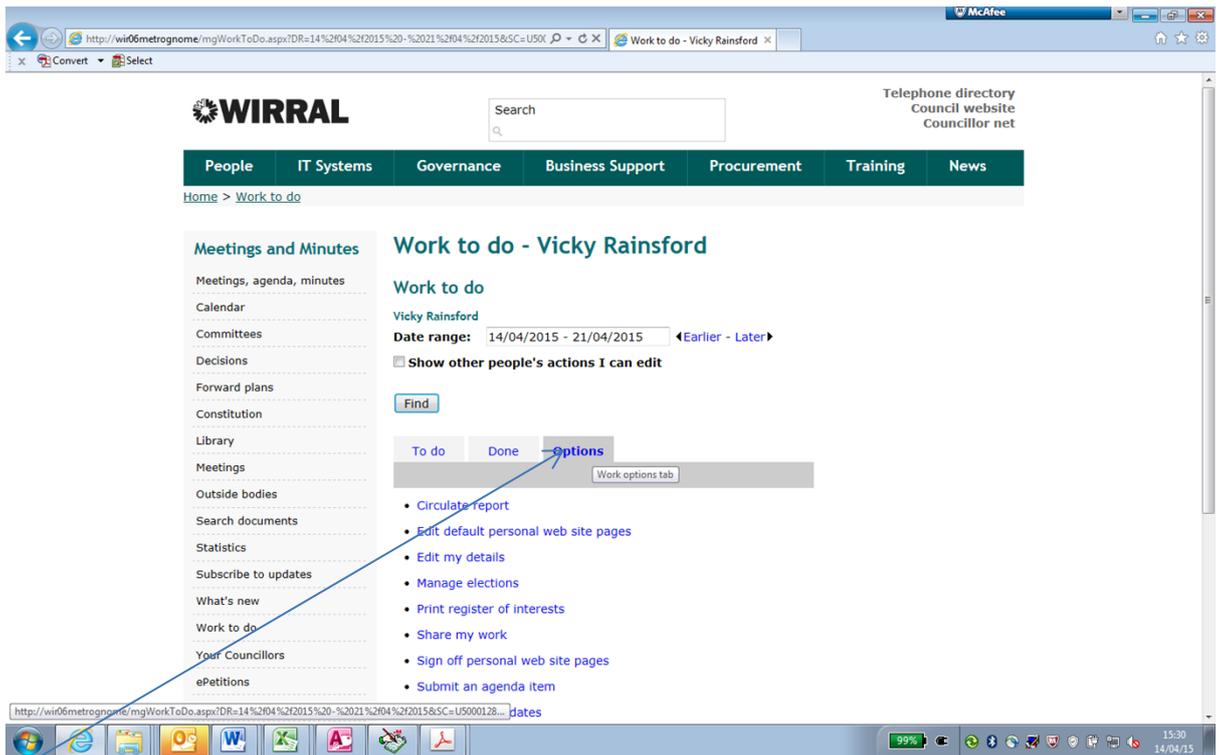


Click on 'Work to do'

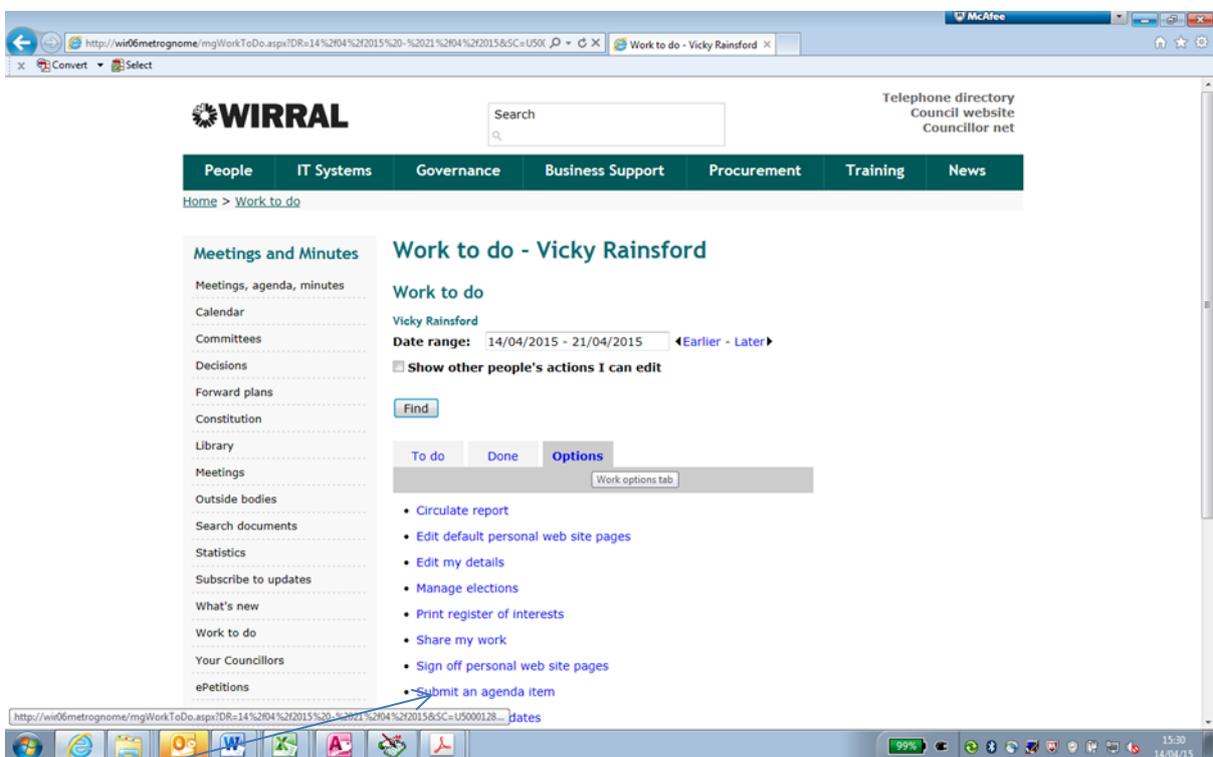


Enter your username (e.g. admin\rainsfordva) and password

PART 1 SUBMITTING A PLAN FOR CABINET AND COUNCIL

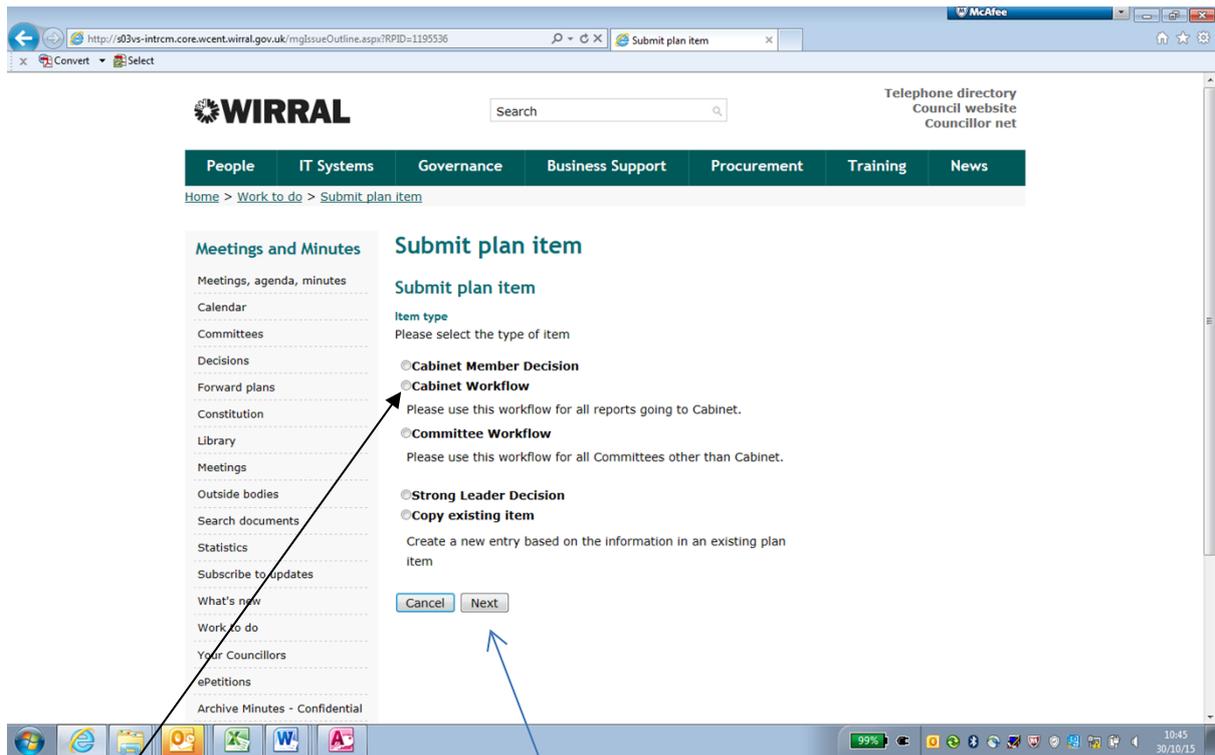


Click on 'Options'



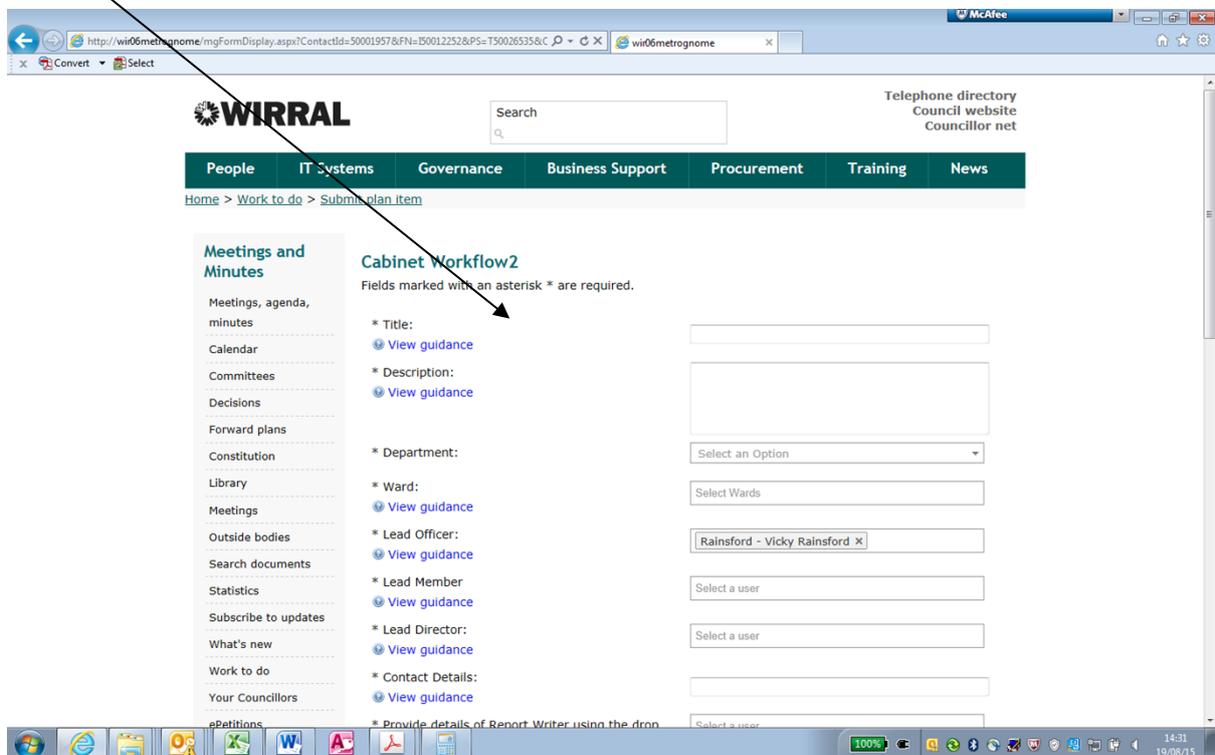
Click on 'Submit an agenda Item'

PART 1 SUBMITTING A PLAN FOR CABINET AND COUNCIL



Click Cabinet Workflow and then **Click** on 'Next'

Complete the form as requested below



NB – Do not press the back button or return

PART 1 SUBMITTING A PLAN FOR CABINET AND COUNCIL

You can complete the form with reference to report writer's guidance notes.

The screenshot shows a web browser window with the URL http://wir06metrognome/mgFormDisplay.aspx?ContactId=50001957&FN=IS0012252&PS=TS0026535&C_. The page title is "minutes". A sidebar on the left lists various menu items: Meetings, agenda, minutes; Calendar; Committees; Decisions; Forward plans; Constitution; Library; Meetings; Outside bodies; Search documents; Statistics; Subscribe to updates; What's new; Work to do; Your Councillors; ePetitions; Archive Minutes - Confidential; Archive Minutes. The main content area contains a form with the following fields and labels:

- * Title: (with a blue arrow pointing to a "View guidance" link)
- * Description: (with a "View guidance" link)
- * Department:
- * Ward:
- * Lead Officer:
- * Lead Member:
- * Lead Director:
- * Contact Details:
- * Provide details of Report Writer using the drop down list. If this is yourself please specify.
- * SLT Sign Off: Strategic Leadership Team

At the bottom, there are two "Cabinet Briefing" sections:

- Cabinet Briefing Meeting date: 25/08/2015 09:30
- Cabinet Briefing Meeting date: 01/09/2015 17:30

A note at the bottom states: "* Please select a Cabinet Briefing date prior to the Cabinet date". The Windows taskbar at the bottom shows the time as 14:41 on 19/08/15.

Manually type in your deadline here for reports to be submitted to SLT by. This can be found in document circulated to you by Committee Services.

PART 1 SUBMITTING A PLAN FOR CABINET AND COUNCIL

* Please select a Cabinet Briefing date prior to the Cabinet date
Cabinet Briefing Meeting date: 01/09/2015 17:30

* Select a Cabinet date - Please ensure it is over 5 weeks in advance
Cabinet Meeting date: 10/09/2015 18:15
[View guidance](#)

* Making Representations:
[View guidance](#)

Documents:
[View guidance](#)

Background papers:
[View guidance](#)

* Open / exempt:
[View guidance](#)

Explanation for exemption:
[View guidance](#)

Select appropriate exemption paragraph
[View guidance](#)

Key decision?
[View guidance](#)

Cancel Next

Click on 'Next'

Information for all of the following headings MUST be completed, as appropriate.

Title: Type in the title of the report, this should be clear and concise. Please ensure this is consistent with the title given to your item on the Forward Plan and you have given the requisite 28 days notice of a key decision to be taken.

Description: This should be a brief description outlining the contents of your report.

Department: Select relevant Department

Ward: Select the particular Ward(s) affected by the proposals or 'All Wards' from the drop down list. You can add multiple Wards if necessary.

Lead Officer: Select the Lead Officer (Report Writer) from the drop down list

Lead Cabinet Member: Select the Lead Cabinet Member from the drop down list.

Lead Director: Select the Lead Director from the drop down list

Contact Details: Provide details including contact telephone number and email address of suitable contact officer this may be a PA or other Departmental Officer on behalf of nominated Report Author (see below).

Deadline Date: Specify deadline for report to be considered by SLT. This will have been given to you in advance by a member of the Committee Services team.

Write Report: Provide details of Report Writer using the drop down list. If this is yourself please specify.

SLT Sign Off: All Reports to be submitted to Cabinet MUST be signed off by the Strategic Leadership Team. Please ensure that you select the appropriate date in advance of Cabinet Briefing and Cabinet.

Cabinet Briefing: All Reports to be submitted to Cabinet MUST be signed off by the Strategic Leadership Team prior to Cabinet Briefing. Please ensure that you select the appropriate date in advance of the Cabinet.

Cabinet: All Reports to be submitted to Cabinet MUST be signed off by the Strategic Leadership Team and Cabinet Briefing prior to the Cabinet meeting.

Making Representations: Provide details of relevant Cabinet Member and contact officer details so that members of the public can make representations or query the decision to be taken in advance of the Cabinet meeting.

Documents: Upload any documents to be considered by the decision taker i.e details of consultation document or petitions Please do not attach your report at this stage.

Background Papers: Click on and attach any background documents. You do not need to include any published documents or previous reports which are available on the Internet or documents which disclose exempt or confidential information.

Open/Exempt:

Select option from the drop down.

Open – The report will be fully available to the press and public.

Part Exempt – Either the report or appendices contains exempt information and cannot be accessed by members of the press and public.

Fully Exempt – Report including any appendices will not be available to the press or public.

Explanation for exemption: Brief description of what is exempt i.e. appendix 2 of the report relates to individuals.

Exempt: Tick the checkbox if applicable and select the applicable paragraph(s). (See Categories of Exempt Information in Chapter 12 of the Council Constitution). See categories of exempt information by hovering over each tick box.

Key Decision Yes: Tick the checkbox and select the applicable Impact

A key decision is

(a) any decision of the Cabinet incurring expenditure or making savings

in excess of 10% of the relevant budget head or £500,000,

whichever is the smaller, unless

(i) the specific expenditure or saving has previously been agreed in

full Council or

(ii) it is a decision taken in accordance with the Council's Treasury

Management Policy

OR

(b) any decision of the Cabinet which, in the view of the Leader, will have a significant effect on a significant number of people.

In addition to the above, and for the avoidance of doubt, any decision approving proposals for the making of a plan or budget which requires the approval of full Council shall be treated as a key decision.

Click on 'Next' at the end of the form

PART 1 SUBMITTING A PLAN FOR CABINET AND COUNCIL

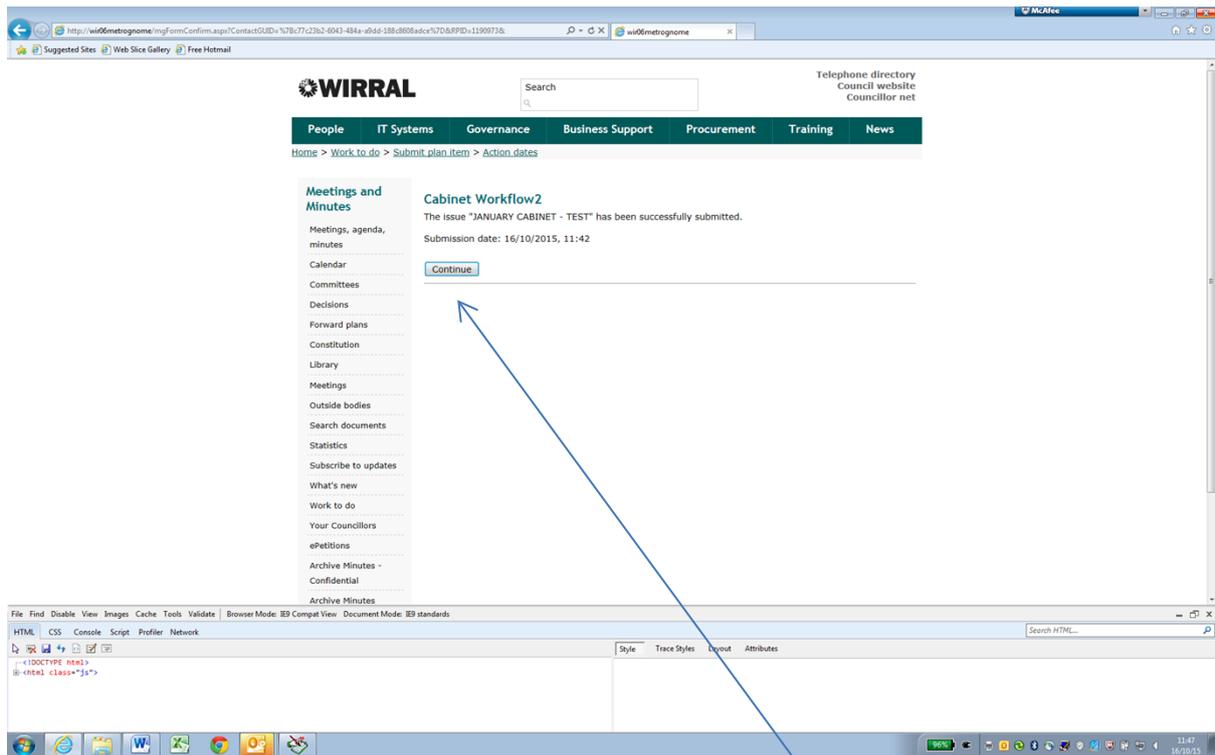
The screenshot shows the Wirral Council website interface. The main heading is "Action dates for JANUARY CABINET - TEST". Below this, there is a table of actions:

Title	Type	Due Date	Fix Date
Write Report for JANUARY CABINET - TEST	On	10/12/2015 09:30	
Lyndzay Roberts			
SLT sign off	On	15/12/2015 09:30	
Cabinet Briefing	On	04/01/2016 17:00	
Cabinet	On	14/01/2016 18:00	

Below the table are two buttons: "Recalculate" and "Finish". An arrow points from the "Finish" button to the text below the screenshot.

Check the 'Action' dates (These are the dates you will need to work to) **Click** 'Finish'.

PART 1 SUBMITTING A PLAN FOR CABINET AND COUNCIL



Click Continue

The system will send an email to: you informing that you need to write a report; and one to Committee Services informing them that you have submitted an item for Cabinet.

The next step is to write your report in 'Work to Do'.

SUBMITTING A PLAN ITEM AT A GLANCE

- On the Intranet, go into Governance then Committees and Reports
- **Click** on **Work to Do** (from the list on the top of your screen) and login, admin\ then the same details as you use to log on to your pc
- **Click** on the **Options** tab and select **Submit agenda item**
- **Click** on **Cabinet Workflow**
- Fill in the relevant details and click on **Next**
- Check the dates Click on **Finish**
- **Click** on **Continue**

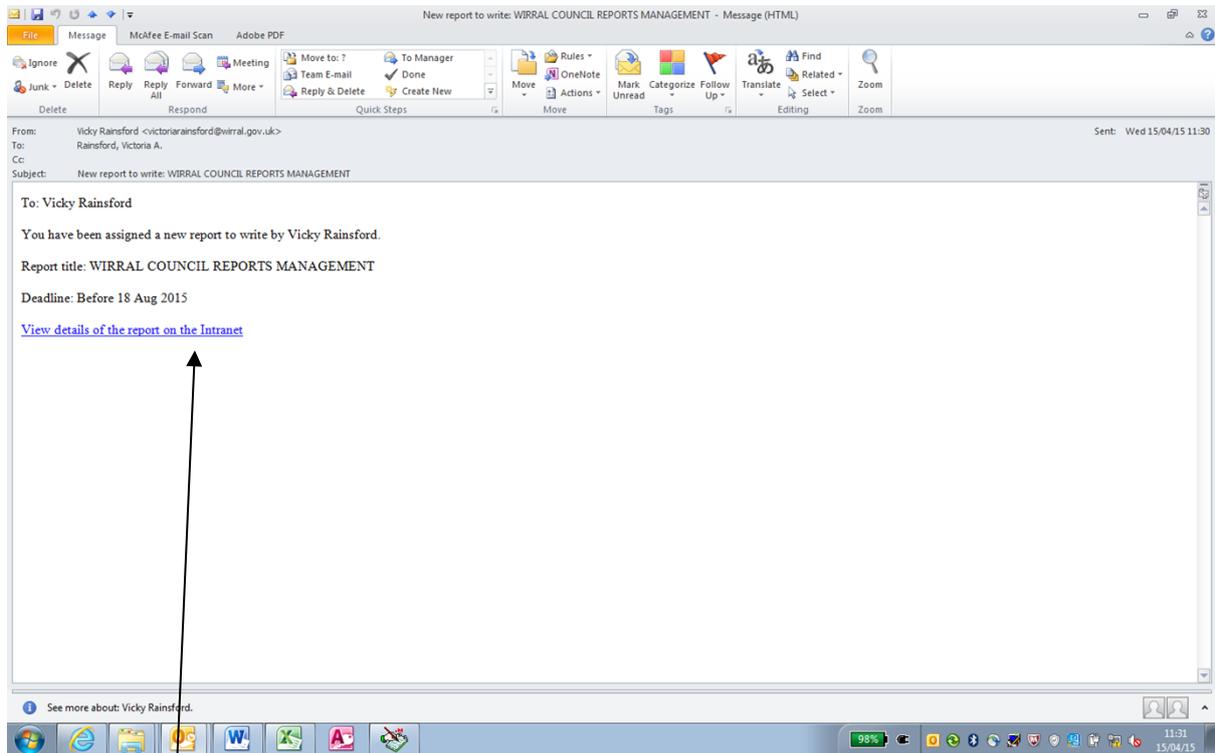
AMENDING A PLAN ITEM AT A GLANCE

- Go to work to do
- **Click** on **Done**
- Move the date backwards until you find your Issue
- **Click** on the **Issue**
- **Click** on **Edit Issue** Make the Changes
- **Click** on **Finish**

The Committee Services Team will receive an automated email to advise that you have edited a published Issue.

CREATING THE REPORT

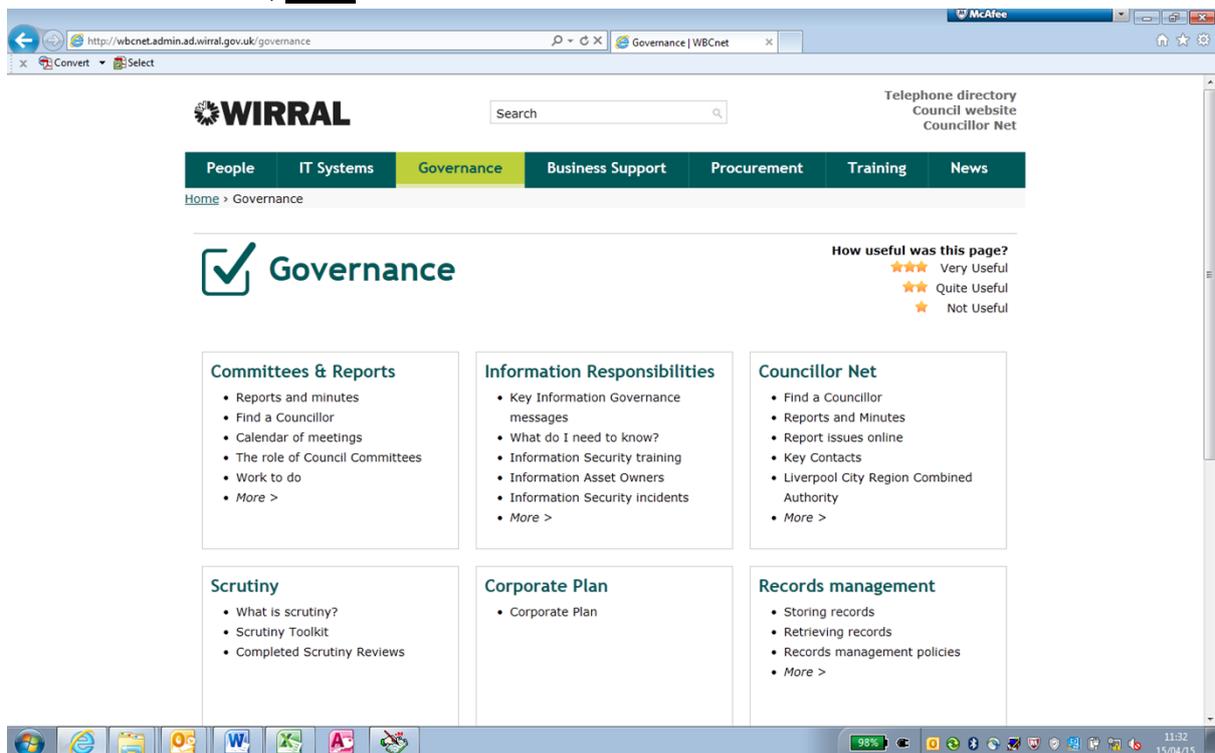
There are two ways to do this

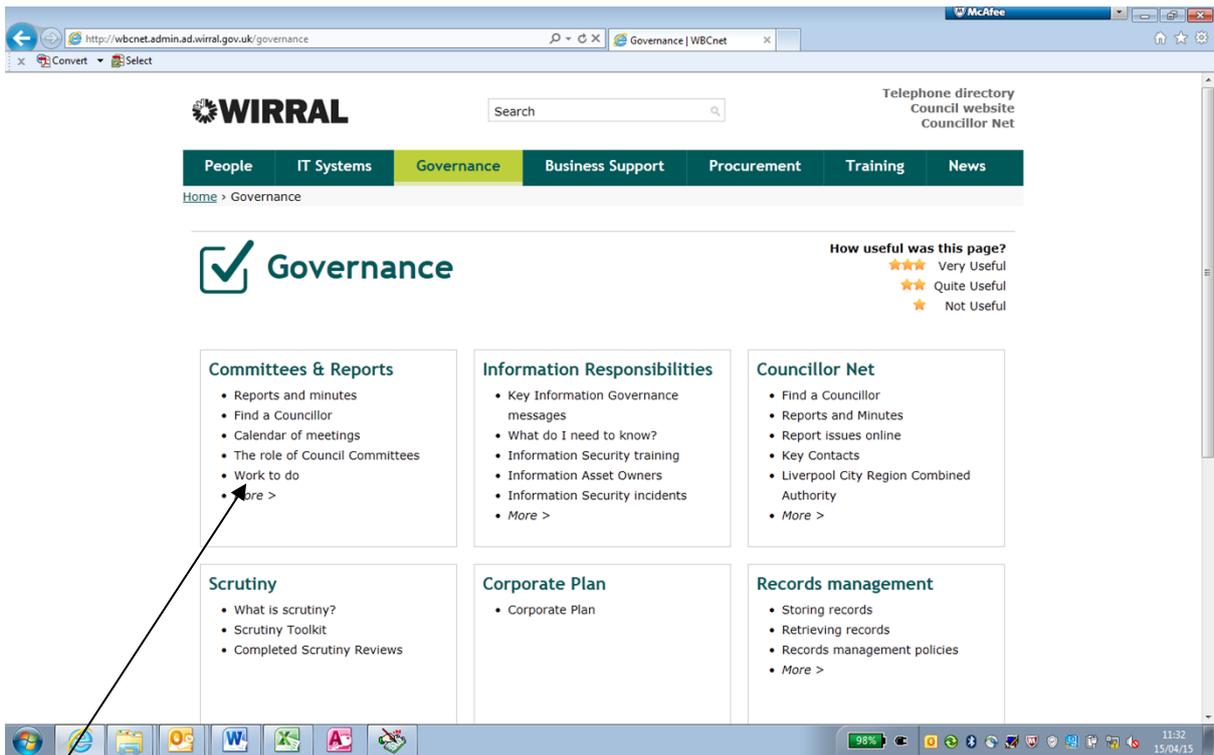


1 - by **clicking** on the link in the Write Report email

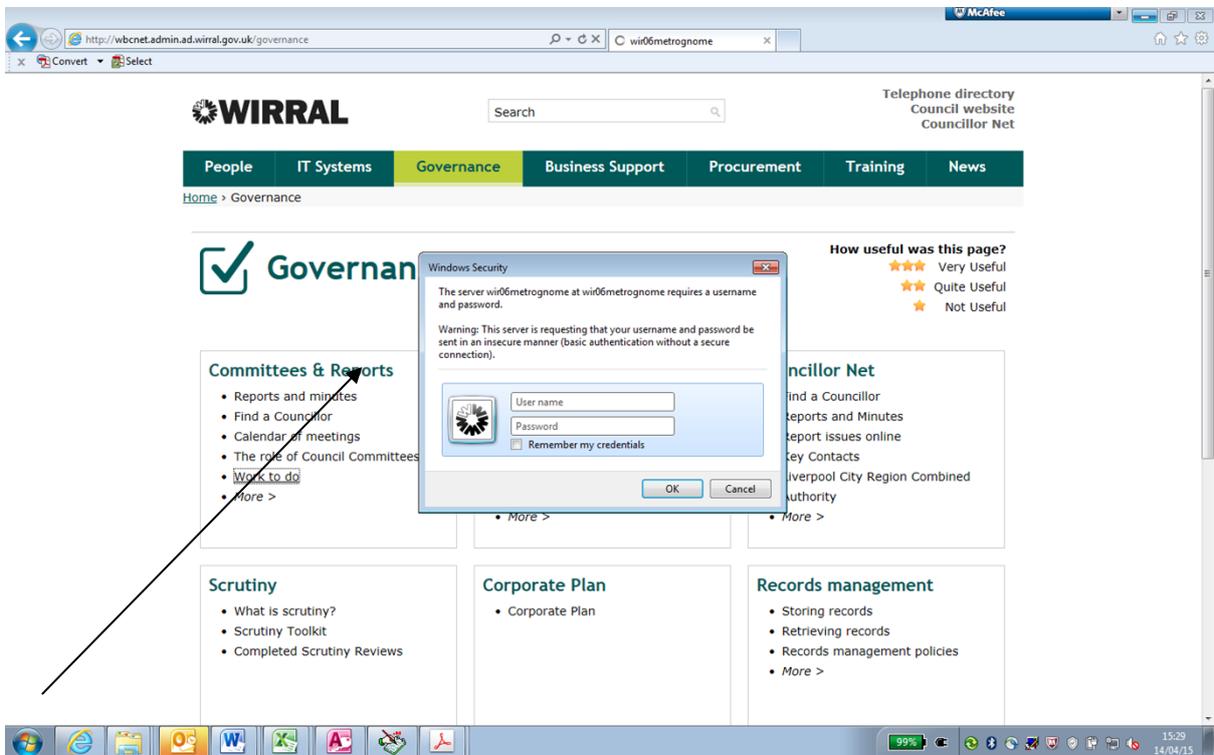
Or

2 - On the Intranet, **Click** on Governance

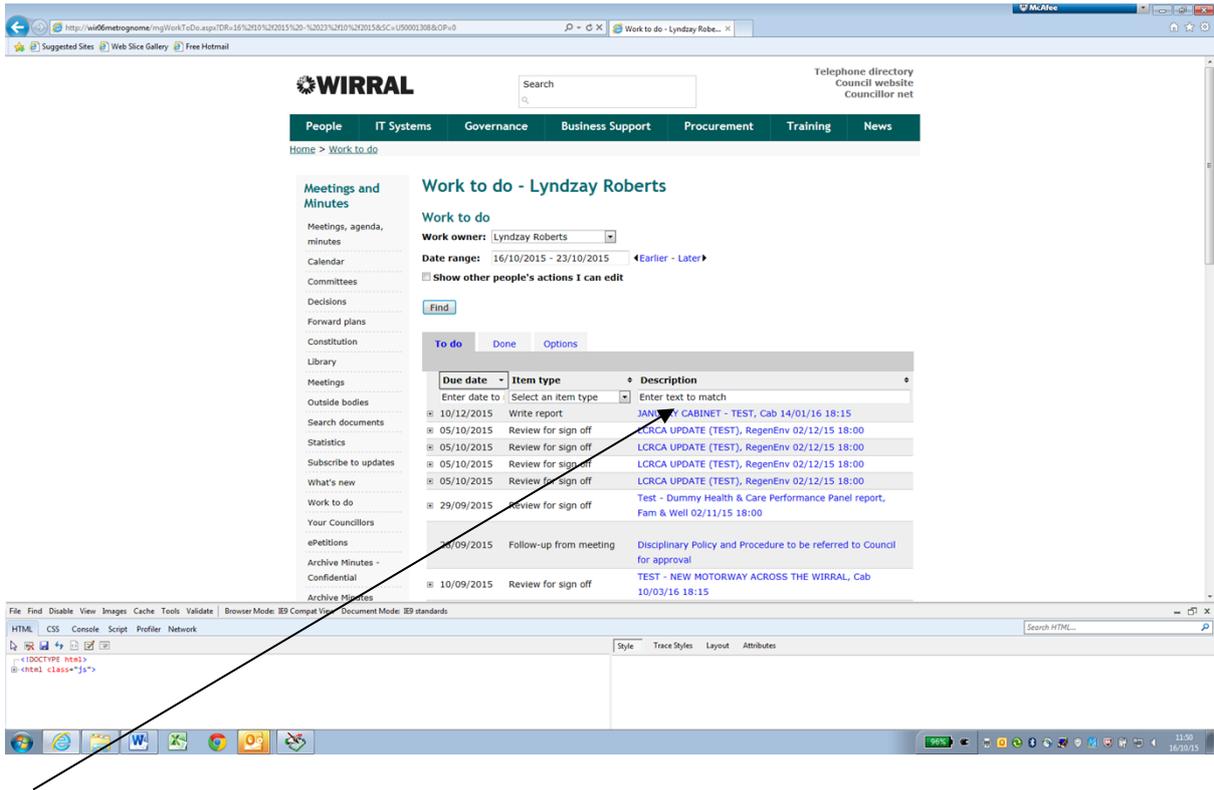




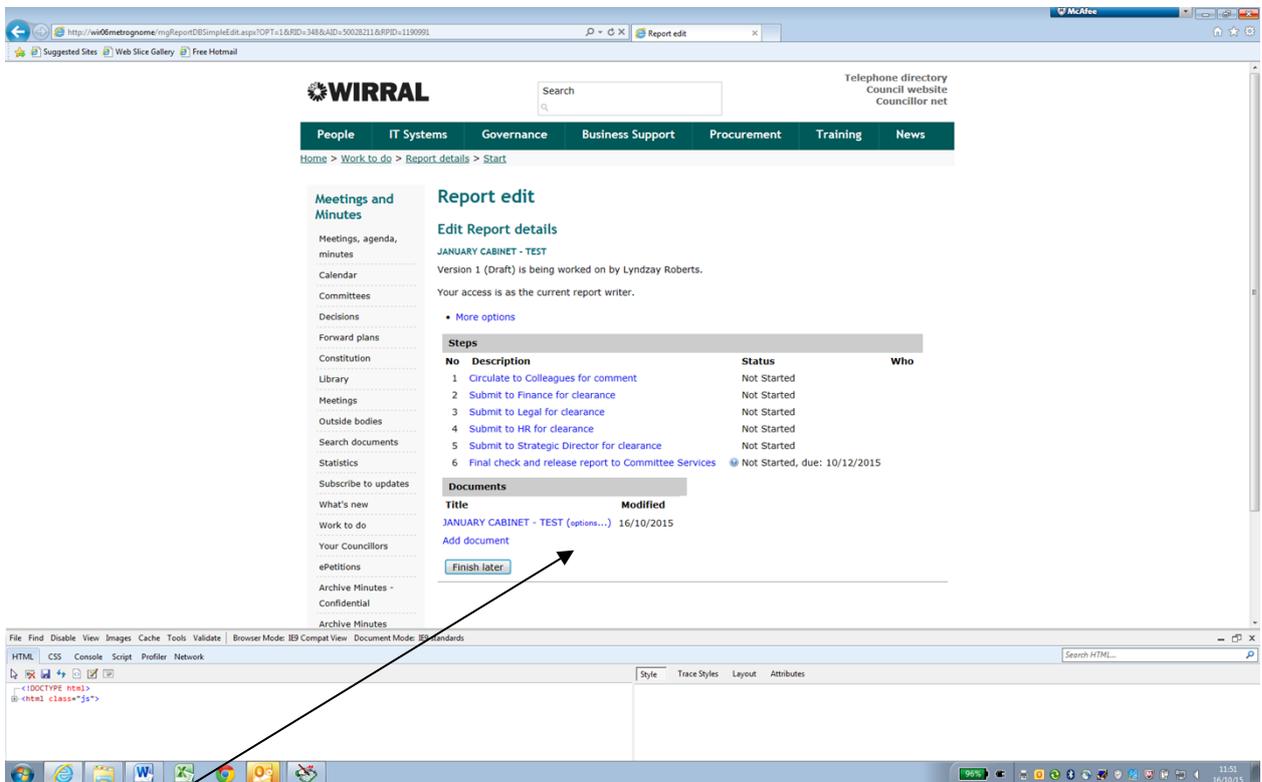
Click on 'Work to do'



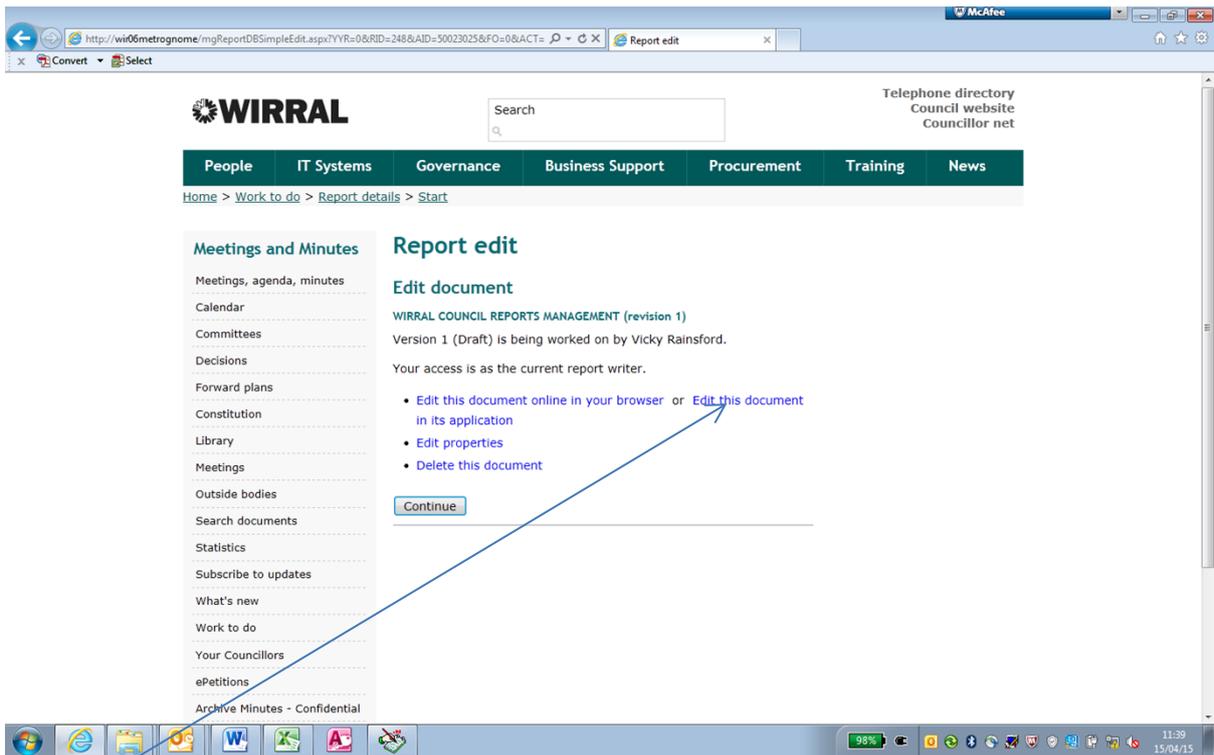
Enter your username (e.g. rainsfordva) and password



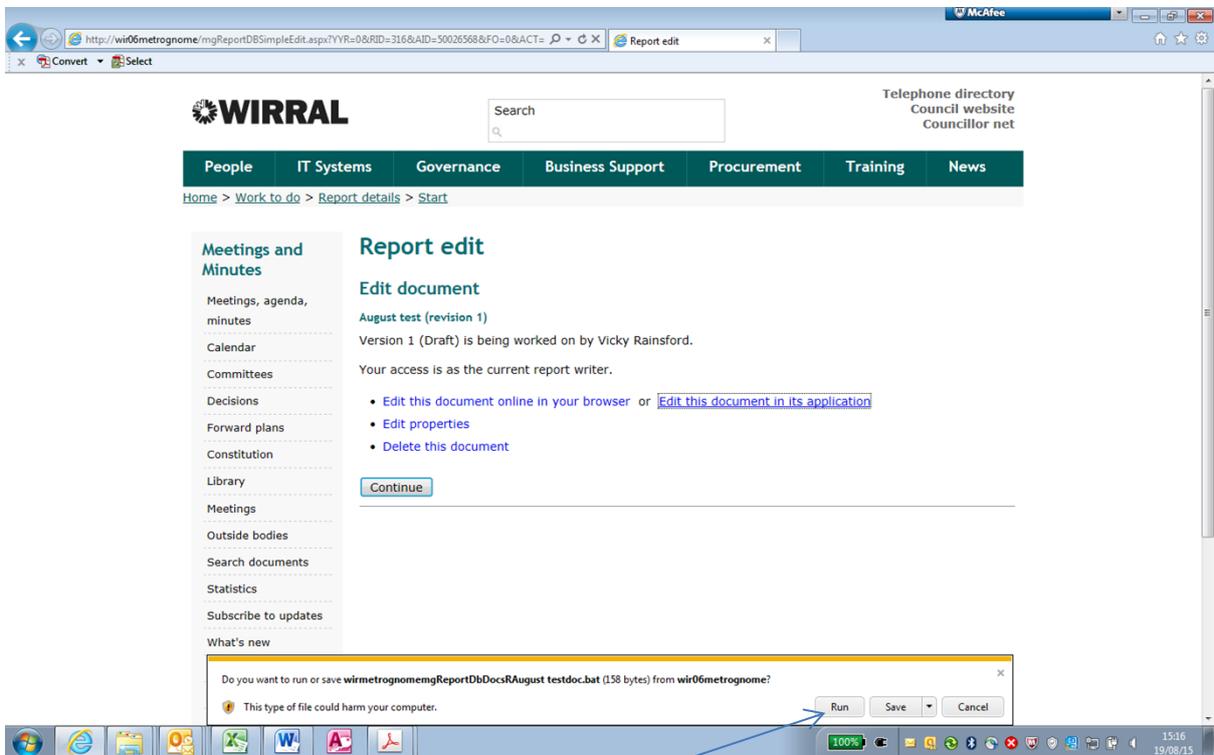
Click on the title of the report



Click on the report title and select 'options'

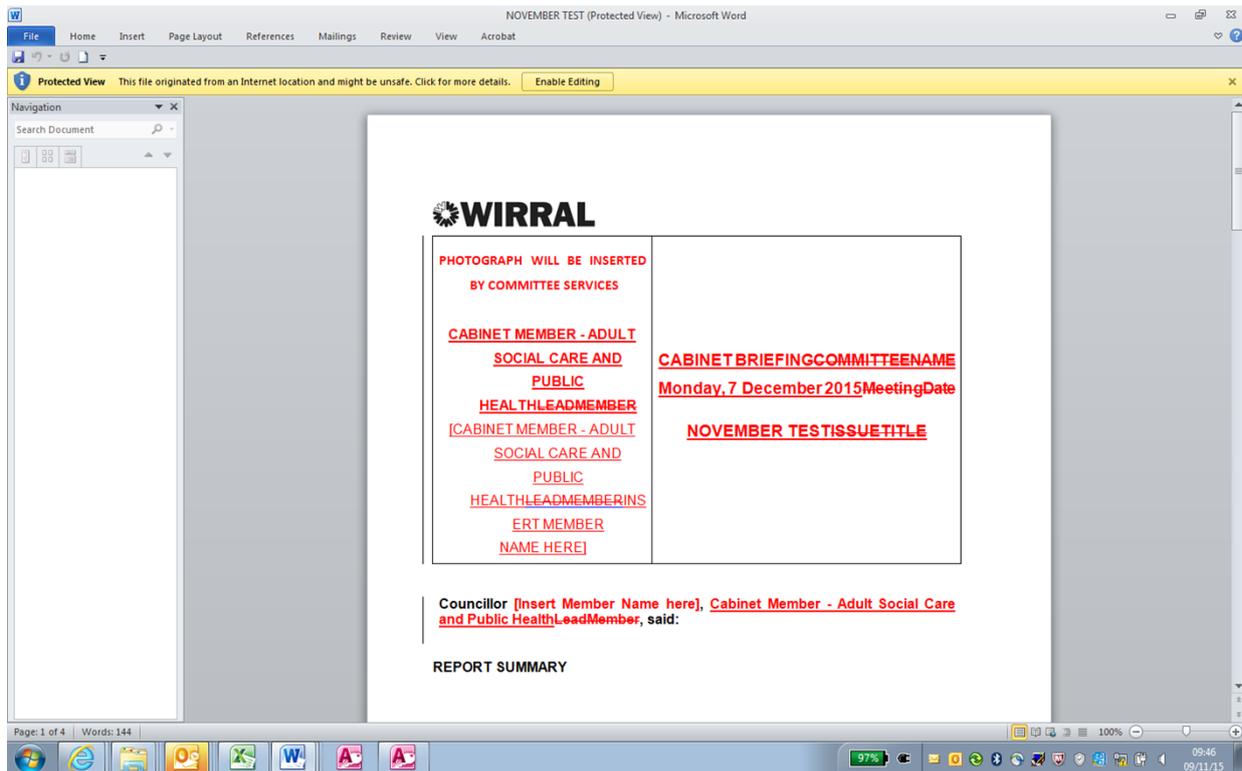


Click on 'Edit this document in its application.'



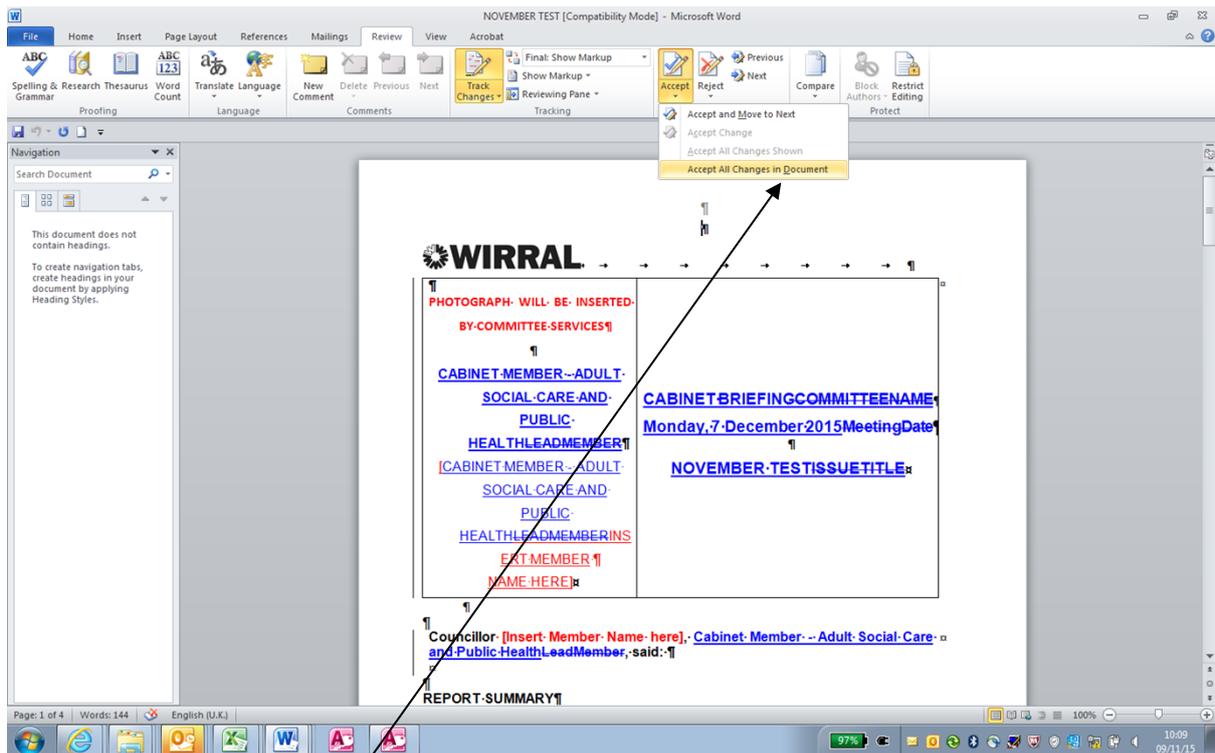
Select Run

PART 1 CREATING THE REPORT



Complete the report.

(The Report Guidance Note can be accessed by clicking on Council and Committee Information on the Intranet and by then clicking 'Library').



Accept all changes that have been made in the document. Then Save and close

As a Report Author you can **add extra documents** to your report if you so wish e.g. appendices to the report

If you are not adding any appendices [go to 'Circulate the Report for Review' on page 23](#)

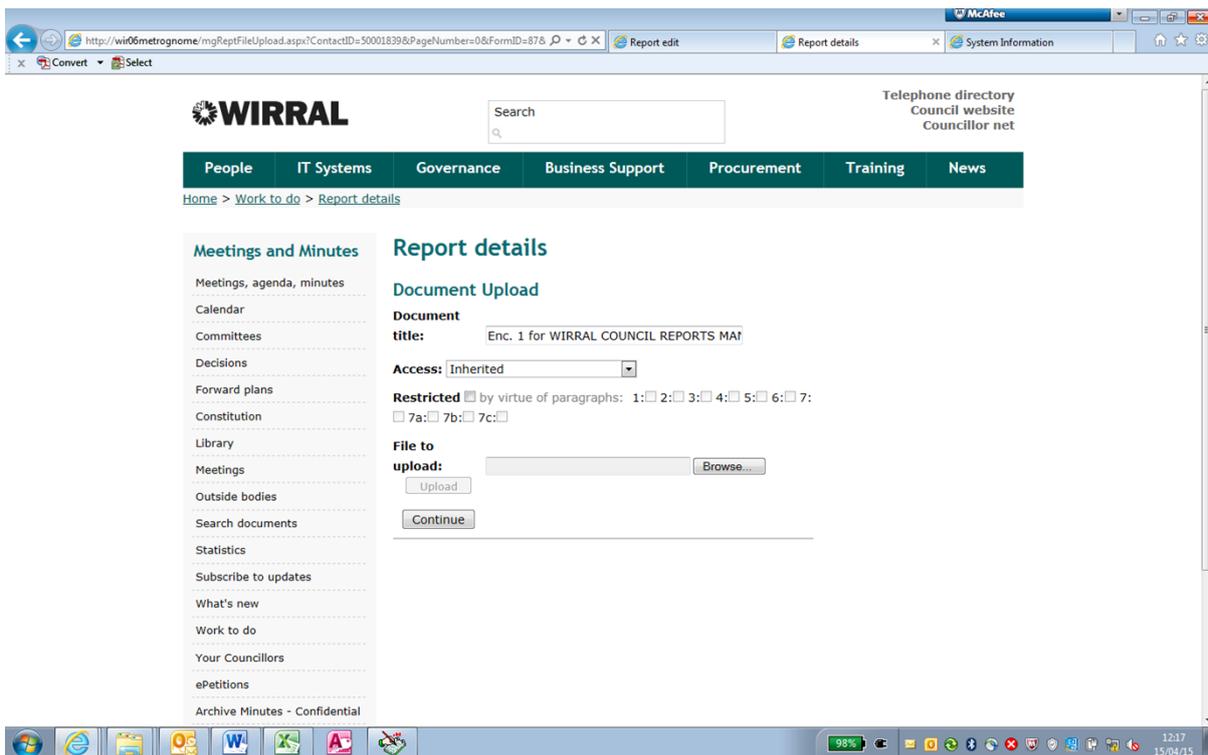
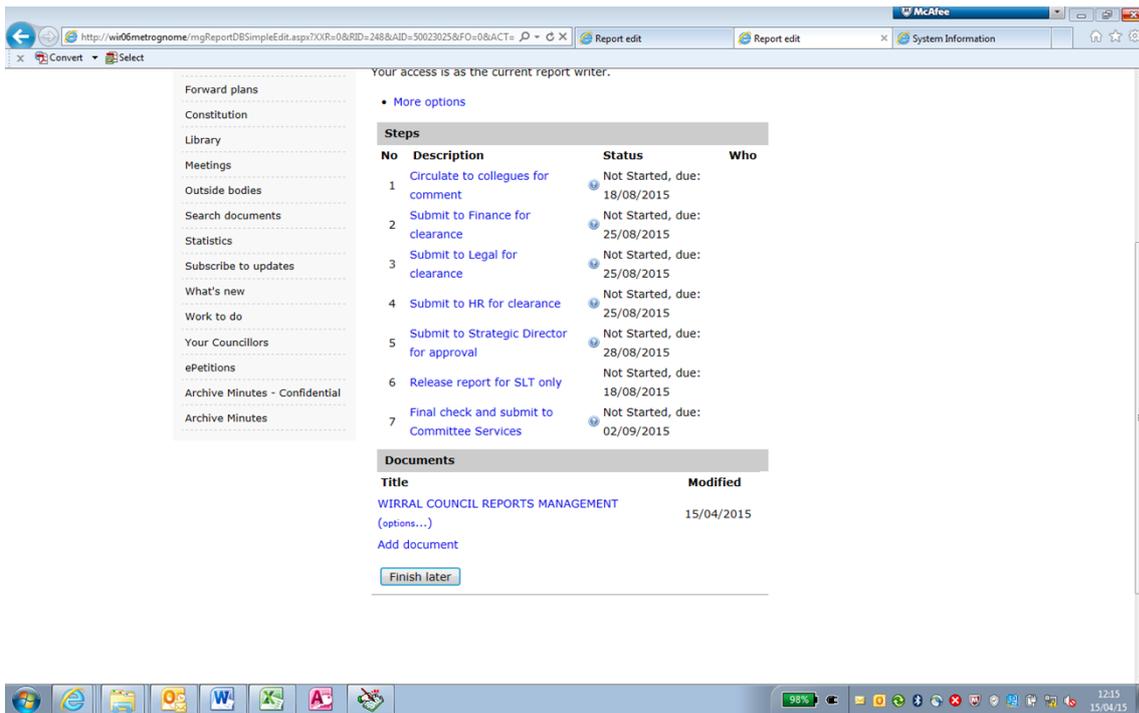
Adding a document/ Appendix

Access your work to do and select relevant report

The screenshot shows the 'Work to do' page for Vicky Rainsford. The page has a navigation menu with categories like People, IT Systems, Governance, Business Support, Procurement, Training, and News. The main content area is titled 'Work to do - Vicky Rainsford' and includes a search bar, a date range filter (21/08/2015 - 28/08/2015), and a 'Find' button. Below this is a table with columns for 'Due date', 'Item type', and 'Description'. The table contains two rows of tasks, both with a due date of 23/05/1910 and an item type of 'Write report'. The descriptions are '20TH AUGUST TEST, PLA 21/10/15 18:00' and '21st august, Constituency Committee - Wallasey 22/10/15 18:00'. A blue arrow points from the text 'Access your work to do and select relevant report' to the 'Work to do' section. Another blue arrow points from the text 'Click on 'Add document'' to the 'Add document' button in the task list.

Due date	Item type	Description
23/05/1910	Write report	20TH AUGUST TEST, PLA 21/10/15 18:00
23/05/1910	Write report	21st august, Constituency Committee - Wallasey 22/10/15 18:00

Click on 'Add document'



Complete the form as directed below

Document Title: a default title is added for you but you can edit it if you wish, e.g. Appendix 1.

Access: Select one of the following access options for your extra documents

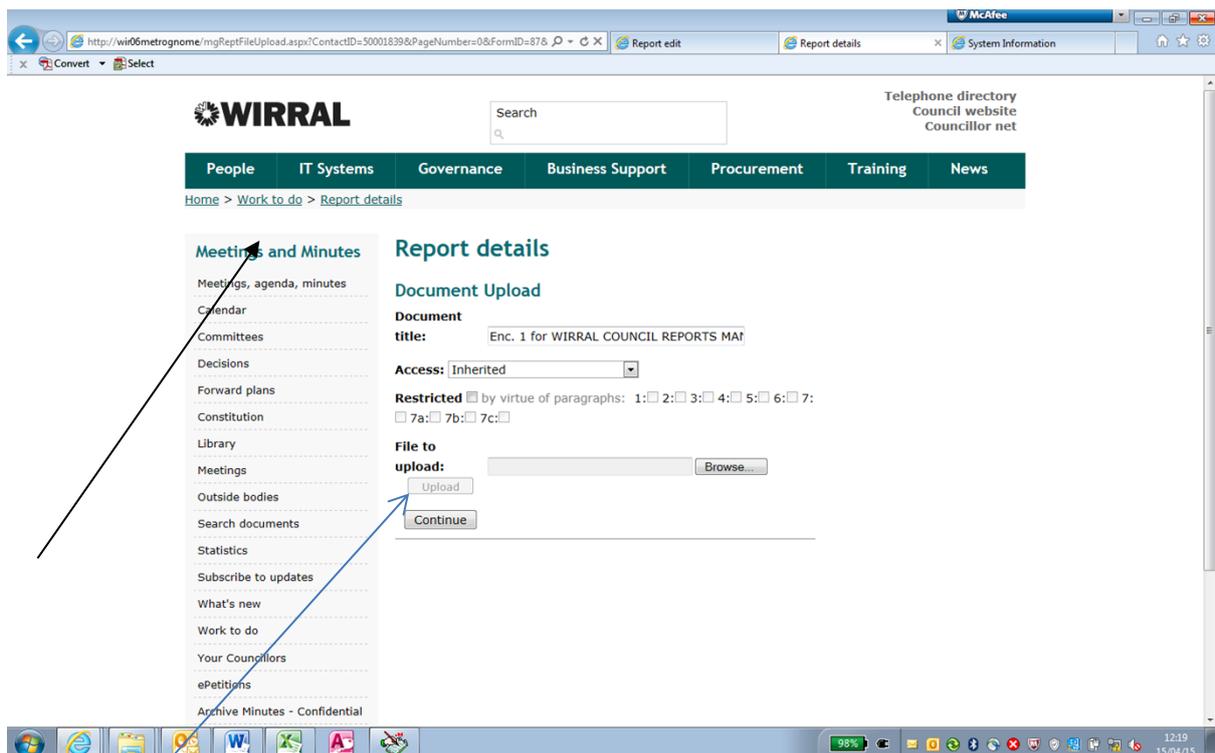
- Inherited – this inherits the access level of the item from this document is attached. (This usually means it will be a public document)
- Restricted – information in the extra document maybe restricted.

Tick and the applicable paragraph(s).

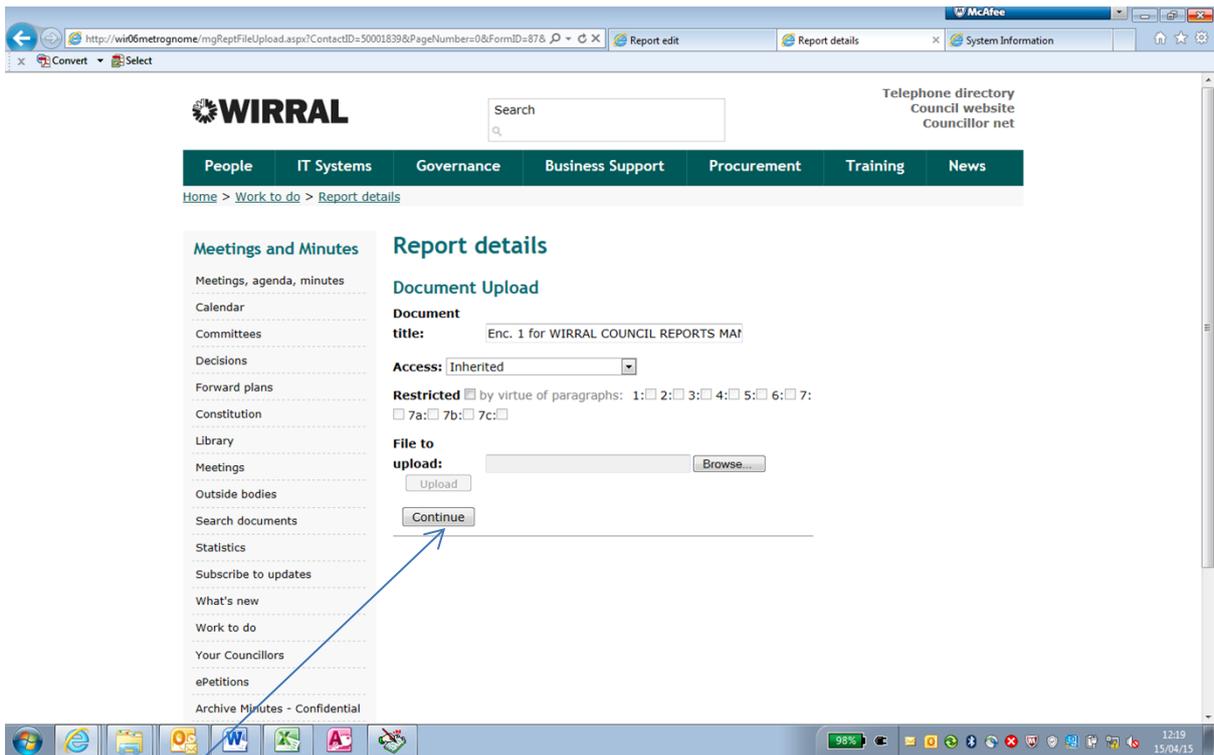
Private – the document is not published on the Intranet or Internet.

File to Upload: **Click** the 'Browse' button, select the filename that you want to upload and **Click** the open button.

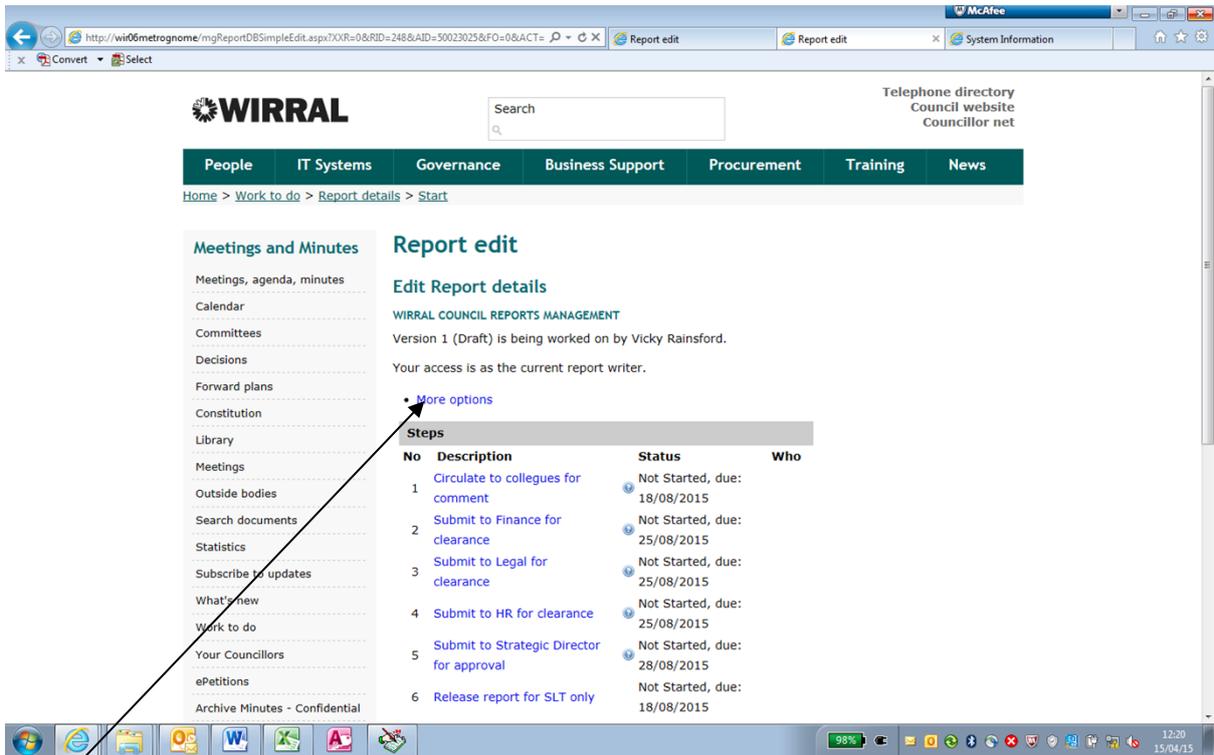
The selected filename will be in the File to upload edit box.



Click 'Upload' button to display the filename



Click 'Continue'



Click on 'More options'

The screenshot shows a web browser window displaying the WIRRAL Council Reports Management system. The browser address bar shows the URL: <http://wir06metrognome/mgReportDBSimpleEdit.aspx?YR=0&RID=248&AID=50023025&FO=1&ACT=>. The page title is "Report edit".

The WIRRAL logo is visible in the top left corner. A search bar is located in the top right corner. Below the logo, there is a navigation menu with the following items: People, IT Systems, Governance, Business Support, Procurement, Training, and News. The "Governance" menu item is highlighted.

The main content area is titled "Report edit" and "Edit Report details". It displays the following information:

- WIRRAL COUNCIL REPORTS MANAGEMENT
- Version 1 (Draft) is being worked on by Vicky Rainsford.
- Your access is as the current report writer.
- A list of actions:
 - Where is this report going?
 - Update this action status (Can start)
 - Edit report details
 - Full report history
 - Notes
 - Submit agenda item
 - Show document order
 - Less options

Below the actions, there is a table titled "Steps" with the following data:

No	Description	Status	Who
1	Circulate to colleagues for comment	Not Started, due: 18/08/2015	
2	Submit to Finance for clearance	Not Started, due: 25/08/2015	
	Submit to Legal for	Not Started, due:	

The Windows taskbar at the bottom shows the system tray with a battery level of 98% and the date 15/04/15.

Now you need to circulate the report for review

CREATING THE REPORT AT A GLANCE

- On the Intranet, go into Governance then Committees & Reports
- **Click** on **Work to Do** (from the list on the top of your screen) and login, admin\ then the same details as you use to log on to your pc
- **Click** on the **title** of the report
- Accept all changes in the report
- **Complete** the report **Save** and **Close**

CIRCULATE THE REPORT FOR REVIEW

For a Cabinet report there are 4 reviews that **must** be undertaken. These are by Legal/ HR/Finance and the appropriate Strategic Director. Internal reviews or 'soft' reviews are optional i.e. through submission to departmental colleagues. **Please ensure all reviewers receive at least 5 clear working days to sign off your report.**

1. Circulate report to Colleagues, This step is **OPTIONAL**
2. Circulate report to Legal, This step is **COMPULSORY**
3. Circulate report to HR, This step is **COMPULSORY**
4. Circulate report to Finance, This step is **COMPULSORY**
5. Circulate to Strategic Director/ Head of Service to Sign off your report. This step is **COMPULSORY** and should be completed after you have **ACCEPTED/REJECTED** changes from 1 (is necessary), 2,3 & 4 as above. .

The screenshot shows the 'Report edit' page for 'JANUARY CABINET - TEST'. The page includes a navigation menu with links like 'People', 'IT Systems', 'Governance', 'Business Support', 'Procurement', 'Training', and 'News'. The main content area is titled 'Report edit' and 'Edit Report details'. It shows the report title 'JANUARY CABINET - TEST' and the version 'Version 1 (Draft) is being worked on by Lyndzay Roberts'. Below this, there is a table of steps for review:

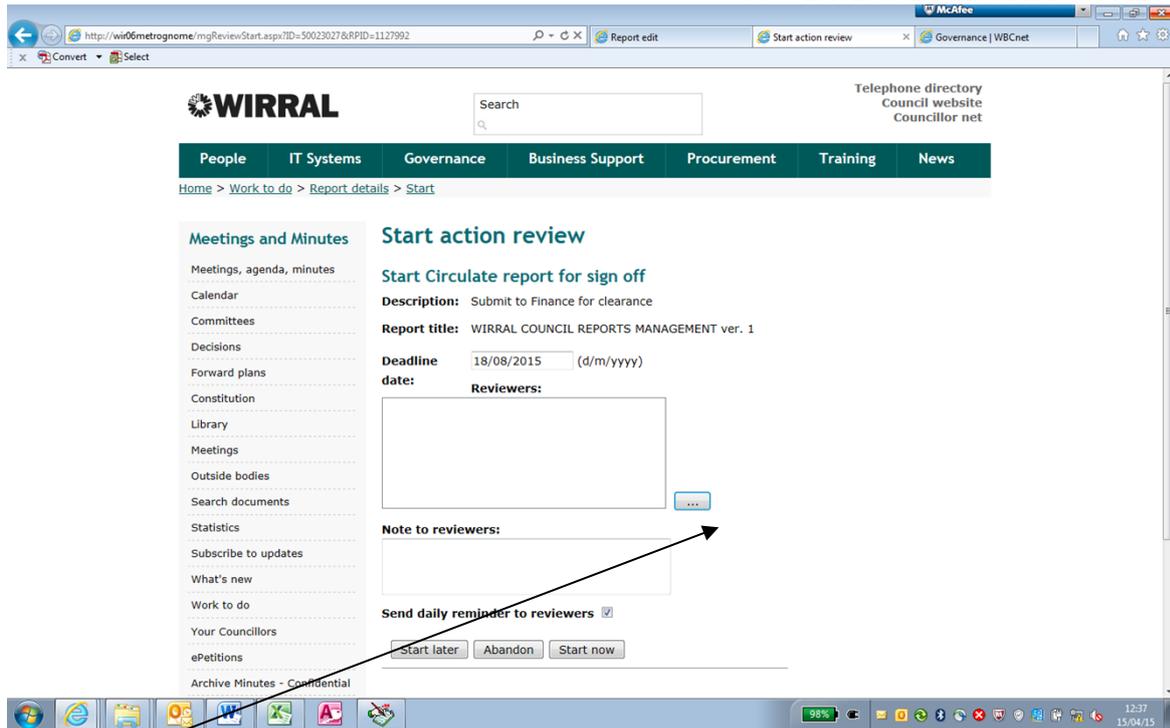
No	Description	Status	Who
1	Circulate to Colleagues for comment	Not Started	
2	Submit to Finance for clearance	Not Started	
3	Submit to Legal for clearance	Not Started	
4	Submit to HR for clearance	Not Started	
5	Submit to Strategic Director for clearance	Not Started	
6	Final check and release report to Committee Services	Not Started, due: 10/12/2015	

Below the table, there is a 'Documents' section with a table:

Title	Modified
JANUARY CABINET - TEST (options...)	16/10/2015

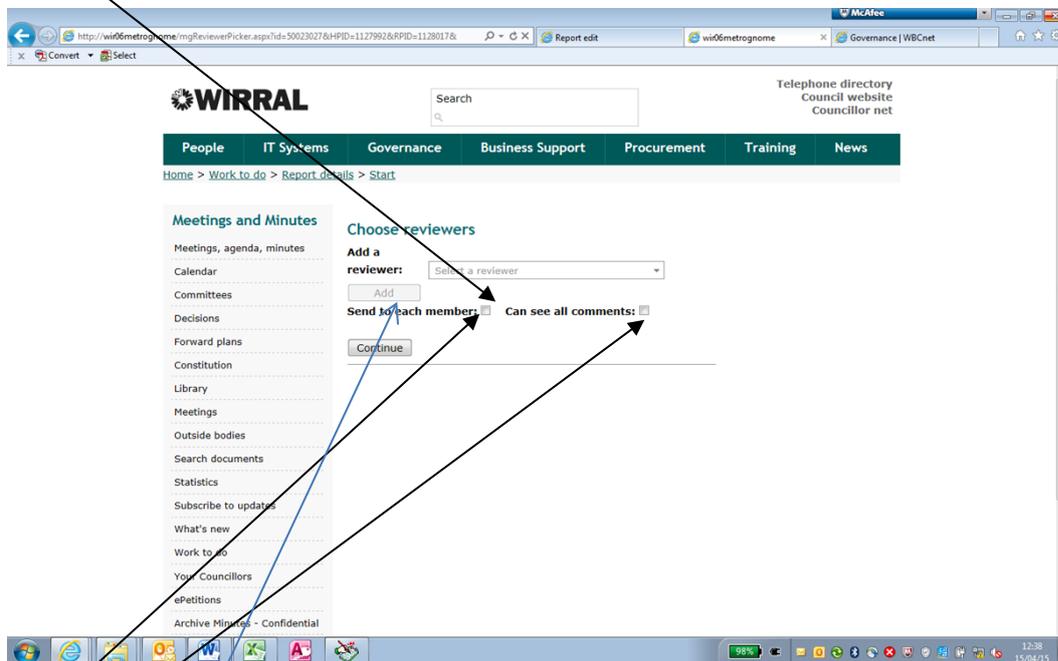
A 'Finish later' button is located below the documents table.

Click on 'To circulate draft report to your reviewers'



Click on ...

Click on 'Add a reviewer' type in the surname then click on the correct name. There is no need to add reviewers for Legal/ Finance and HR as these are default.



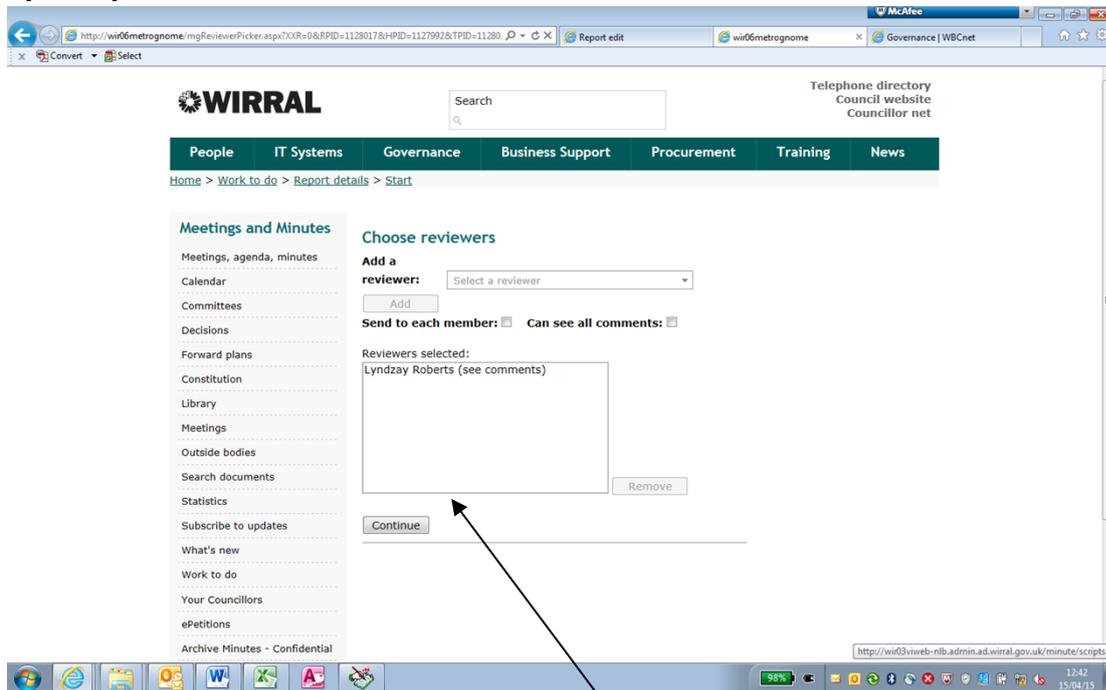
Put a tick in Send to each member

Put a tick in Can see all comments if you want that Reviewer to see other Reviewers comments, if not leave the box empty.

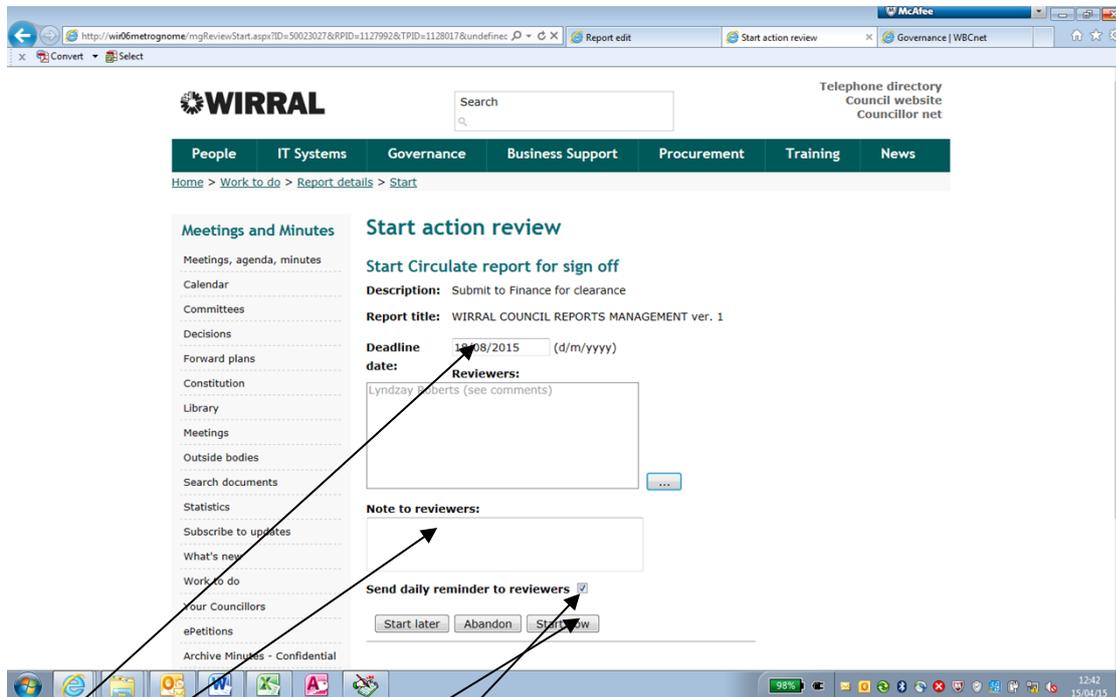
Then Click on 'Add'

Repeat this process to add all of your reviewers

IF YOU CANNOT FIND THE OFFICER ON THE DROP DOWN LIST contact Lyndzay Roberts or Victoria Rainsford on 691 8262 or 8271



When all Reviewers have been added, **Click** 'Continue'



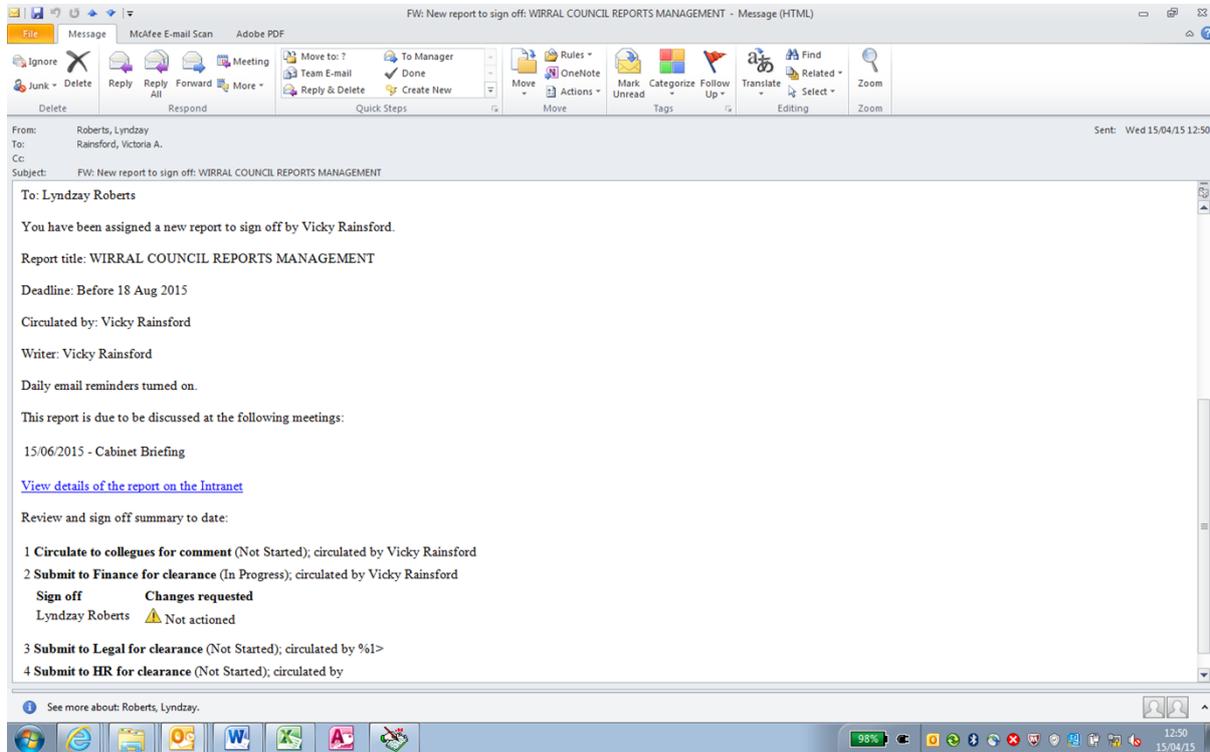
Add a deadline date manually (Please ensure that reviewers are given at least 5 working days to sign off your report).

Add a note to your reviewers (optional)

CIRCULATE THE REPORT FOR REVIEW

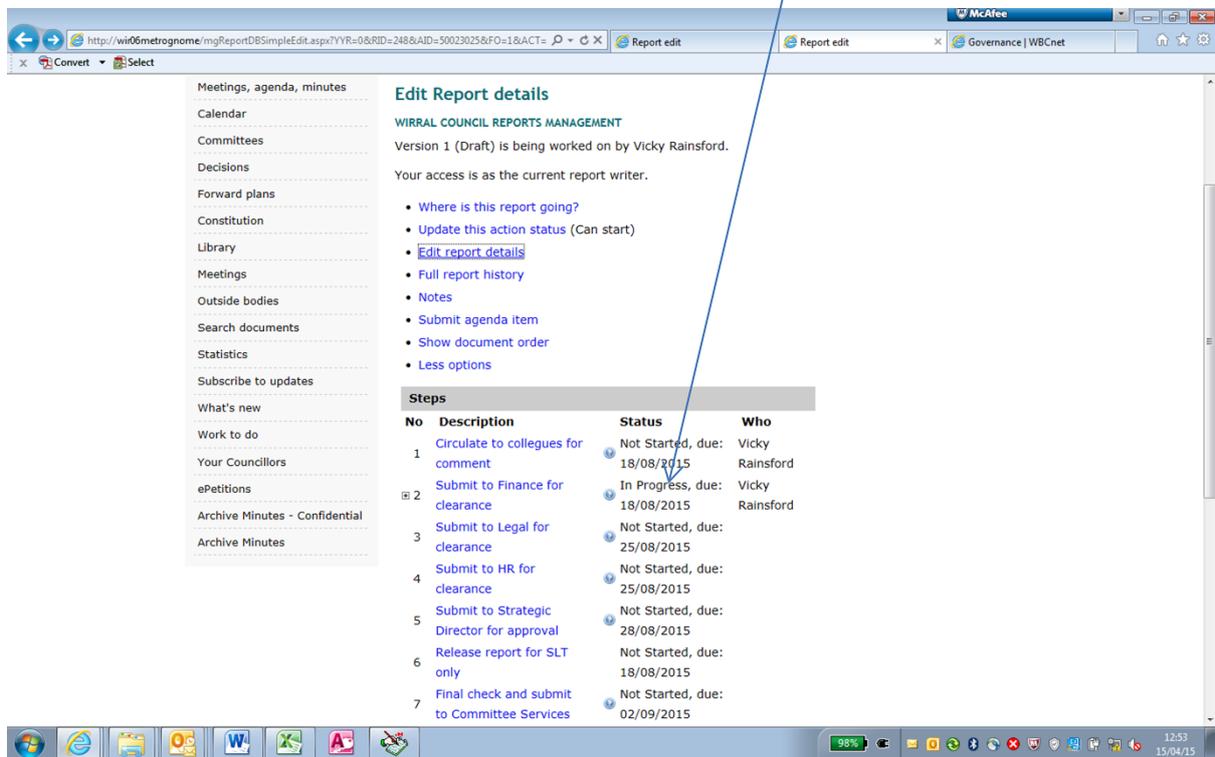
If you wish you can **Tick** to send daily reminders to your Reviewers to complete their review of your report.

Click on 'Start now' to release the report to your reviewers.



Reviewers will receive an email advising them that they have been assigned a report to review/sign off.

You can check on the status of the report on the home screen



When all your reviewers have viewed your report Accept/Reject any suggested changes before sending it to the relevant Strategic Director (**see Accepting/Rejecting Changes on pages 33-37**)

The **final** Reviewer will be the Strategic Director sign off report'. The appropriate Head of Service/ Director will also need to be added as a Reviewer in the event that the Strategic Director is unavailable.

CIRCULATING THE REPORT AT A GLANCE

Click on **To** circulate report to draft reviewers

Click on **...**

Click on **Add Reviewers**

Add the reviewers

Send to each member Can see all comments

Click on **Add**

Click on **Continue**

Add a **deadline date**

Add a note to your reviewers

Daily reminders

Click **start now**

ACCEPTING/REJECTING CHANGES

Go to Work to do

The screenshot shows a web browser window with the URL <http://wir06metrogonme/mgWorkToDo.aspx?bcr=1>. The page title is "Work to do - Vicky Rainsford". On the left, there is a sidebar menu with various categories like "Committees", "Decisions", "Forward plans", etc. The main content area shows a "Date range: 16/04/2015 - 23/04/2015" and a "Find" button. Below this is a "To do" section with a table of tasks. An arrow points from the "Work to do" link in the sidebar to the first task in the table.

Due date	Item type	Description
18/08/2015	Write report	WIRRAL COUNCIL REPORTS MANAGEMENT, Cabinet Briefing 15/06/15 17:30 Wirral Report Management, Cabinet Briefing 30/06/15 17:30
23/06/2015	Write report	Another planning matter, Cab 04/06/15 18:15
05/05/2015	Write report	PLANNING MATTER X 2, Cab 04/06/15 18:15
05/05/2015	Write report	Test, PLA 22/04/15 18:00
15/04/2015	Follow-up from meeting	Write a report TEST APRIL 15, Independent School Appeal Panel
09/04/2015	Write report	

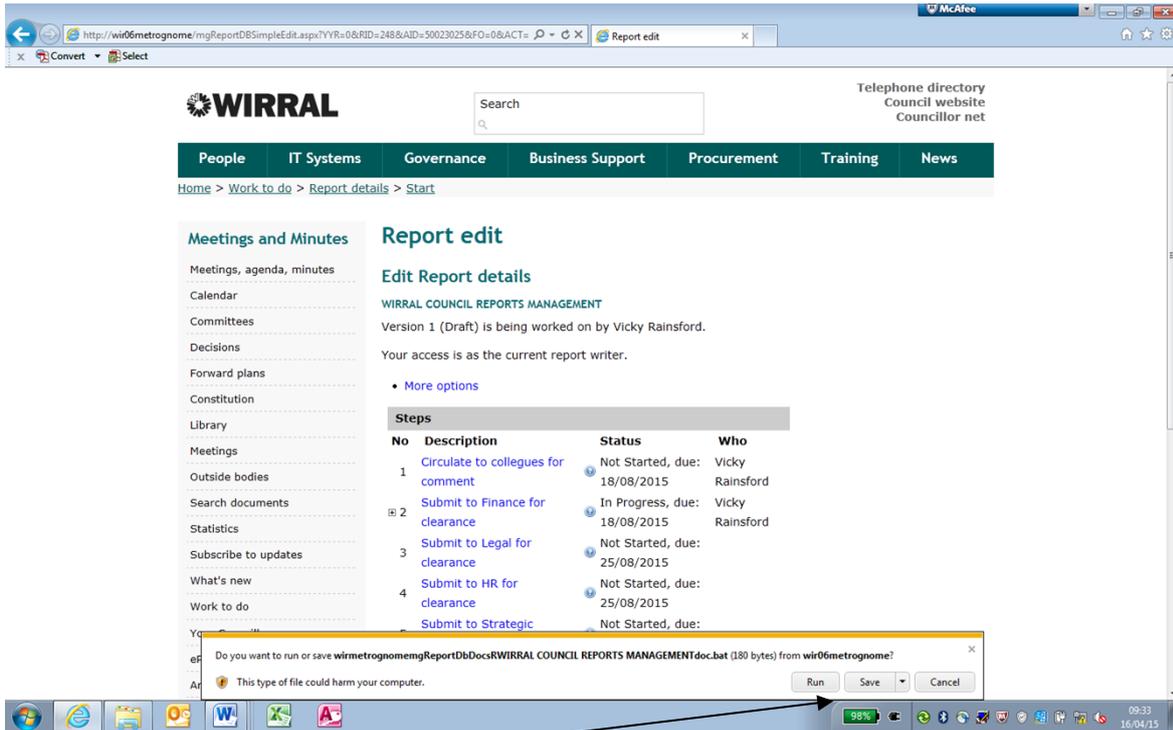
Click on the report you are working on

The screenshot shows a web browser window with the URL <http://wir06metrogonme/mgReportDBSimpleEdit.aspx?OPT=1&RID=248&AID=50023025&RPID=112819>. The page title is "Report edit". The main content area shows a "Steps" table and a "Documents" table. An arrow points from the "Work to do" link in the sidebar to the first document entry in the "Documents" table.

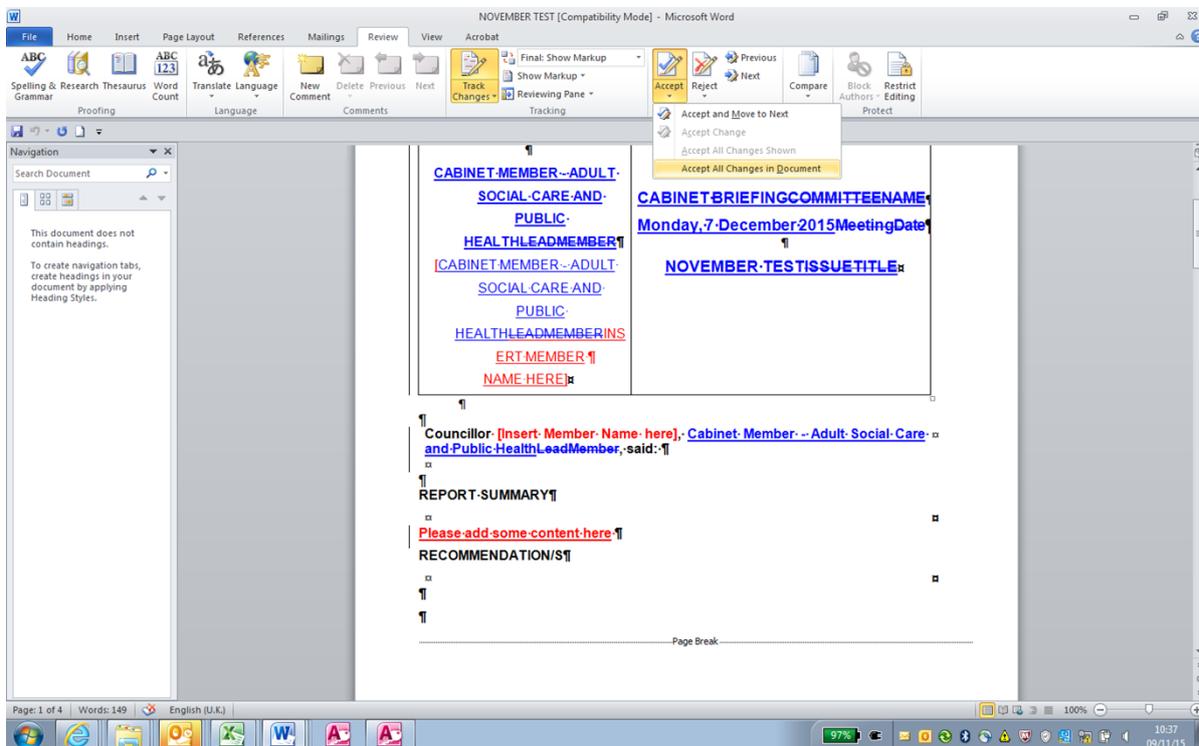
No	Description	Status	Who
1	Circulate to colleagues for comment	Not Started, due: 18/08/2015	Vicky Rainsford
2	Submit to Finance for clearance	In Progress, due: 18/08/2015	Vicky Rainsford
3	Submit to Legal for clearance	Not Started, due: 25/08/2015	
4	Submit to HR for clearance	Not Started, due: 25/08/2015	
5	Submit to Strategic Director for approval	Not Started, due: 28/08/2015	
6	Release report for SLT only	Not Started, due: 18/08/2015	
7	Final check and submit to Committee Services	Not Started, due: 02/09/2015	

Title	Modified
WIRRAL COUNCIL REPORTS MANAGEMENT (options...)	15/04/2015
Enc. 1 for WIRRAL COUNCIL REPORTS MANAGEMENT (options...)	15/04/2015

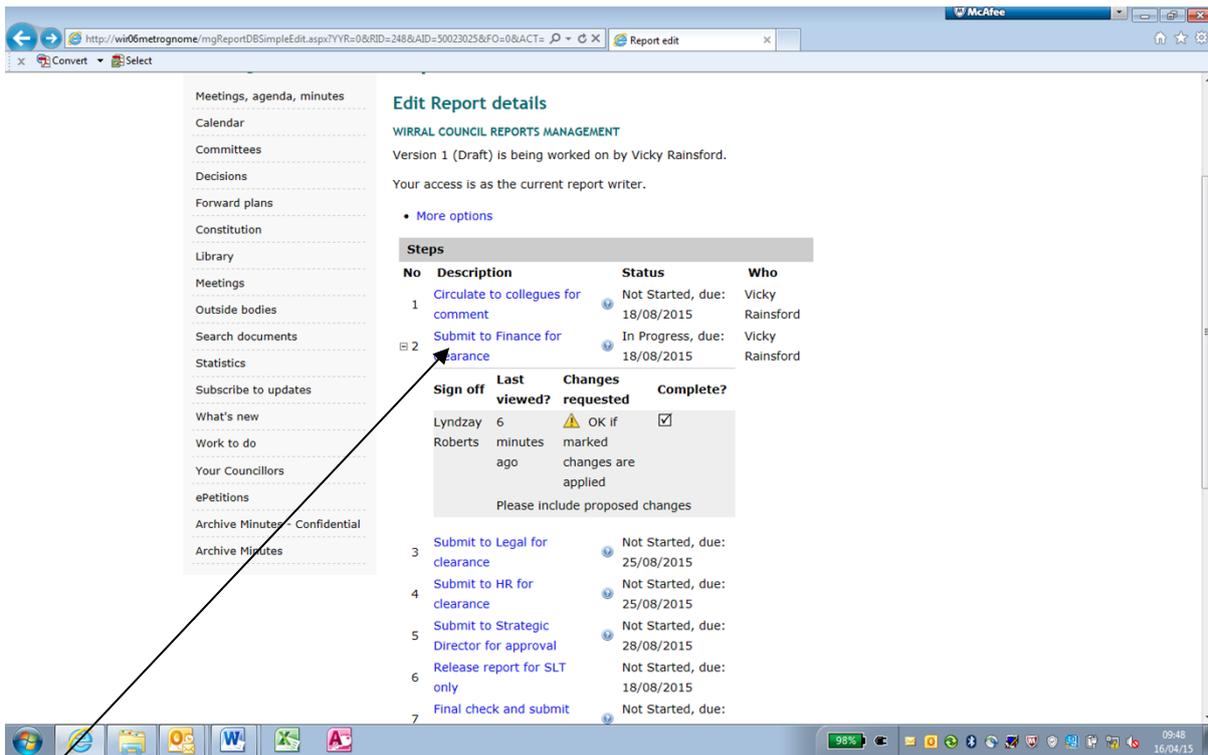
Click on the report



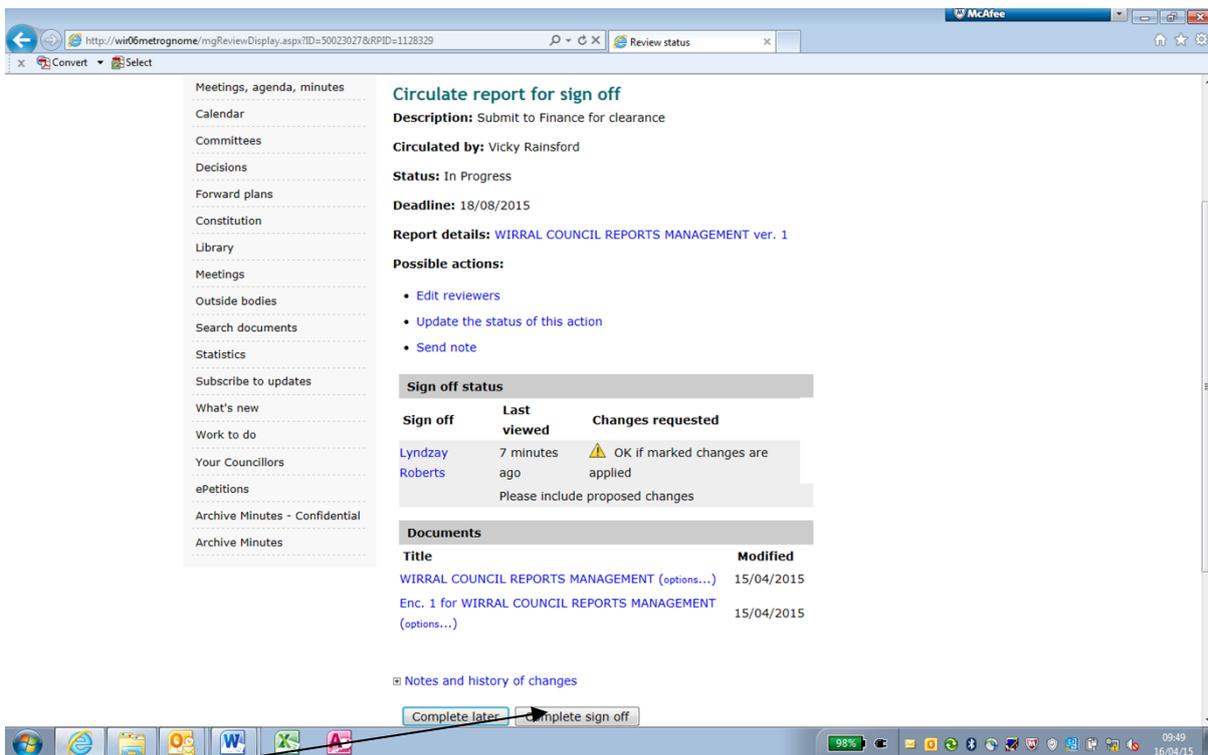
Click on Run



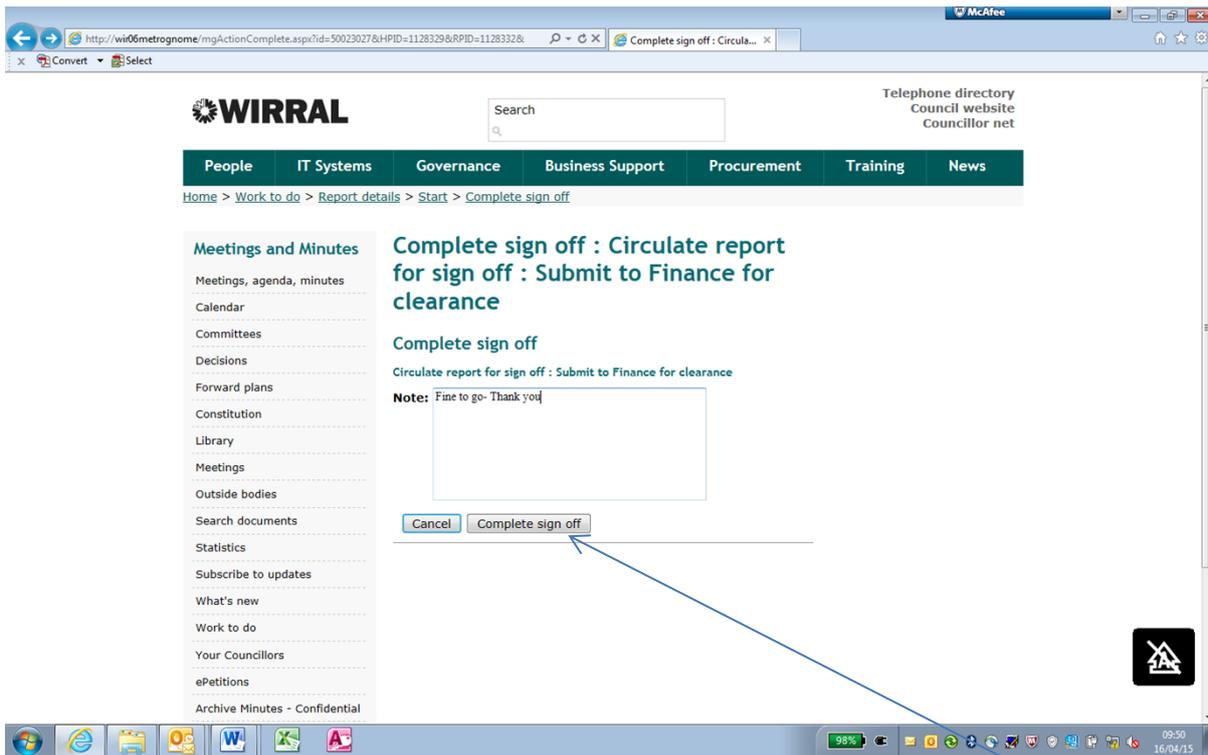
Go through the report and accept or reject the changes. You will be able to identify who has made the changes by hovering the mouse underneath a change. Close and save.



Click on relevant review stage

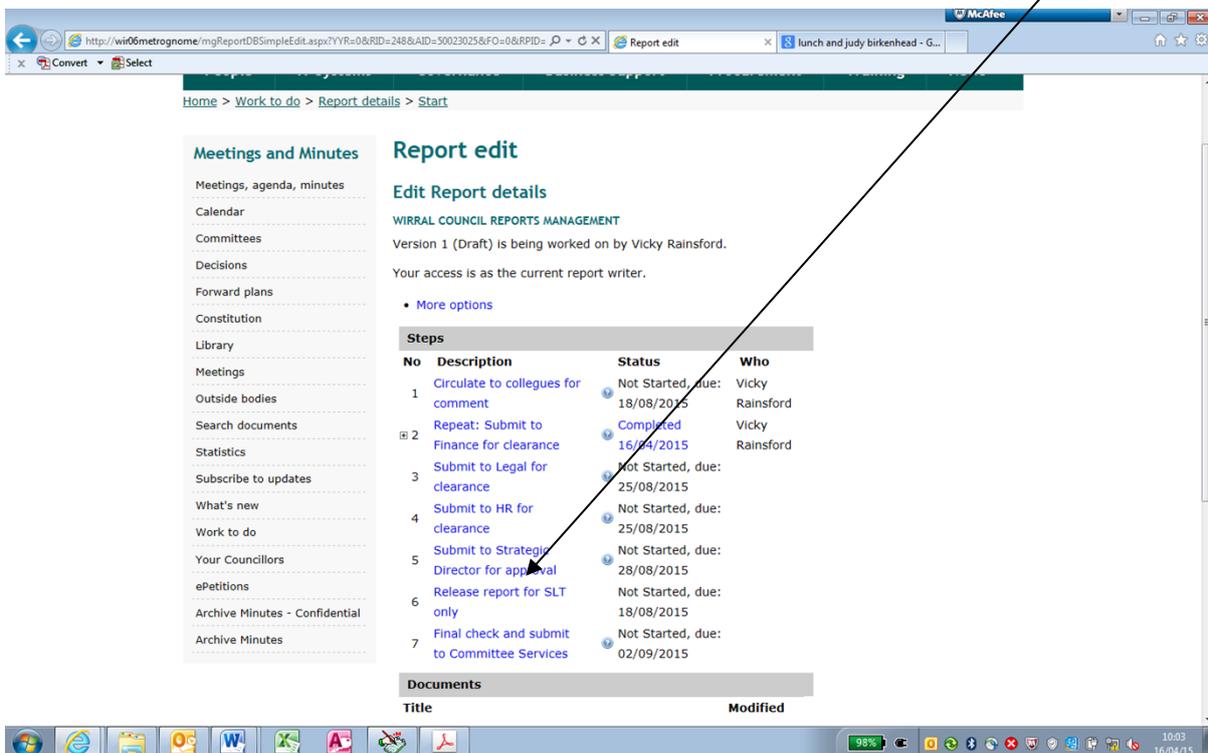


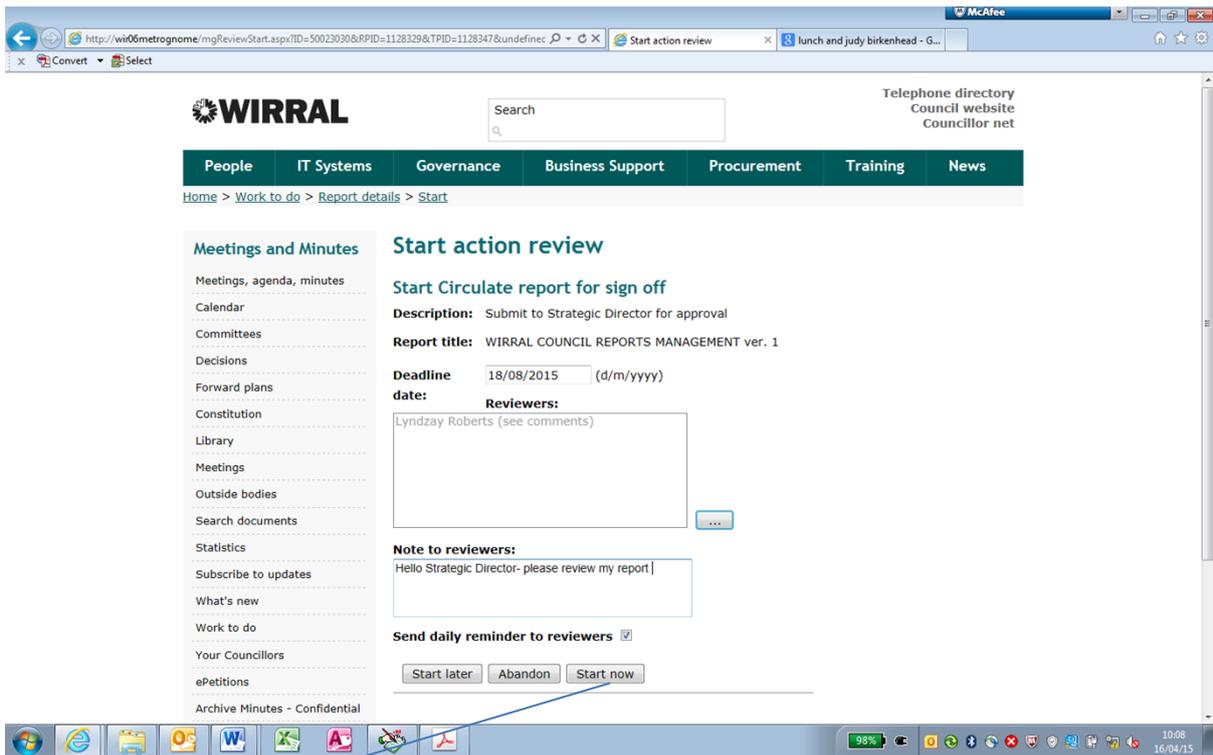
Click on 'Complete Sign Off'



At this stage you can add notes to Report Writer and complete the sign off. Repeat this process for Legal and HR.

AT THIS STAGE GO BACK TO THE EDIT REPORT DETAILS PAGE and **Click** on 'Submit to Strategic Director for approval'

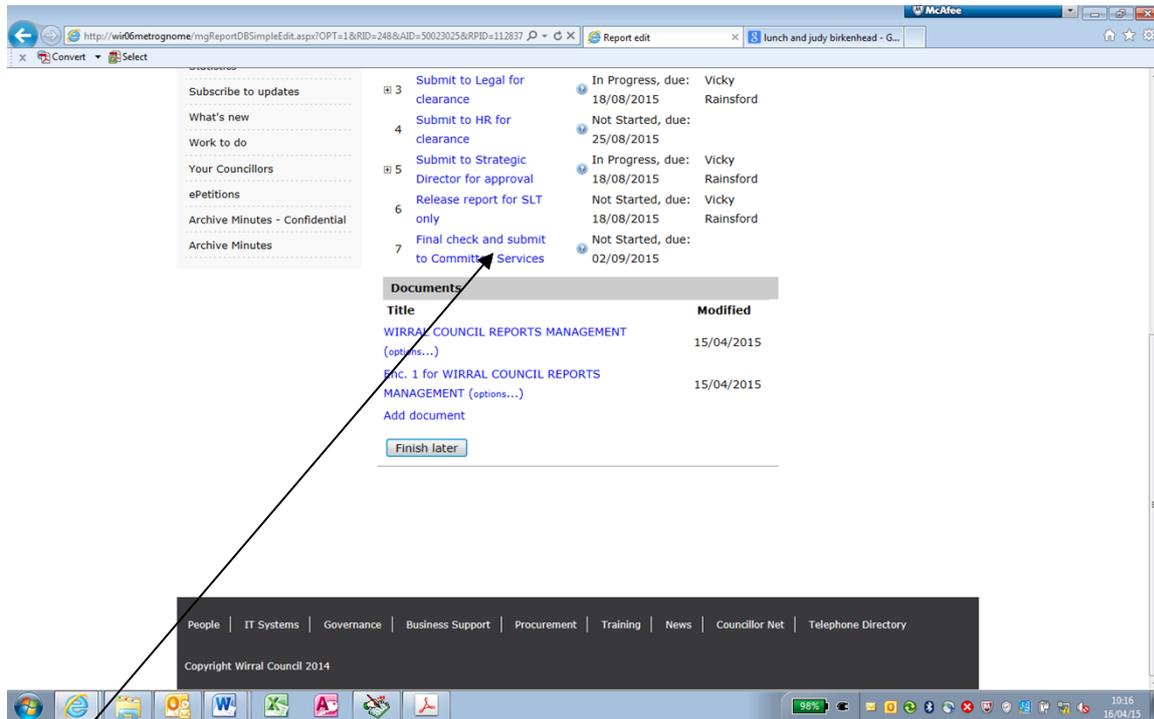




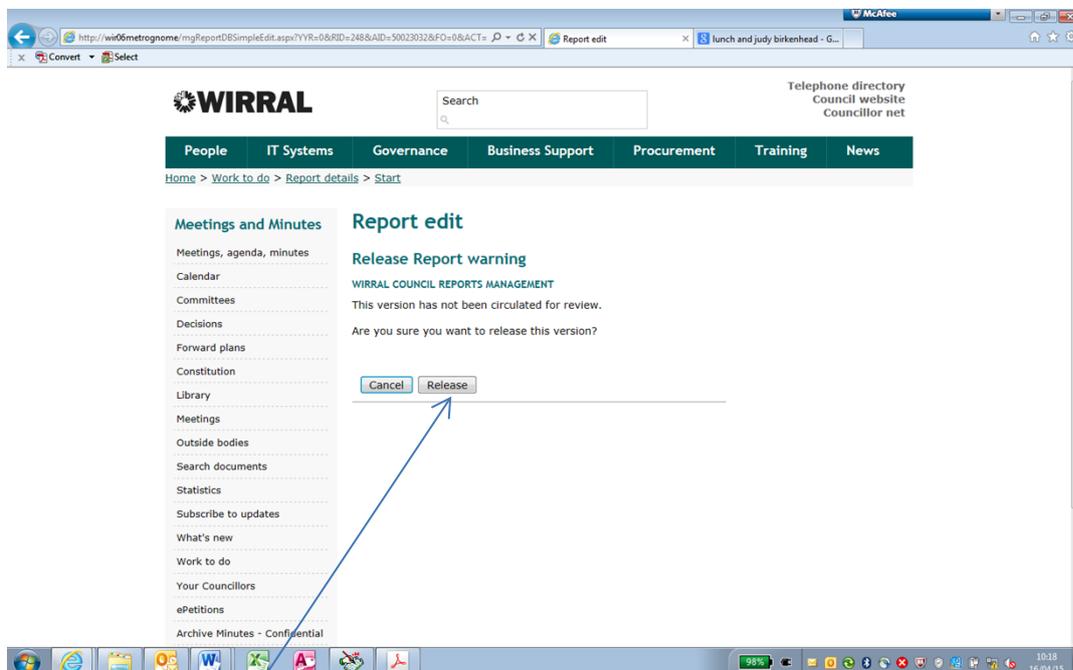
Click on 'Start now' once any notes have been added

Once the Strategic Director has made changes complete the 'sign off', as explained previously. (see page 35)

RELEASING THE REPORT TO COMMITTEE SERVICES

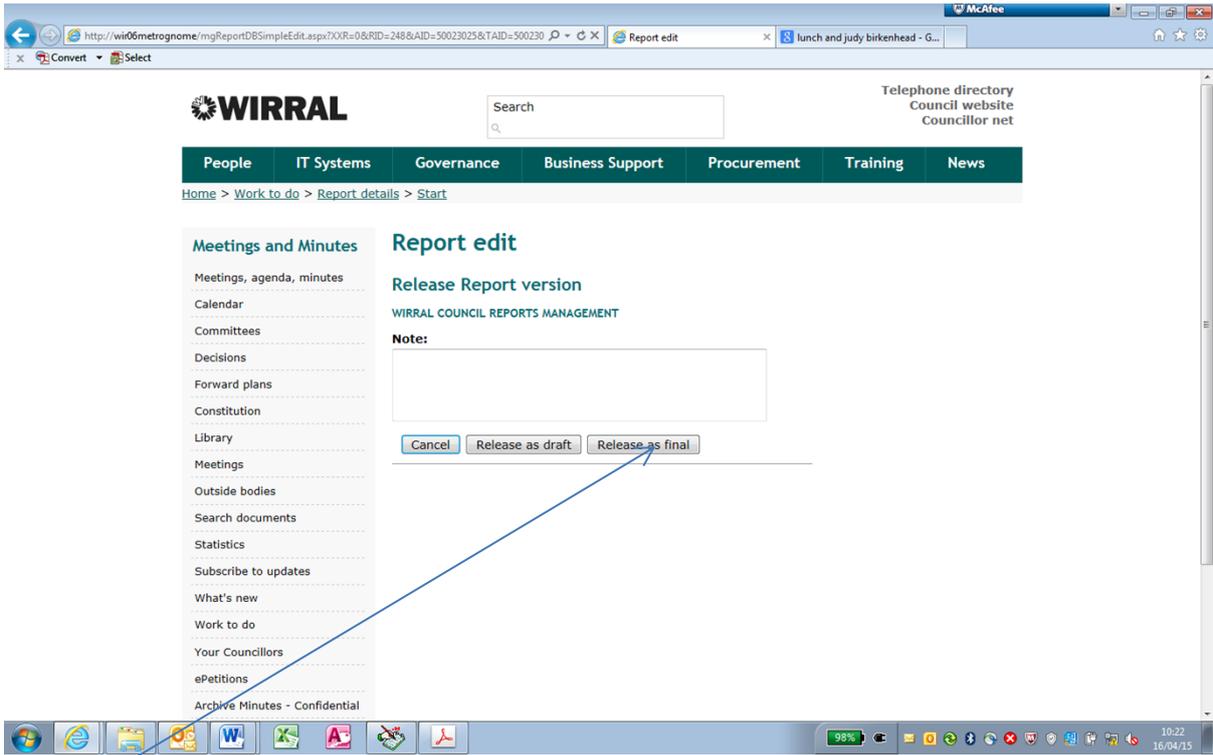


Click on Final check and submit to Committee Services. At this stage this is your final opportunity to check your report before submitting to Committee Services to be published.



Click on Release

PART 1
RELEASING THE REPORT TO DEMOCRATIC SERVICES



Click Release as final

AMENDING REPORTS FOLLOWING SLT AND CABINET BRIEFING

There may be occasions when reports for Cabinet meetings need to be amended following their consideration at SLT and Cabinet Briefing.

On those occasions, the appropriate Officer in attendance at SLT and Cabinet Briefing will advise you of:.

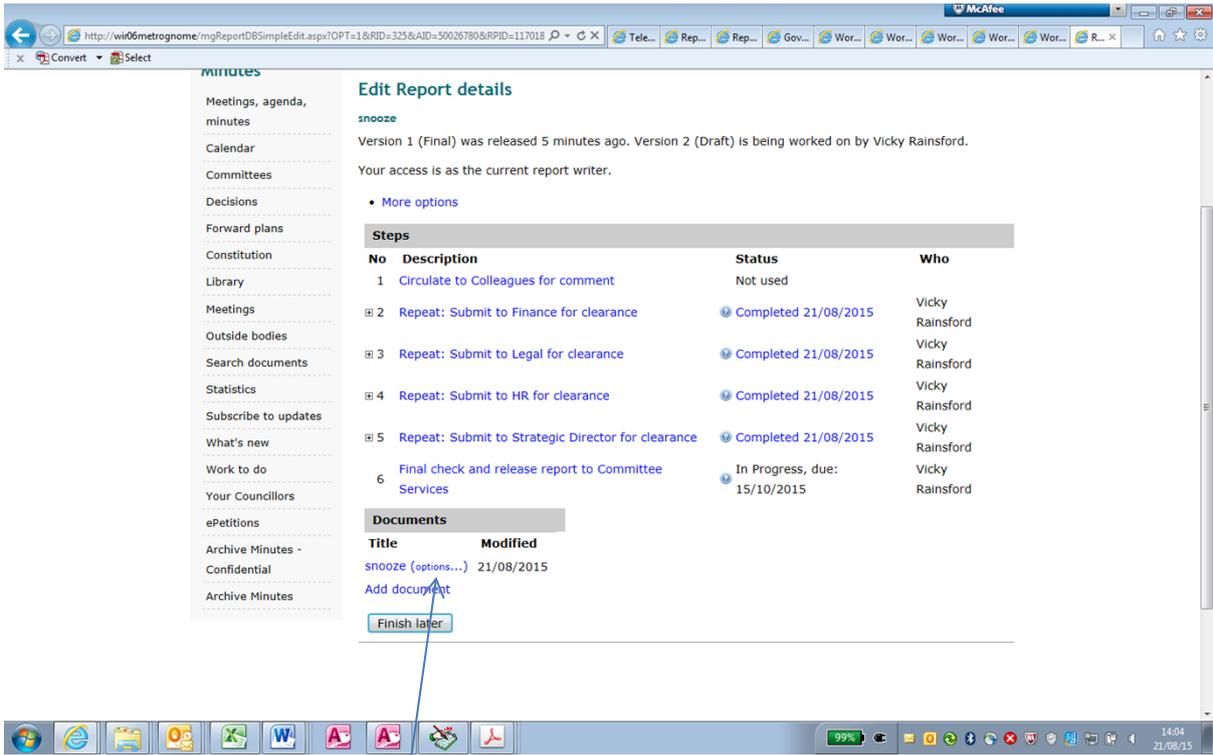
- The amendments to be made and
- The Officers to be consulted on the amended report

The screenshot shows the Wirral Council website interface. The main heading is "Work to do - Vicky Rainsford". Below this, there is a "Date range" filter set to "09/11/2015 - 16/11/2015" and a "Find" button. A table of tasks is displayed with columns for "Due date", "Item type", and "Description". The table contains one entry: "09/11/2015 09:43 Add issue NOVEMBER TEST". Above the table, there are tabs for "To do", "Done", and "Options". A blue arrow points to the "Done" tab.

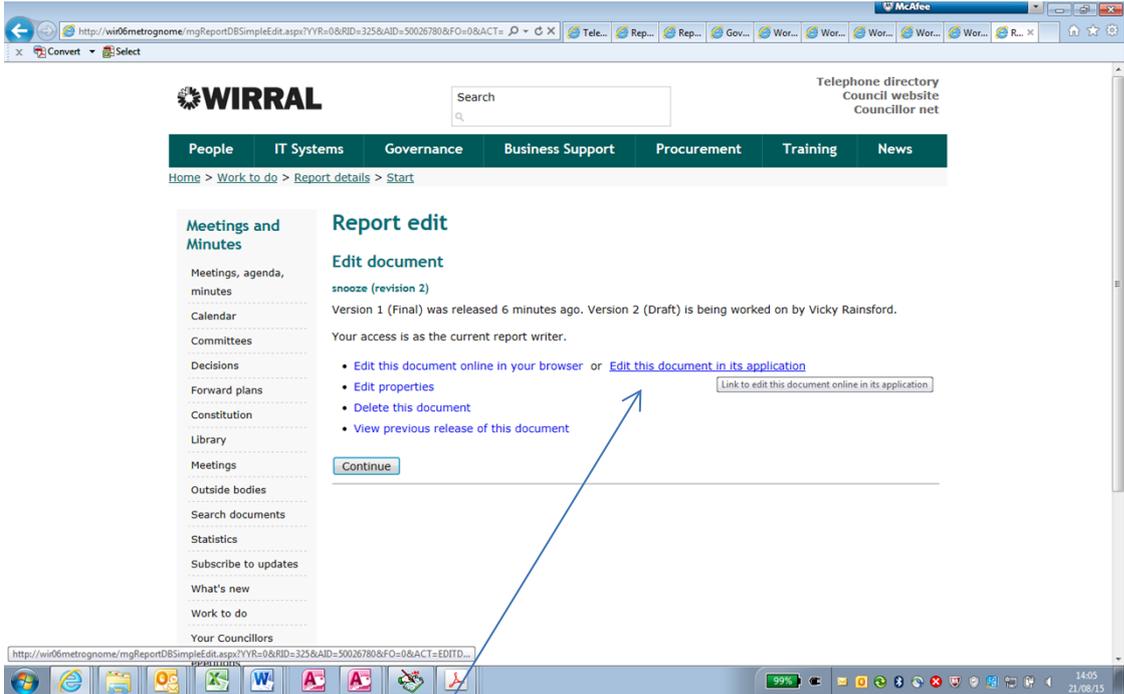
Due date	Item type	Description
09/11/2015 09:43	Add issue	NOVEMBER TEST

Click on the 'Done' Tab then select appropriate report. You may need to adjust the date range accordingly

PART 1 RELEASING THE REPORT TO DEMOCRATIC SERVICES

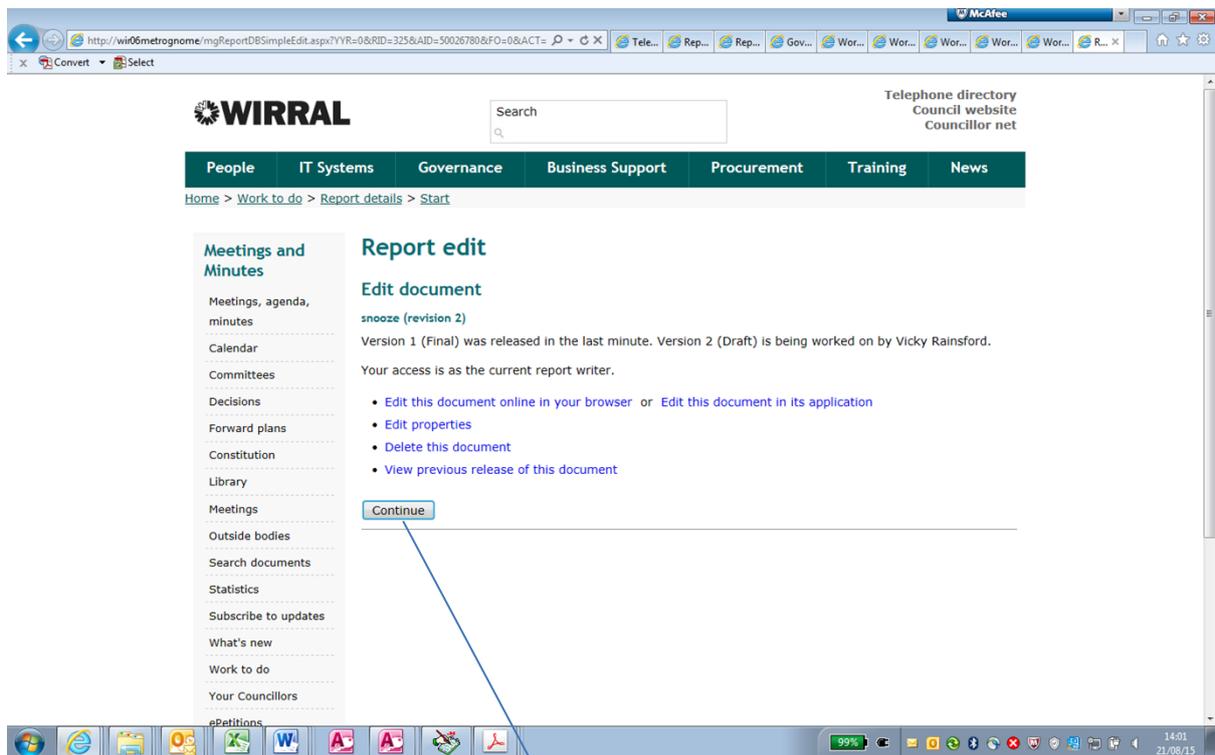


Select 'Options'



Select 'Edit this document in its application' and click 'run'

Make changes, then save and close



Select 'Continue'

PART 1 RELEASING THE REPORT TO DEMOCRATIC SERVICES

The screenshot displays a web application interface with a navigation menu on the left and a main content area. The main content area is divided into two sections: 'Steps' and 'Documents'.

Steps

No	Description	Status	Who
1	Circulate to Colleagues for comment	Not used	
2	Repeat: Submit to Finance for clearance	Completed 21/08/2015	Vicky Rainsford
3	Repeat: Submit to Legal for clearance	Completed 21/08/2015	Vicky Rainsford
4	Repeat: Submit to HR for clearance	Completed 21/08/2015	Vicky Rainsford
5	Repeat: Submit to Strategic Director for clearance	Completed 21/08/2015	Vicky Rainsford
6	Final check and release report to Committee Services	In Progress, due: 15/10/2015	Vicky Rainsford

Documents

Title	Modified
snooze (options...)	21/08/2015

[Add document](#)

Repeat (if necessary) steps and re release to Committee Services

AMENDING THE REPORT AT A GLANCE

- On the Intranet, go into Governance then Reports and Minutes.
-  on **Work to Do** and login, admin\ then the same details as you use to log on to your pc
- Go to Done
-  on **Earlier** until you are within the correct date range to find your report
-  on **Report** (in blue)
- Near the bottom of the screen Click on **(options)**
-  on **Edit this report in its application**
-  on **Run**
- Make the changes **Save** and **Close**
-  on **Continue** or **Back**

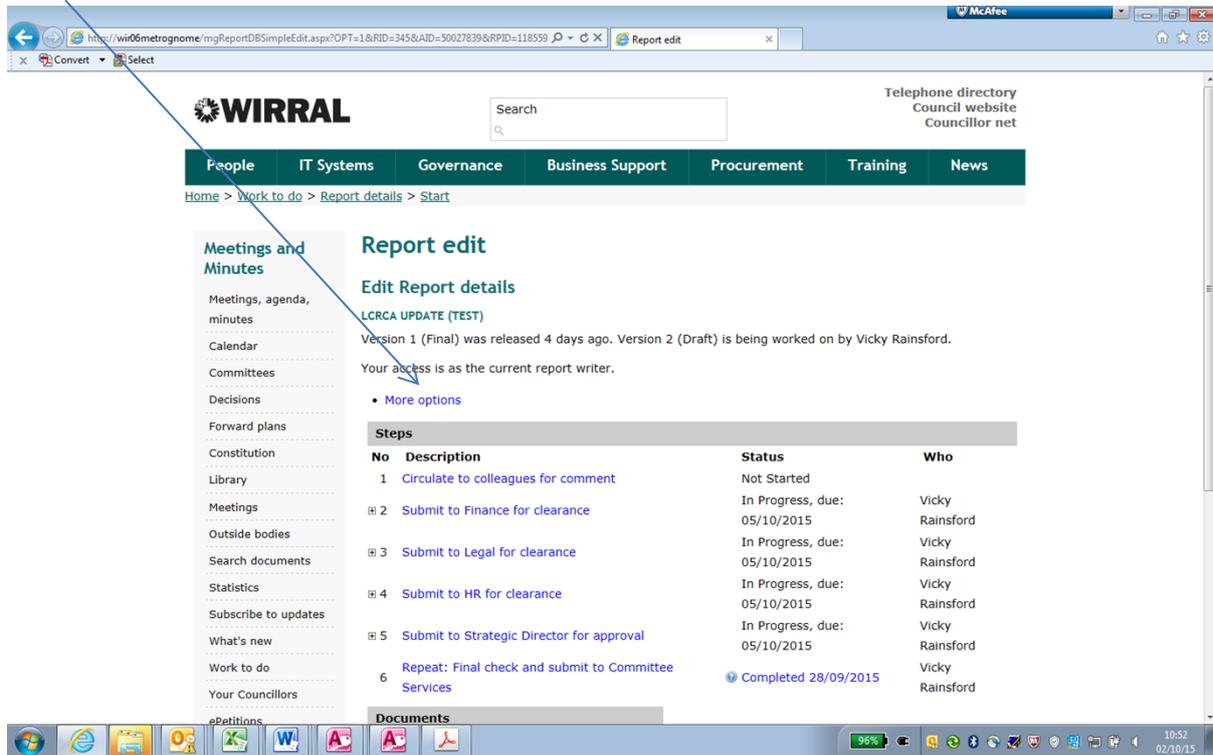
If you need to send the report out to Reviewers Click on Edit reviewers and follow the instructions on page 27

If you are ready to release the report

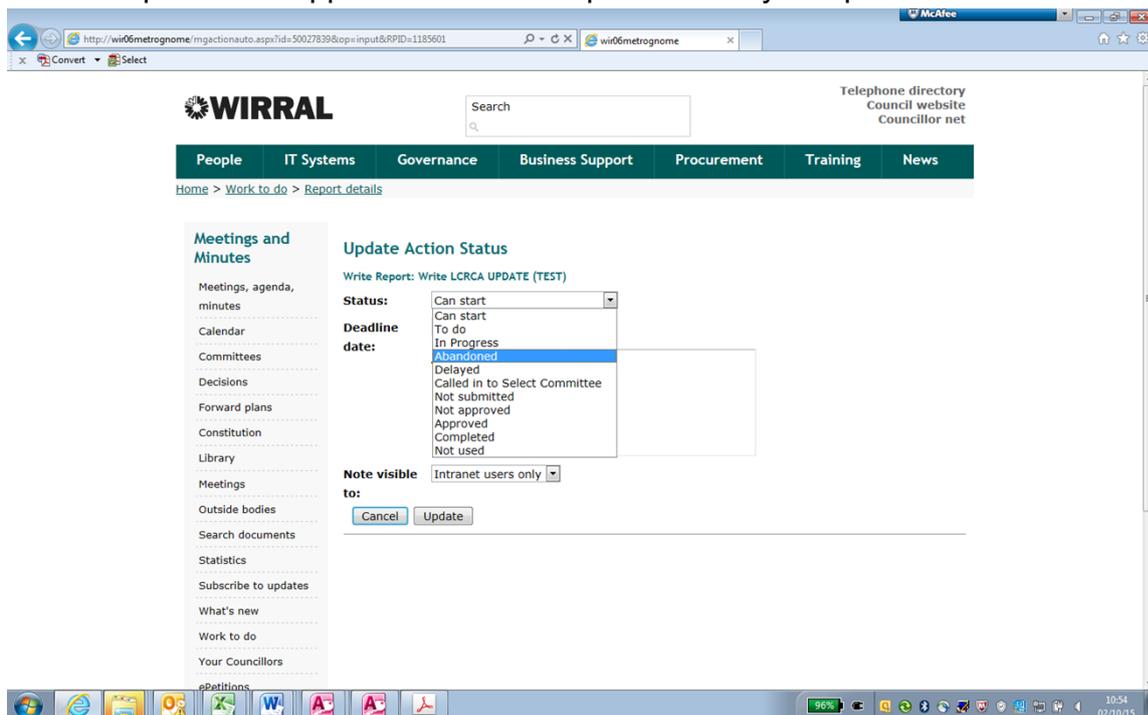
-  on **Release Report**
-  on **Release**
-  on **Release as Final**

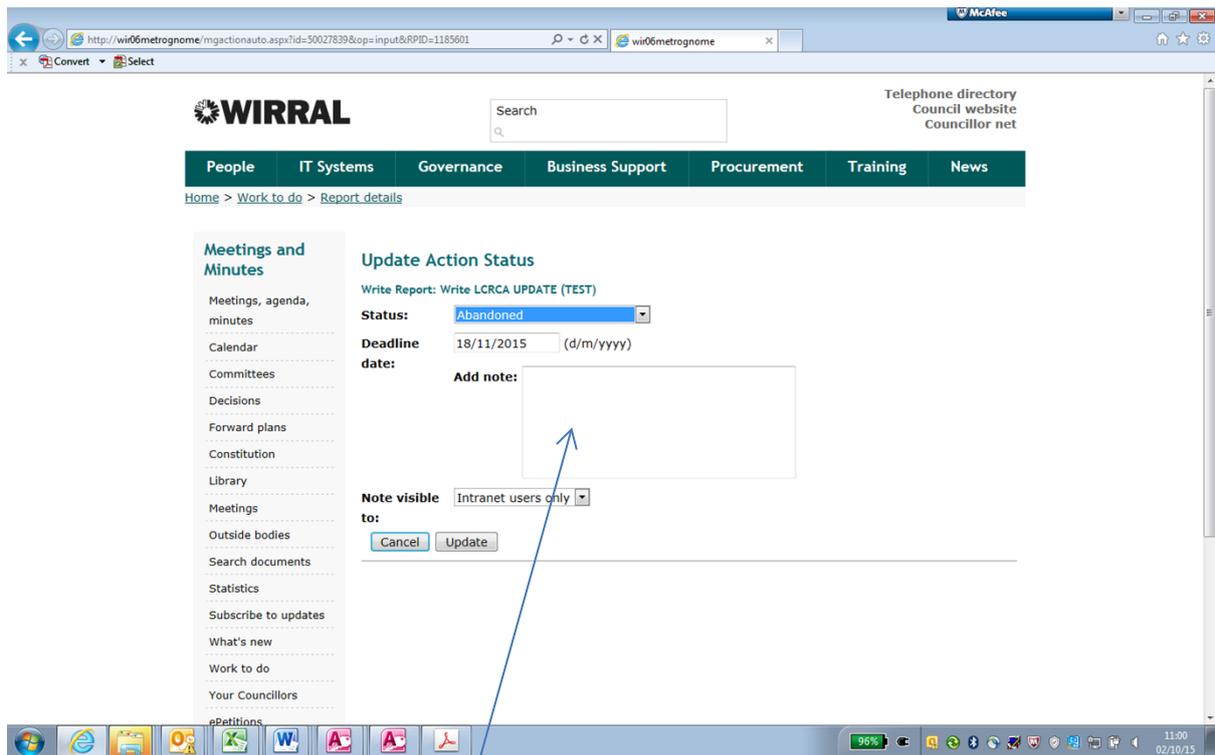
ABANDONING A REPORT

Setting a report to abandoned means you no longer want the report and you want to abandon. To abandon the report go to your work to do and select the report you want to abandon. Select 'More Options'



Several options will appear. Select the Option that says "Update this action status."





The above will be displayed. From the dropdown box next to where it says status select 'Abandoned' and then add any notes you want to the note box. This could be the reason why it's been abandoned.

When you're done click "Update". The report will now be abandoned. The report author will get an email notifying them that the report has been abandoned. Committee Officers will also get an email notifying them of the abandonment.

