

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:-

Shirley Hudspeth	shirleyhudspeth@wirral.gov.uk	0151 691 8559
Andrew Mossop	andrewmossop@wirral.gov.uk	0151 691 8501
Patrick Sebastian	patricksebastian@wirral.gov.uk	0151 691 8424
Victoria Rainsford	victoriarainsford@wirral.gov.uk	0151 691 8271
Lyndzay Roberts	lyndzayroberts@wirral.gov.uk	0151 691 8262
Anne Beauchamp	annebeauchamp@wirral.gov.uk	0151 691 8608
Pat Philips	patphilips@wirral.gov.uk	0151 691 8488

CONTENTS

Part 1 – Cabinet Workflow	4
Submitting an Item for Cabinet	4
Submitting a Plan Item at a Glance	15
Amending a Plan Item at a Glance	15
Creating the Report.....	16
Creating the Report at a Glance.....	27
Circulate the Report for Review	28
Circulating the Report at a Glance	33
Accepting/Rejecting Changes	34
Releasing the Report to Committee Services	39
Amending Reports following SLT and Cabinet Briefing	41
Amending the Report at a Glance	45
Abandoning a report	46

PART 1 – CABINET WORKFLOW

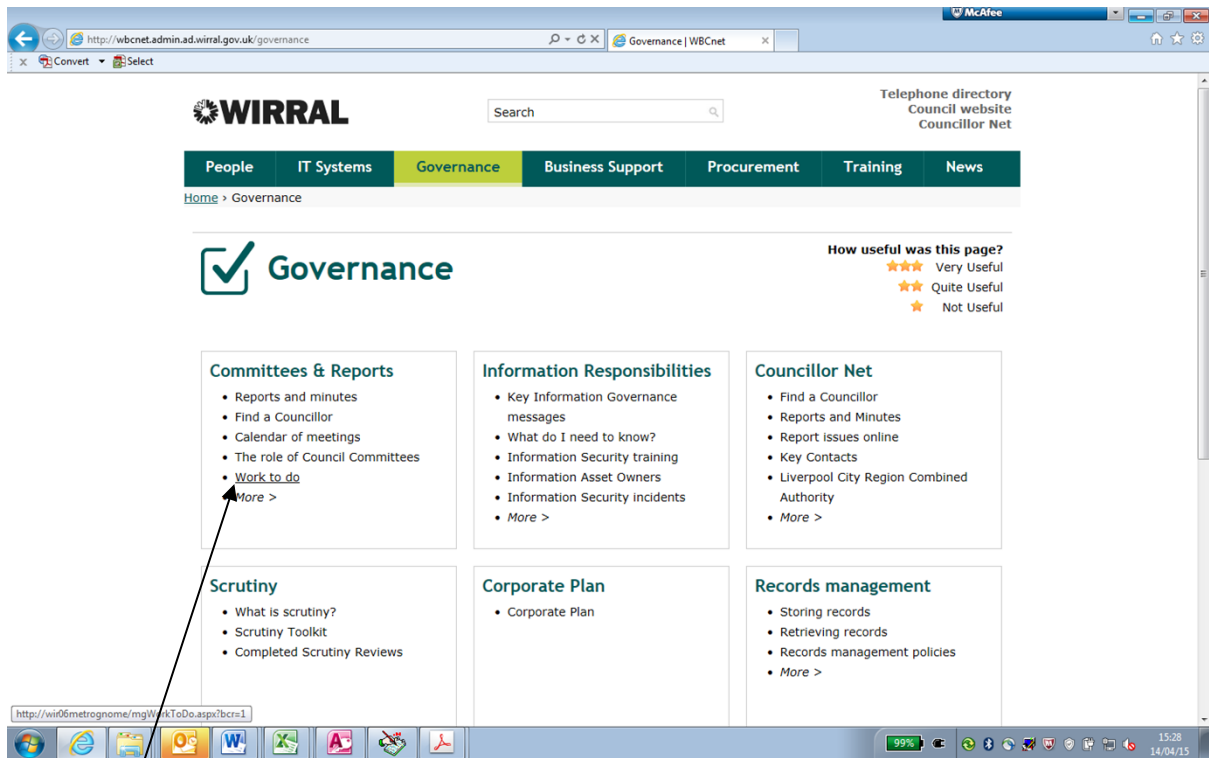
SUBMITTING AN ITEM FOR CABINET



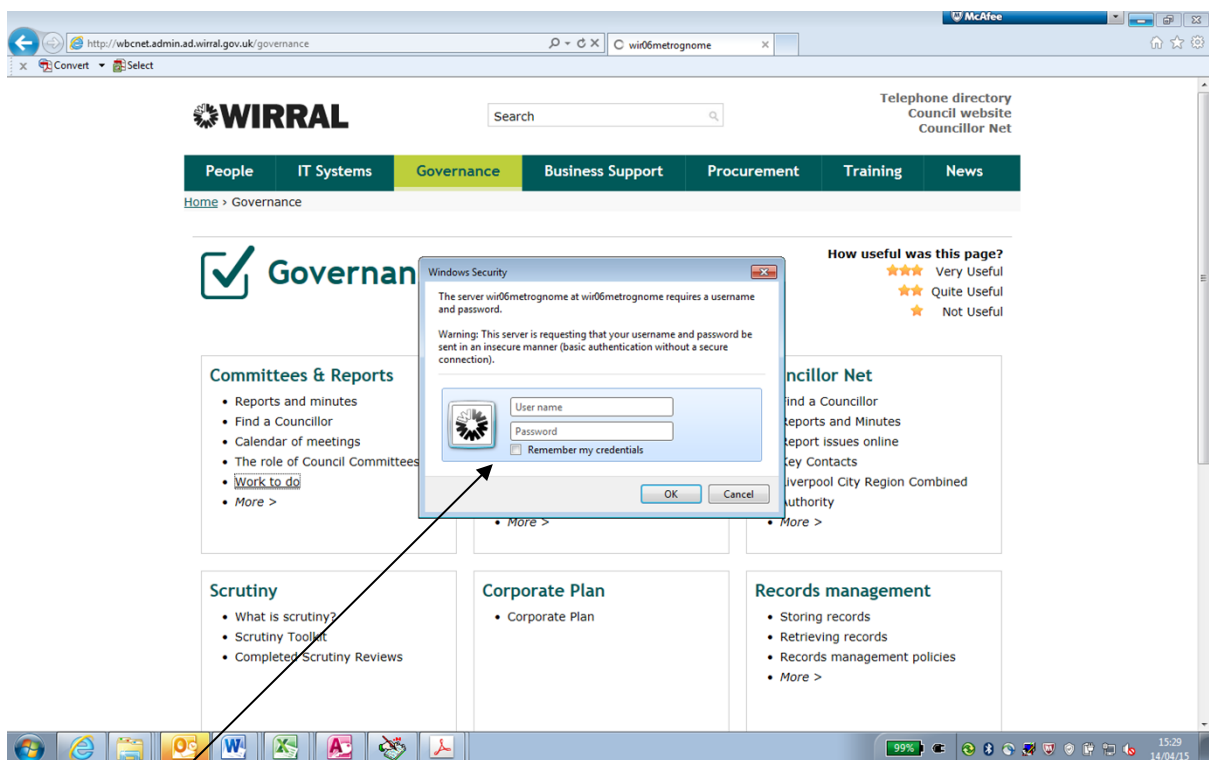
On the Intranet, **Click** on Governance

PART 1

SUBMITTING A PLAN FOR CABINET AND COUNCIL



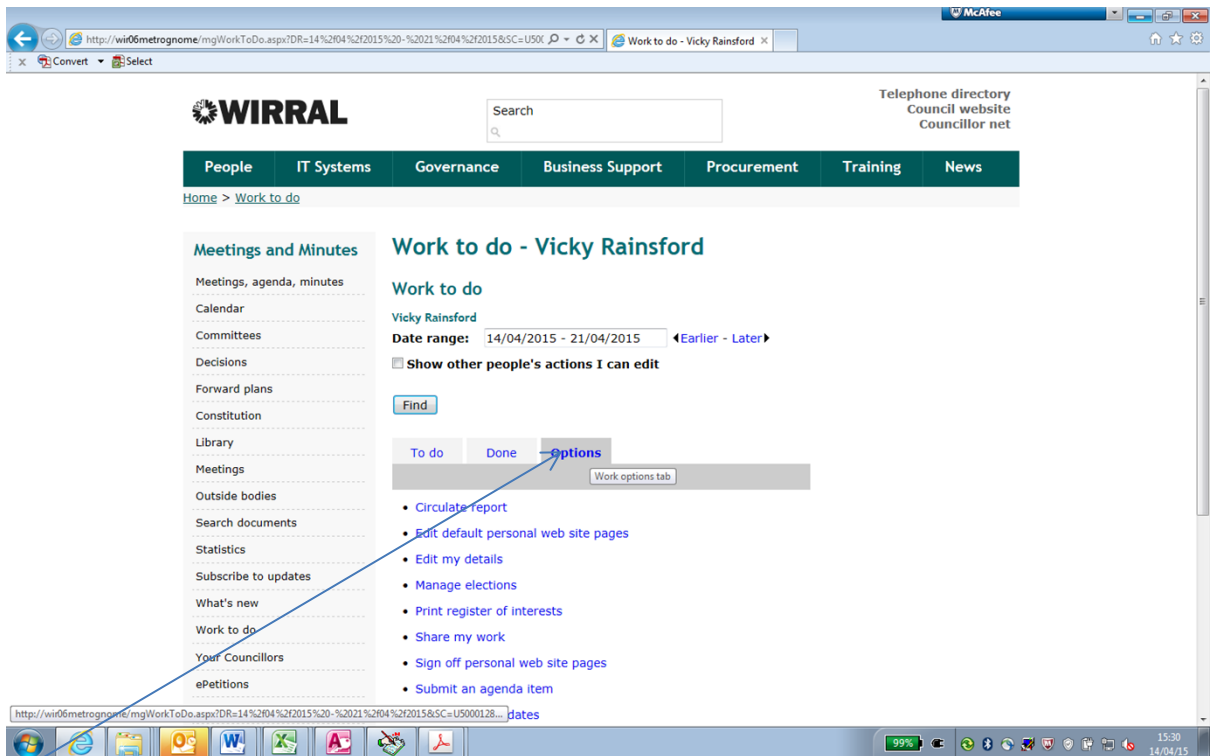
Click on 'Work to do'



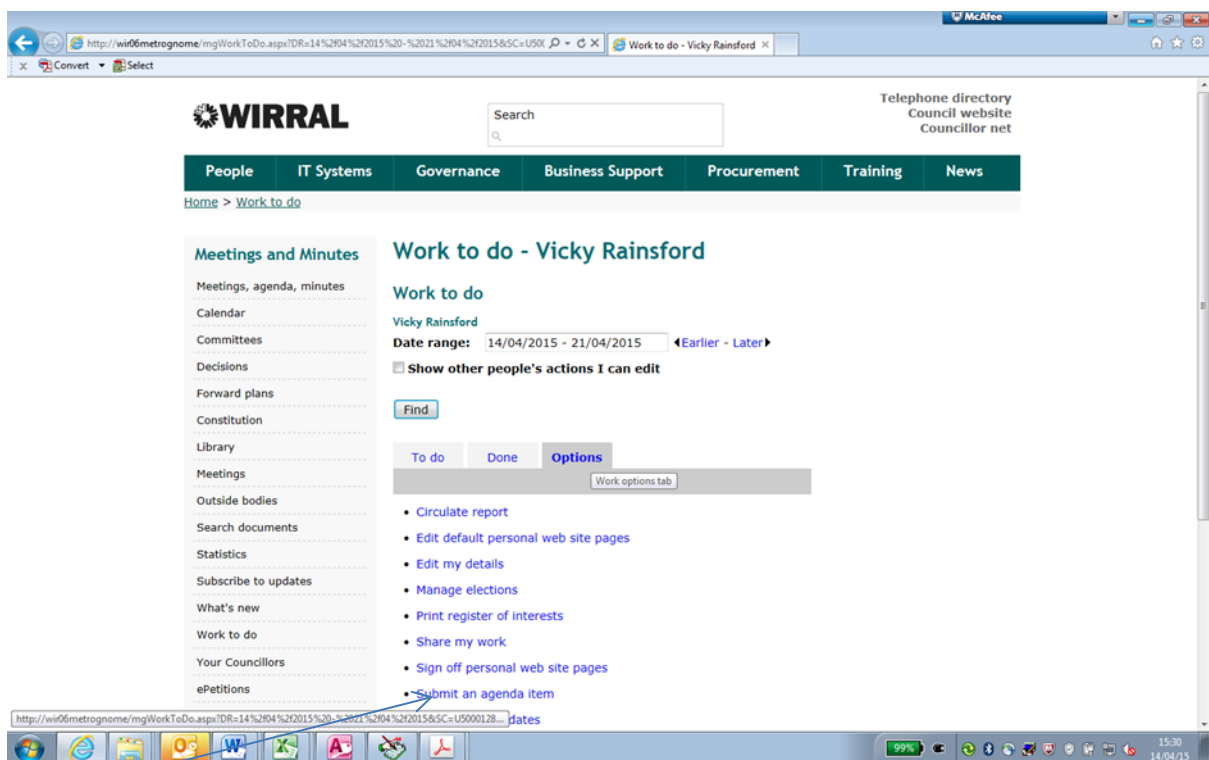
Enter your username (e.g. admin\rainsfordva) and password

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

The screenshot shows the Wirral Council website's 'Submit plan item' page. The left sidebar contains a 'Meetings and Minutes' menu with various options. The main content area is titled 'Submit plan item' and includes a section for 'Item type' with four radio button options: 'Cabinet Member Decision', 'Cabinet Workflow', 'Committee Workflow', and 'Strong Leader Decision'. Below these is a 'Copy existing item' option. A 'Next' button is visible at the bottom of the form. A black arrow points from the 'Cabinet Workflow' option to the instruction text below, and a blue arrow points from the 'Next' button to the same instruction text.

Home > Work to do > Submit plan item

Meetings and Minutes

- 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

Submit plan item

Item type
Please select the type of item

- ☐ Cabinet Member Decision
- ☐ Cabinet Workflow
Please use this workflow for all reports going to Cabinet.
- ☐ Committee Workflow
Please use this workflow for all Committees other than Cabinet.
- ☐ Strong Leader Decision
- ☐ Copy existing item
Create a new entry based on the information in an existing plan item

Cancel Next

Click ☐ Cabinet Workflow and then Click on 'Next'

Complete the form as requested below

The screenshot shows the 'Cabinet Workflow2' form on the Wirral Council website. The left sidebar is the same as in the previous screenshot. The main content area is titled 'Cabinet Workflow2' and includes a note that fields marked with an asterisk are required. The form contains several fields: Title, Description, Department (a dropdown menu), Ward (a dropdown menu), Lead Officer (a dropdown menu with 'Rainsford - Vicky Rainsford' selected), Lead Member, Lead Director, Contact Details, and a field for the Report Writer. Each field has a 'View guidance' link next to it. A black arrow points from the 'View guidance' link for the 'Lead Officer' field to the instruction text below.

Home > Work to do > Submit plan item

Meetings and Minutes

- 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

Cabinet Workflow2
Fields marked with an asterisk * are required.

- * Title: [View guidance](#)
- * Description: [View guidance](#)
- * Department:
- * Ward:
- * Lead Officer: [View guidance](#)
- * Lead Member:
- * Lead Director:
- * Contact Details:
- * Provide details of Report Writer using the drop down:

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'. On the left is a navigation menu with items like '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', and 'Archive Minutes'. The main content area has a heading 'Fields marked with an asterisk * are required.' and a list of form fields:

- * Title: (with a blue arrow pointing to a 'View guidance' link)
- * Description: (with a blue arrow pointing to 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:

At the bottom, there are two more fields:

- * Please select a Cabinet Briefing date prior to the Cabinet date:
- Cabinet Briefing Meeting 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

* 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](#)

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. The main navigation bar includes links for People, IT Systems, Governance, Business Support, Procurement, Training, and News. The breadcrumb trail is: Home > Work to do > Submit plan item > Action dates.

The page title is "Action dates for JANUARY CABINET - TEST". Below the title, there is a section for "Action dates" and a sub-section for "JANUARY CABINET - TEST".

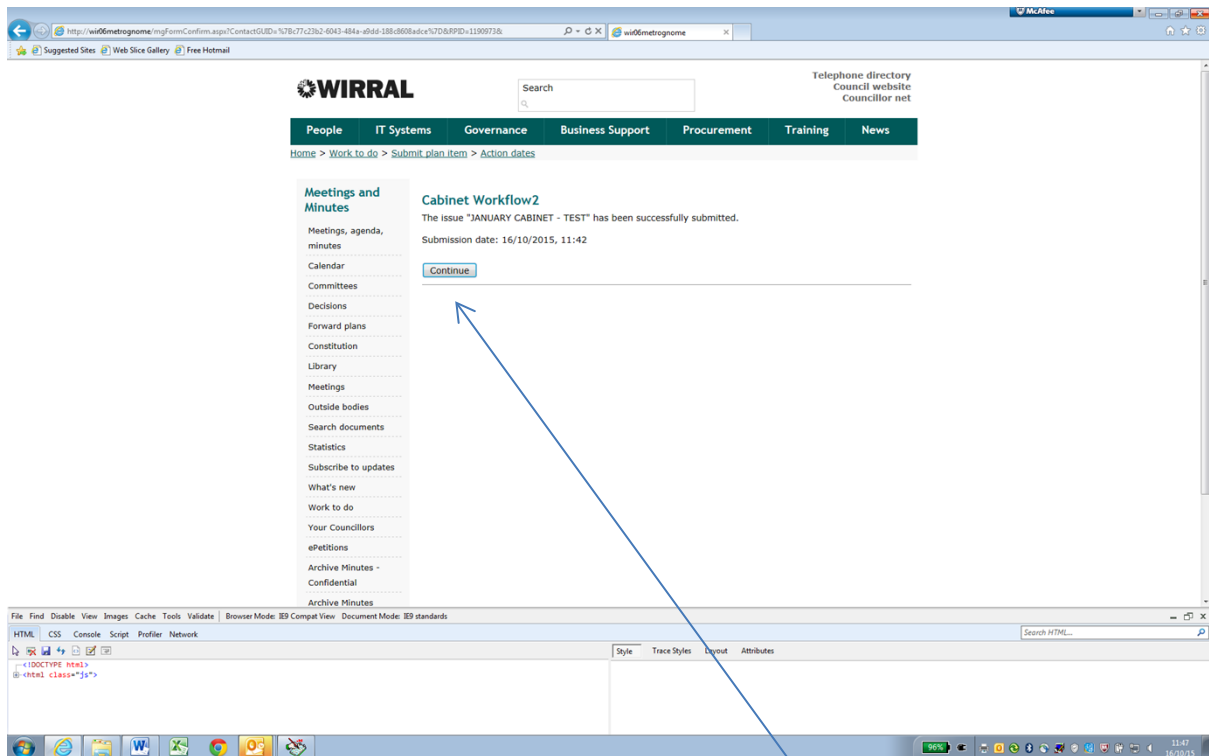
The "Actions" table is as follows:

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	

At the bottom of the table, there are two buttons: "Recalculate" and "Finish". The "Recalculate" button is highlighted with a red box, and an arrow points from the text "Click 'Finish'." to it.

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**

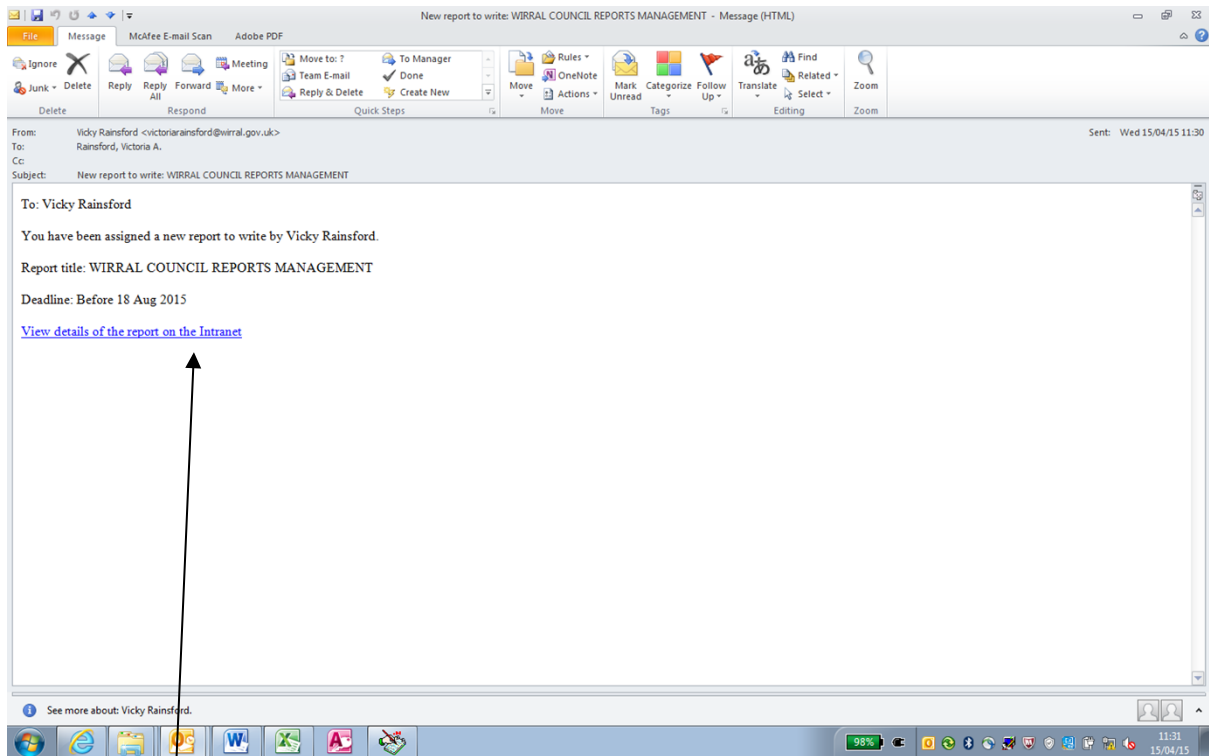
AMENDING A PLAN ITEM AT A GLANCE

- 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

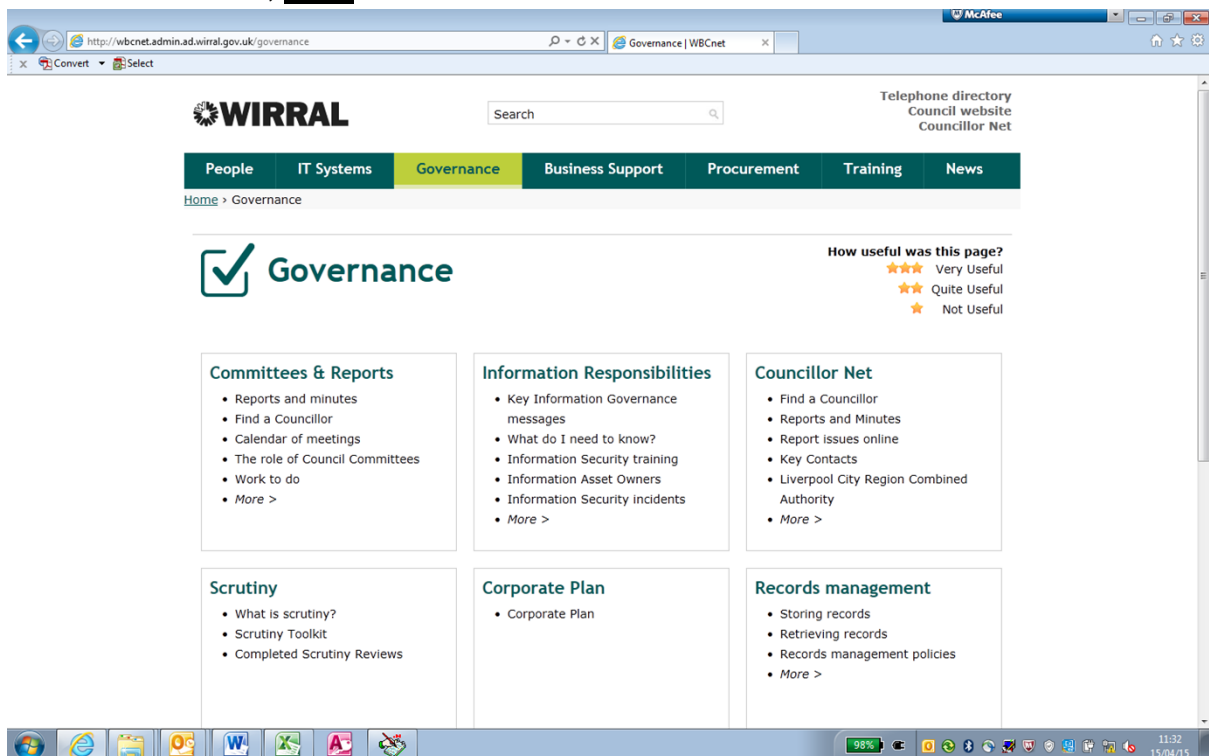
There are two ways to do this

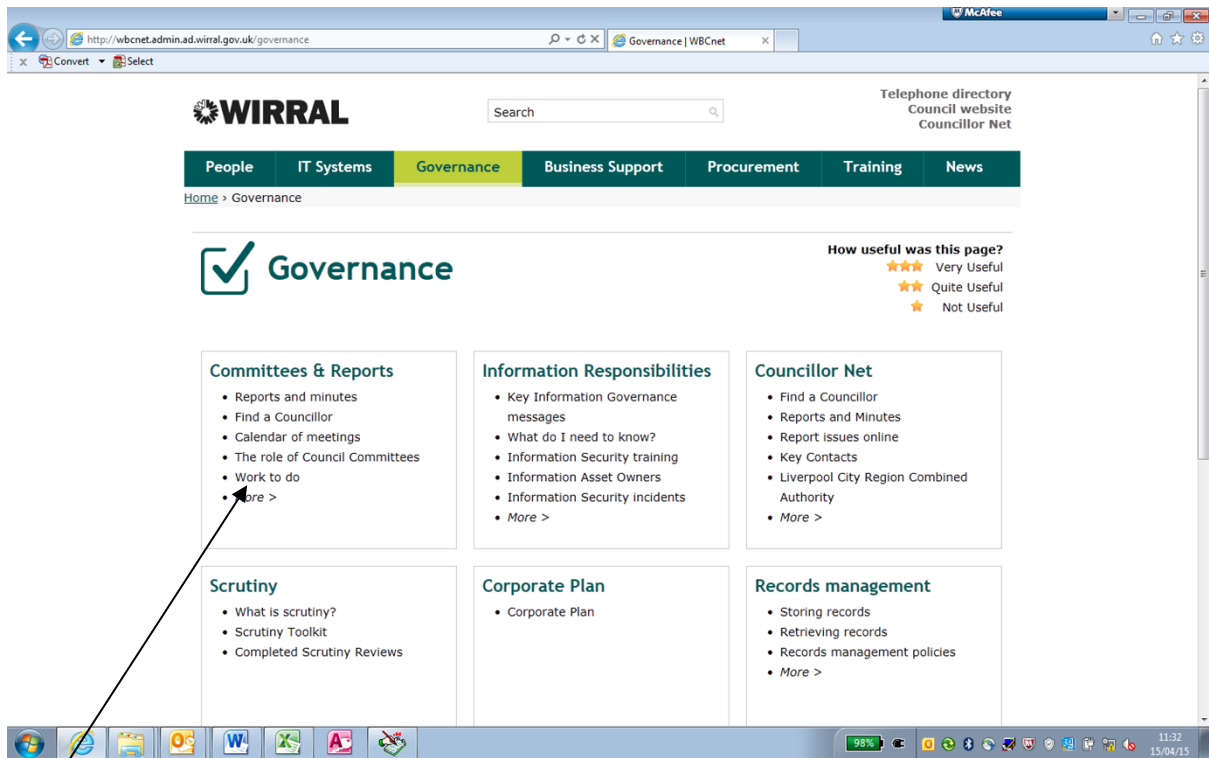


1 - by clicking on the link in the Write Report email

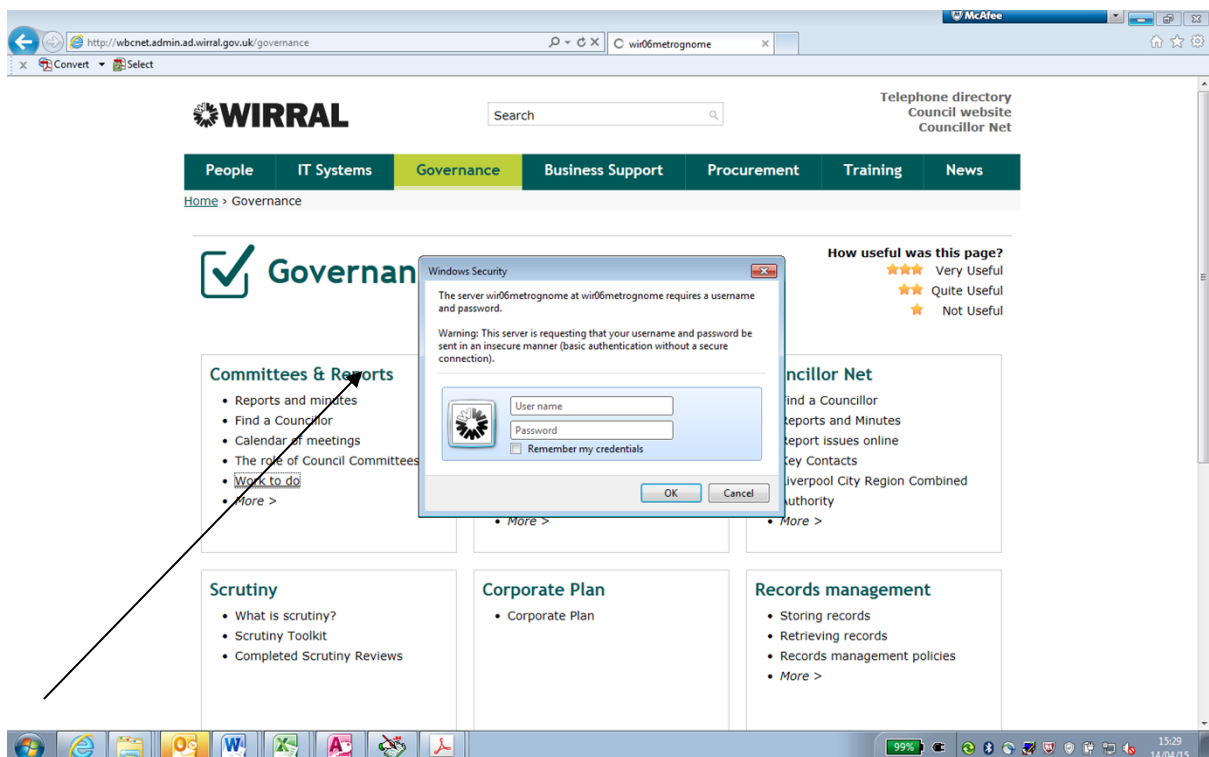
Or

2 - On the Intranet, Click on Governance



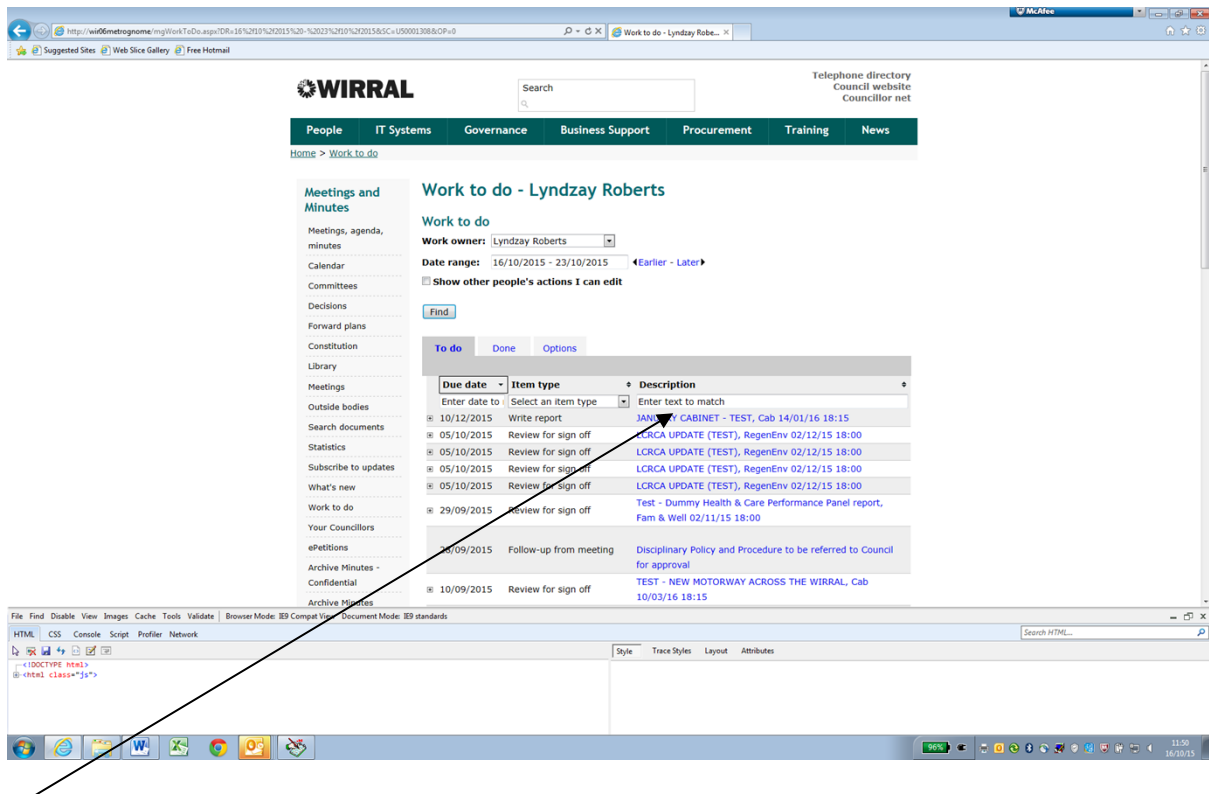


Click on 'Work to do'

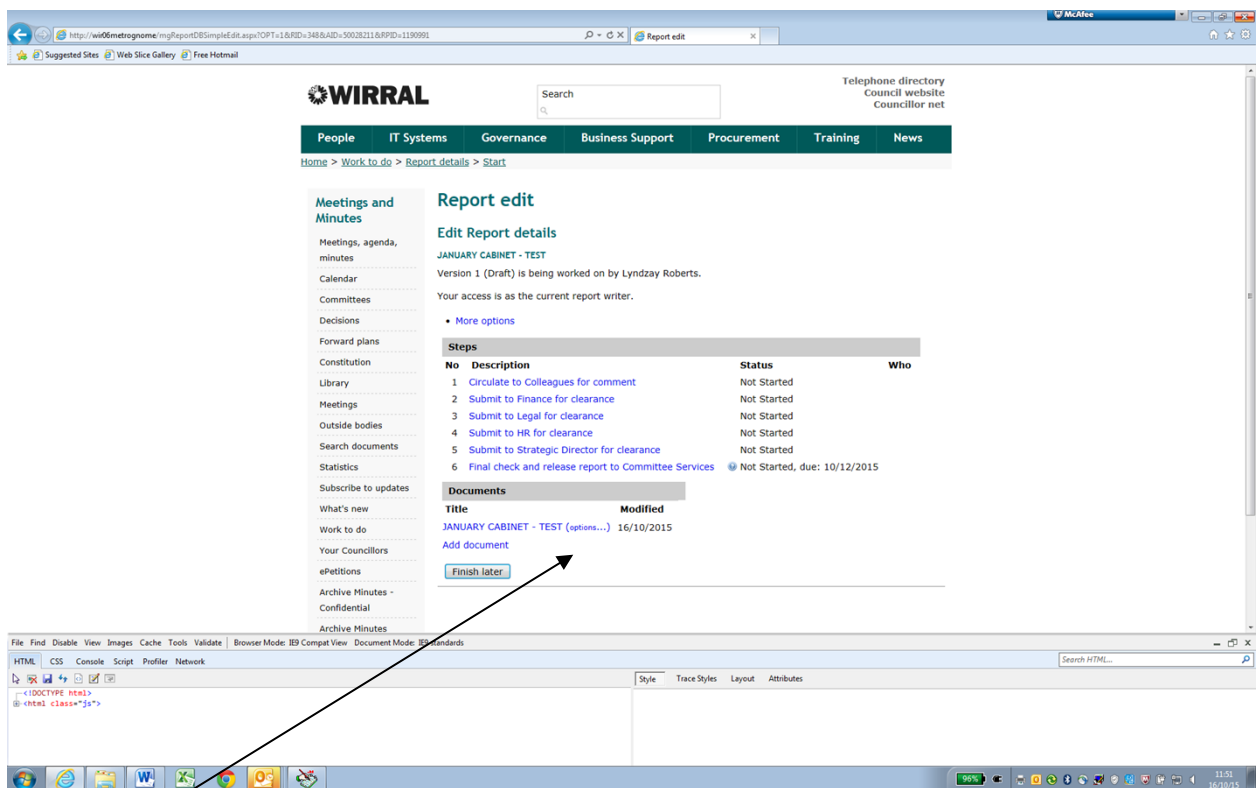


Enter your username (e.g. rainsfordva) and password

PART 1 CREATING THE REPORT

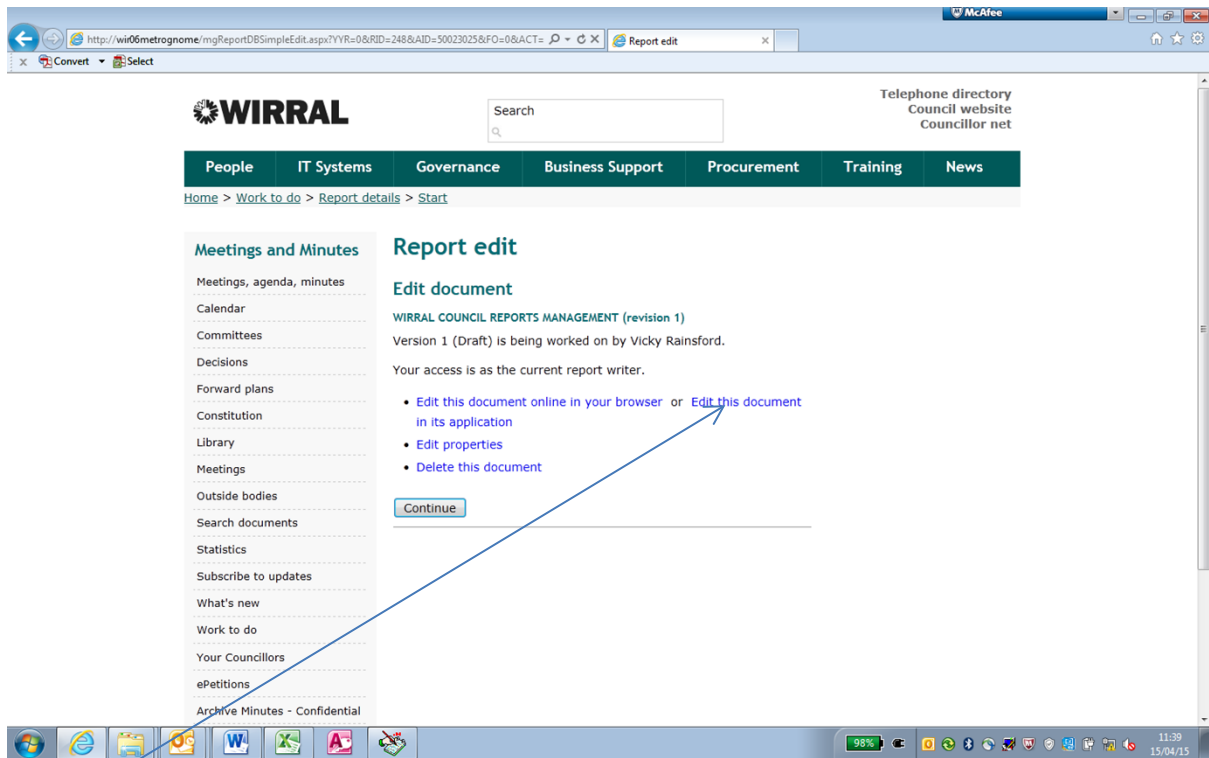


Click on the title of the report

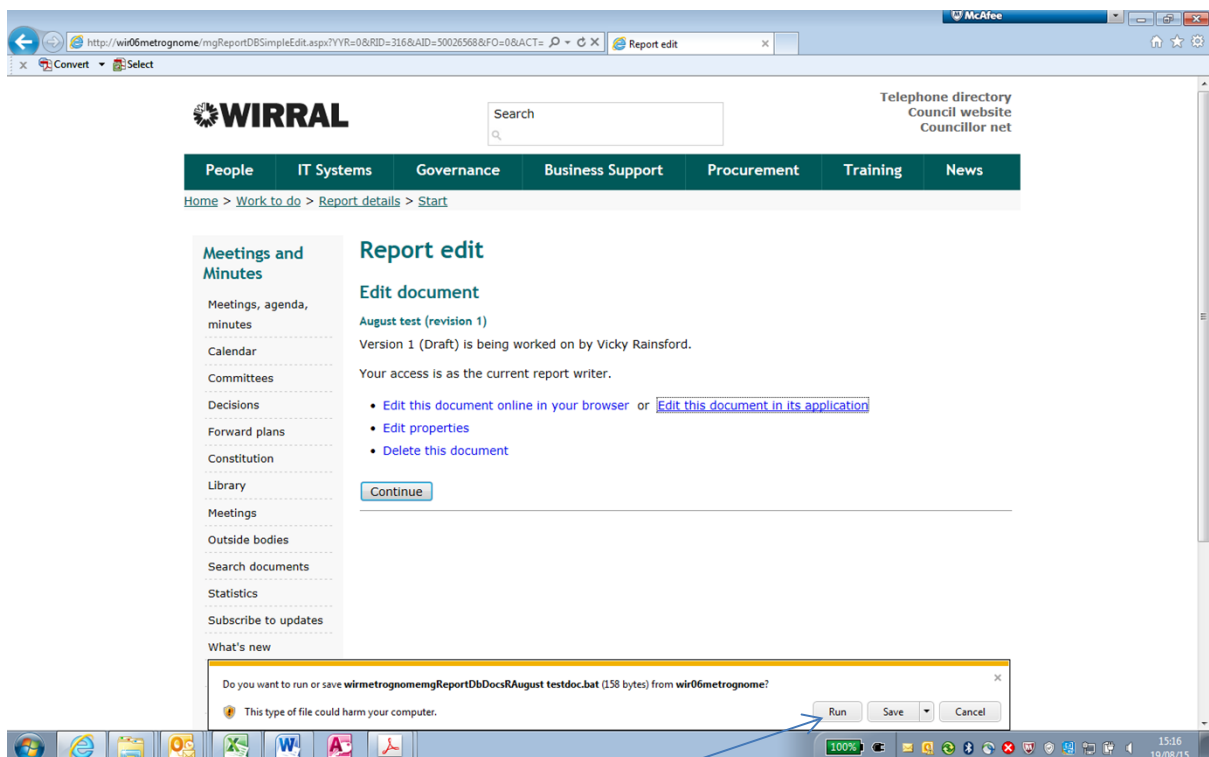


Click on the report title and select 'options'

PART 1 CREATING THE REPORT

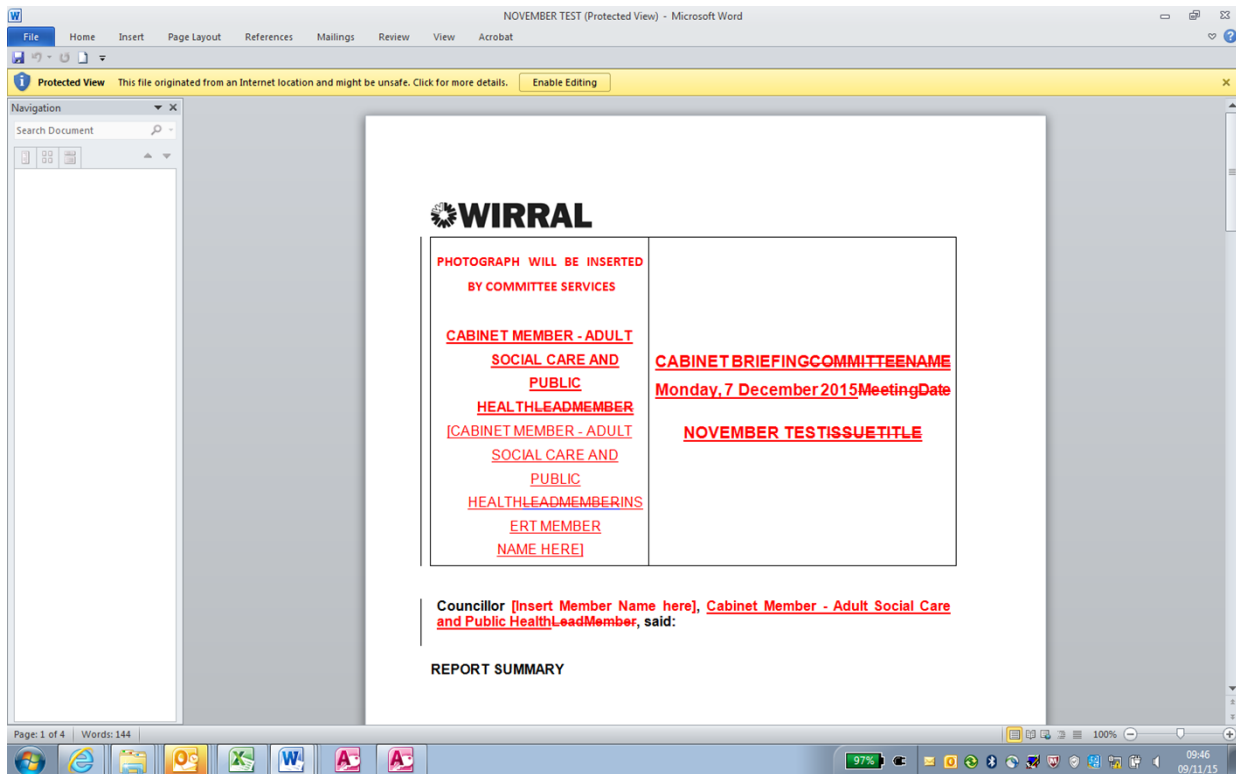


Click on 'Edit this document in its application.'



Select Run

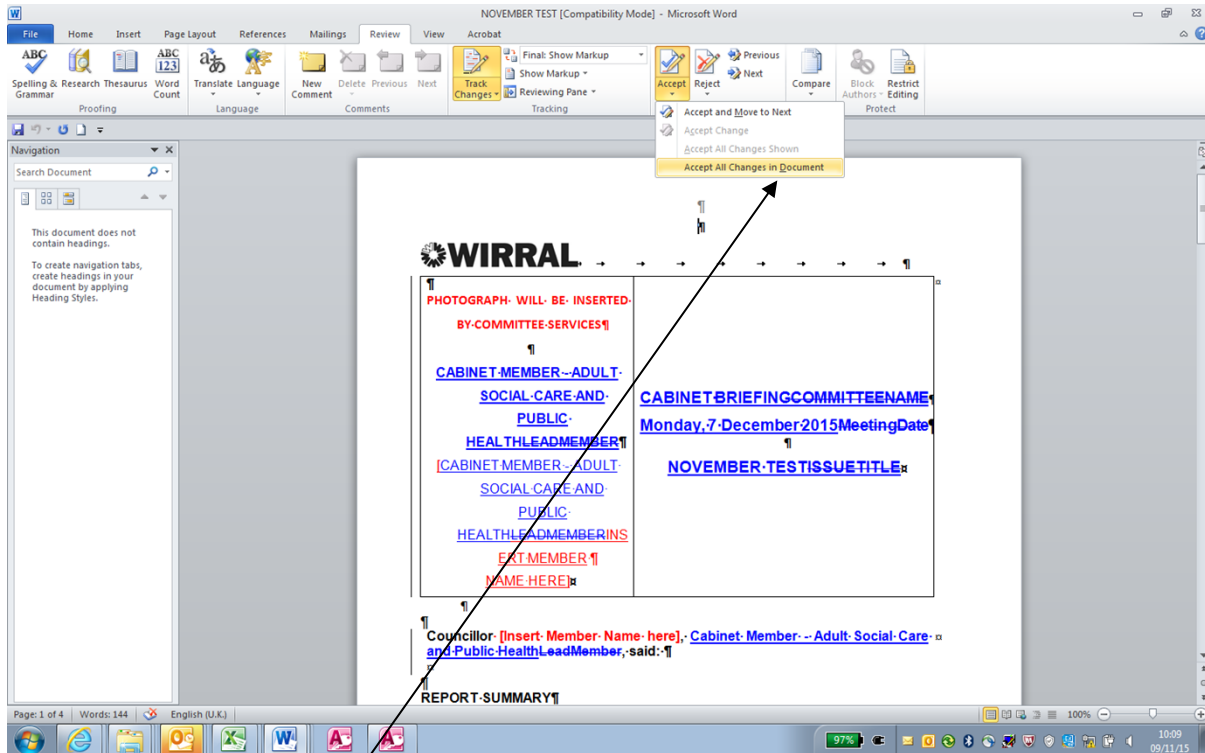
PART 1 CREATING THE REPORT



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').

PART 1 CREATING THE REPORT



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](#)

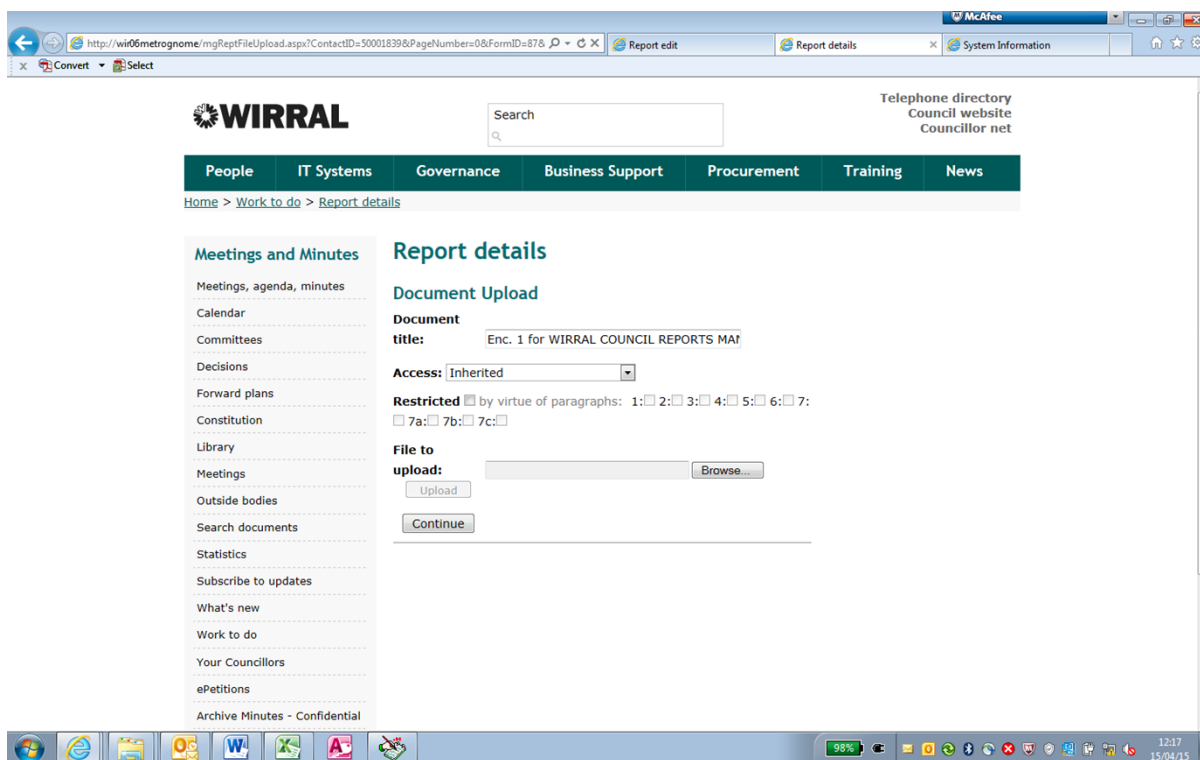
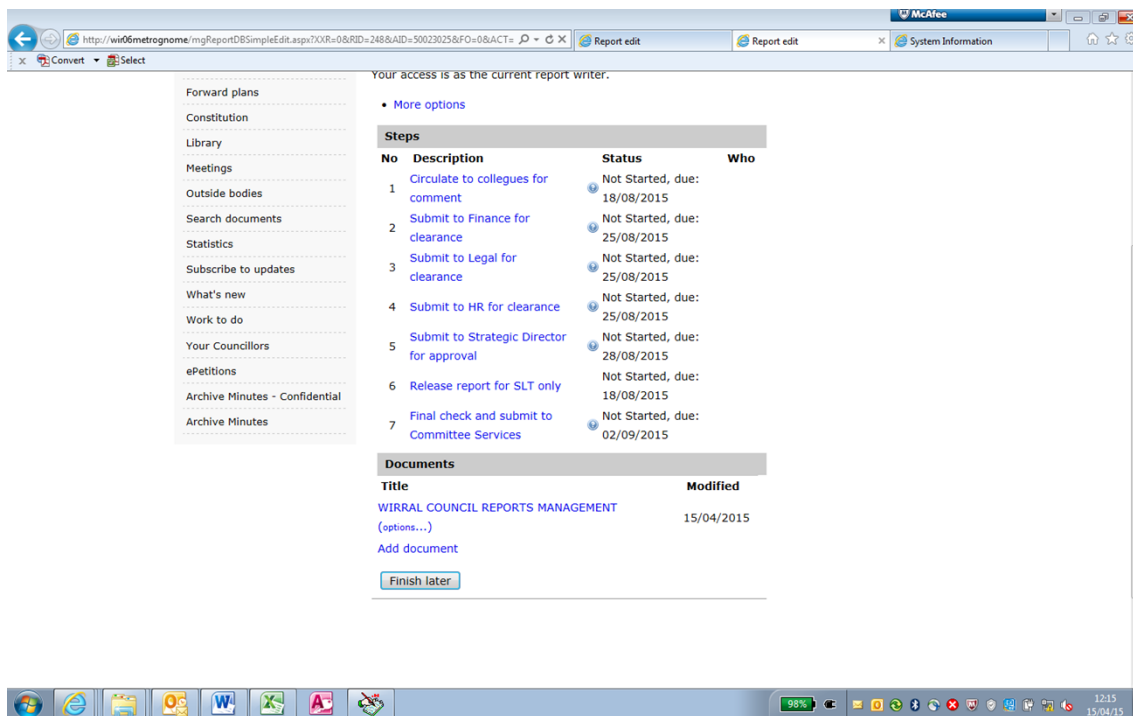
Adding a document/ Appendix

Access your work to do and select relevant report

The screenshot shows the Wirral Council website. The main navigation bar includes links for People, IT Systems, Governance, Business Support, Procurement, Training, and News. The 'Work to do' section is active, showing a list of tasks for Vicky Rainsford. The tasks are listed in a table with columns for Due date, Item type, and Description. 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

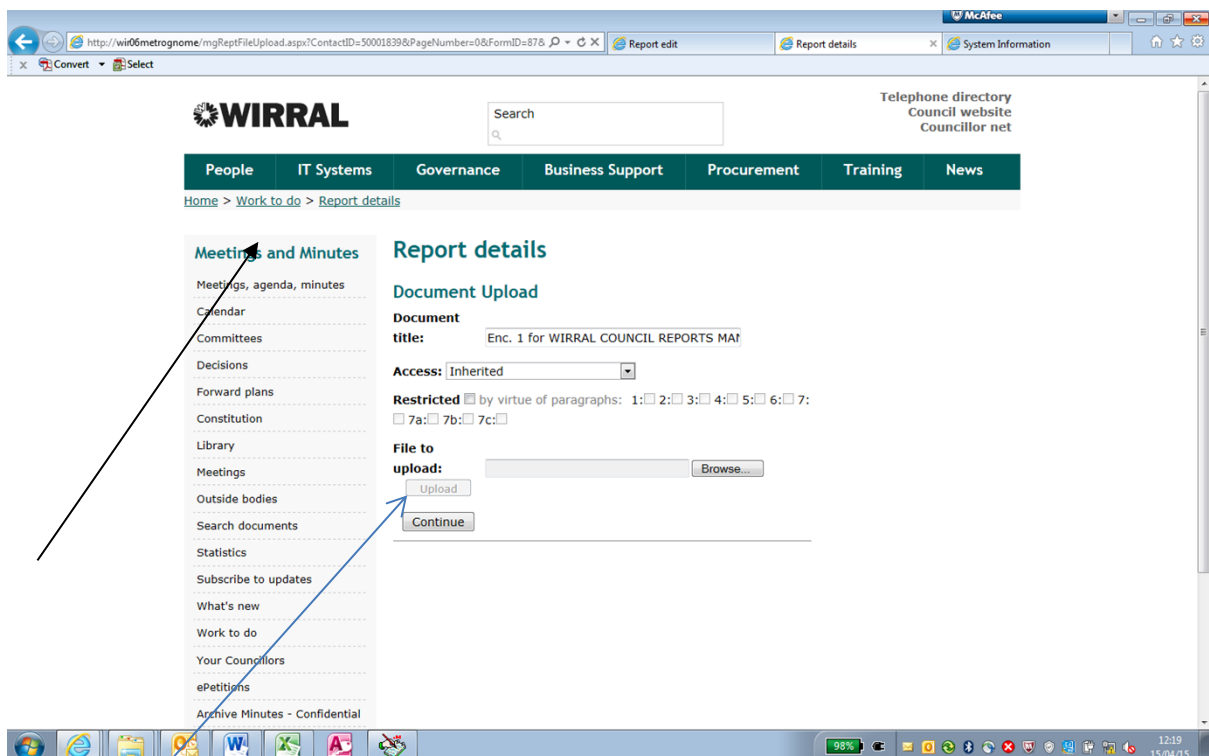
- Inherited – this inherits the access level of the item from this document is attached. (This usually means it will be a public document)
- Restricted – information in the extra document maybe restricted.

Tick ☒ and the applicable paragraph(s).

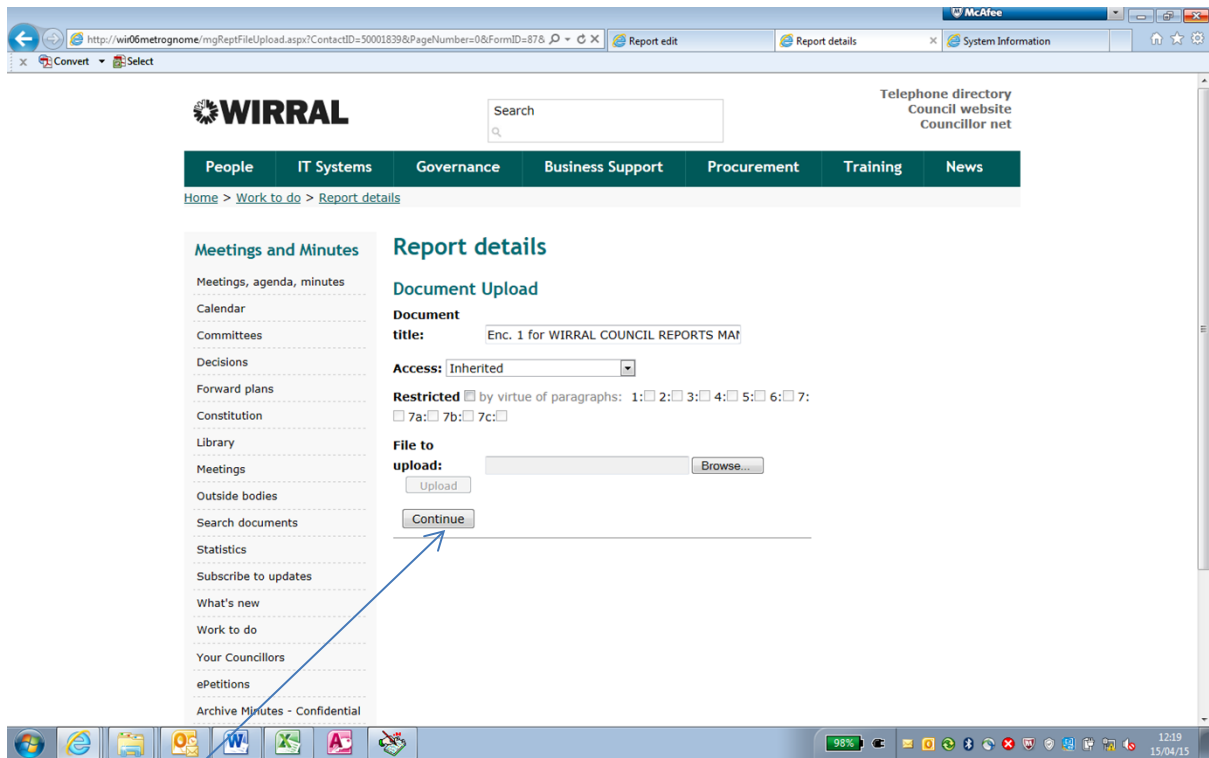
Private – the document is not published on the Intranet or Internet.

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

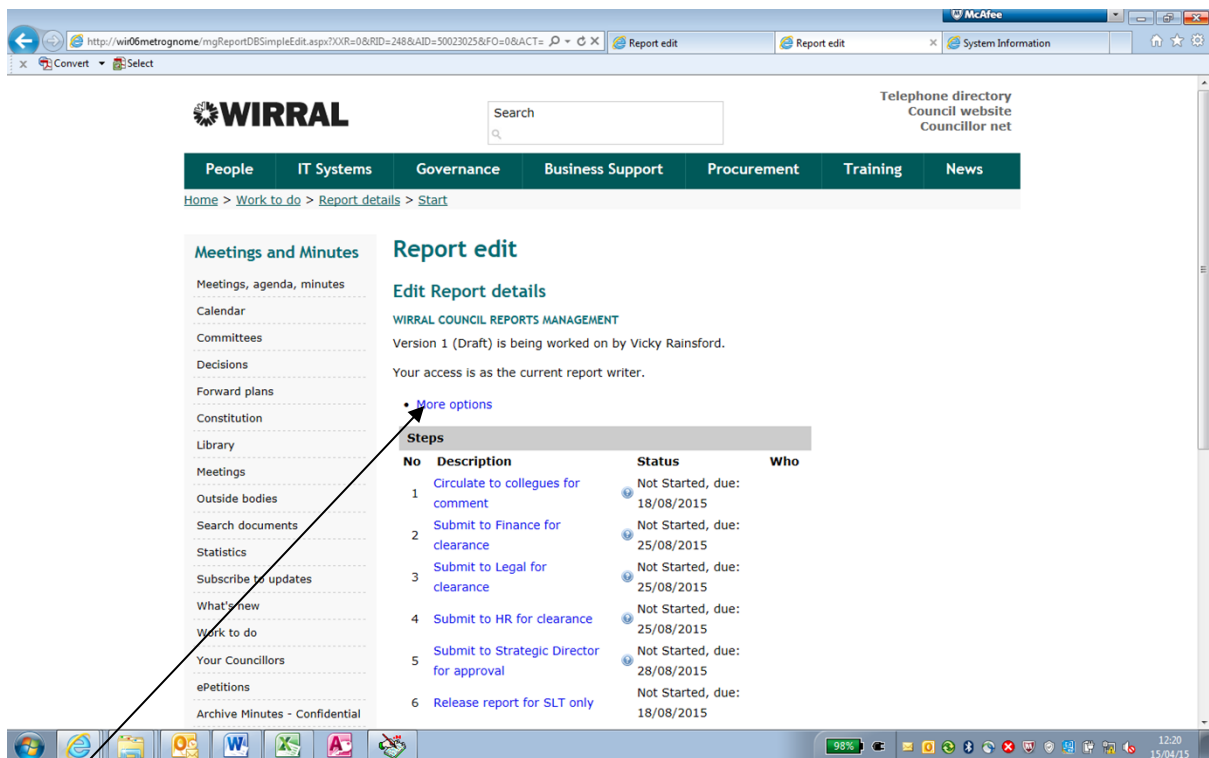
The selected filename will be in the File to upload edit box.



Click 'Upload' button to display the filename



Click 'Continue'



Click on 'More options'

WIRRAL

Search

Telephone directory
Council website
Councillor net

People IT Systems Governance Business Support Procurement Training News

Home > Work to do > Report details > Start

Meetings and Minutes

- 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

Report edit

Edit Report details

WIRRAL COUNCIL REPORTS MANAGEMENT

Version 1 (Draft) is being worked on by Vicky Rainsford.

Your access is as the current report writer.

- 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

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:	

Now you need to circulate the report for review

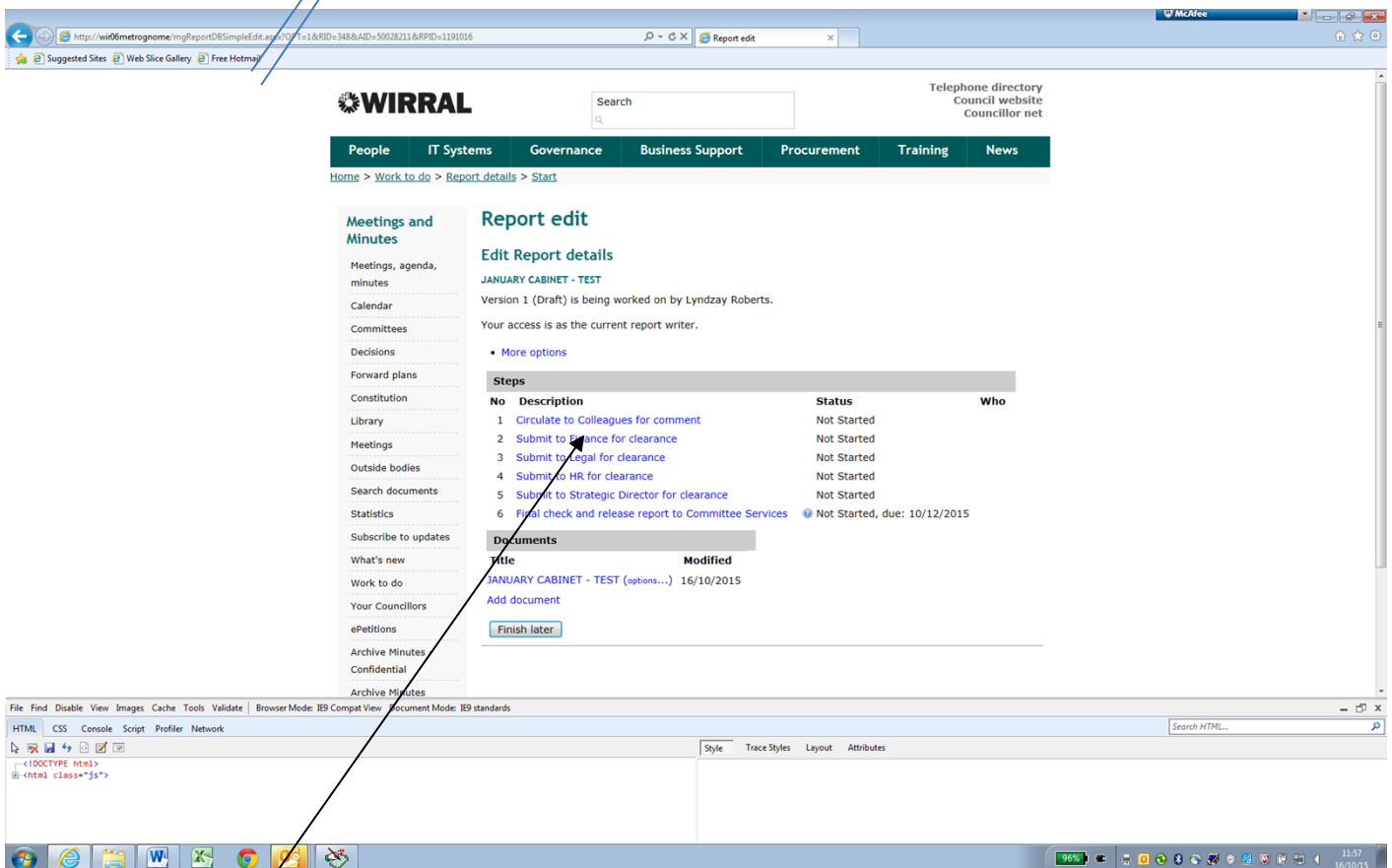
CREATING THE REPORT AT A GLANCE

- 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. .



Click on 'To circulate draft report to your reviewers'

PART 1

CIRCULATE THE REPORT FOR REVIEW

WIRRAL Telephone directory Council website Councillor net

People IT Systems Governance Business Support Procurement Training News

Home > Work to do > Report details > Start

Meetings and Minutes

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

Start action review

Start Circulate report for sign off

Description: Submit to Finance for clearance

Report title: WIRRAL COUNCIL REPORTS MANAGEMENT ver. 1

Deadline date: 18/08/2015 (d/m/yyyy)

Reviewers:

Note to reviewers:

Send daily reminder to 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.

WIRRAL Telephone directory Council website Councillor net

People IT Systems Governance Business Support Procurement Training News

Home > Work to do > Report details > Start

Meetings and Minutes

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

Choose reviewers

Add a reviewer: Select a reviewer

Send to each member ☒ **Can see all comments:** ☒

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

WIRRAL Telephone directory Council website Councillor net

People IT Systems Governance Business Support Procurement Training News

Home > Work to do > Report details > Start

Meetings and Minutes

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

Choose reviewers

Add a reviewer: Select a reviewer

Add

Send to each member: ☐ Can see all comments: ☐

Reviewers selected:
Lyndzay Roberts (see comments)

Remove

Continue

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

WIRRAL Telephone directory Council website Councillor net

People IT Systems Governance Business Support Procurement Training News

Home > Work to do > Report details > Start

Start action review

Start Circulate report for sign off

Description: Submit to Finance for clearance

Report title: WIRRAL COUNCIL REPORTS MANAGEMENT ver. 1

Deadline date: 15/08/2015 (d/m/yyyy)

Reviewers:
Lyndzay Roberts (see comments)

Note to reviewers:

Send daily reminder to reviewers ☒

Start later Abandon Start review

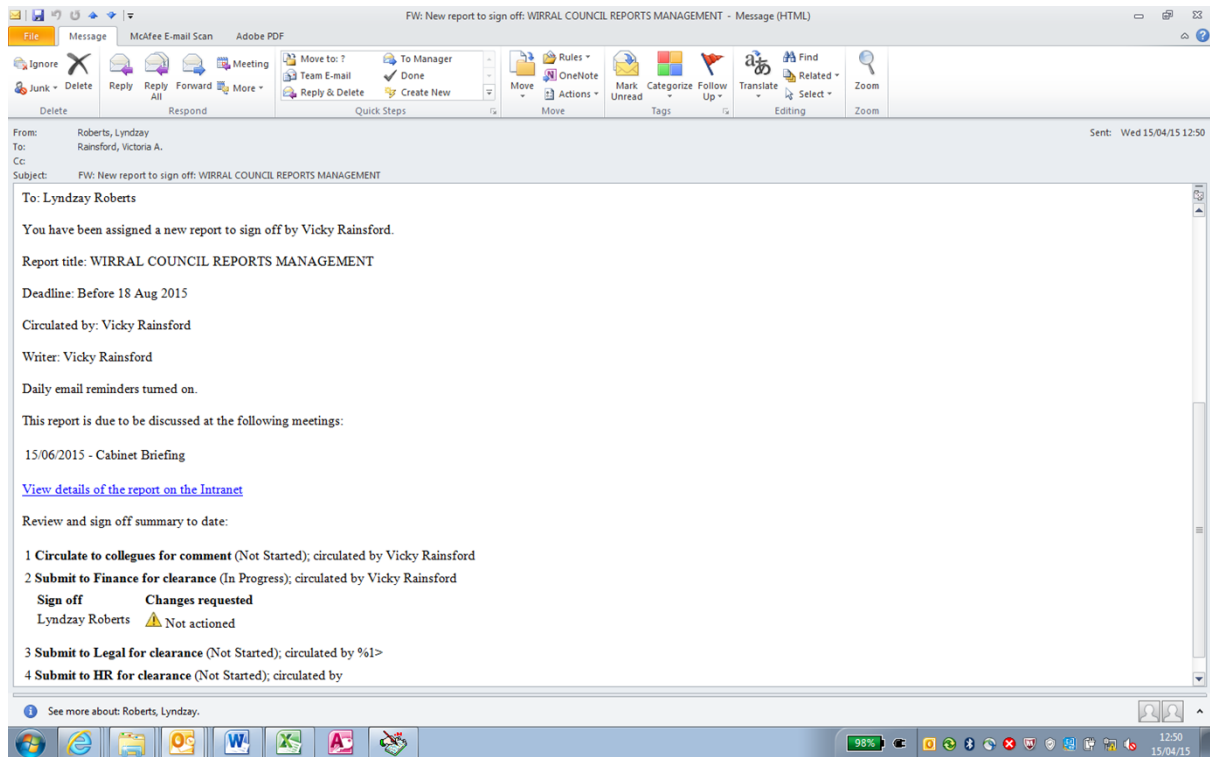
Add a deadline date manually (Please ensure that reviewers are given at least 5 working days to sign off your report).

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

The screenshot shows a web browser window with the URL <http://wir06metrogonme/mgReportDBSimpleEdit.aspx?YYR=0&RID=248&AID=50023025&FO=1&ACT=>. The page title is "Edit Report details" under "WIRRAL COUNCIL REPORTS MANAGEMENT". It states "Version 1 (Draft) is being worked on by Vicky Rainsford." and "Your access is as the current report writer." A list of actions includes "Where is this report going?", "Update this action status (Can start)", "Edit report details", "Full report history", "Notes", "Submit agenda item", "Show document order", and "Less options". A table titled "Steps" shows the progress of the report:

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	

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** 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 the 'Work to do' page in the WIRRAL COUNCIL REPORTS MANAGEMENT system. The page has a left-hand navigation menu with various options like 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, and Archive Minutes. The main content area shows a list of tasks with columns for Due date, Item type, and Description. An arrow points to the first task: '18/08/2015 Write report WIRRAL COUNCIL REPORTS MANAGEMENT, Cabinet Briefing 15/06/15 17:30'.

Due date	Item type	Description
18/08/2015	Write report	WIRRAL COUNCIL REPORTS MANAGEMENT, Cabinet Briefing 15/06/15 17:30
23/06/2015	Write report	Wirral Report Management, Cabinet Briefing 30/06/15 17:30
05/05/2015	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
22/04/2015	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

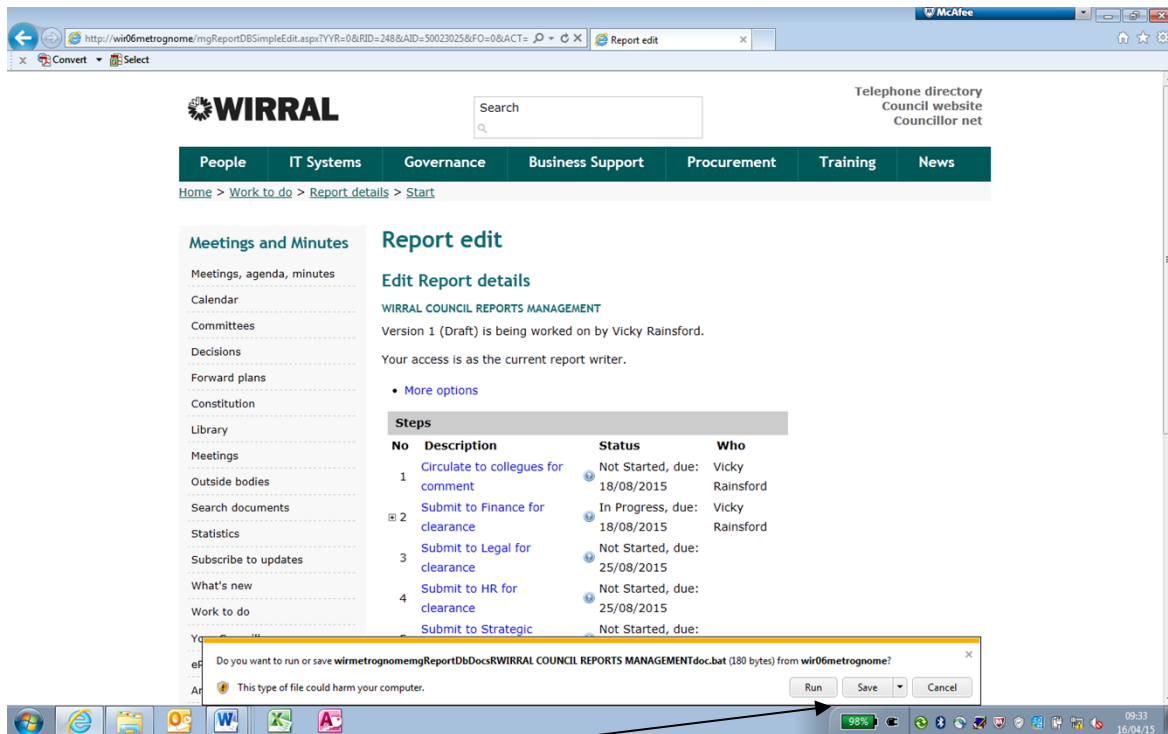
The screenshot shows the 'Report edit' page in the WIRRAL COUNCIL REPORTS MANAGEMENT system. The page has a left-hand navigation menu with various options like Forward plans, Constitution, Library, Meetings, Outside bodies, Search documents, Statistics, Subscribe to updates, What's new, Work to do, Your Councillors, ePetitions, Archive Minutes - Confidential, and Archive Minutes. The main content area shows a list of steps for the report, including 'Circulate to colleagues for comment', 'Submit to Finance for clearance', 'Submit to Legal for clearance', 'Submit to HR for clearance', 'Submit to Strategic Director for approval', 'Release report for SLT only', and 'Final check and submit to Committee Services'. An arrow points to the 'Documents' section, which lists 'WIRRAL COUNCIL REPORTS MANAGEMENT (options...)' and 'Enc. 1 for WIRRAL COUNCIL REPORTS MANAGEMENT (options...)'.

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	

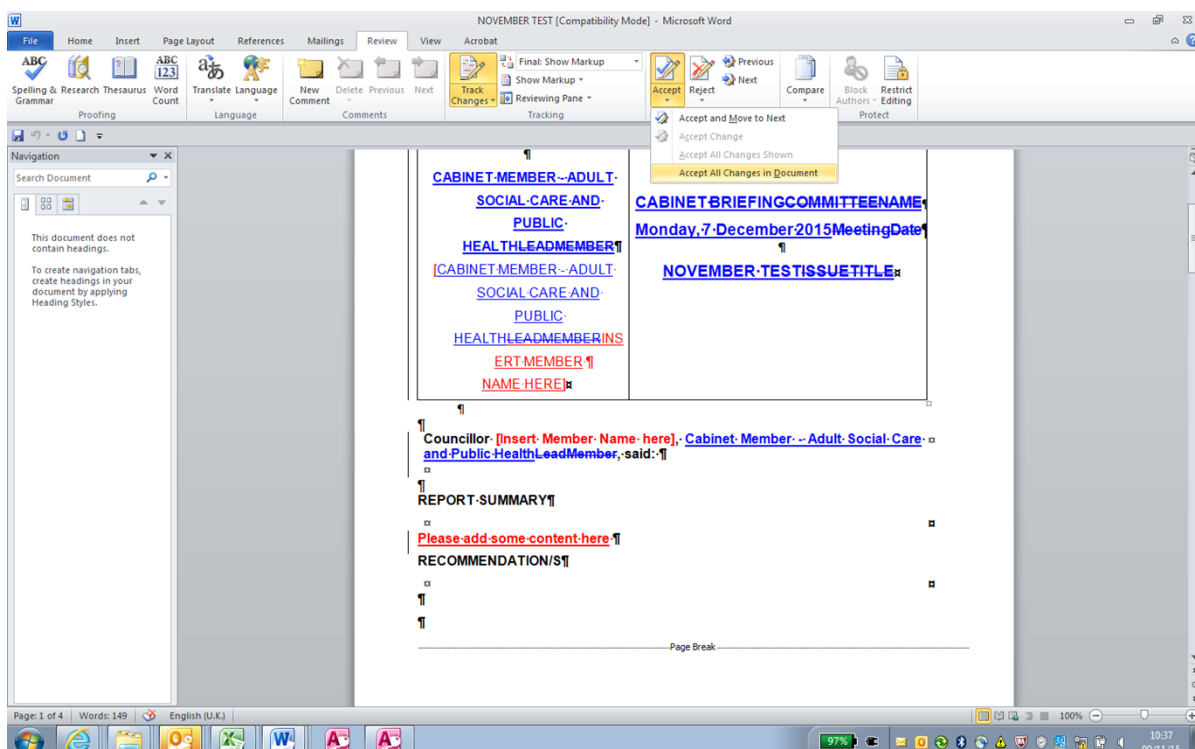
Title	Modified
WIRRAL COUNCIL REPORTS MANAGEMENT (options...)	15/04/2015
Enc. 1 for WIRRAL COUNCIL REPORTS MANAGEMENT (options...)	15/04/2015

Click on the report

PART 1 ACCEPTING /REJECTING CHANGES



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.

PART 1 ACCEPTING /REJECTING CHANGES

Edit Report details

WIRRAL COUNCIL REPORTS MANAGEMENT

Version 1 (Draft) is being worked on by Vicky Rainsford.

Your access is as the current report writer.

[More options](#)

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	Not Started, due: 18/08/2015	

Sign off	Last viewed?	Changes requested	Complete?
Lyndzay Roberts	6 minutes ago	⚠ OK if marked changes are applied	<input checked="" type="checkbox"/>

Please include proposed changes

Click on relevant review stage

Circulate report for sign off

Description: Submit to Finance for clearance

Circulated by: Vicky Rainsford

Status: In Progress

Deadline: 18/08/2015

Report details: WIRRAL COUNCIL REPORTS MANAGEMENT ver. 1

Possible actions:

- [Edit reviewers](#)
- [Update the status of this action](#)
- [Send note](#)

Sign off	Last viewed	Changes requested
Lyndzay Roberts	7 minutes ago	⚠ OK if marked changes are applied

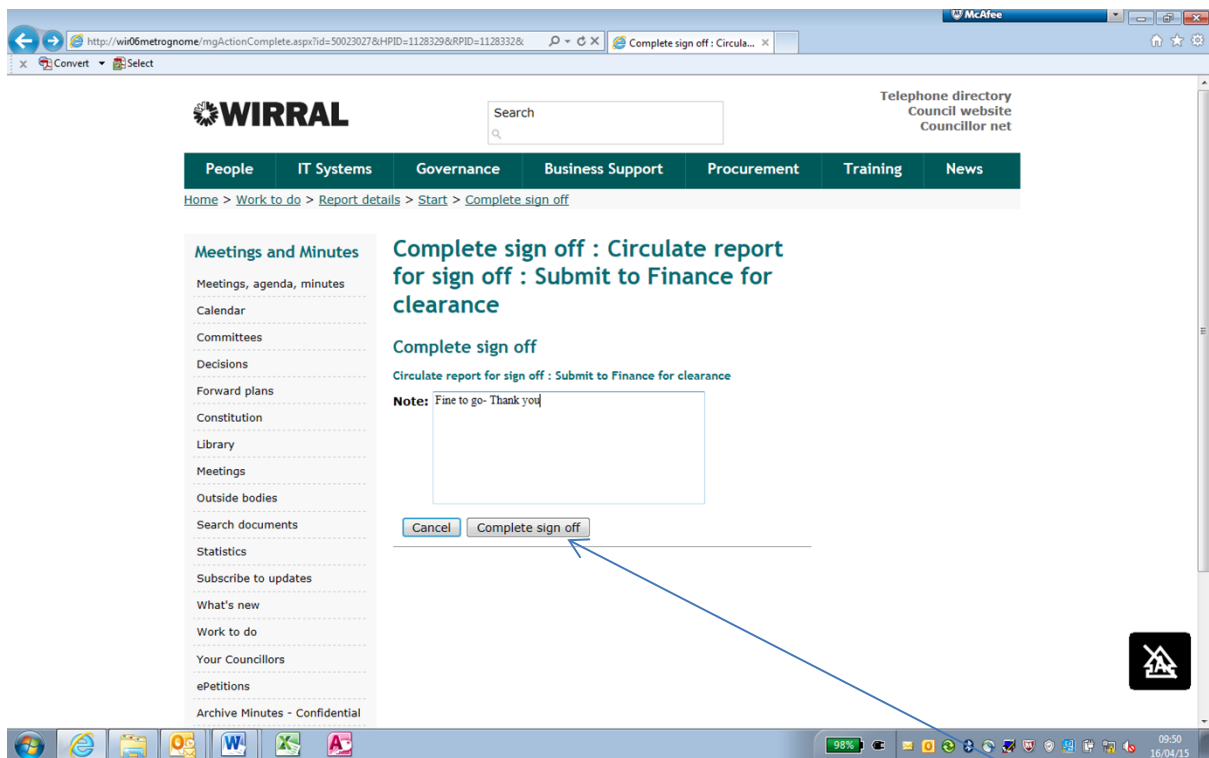
Please include proposed changes

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

[Notes and history of changes](#)

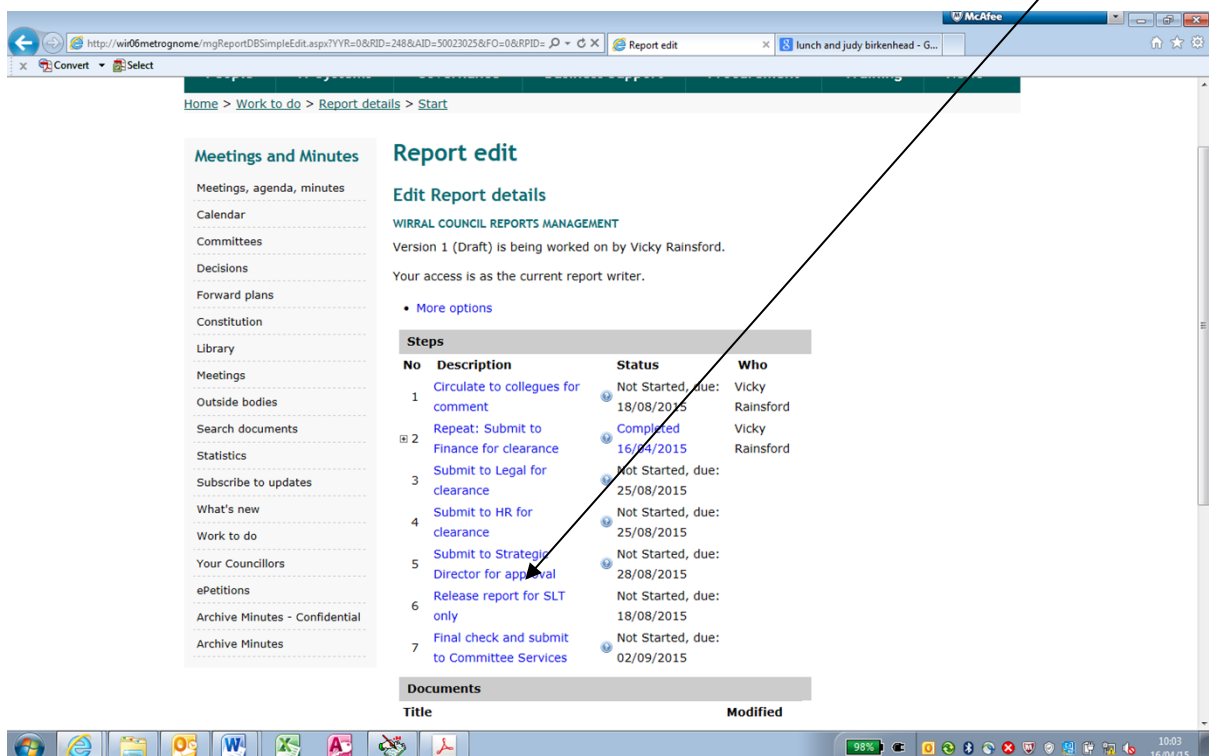
[Complete later](#) [Complete sign off](#)

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'

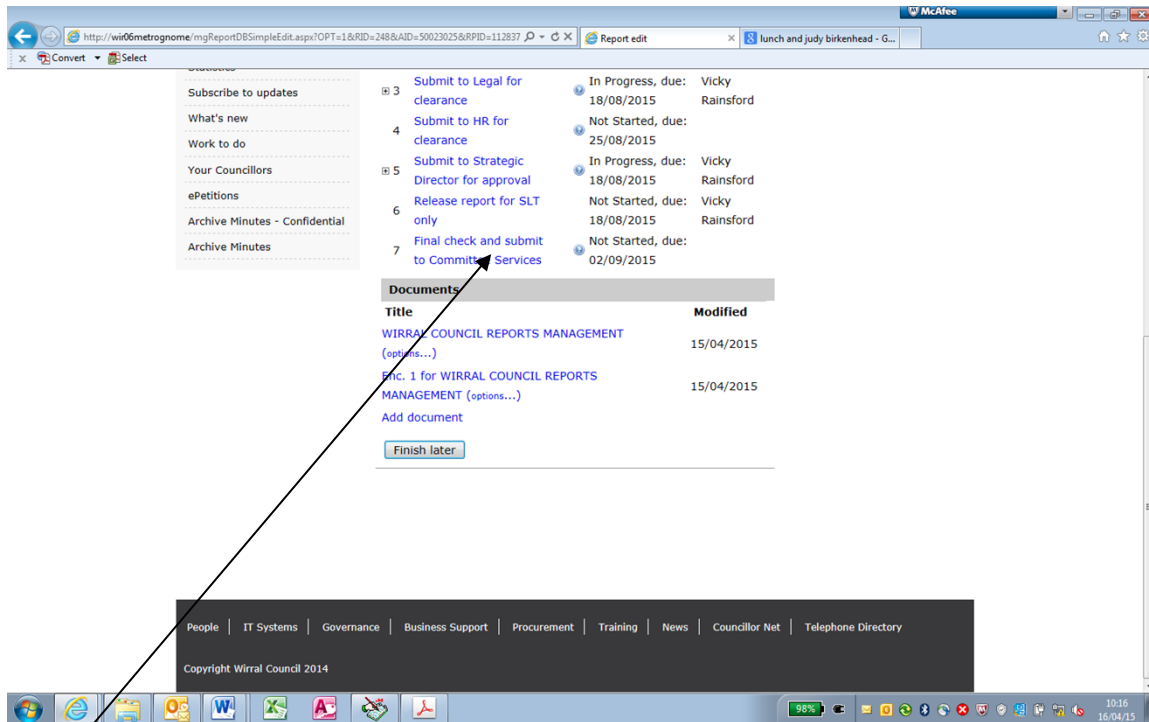


The screenshot shows the WIRRAL Council website interface. The top navigation bar includes links for People, IT Systems, Governance, Business Support, Procurement, Training, and News. The main content area is titled 'Start action review' and contains a form for submitting a report for sign-off. The form includes a description, report title, deadline, date, reviewers, and a note to reviewers. At the bottom of the form, there are three buttons: 'Start later', 'Abandon', and 'Start now'. A blue arrow points from the 'Start now' button to the text below.

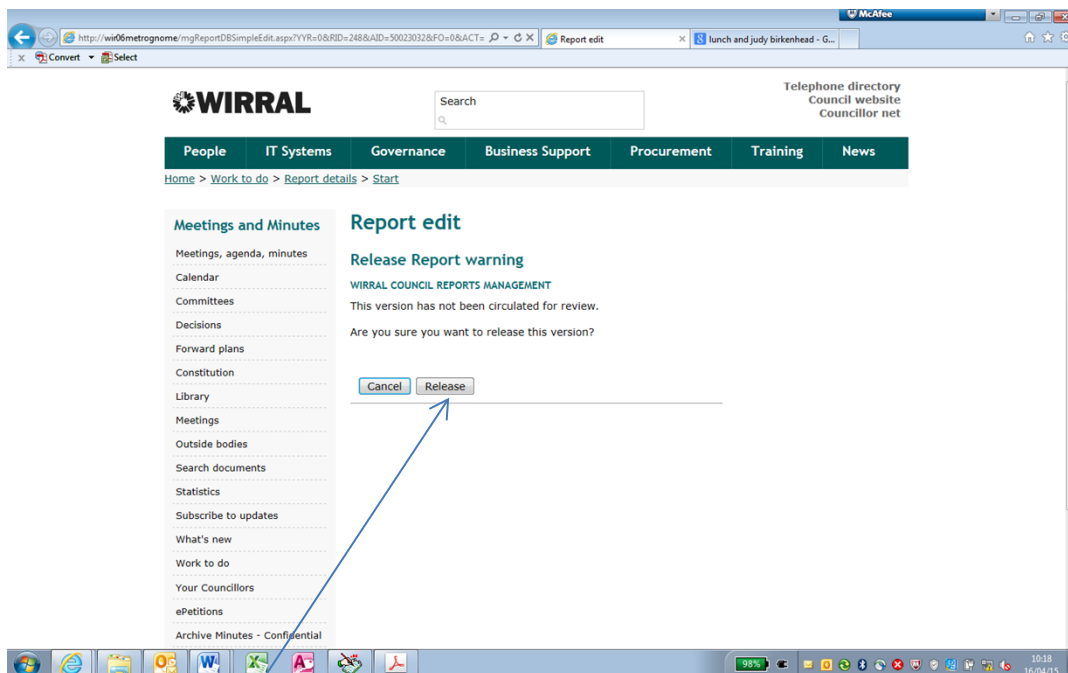
Click on 'Start now' once any notes have been added

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

RELEASING THE REPORT TO COMMITTEE SERVICES

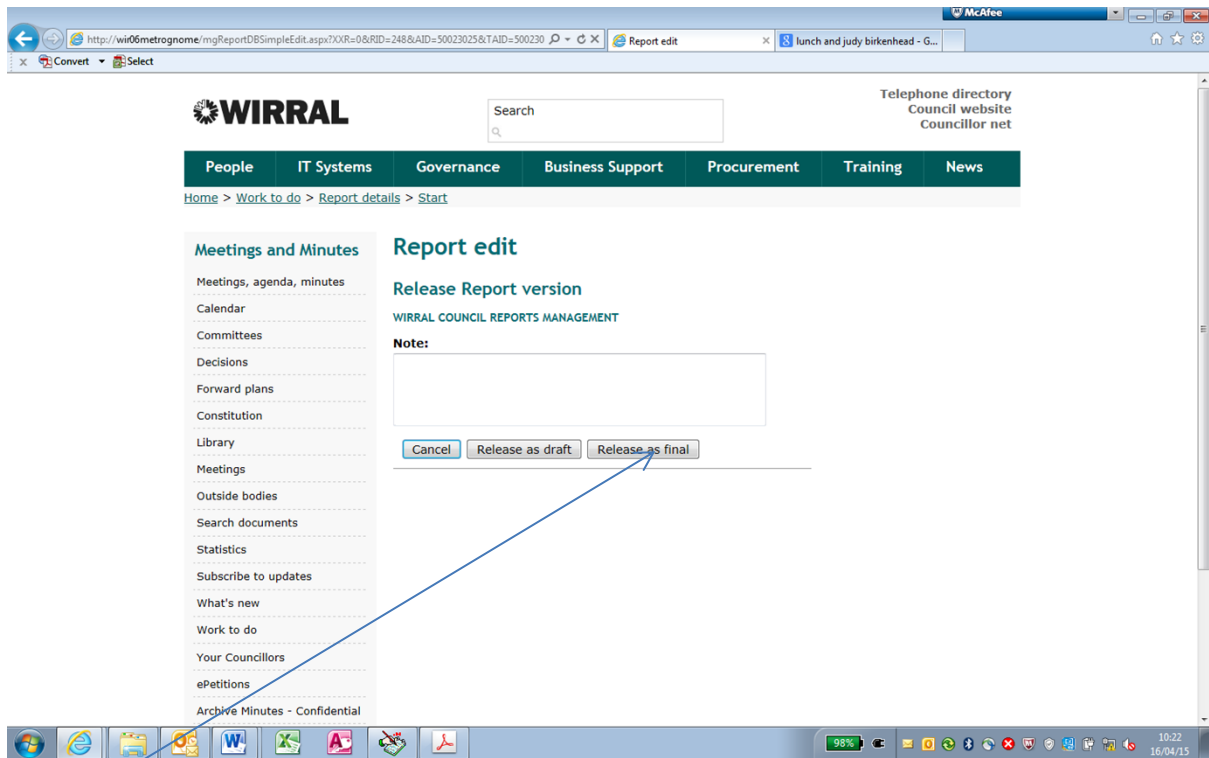


Click on Final check and submit to Committee Services. At this stage this is your final opportunity to check your report before submitting to Committee Services to be published.



Click on Release

PART 1 RELEASING THE REPORT TO DEMOCRATIC SERVICES



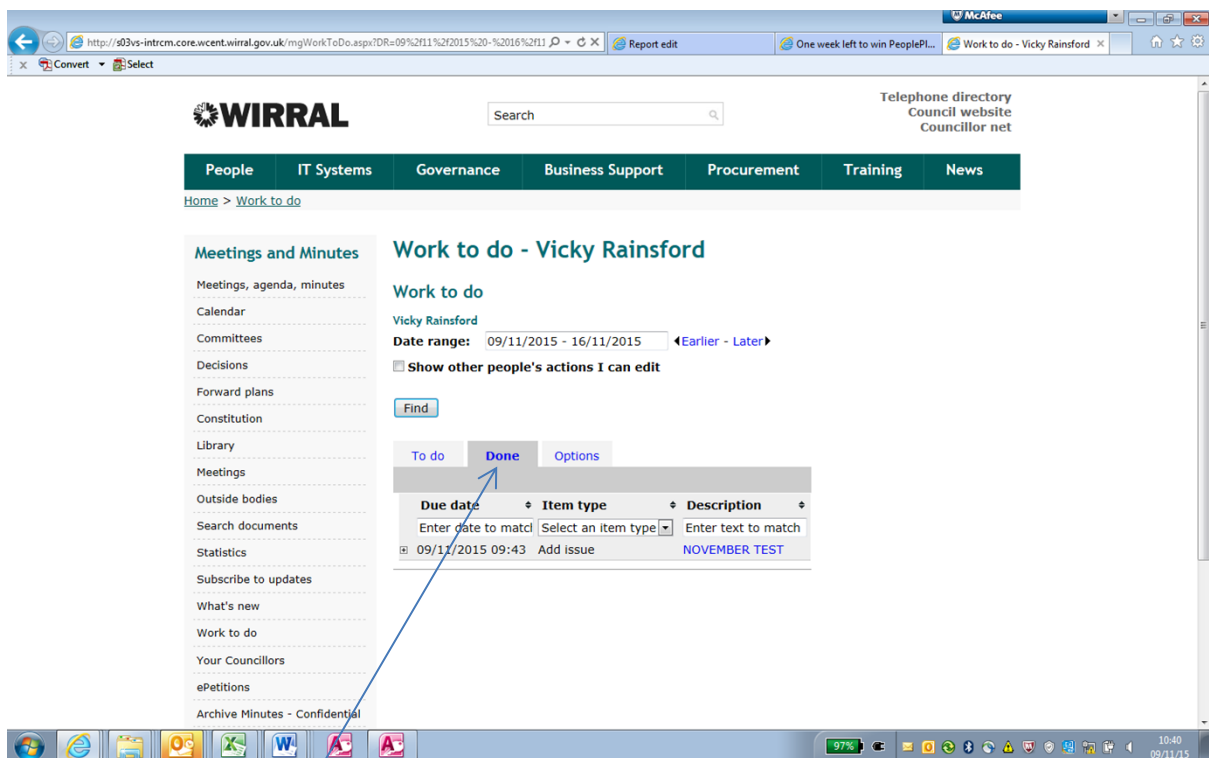
Click Release as final

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:.

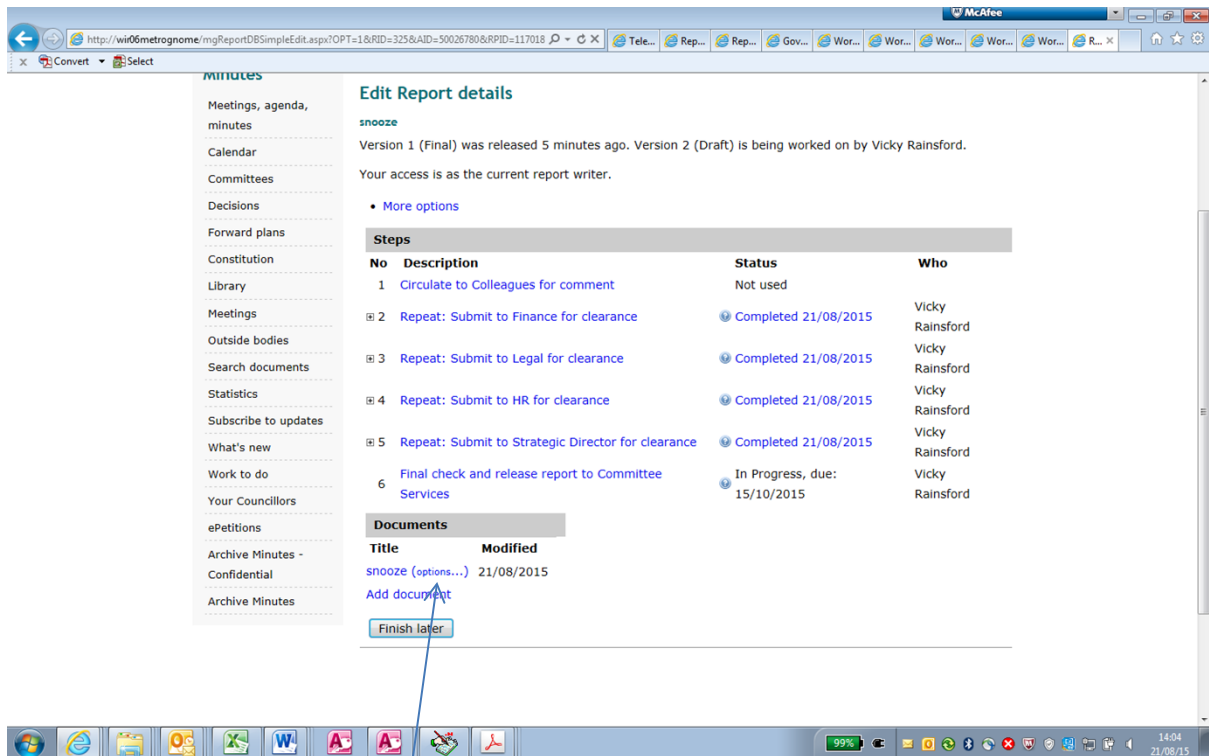
- The amendments to be made and
- The Officers to be consulted on the amended report



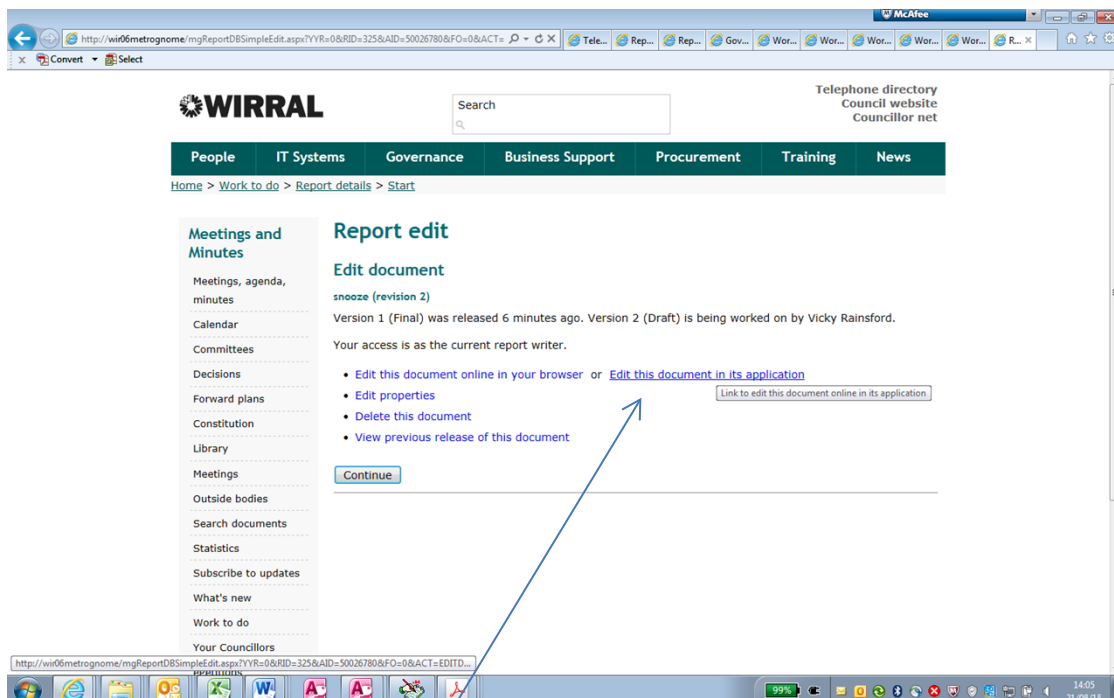
Click on the 'Done' Tab then select appropriate report. You may need to adjust the date range accordingly

PART 1

RELEASING THE REPORT TO DEMOCRATIC SERVICES

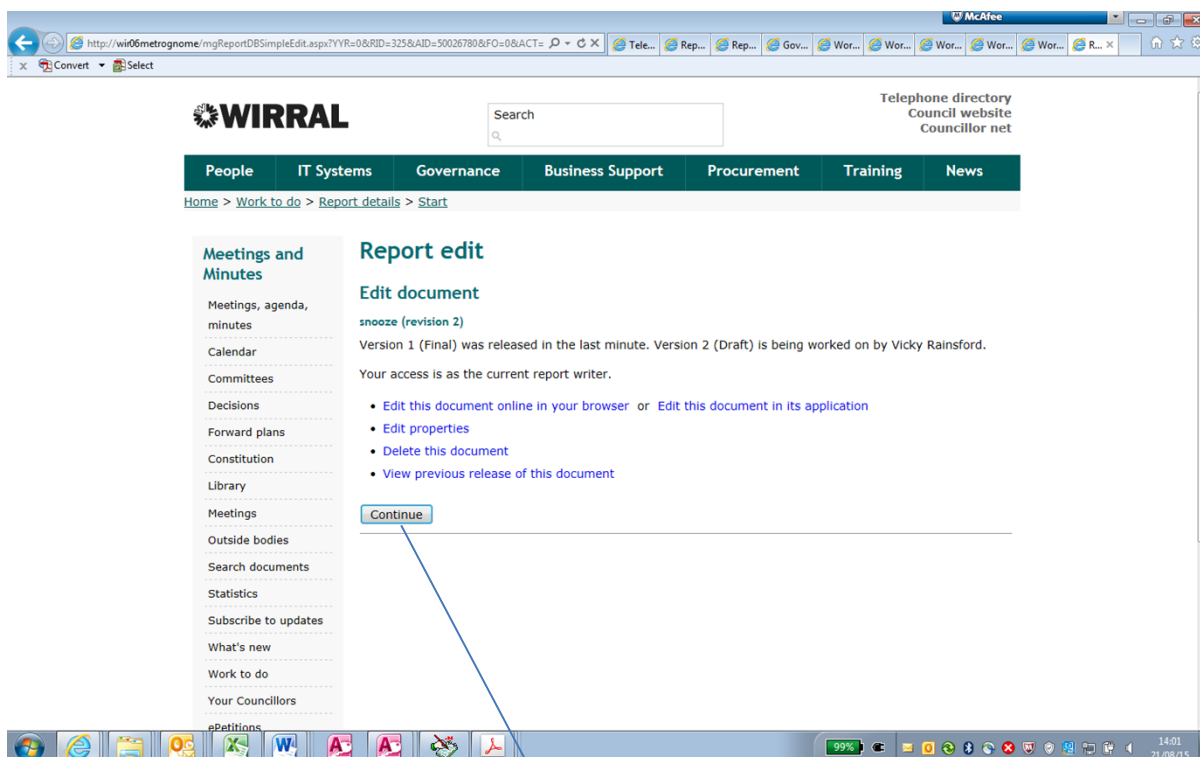


Select 'Options'



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 shows a web application interface for releasing a report to democratic services. The interface is divided into several sections:







- Search documents:** A sidebar on the left with links to Statistics, Subscribe to updates, What's new, Work to do, Your Councillors, ePetitions, Archive Minutes - Confidential, and Archive Minutes.
- Steps:** A table with columns No, Description, Status, and Who. It lists six steps, with the last one being 'Final check and release report to Committee Services'.
- Documents:** A section below the steps table with a table of documents. It includes a 'snooze (options...)' button and an 'Add document' button.
- Footer:** A dark bar at the bottom with navigation links: People, IT Systems, Governance, Business Support, Procurement, Training, News, Councillor Net, and Telephone Directory.

The status of the steps is as follows:

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

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'

WIRRAL Telephone directory Council website Councillor net

People IT Systems Governance Business Support Procurement Training News

Home > Work to do > Report details > Start

Meetings and Minutes

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
Petitions

Report edit

Edit Report details

LCRCA UPDATE (TEST)

Version 1 (Final) was released 4 days ago. Version 2 (Draft) is being worked on by Vicky Rainsford.

Your access is as the current report writer.

[More options](#)

No	Description	Status	Who
1	Circulate to colleagues for comment	Not Started	
2	Submit to Finance for clearance	In Progress, due: 05/10/2015	Vicky Rainsford
3	Submit to Legal for clearance	In Progress, due: 05/10/2015	Vicky Rainsford
4	Submit to HR for clearance	In Progress, due: 05/10/2015	Vicky Rainsford
5	Submit to Strategic Director for approval	In Progress, due: 05/10/2015	Vicky Rainsford
6	Repeat: Final check and submit to Committee Services	Completed 28/09/2015	Vicky Rainsford

Documents

Several options will appear. Select the Option that say's "Update this action status."

WIRRAL Telephone directory Council website Councillor net

People IT Systems Governance Business Support Procurement Training News

Home > Work to do > Report details

Meetings and Minutes

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
Petitions

Update Action Status

Write Report: Write LCRCA UPDATE (TEST)

Status: Can start
Can start
To do
In Progress
Abandoned
Delayed
Called in to Select Committee
Not submitted
Not approved
Approved
Completed
Not used

Deadline date:

Note visible to: Intranet users only

[Cancel](#) [Update](#)

The screenshot shows the 'Update Action Status' form on the Wirral Council website. The form is titled 'Update Action Status' and 'Write Report: Write LCRCA UPDATE (TEST)'. It has a 'Status' dropdown menu set to 'Abandoned', a 'Deadline' field set to '18/11/2015', and an 'Add note:' text area. A blue arrow points from the text below to the 'Add note:' text area. The 'Note visible to:' dropdown is set to 'Intranet users only'. There are 'Cancel' and 'Update' buttons at the bottom of the form. The left sidebar shows a menu with 'Meetings and Minutes' selected. The top navigation bar includes links like 'People', 'IT Systems', 'Governance', etc.

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.

