



Portal channel address data

Purpose

To enable users to update their channel access data, either manually in the tree view, or via spreadsheet download and upload. Whilst originally used for passing URLs to Local DirectGov, as from 1 April 2010 this is no longer happening.

Benefits

Allows users to record URLs against channels in esd-toolkit as a way of referencing information, or as a way of recording proof of e-enablement.

Access

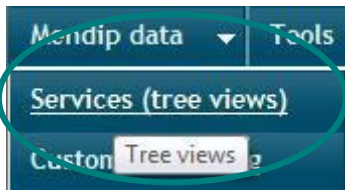
Subscribed users with appropriate permissions (including administrators) can access this functionality. Web portal officers – one per authority – can use the spreadsheet upload and download, and may use the tree view *if* they have permission to update the services in question. In registered authorities, only the web portal officer can use the spreadsheets. If the web portal officer needs to be changed, please email support@esd.org.uk

Guidance

Using the tree view

You need to log in on the home page of www.esd-toolkit.org URLs can be added for any service available via the web site. Interactions and corresponding channels must first be set up.

Once logged in, on the top left blue menu bar, you will see your local authority name followed by 'data', for example 'Mendip data'. If you hover over the menu, the drop down list appears and you should select 'Services (tree views)'.
'Services (tree views)'



Alternatively, you can access the same data by clicking on the "Tree" quick link signposted on the left-hand side of the home page.



Click on the buttons until you find the service you want. You know that you have reached a service as they are identified by this symbol . When you have found the service you want, click on its name. The details for that service will then appear on the right of the screen.

At the top of the details there are three rows of tabs. The top row is 'Local', 'Core' and 'Shared'. Make sure that you have selected 'Local' tab (this is the default). On the second row of tabs, select 'Channels'. When you have selected it, the tab will appear in green as below:

Channels for Waste bins

Local Core Shared

Details Documents Interactions Channels Barriers Officers
Partners Projects FAQs Efficiency Forms Web pages Cost modelling

Service channels are used to identify how service interactions, such as 'providing information' are delivered and include the most popular 'face-to-face', 'telephone' and 'web site'.

More information

ID	Interaction	E-enabled	Planned	Volumes	Cost to serve	Update	Delete
1	Face to face Providing Information (1)	31/12/2005					
1	Web site Providing Information (1)	31/12/2005					
1	Telephone Providing Information (1)	31/12/2006					

Add



Related Building Blocks:
CHA 161, CHA 163

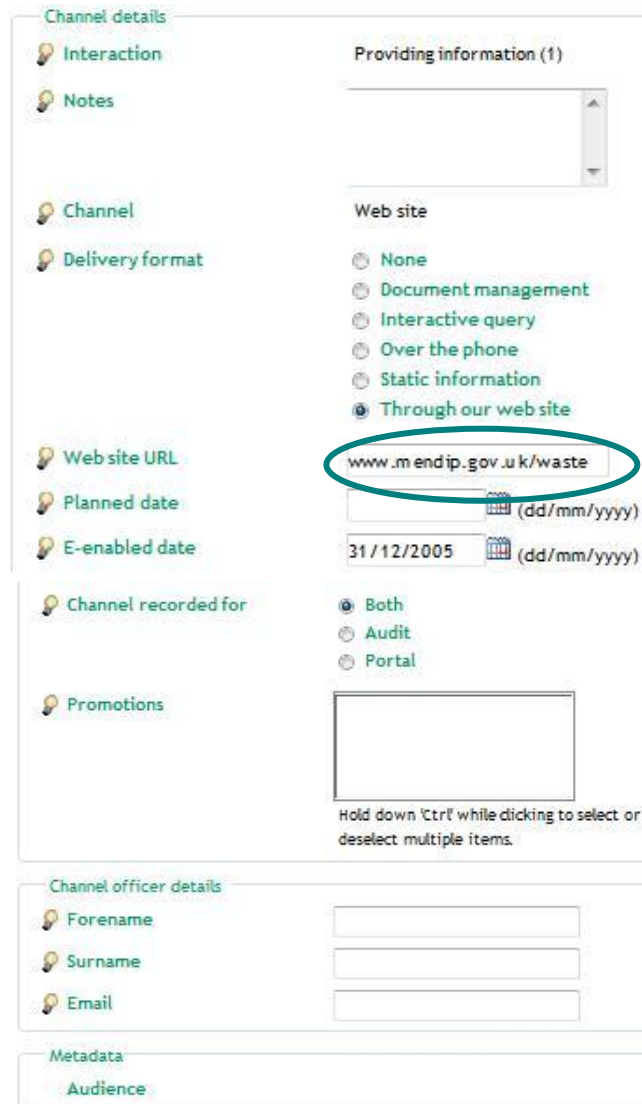
Further help: www.esd.org.uk/forums

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For any Website channels select the 'Update' button.

Tip: If this button does not appear, you do not have permission to update this service. You need to either contact your main administrator (their name is on the top right of your screen), or use the spreadsheet download and upload.

The following screen will be displayed:



Channel details

Interaction Providing information (1)

Notes

Channel

Delivery format

Web site

None

Document management

Interactive query

Over the phone

Static information

Through our web site

Web site URL www.mendip.gov.uk/waste

Planned date (dd/mm/yyyy)

E-enabled date 31/12/2005 (dd/mm/yyyy)

Channel recorded for

Both

Audit

Portal

Promotions

Hold down 'Ctrl' while clicking to select or deselect multiple items.

Channel officer details

Forename

Surname

Email

Metadata

Audience

Select the option 'Through our web site' for the Delivery Format. And enter the URL that is to be stored. It is possible to add further information on the key officer with their email address if desired. Scroll down to the bottom left of the page and click  to save the information.



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Downloading the spreadsheet

The spreadsheet can be used to download all the addresses held for each channel through which each service interaction is delivered.

Navigate to '[Your] data'-> 'Downloads'->'Portal channel address data download'

Report criteria

Channel: 1
Web site (1) [Remove]

Show services

LDG Services: All existing interactions, All existing interactions from those required by LDG, All interactions required by LDG

All Services: All interactions

Services for a (as defined by LDG): District, County, Unitary

Include records for: portal, audit purposes

The download supports many combinations of selection criteria to accommodate different Local Authority requirements and the different ways in which authorities use esd-toolkit.

- **Channel** – allows you to pick the LGChL channel required. Defaults to 'Web site'. Can be deleted to download addresses for all channels.
- **Show services** – specify which service interactions to include. This can be LDG services, or all services for your authority.

The options determine which interactions your spreadsheet will include:

- o **All existing interactions:** all interactions your authority has recorded as applicable to those services. May include some or all of those which were used by Local Directgov. May also include other interactions.
 - o **All existing interactions from those required by Local Directgov:** all the Local Directgov requested interactions that your authority has recorded as applicable to those services. These will probably include most or all of those which Local Directgov required. The spreadsheet will *not* include other interactions supported by your authority.
 - o **All interactions required by Local Directgov:** all the Local Directgov requested interactions irrespective of whether they are recorded in esd-toolkit as being delivered by your authority. This option is appropriate if your authority has not yet used esd-toolkit to accurately record the interactions which you support electronically.
 - o Selecting "all" services will include all interactions recorded for those services, regardless of whether or not they are Local Directgov required interactions.
- **Services for a (as defined by LDG) (District, Council, Unitary)** - The option to select services for a District/County/Unitary type authority is used to limit the download to services that Local Directgov uses for each authority type. The default selection depends on your authority type, which is assumed to be 'unitary' if your authority is not a district or a county. All Local Directgov's required services are included in 'unitary'. 'District' and 'county' return subsets of services.

Tip: This selection is not relevant (and therefore disabled) if you have selected all services.



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- **Include records for (portal/audit purposes)** - The options to show records for audit and/or portal purposes is given to allow you to distinguish between addresses recorded in esd-toolkit for auditing data (eg for BVPI 157 purposes) and addresses recorded as 'landing pages' for links from portals. For most authorities these addresses are the same but some choose to distinguish the two. For Local Directgov purposes you need only select the 'portal' option, which includes addresses recorded for both portal and audit purposes.

Updating the spreadsheet

Your spreadsheet must be in csv (comma separated value) format. As a minimum, it must include these columns. They can be in any order but the headings must be exact:

- **ServiceNumber** – The LGSL ID. See www.esd.org.uk/standards/lgsl/viewer/viewer.aspx
- **LGILInteractionNo** – The LGIL ID. See www.esd.org.uk/standards/lgil/viewer/viewer.aspx
- **LGChLChannelNo** – The LGChL ID. See www.esd.org.uk/standards/lgchl/viewer/viewer.aspx
- **ChannelAddress** – The channel address - the web URL. If the service is not applicable to your authority, enter 'N'. URLs must start http://

The other columns are *either* just for descriptive purposes and ignored by the upload, or only required if your authority has more than one channel of the same type for the same service/interaction combination.

Tip: If you want to record a different channel address for a 'landing page' from a portal than one used to audit BVPI 157 data, see [Building Block CHA 163 – Using different audit and portal URLs](#)

Tip: You can leave the InteractionChannelID blank unless you have more than one channel of the same type for a single service/interaction combination. If you do this, existing records will be updated and any new ones will be added.

Tip: A value of 'new' in the InteractionChannelID will force a new channel record to be added, but this is normally only needed if you wish to add an additional channel of a type which already exists for a service/interaction combination.

Uploading the spreadsheet

Navigate to '[Your] data'-> 'Uploads'->'Portal channel address data upload'

The portal channel address data upload normally only adds and updates channel information for existing service interactions. It will only add new interactions if you check the 'Add interactions not already recorded' box.



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Portal channel address data upload

Please specify the CSV file you wish to upload. Ensure the file is in the correct format.

Please note: Uploading a spreadsheet will overwrite existing data. If your upload contains a lot of updates, it may take a few minutes to complete at busy times.

We strongly advise you to take a copy of your data - in the form of a [current spreadsheet download](#) - before you upload a spreadsheet.

Upload portal channel address data spreadsheet

Find portal channel upload file:

Add interactions not already recorded

When this box is checked, any service interactions in your CSV file that do not already exist in your esd-toolkit data will be added so long as you have not marked the corresponding service as 'not applicable'. The addition of interactions will affect detailed BVPI 157 calculations where your authority uses esd-toolkit for such calculations. Your percentage e-enablement will not drop so long as you specify an e-enablement date for the new interactions.

You must enter an e-enabled date for new interactions if you check this box:

Add interactions not already recorded

with an e-enablement date of (dd/mm/yyyy)

WARNING

Adding interactions will change your base BVPI 157 data and omitting an e-enablement date for added interactions will reduce your BVPI 157 percentage(s) Your last IEG submission was made by [Rob List](#)

If you use the option to add interactions, an e-mail message will be sent to your esd-toolkit main administrator and to the person responsible for your IEG submission to advise of the additions.

Tip: If you upload a CSV file containing blank channel addresses, any existing addresses for those records will be removed.

Tip: We advise you to take and keep a full CSV download before performing an upload.