



Attach, update or delete a service document

Purpose

Enables users to attach documents to a service. These can be restricted to viewing by only the local authority or made available more widely.

Benefits

Adding documents will add value to esd-toolkit. Documents can be in a variety of formats and types (such as process maps or project documents). Such documents can be shared locally only within your organisation or shared therefore enhancing service information. This functionality complements the File exchange feature – see Building Block TOO 117 for more information.

Access

Only subscribed esd-toolkit organisations have access to the document functionality. All esd-toolkit administrators have permissions as well as users who have the 'Upload documents' permission. Registered and non-registered esd-toolkit users can search and view documents that have been shared with such groups by the owner.

Guidance

You need to log in on the home page of www.esd-toolkit.org

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)'. 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, click on its name. The details for that service will then appear on the right of the screen.

Alternatively, you can search the tree for the service. See Building Block TRE 35 for more details.

Tip: 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 'Documents'. When you have selected it, the tab will appear in green.

Documents for Waste bins

Local Core Shared

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

Documents

Title	Location	Document type	Locked	
TEST	27consulting Training\	Sounds	No	View/Update/Delete

Add Bookmark

Add document Show recently uploaded documents/links

Show bookmarked documents Show all documents



Related Building Blocks:
TRE 35, TOO 117.
Further help: www.esd.org.uk/forums



Attach, update or delete a service document

Local documents uploaded against this service by your local authority will display on screen, in 'Title' order. The headings for the documents are 'Title', 'Location', 'Document type' and 'Locked'. To change the display order, click on any of these headings and the screen will refresh to show the re-ordered listing.

To display all documents attached to the service from any authority, click on the 'Show All documents' option. This will display any local or bookmarked documents which have been attached to the service. The 'show all documents' can also be selected to see any other documents attached to that service.

To revert back to your own document listing only, click on the 'Hide documents' button at the bottom of the page.

Documents for Waste bins

Local Core Shared

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

Documents

Title	Location	Document type	Locked	
Bromley's Information on Street Litter Bins	London Borough of Bromley\ Archive \ B \	Links and resources	No	View Add Organisation Bookmark Add Bookmark
Bromley's Street Litter Bin Reporting Form	London Borough of Bromley\ Archive \ B \	Links and resources	No	View Add Organisation Bookmark Add Bookmark
Grounds maintenance	Core\	Process Map	No	View

Adding a document

Click 'Add document' to attach new documents.

Complete the required details in the 'Summary' tab (marked with a red asterisk *) in order to upload the document successfully. Hovering your cursor over a light bulb displays further information about its corresponding field. All documents need an appropriate 'type' selecting from the LGTL (Local Government Type List) to help identify them in future searches (e.g. process map). Wait for the page to refresh to prompt for information specific to the document type selected (different information is required for process maps).

Additional information relating to the document can be added if wish via the 'Links' and 'Officer details' tabs.

Documents can either be added as links to a file (Web page, document on an intranet etc.) or by physically uploading the document to the esd-toolkit server. You will be prompted either to enter a URL or to specify the file location if the file is to be uploaded.



Related Building Blocks:
TRE 35, TOO 117.
Further help: www.esd.org.uk/forums



Attach, update or delete a service document

Add Document

Summary Links Officer details

Fields that must be completed are denoted by an asterisk (*). Fields which cause the page to reload are denoted by a hash (#).

Summary

Document type* #

Title*

Reference ID

Notes

Owner 27consulting Training

Authority type District council

Location

Tip: There is a maximum size limit of 5MB per individual file.

Click the 'Add document' button when the details have been completed.

Setting share permissions

You can decide who should be able to see the document once it has been attached to the service. To do this, click on the 'View/Update/Delete' button and select the 'Sharing' tab. Under the 'Subscription type', five types of users are listed, each with a 'Share rights' drop down menu:

- Public
- Registered organisation
- Subscribed organisation
- Supplier member
- Central government

Use the 'Share rights' drop down menus to grant permissions ('none', 'view', 'view and update' or 'view, update and delete') to each of the subscription types as required. When a file is created within a folder, it automatically inherits the sharing permissions of that parent folder.



Attach, update or delete a service document

Summary Links Officer details Versions **Sharing**

Fields which cause the page to reload are denoted by a hash (#).

esd-toolkit users

By subscription type	Share rights #
Public	None
Registered organisation	None
Subscribed organisation	None
Supplier member	None
Central government	None

Additionally, you can grant permissions to partnerships and/or specified individual organisations. To do so, click on the 'Add' button towards the bottom of the screen. From here you can select from the list of existing esd-toolkit organisations by name and assign permission to 'view', 'view and update', or 'view, update and delete' the document.

Tip: Regardless of the share permissions set, all administrators and users allowed to 'Upload documents' within your organisation will be able to edit, delete and move documents which you upload.

Once you have setup all the necessary sharing rights, click on 'Save changes'.

This will add the document to the list of those associated with the service.

Once a document has been attached to a service it can be updated or deleted by users from the owning authority only. Other users are able to download/view the document but cannot change it in any way.

This functionality mirrors that of the File exchange and in fact the documents that are added are filed and stored in your authority's File exchange. See Building Block TOO 117 for more details, in particular file locking, version control, deleting documents and how to view the documents in File exchange.