Introduction

The purpose of the Reports Monitoring System is to help with effective forward planning by providing a comprehensive, up to date list of all the reports required to be submitted through the decision-making process of the city council. This means reports being taken to the Strategic Directors' Board (SDB), full Executive, individual Executive Members, regulatory committees, policy and review panels and the full council.

It enables reports to be searched for using a number of criteria, such as directorate, lead officer, report author, subject matter, decision-maker or committee, meeting date and Forward Plan. A key factor of the system is the automatic production of notifications to Lead Officers and Report Authors.

These guidance notes (in PDF format) and also the Forward Plan guidance notes are available by selecting the **Help** link, they will open in a new window.

Notes on how to use the system

From the IntraLINK homepage, click on Systems Access and then select Reports Monitoring System. This will take you to the following screen:

From the Home Page, you have a number of choices depending on the task you wish to undertake.   The options are listed across the top of the screen.   You may not have all the menu options shown in the image above, depending on whether your job requires you only to view the records, or amend/update them.

Only designated System Administrators in Democratic Services are able to access **Admin Tasks**, which allows meeting names and dates to be entered or changed, and other administrators registered.

The only people who can enter a record (called Actions in the system) **for the first time** are those designated as System Administrators and Forward Plan Co-ordinators. The Actions and Search (With Update/Add) functions are available under the Coordinator Tasks heading.

Once a report has been registered, Lead Officers and Report Authors can amend the entries for their own reports.

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To enter a new Action (by a System Administrator / Forward Plan Co-ordinator)

Click on **Actions** under **Coordinator tasks** and this is the screen that will then show:

At the bottom of the screen, click on the **Add New Action** box.

This screen then comes up. It allows reports to be added to the system, or existing entries amended by a System Administrator or Forward Plan Co-ordinator, for example if the submission date for a report is changed.

Complete the information in all the boxes, using the drop down menus.

To select more than one meeting from the list hold the ctrl key down on the keyboard and select all the meetings required, this should highlight the meetings selected only.

When the **Lead Officer** and **Author** boxes are completed, the rest of the required information in those sections will be automatically completed. Completing the **Description**, **Trigger/Source**, **Report Location** and **Comments** boxes is not compulsory, but they give the opportunity to explain or expand an entry.

Completing the **Forward Plan** box is compulsory. If a report has to be included in the Forward Plan, its category must be stated, such as Budget & Policy Framework or Key Decision. Forward Plan Co-ordinators have a guidance note about the items that must appear in the Forward Plan, and the guidance is also available using the Help link or on IntraLINK (http://intralink/Media/Forward_Plan_Guidance.pdf). When the appropriate fields have been completed, click on **Insert**.

A particular benefit of the system is that it will enable the Forward Plan to be compiled easily and accurately each month, with minimum effort, as it will be possible to search the records by the criterion of the Forward Plan.

To view the records (all users)

To view all the reports entered, click on **ViewActions**. This screen does not permit amendments and is open to all users. It looks like this:

By clicking on **Select** against an entry on this screen, full details of the report in question are given.

To interrogate the system (all users)

The system allows reports to be searched for by category. For example, all the reports to be produced by one Directorate or Lead Officer can be listed, or all those to be produced for a particular Strategic Directors' Board Meeting, or a City Council meeting. Individual officers can call up a list of the reports they are required to write.

To search for a report (Action) by, for example, Directorate, Lead Officer, Report Author, Subject Matter, Decision-Maker (such as the Executive or an Executive Member / Committee), or meeting date, click on **Search(ViewOnly)**.

This is view only and the screen looks like this:

Complete the boxes you wish to search by and click on the **Search** box at the bottom. To search for another report, click on the **Reset Search** box.

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To interrogate the system and also amend an action

Lead Officers and Report Authors can search for a report (Action) that they are the Lead Officer or Author of and amend it (for example to change the date of the meeting it is being submitted to, or to update its status, for example to Finalised) by using the **ActionUpdate** option, and clicking on **Select** by the entry, then **Edit**.

System Administrators and Forward Plan Co-ordinators can use the **Search (With Update/Add)** or **Actions** options (available under the **Coordinator tasks** heading) to amend entries in the same way. The **Search (with Update/Add)** function is as per the **Search(View Only)**, but entries may then be selected for update, or new entries added. The **Actions** functions are as per **ActionUpdate**.

Don't forget only the System Administrators, Forward Plan Co-ordinators, Lead Officers and Report Authors can amend entries. It is very important, if the system is to be effective, that the status of reports should be updated every time there is a change.

This is the **ActionUpdate** screen:

Identify the report in question and click on **Select** on the far left side. This screen then appears:

Click on **Edit** and amend the information as required, then click on **Update** (or **Cancel** if the update is incorrect). The **Actions** option works in the same way.

Notification to Lead Officers and Authors of an entry being made or updated in the system

When the requirement for a report (an Action) is first recorded in the system by a System Administrator or Forward Plan Co-ordinator, an email is automatically generated and sent to the Lead Officer and the Report Author, so that they are alerted to, and have a record of, the need to write the report.

The email will be in the following form:

From:	CommitteeReports@portsmouthcc.gov.uk
To:	France, Mike
Cc:	France, Mike
Subject:	Report Monitoring - Confirmation of an Action entry

Please do NOT respond to this message. This email was sent from an unattended mailbox.

Thankyou for entering the Action.
A summary of the entry is :

Report Title : Standing Order Changes

Description : Revisions to standing orders of the Council

Lead Officer : Haskell, John

Author : Haskell, John

Status : Draft in Preparation

Comments : John Haskell

Meeting : **City Council , 21 Jan 2008**

Meeting : **The Leader , 02 Feb 2008**

No reply is required to this email. Once alerted that the entry has been made, the Lead Officer and Report Author can interrogate the system, and from then on they can amend and update the information about their own reports as necessary. Any amendments will generate an email to notify any changes made. The email will be in the following form:

From:	CommitteeReports@portsmouthcc.gov.uk
To:	France, Mike
Cc:	France, Mike
Subject:	Report Monitoring - Confirmation of an Action update

Please do NOT respond to this message. This email was sent from an unattended mailbox.

Thank you for updating the Action.
A summary of the entry is :

Report Title : Standing Order Changes

Description : Revisions to standing orders of the Council

Lead Officer : Haskell, John

Author : France, Mike

Status : Draft in Preparation

Comments : Change of Author/ New meeting added

Meeting : **City Council , 21 Jan 2008**

Meeting : **City Council , 10 Apr 2008**

Meeting : **The Leader , 02 Feb 2008**

Reports

Although searches can be conducted for reports (actions) by various criteria using the **Search** options as explained above, the system also has a specific **Reports** function. This also allows reports to be searched for by the same criteria, but then produces a formatted document which is easy to read and can be promulgated electronically, or printed off as a paper copy. It is recommended that if the output is to be saved electronically the Excel format is used. To use the **Reports** function, click on the Reports option on the menus, and select the appropriate option. This is what the screen looks like:

The reports that can be produced are, for example, all the Forward Plan items or any outstanding actions.

Notifications

A principal benefit of the system is that it produces automatic electronic notifications to selected officers to ensure they are aware of the actions they are required to take and the due dates.

The notifications are:

1. **New Action** – notification to lead officers and authors of a required action
2. **Updated Action** – to lead officers and authors where there is a change to an action (for example a changed meeting or date)
3. **Weekly Notification** – to authors, which will include:
    *   all outstanding actions due in a period currently set at 30 working days
    *   any overdue actions (such as the meeting date has passed and the status of the action has not been changed in the system)
    *   any actions in progress – such as where action is progressing but not finally completed

Urgent Actions – to authors of the actions with an outstanding status due in a period of time currently set at 3 working days or less.