# Getting started with…

**esd toolkit**
*improving together*

## Contents

## About esd-toolkit

The esd-toolkit was developed to help local authorities meet the 2005 target of delivering all their services electronically. It has continued to grow since then, helping authorities focus on the efficiency and transformation agendas. esd-toolkit also provides the means for different organisations to share information and knowledge.

Today, esd-toolkit emphasises:
- *Focusing on the customer*: customer profiling, volumetrics, take up of different channels and services.
- *Empowering front line staff:* access to service information, FAQs, process maps, aligning services with LCSL & ISPV.
- *Sharing service delivery:* process maps, partners and partnerships, working with other agencies).
- *Improving service delivery*: customer satisfaction, service delivery standards, comparing progress with other agencies.

## Using the esd-toolkit

Tens of thousands of people from local authorities and other government organisations use esd-toolkit.

Some, such as Mendip District Council, keep track of all their services through esd-toolkit; others may only log in to fill in AES statements. Many benefit from the controlled vocabularies – maintained by esd-standards and used throughout the esd-toolkit.

### Registering and logging in
Registering with esd-toolkit is simple, quick and free. Go to www.esd.org.uk/esdtoolkit and click on the *Register/subscribe* link at the top of the page.

Fill out the form, and confirm that you have read the terms and conditions. After you submit your registration, you'll be e-mailed your username and password. When you have them, login to esd-toolkit by entering your username and password in the boxes at the top right:



## Finding your way around

The esd-toolkit has a simple navigation structure of drop-down menus.



The options which are visible depend on your authority's subscription level and on your own user permissions.

On the top right, you can see your name, whether you are an administrator, your organisation's name and subscription level, and your main administrator.
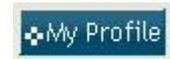


Important links are available from the green bar at the very top of the screen:



- The 'Standards' link takes you to the esd-standards website, the home of the controlled vocabularies (including IPSV and LGSL)
- 'My Toolkit' allows you to customise your homepage view of esd-toolkit to reflect the priorities of your local authority
- The 'Forums' are a friendly, supportive and collaborative community of all esd-toolkit's users.

## Updating your profile

Click on the *My profile* button in the top right corner of your screen.



The default tab allows you to change your password:



You may want to update or complete information under the 'Contact details' or 'Personal details' tabs. If you wish, you can also upload a photo of yourself under the 'Photograph' tab.

The 'Forum preferences' tab is important, as you will not be able to view a forum unless you have chosen 'Join forum' here.



The *What is esd-toolkit?* link under 'Help' on the menu bar gives more information about the esd-toolkit and its functions.

The latest esd-toolkit news can be viewed under *News and events*, as can a list of events which you can book onto.

# Searching esd-toolkit

The esd-toolkit has a number of searches to help you find useful resources.

Search site **Go**

The general site search, in the top right corner of every page, searches all the information which has been shared by the esd-toolkit community. This includes details of people, forum posts, uploaded documents, services-specific FAQs, and forms.

## People finder
*(Tools→People finder)*

You can search:
- For a specific user, by entering their surname.
- For a single organisation, or all organisations of one type (click on the circle to bring up a 'tree picker')
- For users within a specific region.
- For users interested or skilled in particular areas.

Search parameters

| | |
|---|---|
| Surname | Jones |
| | ○ Contains |
| | ● Starts with |
| Organisation | Basildon District Council |
| Organisation type | |
| Region | |
| Only include | ☑ Main administrators |
| | ☐ IEG respondents |
| | ☐ AES respondents |
| | ☐ ATPs |
| | ☐ Web portal officers |

Fill in the form and click *Search* at the bottom of the page. To view a person's profile, click on their name. You can sort the results by surname, organisation or region.

## Projects database
*(Tools→Projects database)*

The Projects search is available to subscribed users only.
There are many different search options to allow full flexibility. The most popular searches are by:
- Name of project
- Organisation
- Partnership

Search options

| | |
|---|---|
| Search text | CRM |
| | ● Contains |
| | ○ Starts with |
| Partnership # | esd teams |
| Authority | |
| Restrict to neighbouring local authorities # | ○ Yes |
| | ● No |
| | View near neighbours |
| | ● Lead authority |
| | ○ All involved |
| Search type # | ● Simple |
| | ○ Advanced |

**Search**

You can sort your search results by Reference, Name, Ownership type or Local Authority owner of the project.

Click on a project's name to view that project. Depending on what details the organisation filled in, you will find information under different tabs.

## Document search

*(Tools→Resource search→Document search)*

You can run a *Simple* search, for text in the title and/or description of a document, or an *Advanced* search which allows more complex criteria to be specified.

**Resource attributes**

- Title
  - ⦿ Contains
  - ○ Starts with

- Description
  - ⦿ Contains
  - ○ Starts with

- Search type #
  - ⦿ Simple
  - ○ Advanced

**Search**

Once you have run a search, you can sort the results by the document's Title, Owner and Type. You can also bookmark documents of particular interest.

When you click on a title of a document, you will see a review screen, with a link to the document itself.

# Local details in esd-toolkit

## Tree views

The 'tree views' in esd-toolkit are intuitive and user-friendly ways to navigate:
- The controlled lists maintained by esd-standards
- The 'local tree' for your own authority
- The 'local document repository' for your own authority

The trees are found under ***Your data→Services (tree views)***.

Subscribed authorities will have a *Local Tree* which can be fully customised to show the structure of that authority.

**Tree select**
Tree
Local Tree

**Tree options**
Search the tree | Filter | Key to Icons
☐ Show N/A Services  ☐ Show Interactions

Each tree has 'branches' and 'leaves'.

The branches of the local tree are usually the council departments and sub-departments, and the leaves are the services offered by those departments.

- Local tree
  - Arts and leisure
    - Arts centres
      - Arts - information
      - Museums and galleries - shops
    - Exhibitions
    - Libraries
    - Museums and galleries
    - Physical activity and sports
    - Tourism
  - Education

Branches can be named and structured however you wish, and services can be moved between branches, duplicated if your authority wants to place them under multiple branches, and marked as non-applicable if your authority does not supply that service.

Service details can all be recorded against the services in your local tree. This includes details of the interactions between your authority and the citizen details of the channels used to perform these interactions (telephone, post, websites) and the volume of user take up of each channel option.

## Projects

You can enter projects which your authority has worked on. Projects can be viewed and entered in your local tree against a service, by clicking on the 'Projects' tab.



Projects can also be entered under **Tools→Projects database**.

Each project needs a name and a reference. You must also select ownership of the project (local, national or partnership) as well as listing the lead authority and other authorities involved.

You can choose to make the project visible to just your authority, or to all of esd-toolkit's subscribed users.

## Documents

You can add documents against services using the *Documents* tab.

There is also a special tree called *File exchange*, where you can upload and classify all of your authority's documents.

The 'branches' are the folders and subfolders of your repository and the 'leaves are the documents themselves.



You can also go directly to this tree from **Tools→File exchange**.

# Annual Efficiency Statements

## Getting permissions to submit an AES return

You can find the AES submissions page at *Online submissions→ Annual efficiency statements→ Online submissions*
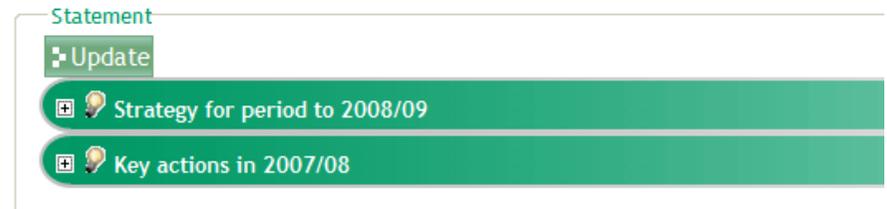


If your authority is subscribed, your main administrator can give you permission to view, update and/or submit AES statements.

If you are from a registered authority, you must post on the esd-forums or e-mail support@esd.org.uk in order to be given these permissions. Only one person from a registered authority is allowed to update and submit the AES return.

Any number of users from a subscribed authority can update the AES return, but only one user can have permission to submit.

## Updating the working copy of an AES form

Once you have permissions, you can update the AES return by clicking on 'Working copy' by the correct statement, then by clicking on the 'Update' button in the 'Statement' box:



You can then fill in your figures and comments. Make sure you 'Save changes' using the button at the top or bottom of the form.
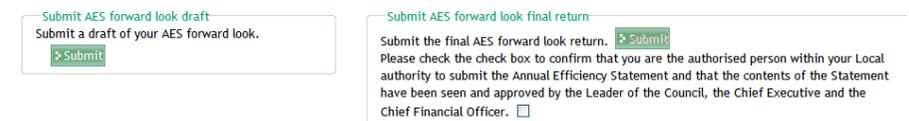
Each statement can be updated as many times as you like – you don't need to complete the form in one session.

## Validating and submitting an AES return

Click on the 'Working copy' link to view the data entered, then (if you're happy with it), click on 'Submit statement'.
This will perform a validation check on your form, and will list any errors or warnings.

You can submit a draft of your statement, or the final version.



Your last 'final' version submitted before the deadline will go to the Communities and Local Government department. If you do not submit any final version, the CLG will receive your draft.

# Where to get help and support

User guides for all aspects of the esd-toolkit can be found on the *Training materials* page under the *Help* menu. There are also links to relevant materials on individual pages.

The *Foundation pack* and *Training Modules* are a good place to start as these are aimed at first-time users. The *Building blocks* are short, self-contained guides on individual features within the esd-toolkit. Each time we release new functionality, we publish a building block.

## Contacting the support team

You can access our forums at www.esd.org.uk/forums or from the *Forums* links on the green top menu bar and under the 'Help' menu in esd-toolkit. The friendly support team reply to queries promptly during office hours. Users of other local authorities are always happy to share their experiences and expertise via the forums.



For technical questions and problems, please use the *Operation, Technical and Usability Help and Support* forum.

You can also e-mail support@esd.org.uk for help. Please post on the forums instead where possible, as the response time is quicker and other users can learn from the questions and discussions there.

# Communities

The communities pages give information about specific groups of users within esd-toolkit. These are all means of sharing information and expertise around the nation in order to improve each council's local service delivery.

## Toolkit Local Communities (TLCs)

There is one TLC for each of the nine English regions, and they host regular, free, events, to which all local authority officers in the region are very welcome.



Each TLC has its home page, accessed through *Communities→TLCs* then the *Regions* menu, as well as its own forum at www.esd.org.uk/forums .

## Integration Practice

The *Integration Practice* community is hosted by esd-suppliers. It aims to foster standards for integration of computer systems.

You can register your interest in the various communities of practice under *My profile→Integration Practice*.

| Area of interest | | Join IP/CoP | Show as member + | Watch |
|---|---|---|---|---|
| | Integration Practice | ☑ | ☑ | ☐ |
| | Housing | ☑ | ☑ | ☑ |
| | Infrastructure | ☑ | ☐ | ☐ |
| | Revenues & Benefits | ☐ | ☐ | ☐ |
| | Social Care | ☑ | ☐ | ☐ |

**Update Integration Practice preferences**

As with the TLCs, each Community of Practice (CoP) has its own web pages and forum.

## esd-suppliers

esd-toolkit has a sister community of esd-suppliers – private sector organisations who supply products and services to the public sector.

The esd-suppliers system is designed to allow local authorities to work with suppliers, and to see what projects the suppliers have engaged in with other local authorities. Your personal contact information is never available to suppliers.

The *Supplier register* under the *Tools* menu is a powerful search allowing you to find suppliers who best fit your needs. You can search for a particular supplier, or search for all suppliers offering a certain product or service. You can also search for suppliers who have worked with particular types of organisations.



Our supplier users often make special offers available exclusively for esd-toolkit subscribers; these can be found under the *News and events*→*Supplier offers* menu in esd-toolkit.

## toolkit-lite

toolkit-lite is a ready-made template designed for your type of authority (District, Unitary, London Borough and County). This is provided in the form of two spreadsheets – 'service interactions' and 'access channels' which you can upload and tailor to your own departmental structure.

It is aimed at authorities who have done little or no work on customising their 'Local tree'. The toolkit-lite is stripped down to the basic interactions and channels to make it easy to implement and simple to learn.



We can only provide the templates to *subscribed* authorities who have received training. Please see the events list for current training dates and venues, or email esd-toolkit@idea.gov.uk for more details about toolkit-lite.