



Sharepoint/Procedures - How To Use

All procedures are accessed through the intranet using a product called Microsoft SharePoint 2010 (SharePoint). SharePoint can be accessed from the intranet or directly from the 2012 system.

This is an overview rather than a step by step process that will give you an understanding of how procedures look, the information they contain and how to use SharePoint to locate them.

SharePoint is available to everyone within the CMG. It provides quick links to procedures and support and guidance, with useful links into policy and letters that you may need. This provides a user friendly way to obtain the information and guidance you require quickly and effectively.

Each procedure contains a summary, step by step guidance and links to letters, policy documents, related items and frequently asked questions (FAQs) providing you with all the information you require in one place. SharePoint will also provide you with links to external web sites such as the Ministry of Justice.

Access SharePoint

SharePoint is used to access all 2012 procedures and is available to all users. SharePoint can be accessed in two ways:

- Through the intranet
- From the 2012 system

There is no password required for SharePoint. Once accessed, you are taken to the landing page screen. This screen provides quick links to procedures, a search bar and other useful links.

Locate a procedure

There are three ways to obtain the information you require from SharePoint, providing an effective way to locate your procedure. The options available to you are:

- **Procedural Content** -This can be located on the left hand menu. Once selected it will provide a summary of procedural topics which can be selected, giving the user a list of procedural links relating to the chosen topic.
- **Procedural area boxes** – These are located at the bottom of the screen on the landing page and contain procedural titles such as Applications and Client Contact. Once selected they provide an overview of the procedural topic and a list of all procedures within that area on the related items tab. From this list you can select the procedural area you require and are taken directly to it, providing you with a fast and effective way to locate the information you need.
- **Search bar** – If you need to find a procedure but aren't sure of the exact procedural title it relates to, search using the search bar at the top of the screen. SharePoint searches all procedures and identifies ones relating to your searched word/s. A list of search results is shown.

The landing page

The screenshot below is for illustrative purposes only and provides an example of what you see once you open SharePoint. Areas have been numbered to provide additional information.

The screenshot shows the 'Department for Work & Pensions Procedures' page. At the top right is a search bar (1). On the left is a navigation menu with links such as 'Announcements Archive' (2) and 'Feedback' (4). The main content area is titled '2012 Child Maintenance Scheme' and includes a 'Procedural Announcements' table (3) with columns for ID, Title, Audience, Modified, and Expires. Below this is an 'Enhanced Support Model' section (5) with three icons: 'Key Messages', 'Fundamentals', and 'Collective Change Calculator'. At the bottom is a 'Functional Area' grid (6) with buttons for 'Applications', 'Client Contact', 'Maintain Client Details', 'Method of Payment', 'Maintain Case', 'Process Payment', 'Assess', 'Civil Enforcement', 'Civil Enforcement (Scotland)', 'Criminal Enforcement', 'Employer', 'Complaints', 'Assurance and Guidance', 'Self Service', 'Interfaces', 'Use the System', 'Finance', 'Case Closure', and 'Exceptional Case Handling'.

1. The FAST Search is prominently at the top of each page and is used to find guidance quickly. SharePoint records all search information used, which means management information (MI) reports can be generated, for example to identify the most frequently visited procedures.
2. Useful links are listed here, including links to the announcements archive and the Policy, Law and Decision Making guidance.
3. Announcements appear here – these are added as and when they are needed, and include a weekly list of which procedures have been updated.
4. Procedural feedback link which gives you the option to provided constructive feedback in helping to improve or correct current procedures.
5. The enhanced support model has been developed to support the roll out of the 2012 child maintenance scheme and links to the main sections are here.
6. Each procedure falls within a functional area, these boxes link to an overview of each area.

Searching in SharePoint

You can search this guidance by:

- Selecting the Procedural Content hyperlink on the left hand side of this page
- Entering a word/term in the search tool at the top right hand side of this page

Entering any word/term within this field will return a Google-type search response, which lists all documents containing that word/term in a priority order, according to how relevant the term is to each document.

SharePoint does not however identify similar words and does not provide alternatives, for example spelling errors.

Search words must:

- have the correct spelling - the majority of unsuccessful searches are due to spelling errors e.g. use correspondence not corpondance, use change not chnage
- not be abbreviated
- use the correct terminology for 2012 Child Maintenance Scheme

The most common unsuccessful search words, and the correct terminology to use are listed below:

Unsuccessful Search Word	Suggestions
Student	There is no reference to students in procedures as student income is not a 2012 exception
Write offs, wite off, writeoff, wroteoff	Correct spelling is required
Wellfare, wefare	Welfare or welfare of the child produces successful results
Change personal info	Change personal details or Change client details
Voluntry, voluntary, vol	Correct spelling is required

Mandatory recon	Mandatory reconsideration
Method of pymt	Method of payment
Perform calc	This shows results for the Perform Calc SR, not perform calculation.
PP in prison	Paying parent in prison - abbreviations for paying parent and receiving parent are not used
Variations, variatoon, variatons	Correct spelling required

If you do not know the exact title of the procedure you are looking for, you can also use a Buzz Word. Enter * followed by the word for example, *close. Quotation marks search for all terms within the quotation, e.g. "service type".

To identify relevant areas within a long page of procedures, use the Find facility (Ctrl F), enter the relevant word and each occurrence of that word will be highlighted.

Search Results

When you use the search bar on the top of each page the results are presented in a way you'll be familiar with, similar to Google. The image below displays an example of what you see once you have performed a search. Areas of the screenshot have been numbered to highlight the options that are available to you.

The screenshot shows the 'Department for Work & Pensions Procedures' site search results for the term 'rejected'. The interface includes a search bar at the top with a dropdown menu set to 'Pages' and a search button. Below the search bar, there are filters for 'Result Type' (set to 'Web Page (105)') and 'Sort by' (set to 'Relevance'). The search results are listed in a table-like format, with each result including a title, a brief description, and a URL. The results are numbered 1 through 4 to indicate key features: 1. The search results themselves. 2. The left-hand navigation pane with filters for Site, Author, Modified Date, and Company. 3. The search bar and dropdown menu. 4. The 'Sort by' dropdown menu.

1. Search results appear here.
2. You can refine your search by useful filters, such as how recently the pages were edited, who wrote them or what type of document they are.
3. The default search is just for the procedures site but you can change this to include all sites. This would bring up results from the Policy, Law and Decision Making guidance too.
4. The default search display is sorted by relevance but you can also view results by newest or oldest.

Viewing a procedure

Once you have selected a procedure you are taken to the procedure guidance content page.

Procedures are displayed in a layer of screen tabs; each tab contains different information and takes you to the relevant area of the procedure. Below are the tabs that you see once you have selected a procedure:

- **Summary:** This tab provides a summary overview of the procedure you have selected.

- **Details:** Contains the main detail relating to a procedure in a step by step user friendly layout. It provides each action that needs to be taken to complete the required process.
- **Procedural Exceptions:** This tab shows any exceptional circumstances and is mainly used regarding differences to the procedure for users based in Northern Ireland
- **Customer Materials:** This tab holds details of all of the letters and forms associated with the procedure. By selecting the letter header hidden text shows you the required steps for completing the letter
- **Related items:** There are links to any procedures that are related to, or have been mentioned within, the one you are using. Selecting a link takes you to the summary page of the linked procedure
- **FAQ:** These are frequently asked questions relating to the procedure






The screen shot below is an example of what you see once you have selected a procedure, this has been numbered to highlight areas of the procedure, detailing the options that are available to you.


The screenshot shows the 'DEO - Enforced' procedure page. The breadcrumb trail at the top is 'Procedures > DEO - Enforced' (1). Below the breadcrumb, there are tabs for 'Summary', 'Details', 'Procedural Exceptions' (2), 'Customer Materials', 'Related Items', and 'FAQs'. The 'Summary' tab is active, showing a brief overview of the process (3). Below the summary, there is a process flow diagram (4) with three steps: 'Establish DEO set up in process', 'Determine NRP pay set up DEO', and 'Transfer all case'. The page also includes a left-hand navigation menu and a feedback section.

1. A breadcrumb trail of links helps you to keep track of where you've navigated from and what section of the procedures you're looking at.
2. Tabs allow you to navigate quickly through each section of the guidance, giving you everything you need in manageable chunks.
3. Every page has a summary which is an overview of the procedure you're looking at, often with a process flow where appropriate.
4. Links to relevant policy guidance appear within the guidance text and in the left hand menu. Policy guidance links in the summary take you to the Policy, Law and Decision Making Guidance homepage and links within the details tab take you to appropriate guidance.

Procedures icons

Each procedure contains icons to quickly highlight an action that is required to a user. The list below shows examples of all the icons that are used within the procedures, providing an explanation of them.

-  **Information:** The information icon indicates that the information you are reading has added value, is important and is informative. This icon can be present at any point during the procedures to highlight additional information to the user.
-  **Mail:** This icon advises that, within this procedure you should consider if you require to send a letter, or that a letter has been received.
-  **Telephone:** The telephone icon highlights telephone contact. It may be that you need to make a call or have received a call. This may appear more than once in a procedure, you should read the whole process before taking any action, ensuring you have all the required information before making the call.
-  **Scan:** This advises that there is a scanning requirement.
-  **Policy:** The scales icon is used to represent policy. You should consider linking to policy for further information, if required.

-  Warning: The warning symbol acts in a similar way to the information point. It makes you aware that you should strongly consider the action you are about to take. Warnings are used in procedures, only when failure to follow the correct process will result in case technical failure.

Maintenance

There is a continuous process for reviewing the procedures to reflect the views received from users and analysis of training products. Procedures are constantly updated and maintained to ensure that they are fit for purpose and accurate. Feedback that is received allows early identification of any areas that require more detail or clarity.

SharePoint allows you to leave feedback on procedures and rate them on a star system one to five. This feedback will be monitored and used to improve procedures and used for management information (MI) purposes.

To leave feedback for a specific page, select **Add new feedback** at the bottom of the left-hand menu of the procedure page. The **URL** box is automatically filled in with the address of the page you're on. Select the **Category** and **Topic** from the dropdowns available. Enter your feedback in the comments box. Select **Save** to send the feedback. Feedback should be used to report cosmetic issues e.g. broken links, spelling errors, formatting issues and incorrect terminology.

Combining written feedback and the one to five rating scale provides an effective method for measuring the content of each procedure and quickly identify areas that require additional attention.

You should consider this guidance when deciding on the rating you give to a procedure. Guidance should be used constructively, with sound reasoning for the feedback and rate given.

To evaluate any overall performance of a procedure you are able to rate it out of five:

5 star = excellent – The procedure provided all required information to a high level of detail; it is clear and precise and provided the user with everything they require to perform their action.

4 star = very good – The procedure provided all required information, is clear and precise to follow and aids users in the required area.

3 star = good – The procedure provides users with information that they require to complete a process but could contain benefit from some additional information.

2 star = fair – The procedure holds some valid steps/information but is lacking detail and requires additional information to improve the contact level.

1 star = poor – The procedure lacks content and detail and is not fit for purpose, requires additional action to improve the content level.

SharePoint has the ability to update procedures on demand in real time without relying on external suppliers, this will allow you to know when and who's updated the material. This feature will ensure that the procedures are able to be updated when required without delay or disruption, ensuring the most up to date information is available.

NICMS replaces CMG in Northern Ireland

How will SharePoint be accessed?

- from a desk based icon
- from the 2012 system
- from the child maintenance group (CMG) intranet site.

What will SharePoint be used for?

SharePoint will be used to access all 2012 scheme procedures and will be available to all users.