



Services for Schools

Interactive Order System

School User Guide

2015-2016

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Overview

What is the Interactive Order System (IOS)?

The Services for Schools Interactive Order System (IOS) is a web-based electronic ordering system for the ordering of School Services. The IOS enables Schools to browse, select and submit requests for services within an online shopping environment.

System Requirements

- Internet Explorer 7 or
- alternative Web Browser eg., Google Chrome

Prior Assumed knowledge

This manual assumes that users will have some familiarity with the following areas:

- Basic computer skills using Windows
- Using a mouse and keyboard
- Using Internet Explorer or an alternative Web Browser
- Using hyperlinks
- Sending emails

Glossary of terms

School Status

- **LA** – Local Authority maintained school
- **Academy**
- **External** – other educational establishments wishing to purchase services provided by NCC

School Type

- **Primary**
- **Secondary**
- **Special**

IOS **Interactive Order System**

SP **Service Provider**

GETTING STARTED

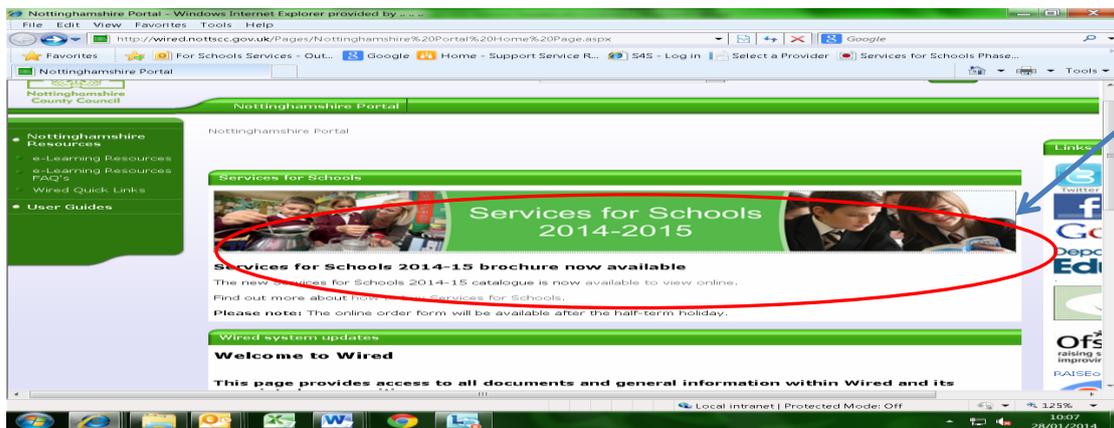
The majority of our service packages are available to purchase via the IOS online directory of services, following the “How to buy” link or alternatively by following the 'order online' link on Wired.

The 'order online' symbol is shown on each of the service pages where this facility is available.

Log In

You can log in to the Services for Schools Interactive Order System by either:

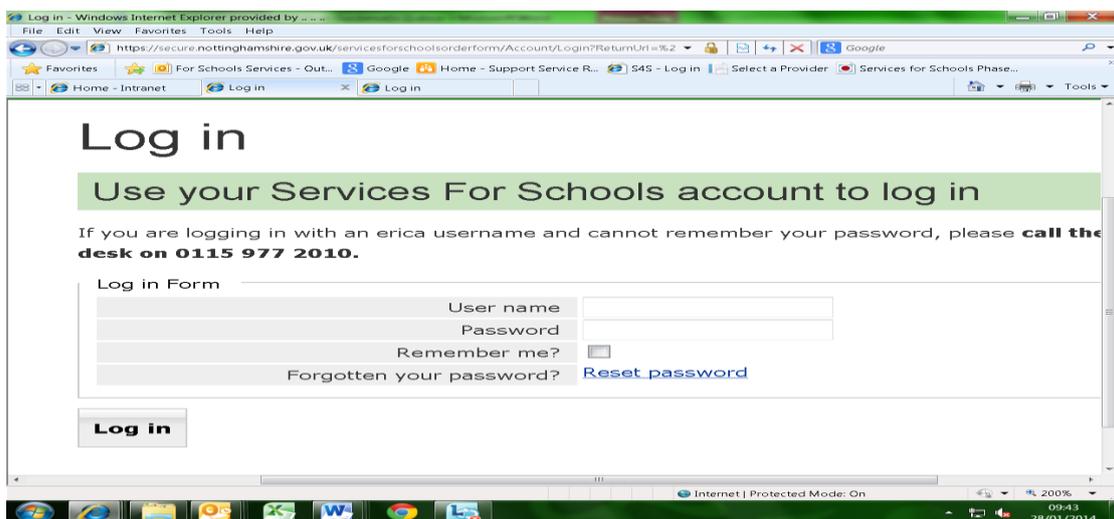
WIRED portal



Click on the green banner and this will take you directly to the NCC digital brochure

Or clicking on the link below:

<https://secure.nottinghamshire.gov.uk/servicesforschoolsorderform/>



The screen above is the initial Log in screen

If you are using the system for the first time the User Name is the school's Dfe number and the password is the first 5 digits of the School ERICA password. This will give you limited functionality – it will allow the school to set up users only; however if you need to

remind yourself of these details or your password, please contact our Schools Service Desk on 0115 977 2010 and select option 1.

The screenshot shows the website 'Services for Schools and Education Providers' with a navigation menu on the left and several content sections. The 'How to buy' section includes a link to 'Order ONLINE' and instructions on how to set up a new user account. The 'Full brochure' section has a link to 'Download a PDF version of 2015/16 Services for Schools brochure' and a 'Get in touch' link. A red circle highlights the 'Get in touch' link, and a blue arrow points to the 'Full brochure' section. A red arrow points to the 'Get in touch' link.

NCC digital brochure – here you can view the services on offer electronically and order online.

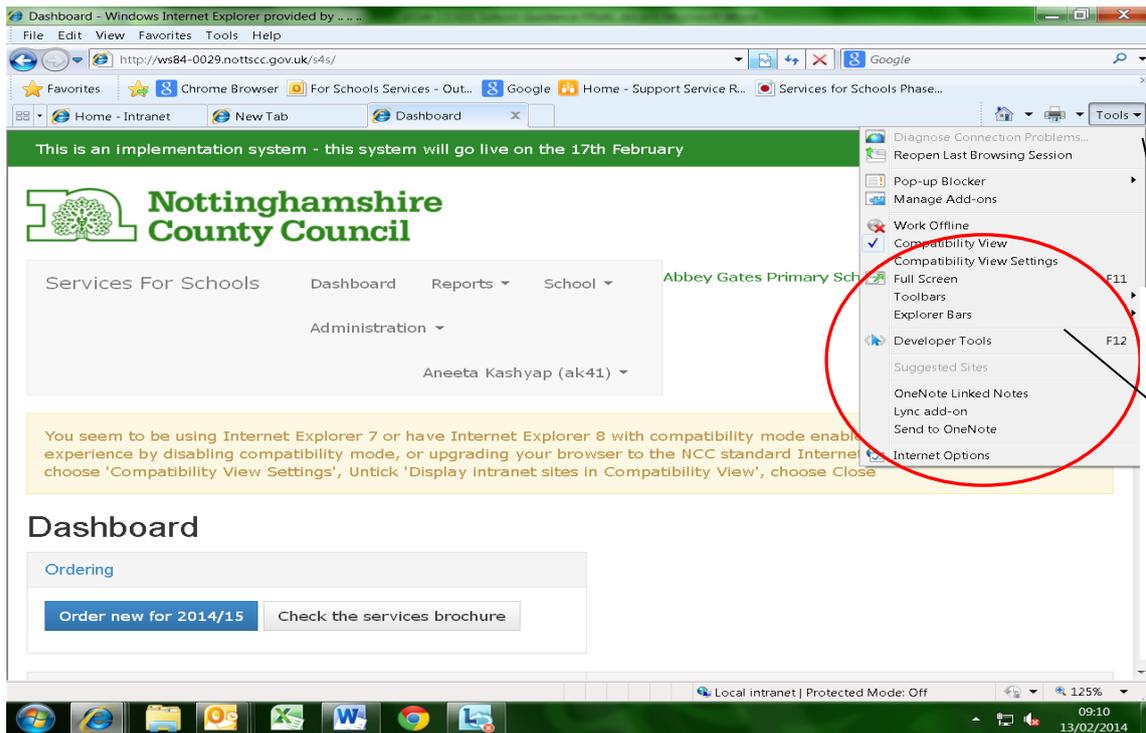
If you have a query use the "Get in touch" button to email Services for Schools

- add the website to your **favourites** (if using Internet Explorer) or **bookmark** the page (if you are using ~~Netscape Navigator~~).

Note: If you encounter a problem with logging into the system this could be due to a number of things:

1. You have not been set up on the system as a user, if this is the case then either:
 - Use the Services for Schools Contact form via the Get in Touch link,
 - Email servicesforschools@nottscc.gov.uk or
 - Telephone a member of the Services for Schools Team (see the *Getting Help* Section at the end of the Guidance)

OR
2. Your computer PC compatibility mode is turned on - to turn it off
 - Click Tools on Internet Explorer > Click Compatibility View Settings > Uncheck the box next to "Display Intranet Sites in Compatibility View"



Click Tools on Internet Explorer > Click Compatibility View Settings > Uncheck the box next to "Display Intranet Sites in Compatibility View"

3. For any other error message or if any of the information is incorrect please contact the Services for Schools Team. You will find contact information at the back of this Guide within the *Getting Help* section.

DASHBOARD SCREEN EXPLAINED

When the school logs on to the database the opening screen shows the 'Dashboard'. This view enables the school to navigate the various views using the grey panel at the top.

This button opens up the pdf version of the Services for Schools brochure

Navigation panel

Showing past history and live contracts

Finance	From: 01 Apr 2015	To: 31 Mar 2016	£2,035.00	View and Decide
Total			£2,035.00	

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The dashboard is the first screen a school will see when they log onto the Interactive Ordering System. This is a quick overview for the school and it allows the school administrator to navigate across the various options available to them.

- **Dashboard** – this is the area where a school undertakes the main ordering functions:
 - Order new enables the school to view all services currently being offered
 - Check the services brochure redirects the school to the online brochure
 - Updates gives an overview of the activity undertaken within the system
- **Reports** – this allows the school to export current buying activity under their account for sharing at Governors meetings or for accounting purposes
- **School** – this is the area within the ordering system where the main details of the school are held
 - These are details the system uses to calculate some of the charges. It includes the name, address and contact details of the school

OVERVIEW OF ORDERING PROCESS STAGES

Each School has a School User or Users identified who can access the IOS. After the initial login Schools can add new Users to access the IOS portal to order/set up contracts for their school.

Schools will see their history or if not ordered before will see not contracts.

Various contract statuses within the ordering stages explained:-

1. Suggested

This is the start of the renewal process.

A provider suggests a contract for the school for a future date, using previous year's information.

Please note: the start date of the contract must be in the future.

The Information held on a **'Live'** or **'Archived'** contract can be used by the Service Provider to create or edit a **'Suggested'** contract for each school for a future date.

- a. Schools can accept this suggestion which will change the status to **'Live'** once the start date is met or the minimum notice period has expired
- b. Schools can amend the suggestion which will change the status to **'Pending'**
- c. Schools can **'Reject'** the suggestion

2. Live

The contract is currently live and current date is before its end date.

- a. Providers can use this to generate a **'Suggested'** contract for a future date
- b. Schools can choose to either
 - Accept – this will generate a **'Live'** status
 - Amend - which generate a **'Pending'** status and will convert to a **'Live'** status once the contract start date has lapsed.
 - Reject – this will generate an email to the Provider who will suggest an alternative.

3. Pending

This is a contract status which is created by a school either from scratch or edited by them from a **'Suggested'** contract.

4. Rejected

A **'Rejected'** status is created when the school have said no to a **'Suggested'** contract.

- a. Provider can **'Edit'** this to **'Create'** a Suggested contract
- b. Schools can accept, amend or reject the suggestion

5. **Archived**

The contract has passed its end date after which time the information held is archived.

- a. Provider may use an archived contract to create a **'Suggested'** contract and start the renewal process
- b. Any queries or requests to change your service options after the publication date must be addressed to the Services for Schools Team. Please refer to the Section: *Getting Help* at the end of this Guide.

ORDERING PROCESS

Clicking on the **Order new for 2015/16** button will open up the screen below and you can start the ordering process:

Please Note: By ordering you are accepting the Terms and Conditions for each contract. Some providers have special Terms & Conditions and a note of this will be displayed,

The first step for ordering is to decide what you wish to purchase.

To see details of the offer then there are two ways to do this either:

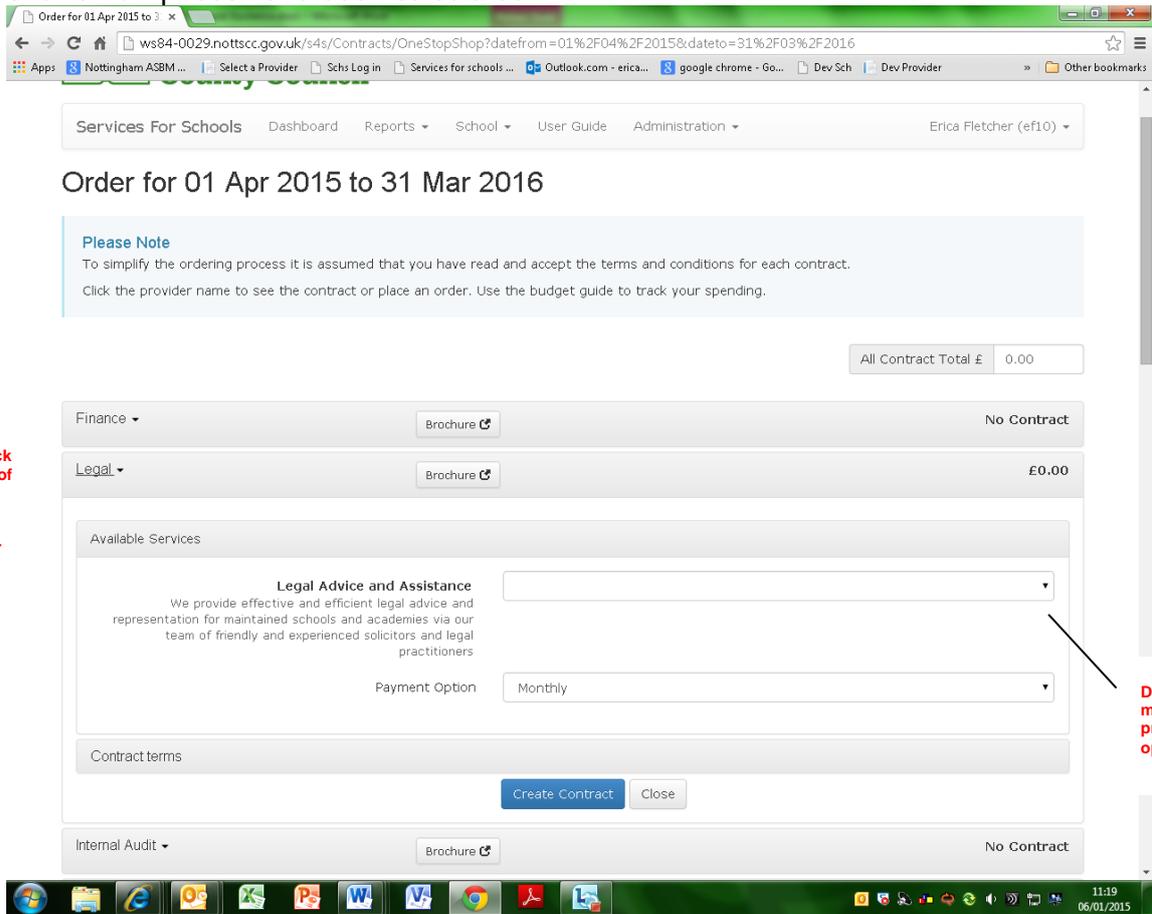
1. Click on the **Check the services brochure** button which is available on the front page or
2. Click on [Brochure](#)

The screenshot shows a web browser window displaying the Nottinghamshire County Council 'Order for 01 Apr 2015 to 31 Mar 2016' page. The page header includes the council logo and navigation links. A 'Please Note' section states: 'To simplify the ordering process it is assumed that you have read and accept the terms and conditions for each contract. Click the provider name to see the contract or place an order. Use the budget guide to track your spending.' Below this, a table lists various services with a 'Brochure' link and a 'No Contract' status. The total amount is shown as 'All Contract Total £ 0.00'. The browser's address bar shows the URL: ws84-0029.nottscc.gov.uk/s4s/Contracts/OneStopShop?datefrom=01%2F04%2F2015&dateto=31%2F03%2F2016.

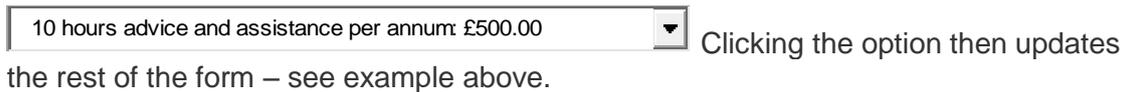
Service Category	Action	Status
Finance	Brochure	No Contract
Legal	Brochure	No Contract
Internal Audit	Brochure	No Contract
Risk & Insurance	Brochure	No Contract
HR	Brochure	No Contract
Staff Absence	Brochure	No Contract
Payroll	Brochure	No Contract
Governing Learning & Development	Brochure	No Contract

If you want to review the service options being offered a more detailed description is available by clicking the provider name. This will open up a screen which displays the service options available (if there is more than one).

The school is able to view the various service options being offered and the grey button shows how prices have been calculated.

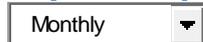


Schools are able to check the prices being charged by using the dropdown arrow and if the SP is offering a range of service options this will be shown here e.g. for Legal services you are able to purchase either 5 or 10 hours of legal advice.



The system also allows the School to choose their preferred payment option

Payment Option

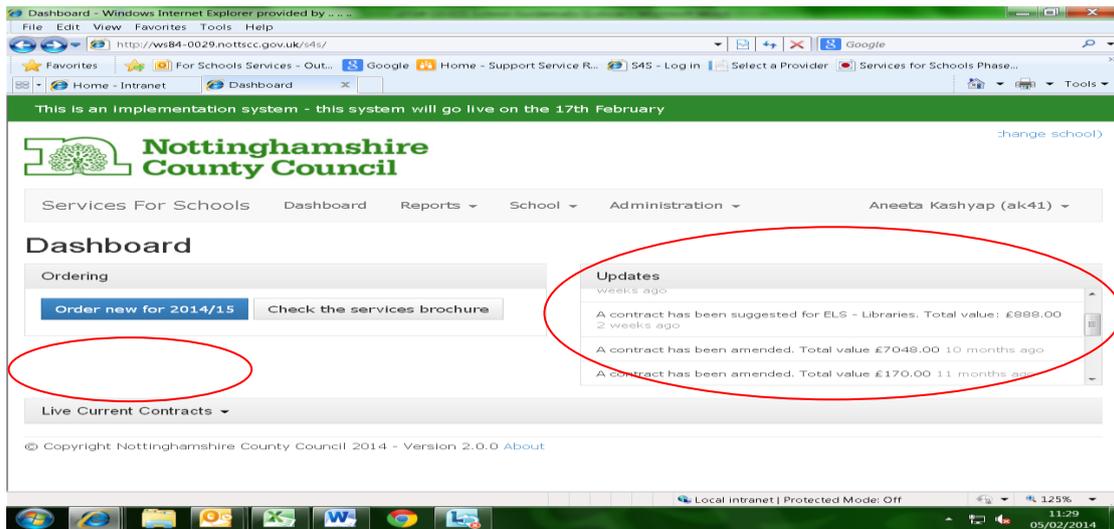


[Contract terms](#) - this is where you will find the full Terms and Conditions – please note all T&C’s have been ticked as accepted for ease of navigation. Some services do have additional special conditions and these will be found by clicking this button.

When a school is ready to go ahead with the contract clicking on the



However if the school decides they are not ready to proceed yet, clicking the **Cancel** button navigates the user back to the list of providers.



a. Updates

This is a log of the various amendments made by the school, details of these will also be emailed to the central email address provided or individual email addresses for representatives of the service.

If the SP has 'Suggested' a contract this will appear here; Updates provide the school with a summary of the activity that has taken place.

b. Live Current Contracts

This section will have the various contract statuses available for the school to view the stage of their contract. For example if the contract has been suggested then there will be an additional bar above the 'Live Current Contracts' bar labelled 'Suggested Current Contracts'. By clicking on the dropdown arrow this will reveal a list of the contracts in that status.

This allows the school to decide if they will wish to accept the suggestion or amend; these actions will move this contract from 'Suggested' to 'Live' if accepted or to a new bar labelled Amended Current Contracts.

REPORTS

Schools can generate reports to provide management information on their current buy back of services. Reports are available in 'Summary by Budget Code' format

Summary by Budget Code for 05 February 2014

Export to Excel

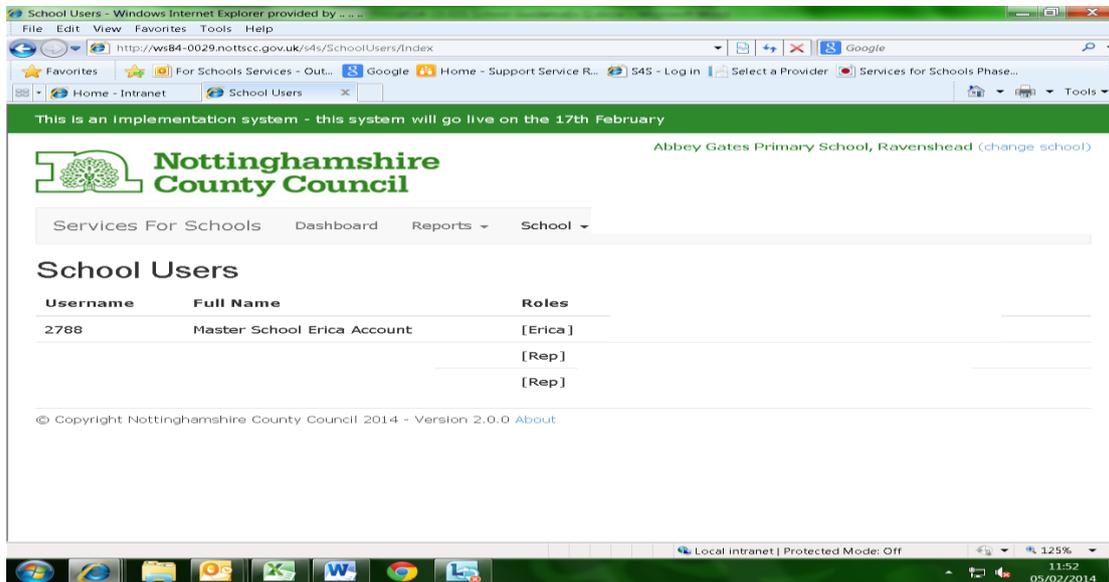
CFR Ref	Provider	Service	Option Description	Budget Code	Cost
	Catering	School Catering Service - Primary Schools	School Catering Service - Primary Schools		£6,808.00
	Cleaning	Sickness absence - after 1st day of absence	Caretaker cover		£4,464.00
				Sub Total	£11,272.00
E09	Governing Learning & Development	Full Package	Governor support full package	12030	£1,040.00
				Sub Total 12030	£1,040.00
E10	Staff Absence	Teachers Standard Protection	3 - 195 days	12080	£8,786.44
				Sub Total 12080	£8,786.44

- This report has been designed to enable the School to export to their local system.
- The report can be printed either directly from the screen or by exporting to Excel thereby enabling the School to print to a preferred presentation.

SCHOOL TAB

By clicking on the School tab it creates a dropdown menu allowing you to review :

- School Users
- School Details



The school users screen will list all the current users listed for the School.

The Master School ERICA Account cannot be amended as this is the account which is centrally controlled at Nottinghamshire County Council. In the event that you have forgotten your password it enables the Nottinghamshire County Council Helpdesk to allow access. (0115 977 2010)

The School can nominate as many Users (Rep) as they wish to but beware that access via this allows the User to enter into/amend or **delete (cancel)** contracts.

The School Details tab (see print screen on page 15) allows the school to view the current data being held for the school. This data is used by the Providers to offer various service options and, it is important that schools keep this information up to date or prices may be calculated incorrectly.

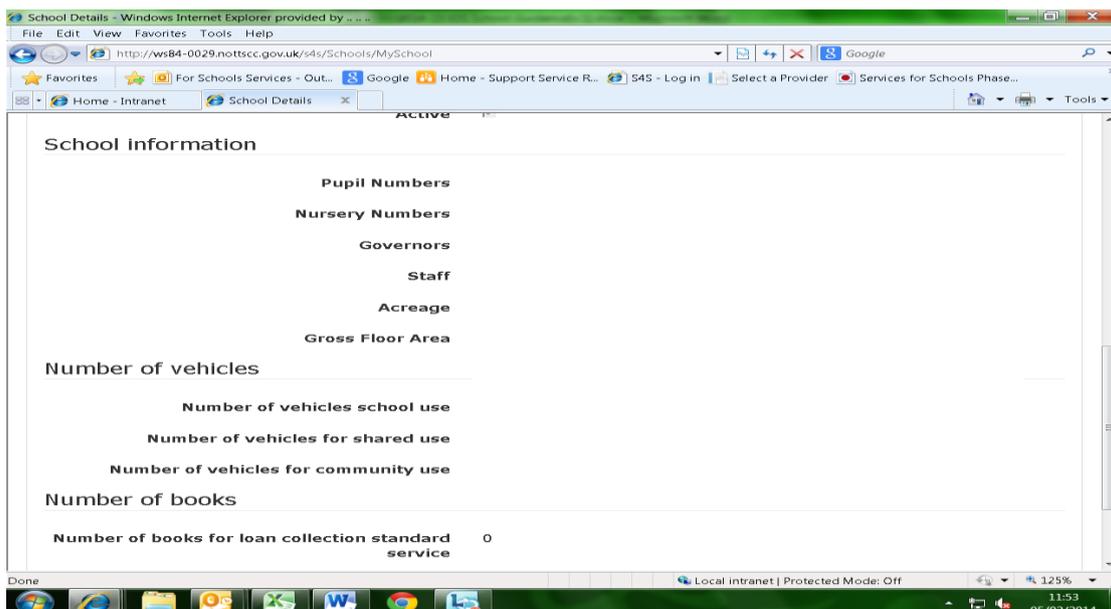
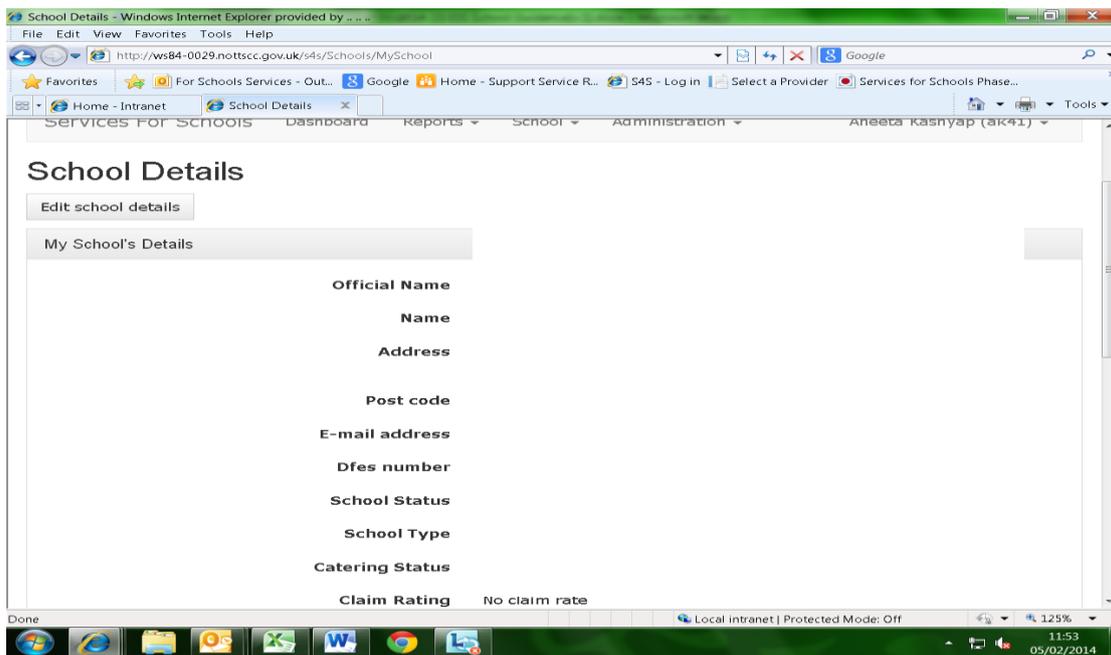
For example

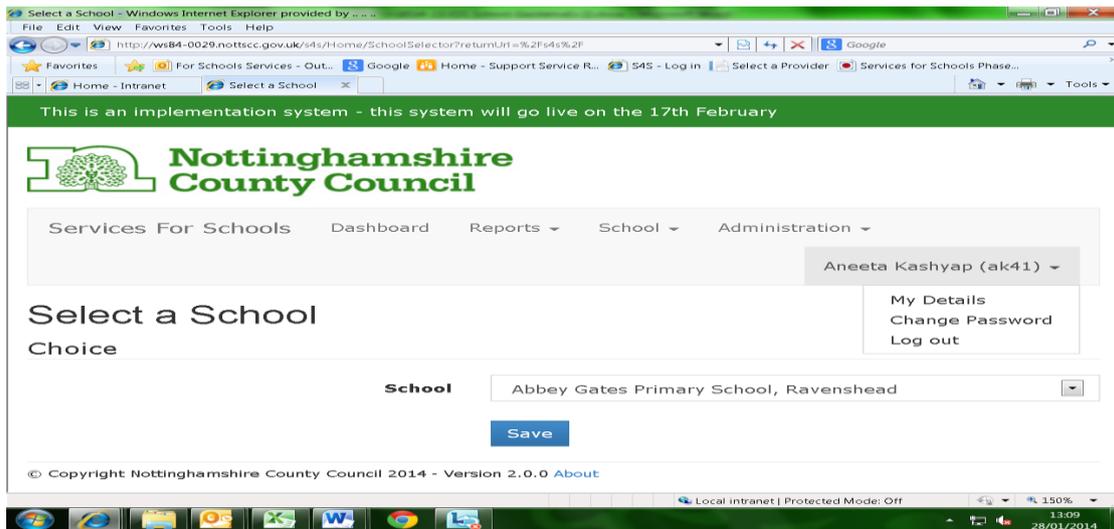
- a price may rely on the School Status – some services are not currently available to a school if it converts to an Academy - this is true of the Risk and Insurance offer
- a price may be determined by the size of a school and the criteria used to configure the school as Small/Medium/Large is dependent on the numbers on roll
- HR absence is calculated by taking the headcount figures so the current numbers under Staff need to be correct
- Education Library Service (ELS) calculates its charges by the number of books on site

If any of the current information held is incorrect please let the System Support Admin know by email so this can be verified and amended.

Note: Schools are able to update the following themselves:

- Number of vehicles
- Number of books





You are now logged out of the system and returned to the original log in screen.

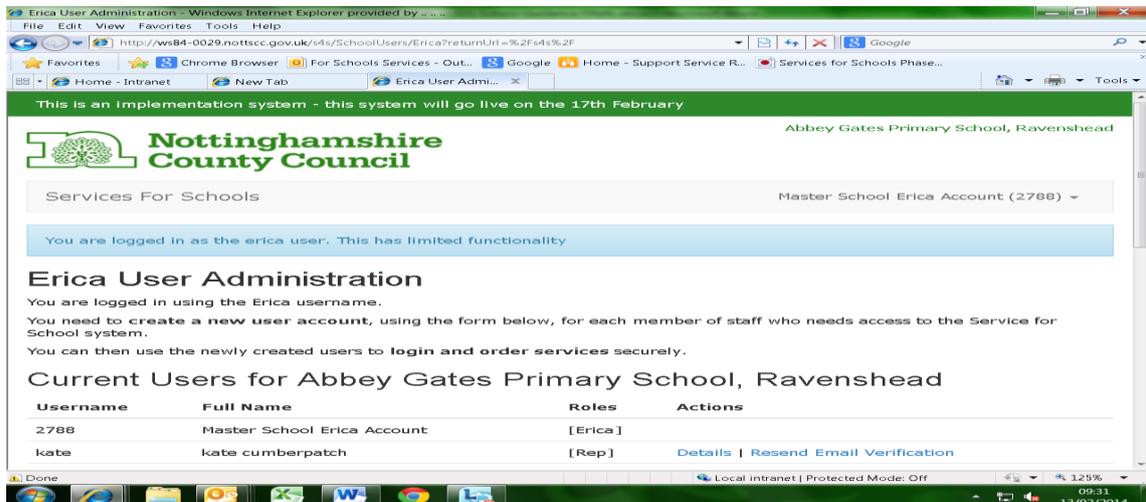
NOTE: YOU WILL NOT LOSE ANY OF YOUR SCHOOL'S CURRENT SUBMISSIONS WHEN YOU LOG OUT OF THE SYSTEM.

MAINTAIN AND ADD USERS

ADD A NEW USER

To add a new user a School needs to login using the schools ERICA userid and password.

Please Note: When you use the schools ERICA login this has limited functionality and schools will have to enter users to activate full functionality.



The screenshot shows a web browser window titled "Erica User Administration - Windows Internet Explorer provided by ...". The address bar shows the URL: <http://ws84-0029.nottsc.gov.uk/s4s/SchoolUsers/Erica?returnUrl=%2Fs4s%2F>. The page content is titled "Create a new user account. Registration Form".

The form contains the following fields:

- UserName**: Text input field with a hint "e.g. Your Active Directory/Sums username".
- Password**: Text input field.
- Confirm password**: Text input field.
- First Name**: Text input field.
- Last Name**: Text input field.
- Email**: Text input field with a hint "This should be a personal work email address".
- Telephone**: Text input field.
- Job Title**: Text input field.

Below the fields, there is a checkbox labeled "Is the user a representative of the school? They will receive notifications of activity by email" which is checked. A note below the checkbox states: "When you click 'Create User' an email will be sent to the address you entered above."

The Windows taskbar at the bottom shows the system tray with the date "13/02/2014" and time "09:33".

GETTING HELP

For any queries relating to the Interactive Order System please contact by:

- ✓ either email 
servicesforschools@nottsc.gov.uk

- ✓ or  Services for Schools Team on 0115 97 72338

SYSTEM SUPPORT ADMIN

Erica Fletcher

0115 97 72338

erica.fletcher@nottsc.gov.uk