

Perspective Lite Secure Portal Complete User Guide V7 March 2025



Perspective
Lite



NCER



Contents	Page No.
<u>How to Access Perspective Lite</u>	3
<u>Home Page</u>	5
<u>Receiving Files from Derbyshire</u>	6
<u>Sending Files to Derbyshire</u>	8
<u>Administration</u>	13
<u>Access and Security</u>	17
<u>Further Support Contact Details</u>	17

Accessing Perspective Lite

Perspective Lite can be accessed at <https://perspective.angelsolutions.co.uk>.

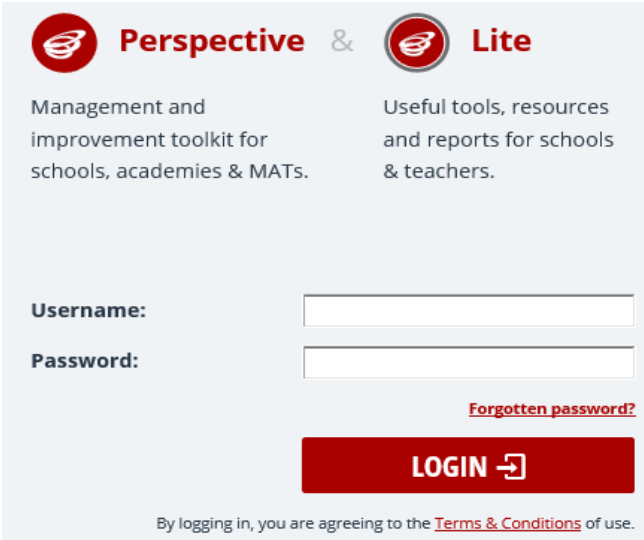
There is also a link with the description of 'Secure Portal' (top right corner) on the [Derbyshire SchoolsNet](#) website.

 [Secure portal](#) [View all re](#)

Search our website...

We recommend you add these links to your internet browser's favourites.

To access the site, enter your login information which has been provided to all users. If you do not have your login information please contact CS Web team on 01629 536797 or email cs.web@derbyshire.gov.uk.



Perspective & Lite

Management and improvement toolkit for schools, academies & MATs.

Useful tools, resources and reports for schools & teachers.

Username:

Password:

[Forgotten password?](#)

LOGIN →

By logging in, you are agreeing to the [Terms & Conditions](#) of use.

Logging in: The *forgotten password* link will automatically send you a reminder of your details and show you the **Angel Solutions Help Desk contact details**.

PLEASE NOTE: It is **ESSENTIAL** that once you have logged in successfully for the first time, you change your [password](#).

N.B. Please do not share your login details with any other members of staff.

1. On the Menu bar, got to Settings - select the Settings icon 

2. Select Account Settings

 **ACCOUNT SETTINGS**

3. Select Change Password

 **CHANGE PASSWORD**

4. Change your password using specification below and Save.
(It's recommended you change your password every 60 days)


Forgotten login details?

Please enter your email address or username below and **we will send you an email** containing a link to reset your password. This link will expire after 120 hours, so please use it promptly.

Need help? [Visit our help guide](#).

Please Note: If you have multiple accounts using the same email address, you will need to enter a username (not email) in the form below or call the Perspective Help Desk on 0845 129 7197.

Email Address or Username:

<input type="checkbox"/> I'm not a robot	 reCAPTCHA Privacy - Terms
--	---

 **Email Reset Link**

5. Password specification:

- Must have **at least one** uppercase letter (e.g. A, B,C...Z)
- Must have **at least one** lowercase letter (e.g. A, B,C...Z)
- Must have **at least one** number (e.g. 0, 1, 2...9)
- Must have **at least one** special character (non-alphanumeric, e.g. \$, # % ^ & *)
- Must be a **minimum** of 8 characters and a **maximum** of 20 characters long
- **Cannot contain** a banned word or phrase (e.g. admin, password, user, school, perspective, primary, secondary, qwerty)
- **Cannot contain** your forename, surname or username
- **Cannot** be the same as the last 3 passwords you have used

6. Click on 'Back to my Account'

 **BACK TO MY ACCOUNT**

7. Click on 'Back to Settings'

 **BACK TO SETTINGS**

8. Click on 'Back to Home'

 **BACK TO HOME**

Home Page

When you log on to Perspective Lite, you will see your individual school inbox, called LA Documents.

PUTTING ARTIFICIAL INTELLIGENCE INTO PERSPECTIVE
Benefit from new AI tools that boost efficiency and supercharge productivity

EMBRACE THE POWER OF AI TODAY

LA Documents

Quick and easy access to important documents sent by your LA.

Analysis (Insight)

Visual, informative & insightful analysis for your school.

Real Time Data Trends

Just like the Ofsted Data Dashboards but much much earlier!

Send Files

Send files to your Local Authority quickly & securely. Tags files and see an audit trail of previous returns.

Announcements

- Assess your curriculum, your way - Webinar**
Assess your curriculum, your way. We thought you might be interested to hear about some of the work that our team at Balance are doing to help schools assess their curriculum. What is Balance? If you haven't heard of Balance, it is our curriculum, planning and assessment tool. We have taken feedback received directly from Head Teachers to ensure...
16/5/2022
- Why more and more Headteachers choosing Balance - LIVE Webinar!**
Want to know why Headteachers up and down the country are choosing Balance? We think you'll love our webinar TOMORROW - The Balance team will be joined by a real Headteacher giving their honest opinions on the

Watchsted

Inspector Profile: Mr Smith
Total Inspection: 7

Want to look up an Ofsted Inspector?
Watchsted makes it possible to see a profile of each Ofsted lead inspector. To unlock this great feature.

WATCH THIS VIDEO NOW

Parent View by Ofsted

0
Responses for your school within the last 30 days

FIND OUT MORE

System Icons

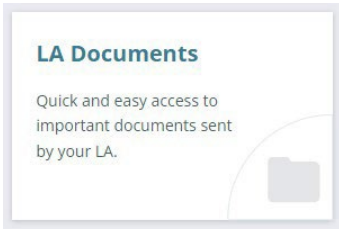
The icons at the top right-hand side of the screen are Help, Settings and Logout:



**Please refer to [‘Further Support’](#) section on page 15 for your usual first point of contact for assistance as the Help button is linked to the Angel Solutions Ltd Helpdesk.*

Receiving Files from Derbyshire

The secure documents folder from Derbyshire is accessed via **LA Documents**.



HOME LA SERVICES NEWS WATCHSTED TOOLS UNLOCK MORE

DOCUMENT POOL

If you are unable to locate a document or have any queries regarding a document you have been sent, please contact your Local Authority.

SEE LATEST LA DOCUMENTS BACK TO HOME

- LA Documents
 - Confidential (Head Only)
 - Derbyshire Documents
 - 1 May Files
 - 2 June Files
 - 3 July Files
 - 4 August Files

Upgrade Perspective now to be able to create your own folders and store your own documents, such as evidence and policies. [Click here to find out more...](#)

You are here : LA Documents

UP FOLDER

Type	Name	Updated At	Options
	Derbyshire Documents	-	view

Documents

To view LA Documents, click on ‘Derbyshire Documents’...
Up to four folders will be visible, being the latest four months of the year so far.

HOME LA SERVICES NEWS WATCHSTED TOOLS UNLOCK MORE

DOCUMENT POOL

If you are unable to locate a document or have any queries regarding a document you have been sent, please contact your Local Authority.

SEE LATEST LA DOCUMENTS BACK TO HOME

- LA Documents
 - Confidential (Head Only)
 - Derbyshire Documents
 - 1 May Files
 - 2 June Files
 - 3 July Files
 - 4 August Files

Upgrade Perspective now to be able to create your own folders and store your own documents, such as evidence and policies. [Click here to find out more...](#)

You are here : LA Documents > Derbyshire Documents

UP FOLDER

Type	Name	Updated At	Options
	1 May Files	-	view
	2 June Files	-	view
	3 July Files	-	view
	4 August Files	-	view

Four standard folders have been created within each month – EHSR Report Confidential, General, SEND, Shared Services HR, but each folder will only be visible if there are documents within it.

DOCUMENT POOL ?

✉ If you are unable to locate a document or have any queries regarding a document you have been sent, please contact your Local Authority.

SEE LATEST LA DOCUMENTS

BACK TO HOME

- LA Documents
 - Confidential (Head Only)
- Derbyshire Documents
 - 1 May Files
 - 2 June Files
 - 3 July Files
 - 4 August Files

Upgrade Perspective now to be able to **create your own folders** and **store your own documents**, such as evidence and policies. [Click here to find out more...](#)

You are here : LA Documents > Derbyshire Documents > 4 August Files

UP FOLDER

Type	Name ▲	Updated At	Options
📁	EHSG Report Confidential	-	view
📁	General	-	view
📁	SEND	-	view
📁	Shared Services HR	-	view

Any documents sent to your school from Derbyshire will appear in these folders and the Headteacher will receive a daily email alert summarising any new documents that have arrived from the LA in the last 24 hours.

All documents uploaded to the secure area on **Perspective Lite** will only be made available for **90 days and will then be deleted**.

It is advisable that you download any files sent to you via the secure portal and save on to your school’s network drive for future reference as soon as possible. This will ensure copies of documents containing confidential information are not held on a third-party system for excessive periods of time. Schools cannot delete files from the folders themselves, this needs to be done by the LA and schools should email cs.web@derbyshire.gov.uk with details of any file which requires deleting.

Sending Files to Derbyshire

1. File naming convention

You can send a file to Derbyshire that is stored on your Computer/Network. Firstly, you need to apply the file naming convention which will ensure the relevant service receives your information promptly:

830nnnn_XXXdocumentdescriptionyyyymmdd

(1) (2) (3) (4)

Example file name: 8301102_INFOeysfreturn20170731

The file name is made up of the following four elements:

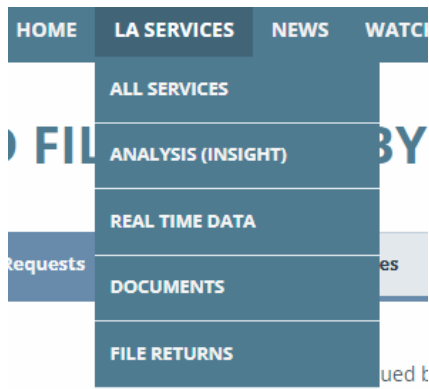
1	A seven-digit School DfE number consisting of 830nnnn (830 = Derbyshire and the remaining four digits identify the school – i.e. 8302000 for Leys Junior School)
2	XXX = DCC service code/team initials in upper case e.g. SEN (see list of Services below). This is vital as the document will not get to the correct Service without it.
3	Documentdescription = meaningful document description all in lower case; keep it brief
4	yyyymmdd = date e.g. 20161023 (or you can use a version number instead e.g. V01)

Service Code	Service Name
ADMISS	Admissions
AUD	Audit Service
AUTISM	Autism Outreach
BSS	Behaviour Support
CME	Children Missing from Education
EHE	Elective Home Education - deregistration
EIS	Education Improvement Service
EP	Education Psychology
EWS	Attendance Process team - Penalty notices
FIN	Finance
FSM	Free School Meals
GOV	Governor Support
HR	Occupational Health Referrals
INC	Exclusion and Access - exclusions, off-site direction, managed moves, part-time timetables, Fair Access
INFO	EYFS, Phonics
IPT	Integrated Pathways
NCMP	National Child Measuring Programme
OOST	Out of School Tuition
PLAY	Positive Play
SAFE	Safeguarding, Child Protection
SEN	SEN – (EHCP via EHC Hub)
SP	Starting Point
SPSS	Sensory and Physical Support Service
SSF	School Support Finance - Budget Monitoring
SSHR	HR Services – starters, leavers, adjusts, DBS, Time Team
VS	Virtual School

2. From the home page, click on ‘Send Files’:



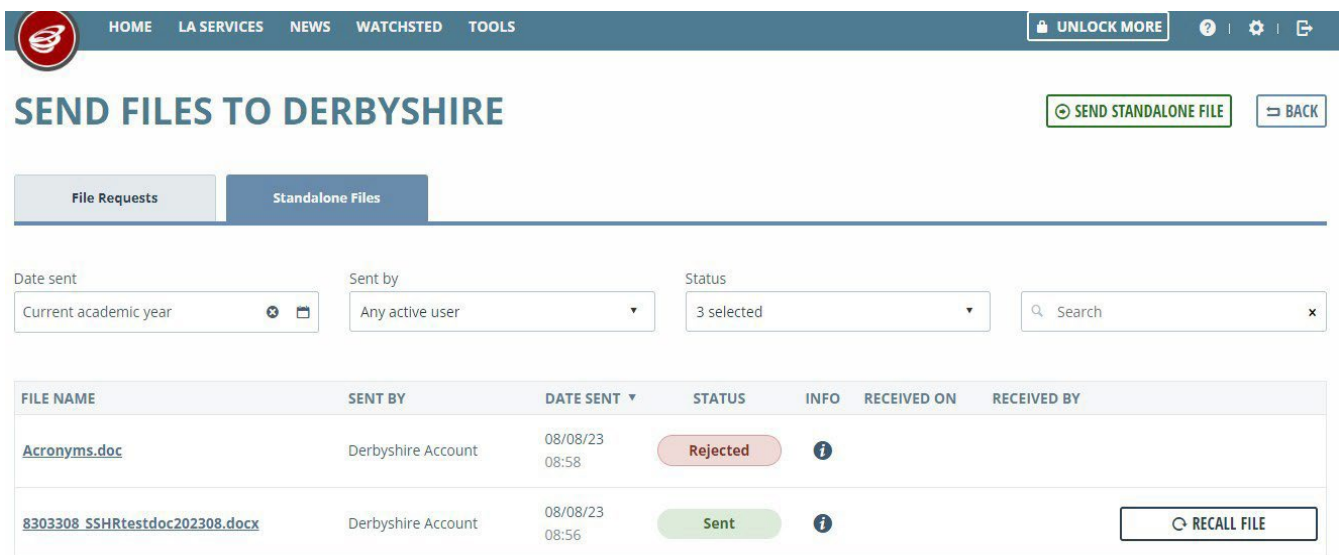
Alternatively, you can access this via the Menu Bar: go to LA SERVICES then FILE RETURNS.



Both the above routes will load up the ‘Send Files to Derbyshire’ page, which looks like this:

3. The page displays two tabs: File Requests and StandaloneFiles.

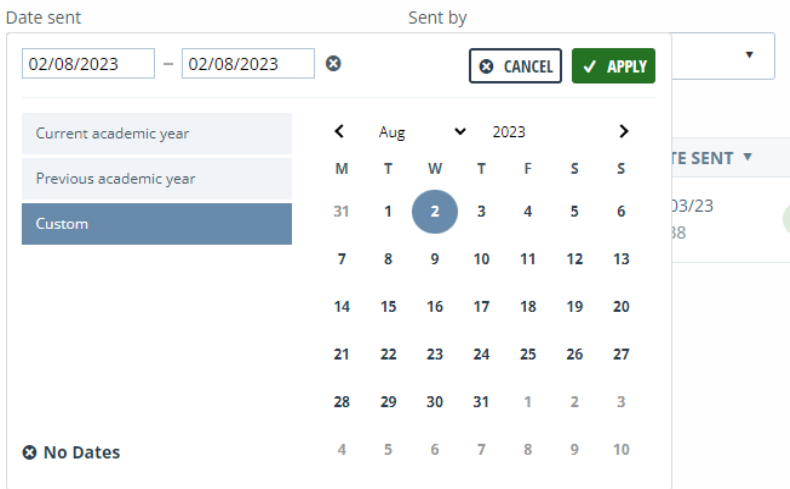
Make sure the ‘Standalone Files’ tab is selected.



Note: ‘File Requests’ is a facility within the system for LAs to issue file requests, targeting specific schools as part of a single file collection. **Please note that Derbyshire LA is NOT currently using File Requests.** (Schools will be notified if this changes in the future).

4. With the ‘Standalone Files’ tab selected; you can view files already sent to Derbyshire.

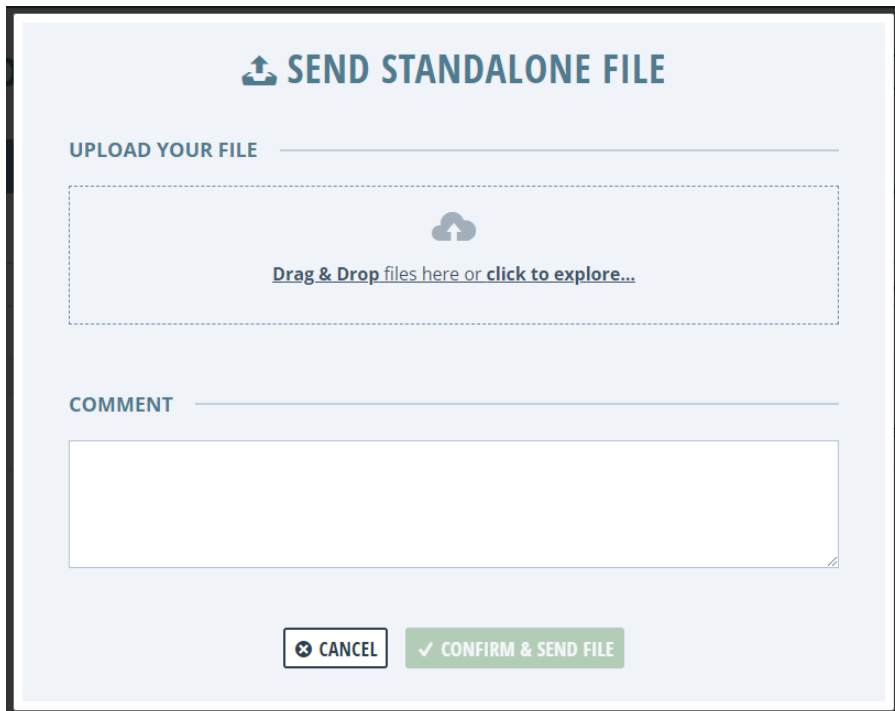
You can also filter files by date or user, using the ‘Date sent’ or ‘Sent by’ options:



5. To upload a file, click on the ‘Send standalone file’ button:



Either **drag and drop** a file into the box or **click to explore** to browse and select your file.



- The following Tags screen will then pop up, with your selected file displayed in the box at the top (if you’ve selected the wrong file, you have the option to discard it by clicking on the dustbin icon):

SEND STANDALONE FILE

UPLOAD YOUR FILE

830nnnn_INF0testdoc20230804.docx
🗑️

TAGS

<input type="radio"/> Census	<input type="radio"/> EYFSP	<input type="radio"/> Phonics
<input type="radio"/> KS1	<input type="radio"/> KS2 TA	<input type="radio"/> KS3 TA
<input type="radio"/> BSS	<input type="radio"/> FIN	<input type="radio"/> FSM
<input type="radio"/> HR	<input type="radio"/> INC	<input type="radio"/> INFO
<input type="radio"/> SEN	<input type="radio"/> Other	<input checked="" type="radio"/> No tag

COMMENT

✖ CANCEL
✔ CONFIRM & SEND FILE

- Please ensure that the file displayed is the correct file and that it is named correctly, according to the [file naming convention](#), then select the **‘No tag’ option**.
- Finally click on ‘Confirm & send file’ to securely transfer the file to Derbyshire.

Your file/s will now be displayed as ‘Sent’ in the ‘Send files to Derbyshire’ screen:

SEND FILES TO DERBYSHIRE

📄 SEND STANDALONE FILE
⇐ BACK

File Requests

Standalone Files

Date sent
01/09/2022 - 31/08/2023

Sent by
Any active user

Status
3 selected

🔍 Search

FILE NAME	SENT BY	DATE SENT	STATUS	INFO	RECEIVED ON	RECEIVED BY
830nnnn_INF0testdoc20230804.docx	Alexandra Mackay	04/08/23 14:05	Sent	📘		

🔄 RECALL FILE

If you believe you have uploaded the wrong document, or you wish to make changes to it, click the **RECALL** option next to it. Please note that once the file has been received by the LA, you will be unable to recall it.

FILE NAME	SENT BY	DATE SENT	STATUS	INFO	RECEIVED ON	RECEIVED BY
830nnnn_INF0testdoc20230804.docx	Alexandra Mackay	04/08/23 14:05	Sent	<i>i</i>		

[RECALL FILE](#)

If you have multiple documents to go to a specific service these can be uploaded in a folder. However, the folder must be zipped and named correctly.

- To check if files were received by Derbyshire, view the table in the ‘Standalone Files’ section. Use the necessary filters to change your results seen in the table.

The screenshot shows the 'SEND FILES TO DERBYSHIRE' interface. At the top, there are navigation links: HOME, LA SERVICES, NEWS, WATCHSTED, TOOLS, and an UNLOCK MORE button. Below this is the main heading 'SEND FILES TO DERBYSHIRE' with buttons for 'SEND STANDALONE FILE' and 'BACK'. The interface is divided into 'File Requests' and 'Standalone Files' tabs. Under 'Standalone Files', there are filters for 'Date sent' (Current academic year), 'Sent by' (Any active user), and 'Status' (3 selected). A search bar is also present. Below the filters is a table of file uploads:

FILE NAME	SENT BY	DATE SENT	STATUS	INFO	RECEIVED ON	RECEIVED BY
Acronyms.doc	Derbyshire Account	08/08/23 08:58	Rejected	<i>i</i>		
8303308_SSHRtestdoc202308.docx	Derbyshire Account		Rejected			RECALL FILE
Excel_Test_Blank.xls	Derbyshire Account		Rejected			
8303308_SENTtestdoc202308.docx	Derbyshire Account		Sent			RECALL FILE
8303308_INF0testdoc202308.docx	Derbyshire Account	08/08/23 08:54	Sent	<i>i</i>		RECALL FILE
830nnnn_INF0testdoc20230804.docx	Alexandra Mackay	04/08/23 14:05	Received	<i>i</i>	07/08/23 13:03	Owen Howarth

A detailed popup for the 'Rejected' status shows the following information:

- Status:** Rejected
- Rejected:** 08/08/23 at 08:59. No Service Code in filename.
- Sent:** 08/08/23 at 08:58 by Derbyshire Account. CS.web@derbyshire.gov.uk

It is essential the file is named correctly for it to reach the correct recipient. If not named correctly, the file may be rejected by Derbyshire, in which case you will see ‘Rejected’ in the status column. The Headteacher will receive an email stating the file has been rejected and by whom. Files received correctly by Derbyshire and passed to the relevant Service will display ‘Received’ in the status column. Hover over the ‘i’ (information button) to see details such as the name of the person who downloaded or rejected the file, including the necessary dates and times this was actioned.

N.B. Files that you’ve sent to Derbyshire will remain available to download in the secure area for 90 days. If you need to download a copy you can enter the relevant search dates to find it.

Always keep a copy of any files you upload on your secure school network.


Administration

Manage Users

Schools can now create and manage their own users. However care must be taken to adhere to the Derbyshire [information sharing agreement](#) your school has signed, when allocating permissions and managing user accounts.

If you are an **SLT (admin) user** you can create, edit, archive and delete **standard** users for your school. However, only the Headteacher can add/edit or archive the SLT team in Perspective Lite.

If your school has a new Headteacher please email cs.web@derbyshire.gov.uk who will set up the new Headteacher account and delete the old one.

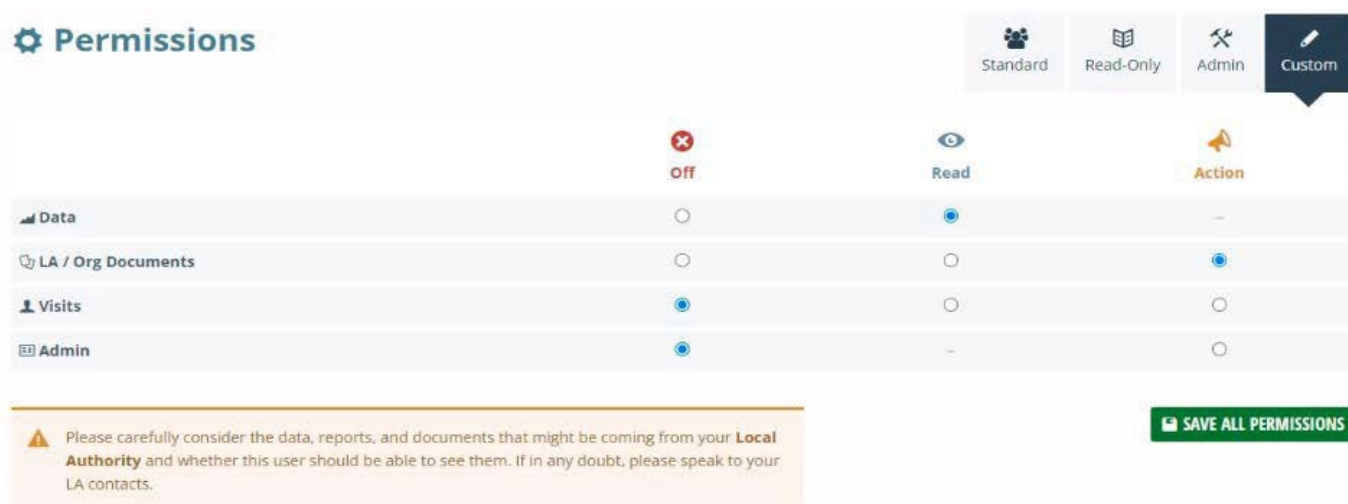
To create a user, click on **Settings**  and **Manage User**; then **Create New User** and fill in all the relevant details then click the **Save** icon. *Please Note:* First Name, Last Name and Email address are ALL required fields. When you are ready to send the new user their welcome email which contains details of how to access Perspective Lite and set up their password, then simply click **Send welcome Email**.

To edit or archive a user, simply click the relevant option next to their name in the User Management Screen.

To archive several users at once, tick the box to the left of the names of all the users you want to archive, then click **Archive Selected**.

Archiving a user will archive them in a way that lets you recover them later if necessary. You can do this from the **Archived Users** screen which you can access via the **View Archived Users** button in the **Manage Users** screen.

To edit the user's permissions, click on the permissions tab in the **User Management** screen. Once you arrive at the Permissions screen, you will see the following options:



Data controls access to the Real Time Data module (attainment data bar charts) and school-level data in the Reports module.

LA / Org Documents controls access to the documents sent to you by the Local Authority. It also controls whether someone can send files back to your LA, providing your Local Authority subscribe to the File Returns module.

Visits controls access to the records of visits sent by your Local Authority.

Admin controls who can edit and update users. Please note, you will also need to add a user into the SLT team for full admin permissions.

There are three permission options that you can give users access to:

Off: The user cannot access this area of the system

Read: The user has basic access to the area. This gives them viewing rights only (for example, Read access will allow a user to see that a visit has occurred, but they won't be able to download the report).

Action: Gives the user full access to the module and all downloadable content.

Archive Users

You can remove someone's access to Perspective Lite quickly, by setting them as an archived user. This will stop them from being able to access the system in future. You can reactivate their account if needed.

To archive a user:

Click on **Settings** (cog icon), then select **Manage Users**.

Locate the user that you would like to archive and then click the **Archive** button.

Only the Headteacher or an SLT member can archive users.

To reactivate a user: click **View Archived Users** on the **Manage Users** page. This will list all staff that have previously been archived. Click **reactivate** next to their name to un-archive them.

Managing User Roles

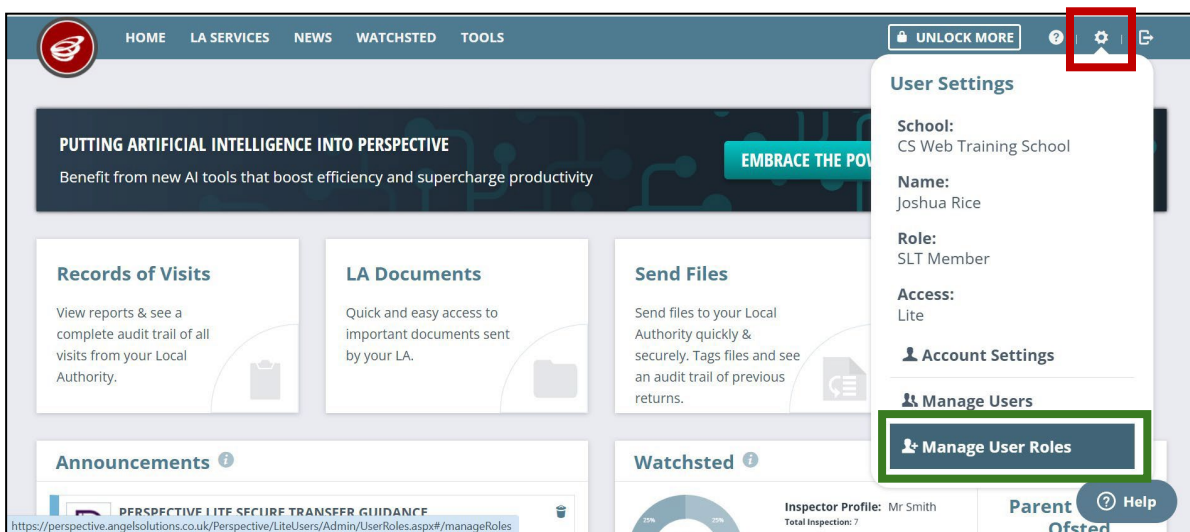
The file-sharing module of Perspective Lite is used to share documents between schools and the Local Authority, as a school using this system you will be able to view the roles within your account.

We, as the Local Authority define these roles for the purpose of sharing documentation with specific key stakeholders in your school.

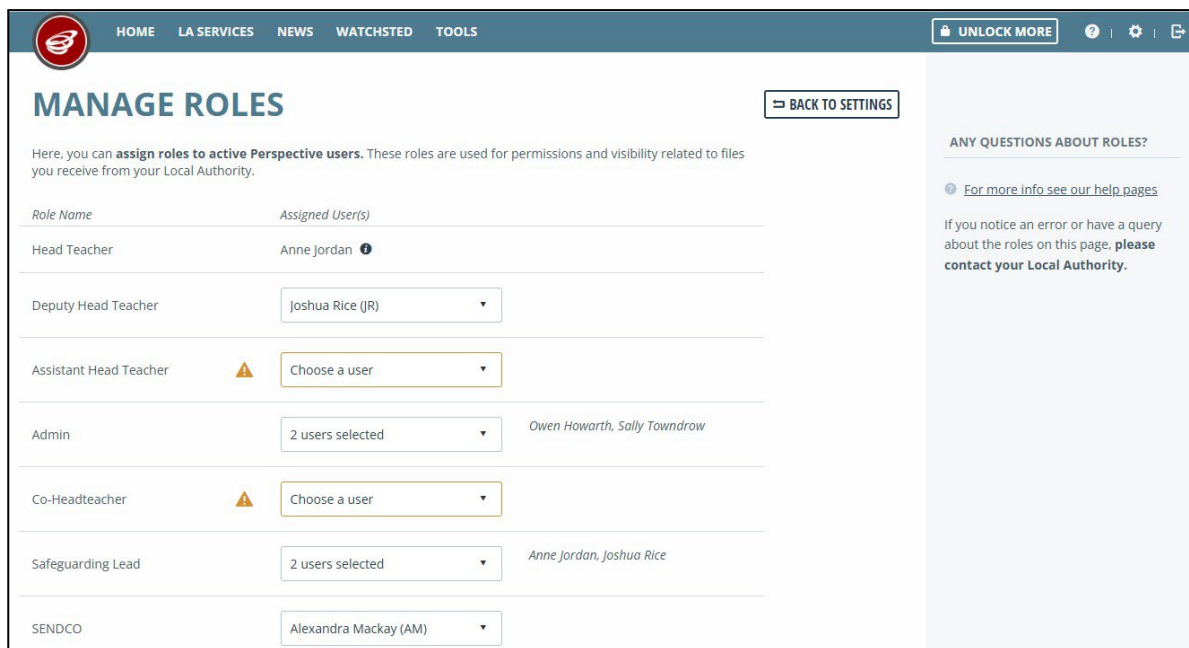
We can then share Confidential Files with specific roles in your school. You should ensure, where possible, that at least one user is assigned to each role within your account. If a role doesn’t have users assigned to it, any files shared with that role will not be visible to the school.

Please Note: To assign a role to someone; they must first be set up as a user inside Perspective and have permission to access LA Documents.

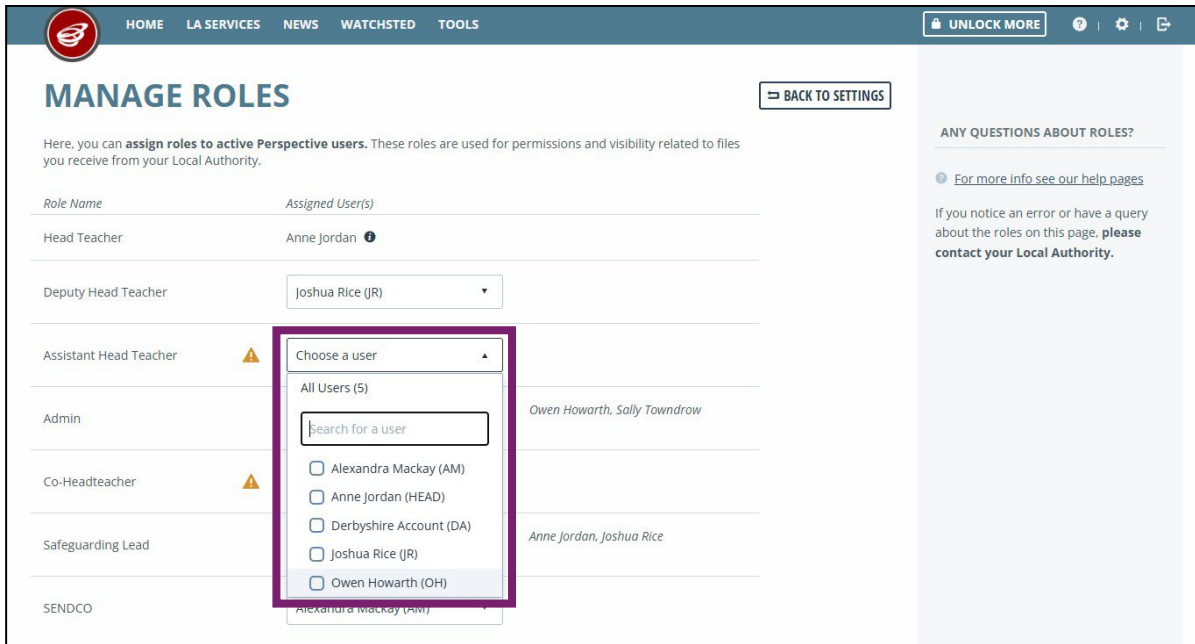
SLT users within Perspective Lite can assign these defined roles to staff. To do this, navigate to **Settings** (cog icon) and click **Manage User Roles**.



From here, you can assign roles to any active Perspective user.



To assign a user to a role, click the **dropdown menu** alongside it and place a tick inside the box of any staff member who should have that role.



If the staff member you need isn't visible in the dropdown, you must first add them as a user through the steps in the Administration section of the [Perspective Lite User Guide](#) available from SchoolsNet.

Please note that assigning someone to an existing role will allow them to see all files previously shared with that role.

For security reasons, a user must already be in the SLT team to be assigned an 'SLT-specific role', such as Deputy Head Teacher.

You can select multiple staff for a specific role, apart from Headteacher, where you would need to use the co-headteacher role for the second headteacher.

The roles will automatically save so you can leave the page when finished.

Access and Security

Under section 9.2 of the information sharing agreement your school has signed in order to access this system you are required to “take appropriate technical and organisational measures against unauthorised or unlawful processing of personal data and against accidental loss or destruction of, or damage to, personal data”.

You must make sure you have procedures in place to do everything reasonable to:

- make accidental compromise or damage unlikely during storage, handling, use, processing transmission or transport
- deter deliberate compromise or opportunist attack
- dispose of or destroy the data in a way that makes reconstruction unlikely
- promote discretion to avoid unauthorised access.

The Academy/school must have policies and systems in place to ensure information held on its information systems is held securely and in compliance with industry security standards and legislation.

When using the secure document transfer web portal ‘**NCER Perspective Lite**’ the headteacher of the academy/school is responsible for ensuring that only authorised staff within the academy/school have access to documents containing personal or commercially sensitive data shared via the portal by the Council.

Academies/schools should have in place procedures for reviewing who has access to this portal and ensure staff that leave or change roles in the academy/school have their access rescinded.

When using this portal, which is facilitated by the Council, schools must comply with the Council guidance on password policy in relation to it. Go to the [Passwords](#) page on the Derbyshire County Council website for further information.

Further Support Contact Details

If you have any queries regarding these arrangements, please contact the Children's Services Web Team on 01629 536797 or email our web team at cs.web@derbyshire.gov.uk