

Perspective Lite Secure Portal

Complete User Guide V5

October 2021



Perspective
Lite



Contents

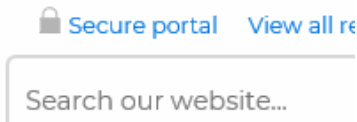
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Accessing Perspective Lite

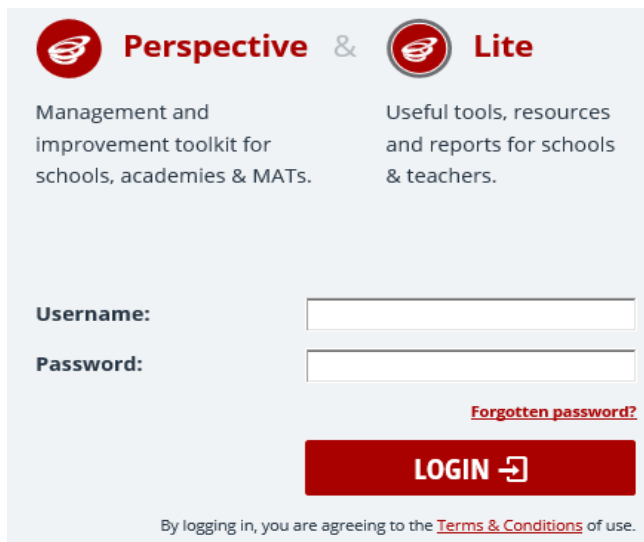
Perspective Lite can be accessed at <https://perspective.angelsolutions.co.uk>.

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



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.



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 
3. Select Change Password 

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

CHANGE YOUR PASSWORD

Current password:

New password:

Confirm new password:

[SAVE NEW PASSWORD](#)

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’

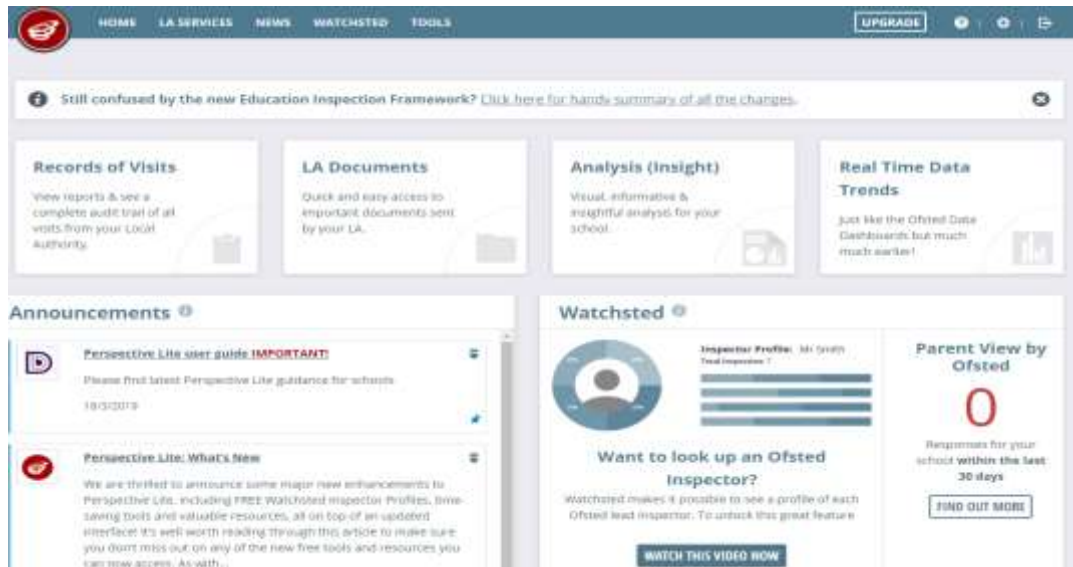
[⇒ BACK TO SETTINGS](#)

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.



System Icons

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



**Please refer to '[Further Support](#)' section on page 13 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**.

LA Documents

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



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

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

There is now a Confidential (Head Only) folder which is **not** currently being used by Derbyshire. We will advise schools if this changes.

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.

- LA Documents
 - Confidential (Head Only)
 - Derbyshire Documents

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 July Files	-	view
	2 August Files	-	view
	3 September Files	-	view
	4 October 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.

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 October Files

Type	Name	Updated At	Options
	EHSR Report Confidential	-	view
	General	-	view
	SEND	-	view
	Shared Services HR	-	view

UP FOLDER

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_INFOeysreturn20170731

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. 20161018 (or you can use a version number instead e.g. V01)

Service Code	Service Name
ADMISS	Admissions
AUD	Audit Service
AUTISM	Autism Outreach Service
BSS	Behaviour Support Service
BUS	Business Support
CME	Children Missing from Education
EHE	Elective Home Education
EIS	Education Improvement Service
EP	Education Psychology
EWS	Education Welfare
FIN	Finance
FSM	Free School Meals
GOV	Governor Support
HR	HR and Occupational Health Referrals
INC	Inclusion - Taps
INFO	Info and ICT
IPT	Integrated Pathways
OOST	Out of School Tuition
SAFE	Safeguarding, Child Protection
SEN	SEN – Grip, EHCP
SOC	Social Care -
SP	Starting Point
SSF	School Support Finance - Budget Monitoring
SSHR	HR Services – starters, leavers, adjusts, DBS, Time Team
SSSEN	SSSEN
VS	Virtual School

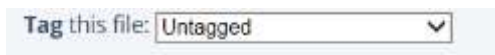
2. On the Menu Bar go to LA SERVICES then FILE RETURNS.



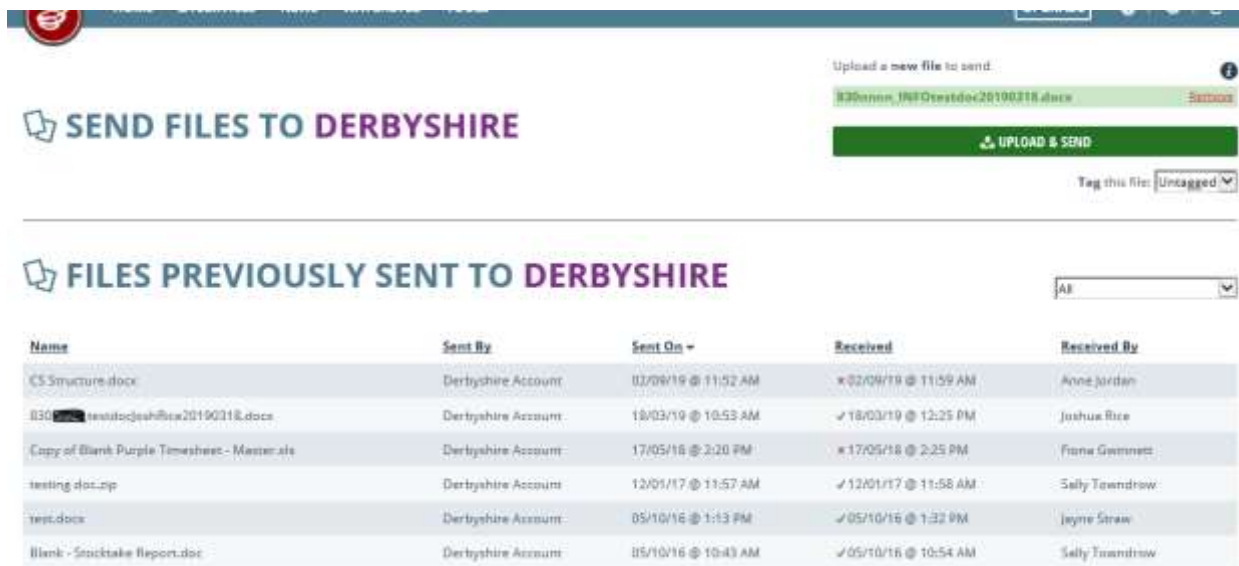
3. Use Browse for Files and select the file you wish to send from your computer/network and click Open.



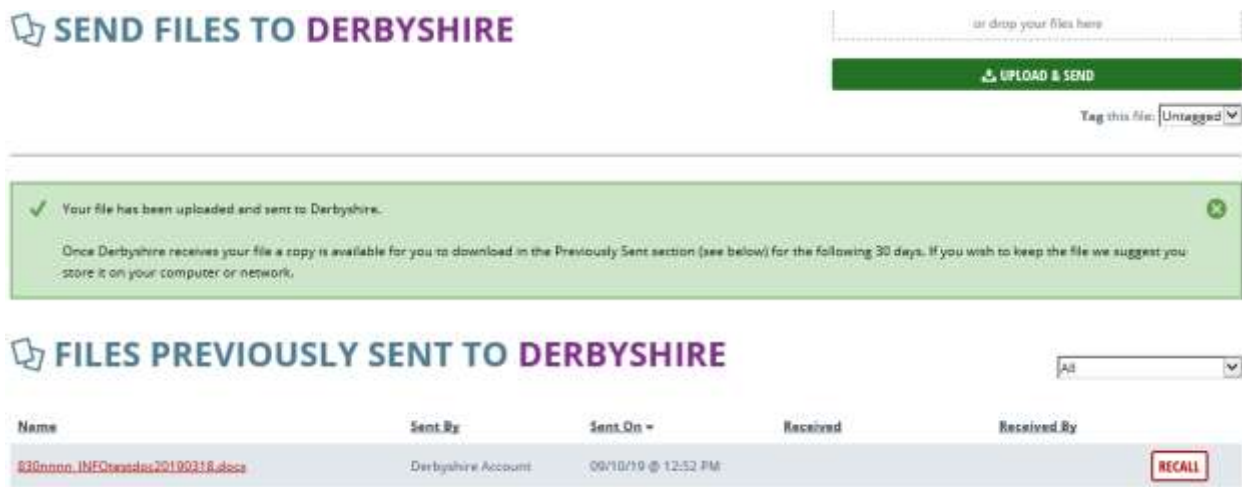
4. **DO NOT** select a Tag for the Service you are sending the file to – leave as **Untagged** by using the ‘Tag this file:’ drop down list:



5. Finally click **Upload & Send** to securely transfer the file to Derbyshire.



6. A message will show on the screen to show that your file has been uploaded correctly.



7. It is essential the file is named correctly for it to reach the correct recipient. If it is not named correctly the file may be rejected by Derbyshire in which case you will see a red cross against the Received date and time and the Headteacher will receive an email stating the file has been rejected and by whom. Files received correctly by Derbyshire and passed on to the Service will have a green tick and the name of the person who downloaded the file.



8. 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.



9. 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**.

N.B. When you have uploaded and sent your file, a copy is available for you to download from the ‘Files Previously Sent to Derbyshire’ section. These files will remain available in the secure area for 90 days.

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.

The screenshot shows the 'USER MANAGEMENT' interface. At the top, there is a navigation bar with 'HOME', 'LA SERVICES', 'NEWS', 'WATCHLIST', and 'TOOLS'. Below this is the 'USER MANAGEMENT' section with a 'BACK TO SETTINGS' button. There are input fields for 'Code', 'Last Name', 'First Name', and 'Team'. Below these are buttons for 'CREATE NEW USER', 'DELETE SELECTED', 'ARCHIVE SELECTED', and 'VIEW ARCHIVED USERS'. A table lists users with columns for Code, Last Name, First Name, Teams, and Options (edit, archive, delete).

Code	Last Name	First Name	Teams	Options
HD	Kevan	Kieron	SLT	edit archive delete
KVSLT	kevansit	kieron		edit archive delete

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

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

Deleting a user will permanently delete them from the system. *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.

User Permissions

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.

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

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.