PLACECUBE

Open Place Directory

Maintain assured local service information and publish as open data.

Service Provider User Guide

Version 2.0 (March 2025)

Section One

Getting Started

WELCOME TO OPEN PLACE DIRECTORY

Welcome

What is Open Place Directory?

Find out more at…
https://www.placecube.com/platforms/open-place-directory/

Open Place Directory enables communities to work together to create and maintain reliable, centralised service directory data, which is accessible to local or specialised service finder tools, meaning that service data can be collected once and then used by many people and organisations. This provides an alternative, more efficient approach to the traditional model where every organisation maintains its own service directory and is subject to the maintenance overheads and reliability risks that go with that.

As a Service Provider user, you can play a fundamental role in the collection and maintenance of the data and information relating to the services you or your organisation provide.

This document provides guidance on setting up your account and finding your way around so that you can start entering, reviewing and maintaining information about your services. You can get further information about Open Place Directory, the Open Referral UK data standard and local assurance standards from your local Assurance team.

As a Service Provider User, you are able to do the following things within Open Place Directory:

- Maintain information relating to your own Services
- Submit amendments to your services for assurance
- Submit brand new Services for Assurance
- Tag services with service types, eligibility rules and other key information
- Unpublish Services in order that they can no longer be found as live services
- Search, edit & create Venues, so that you can link them to your service sessions
- Communicate with Assurers, ensuring clarity of requirements and action

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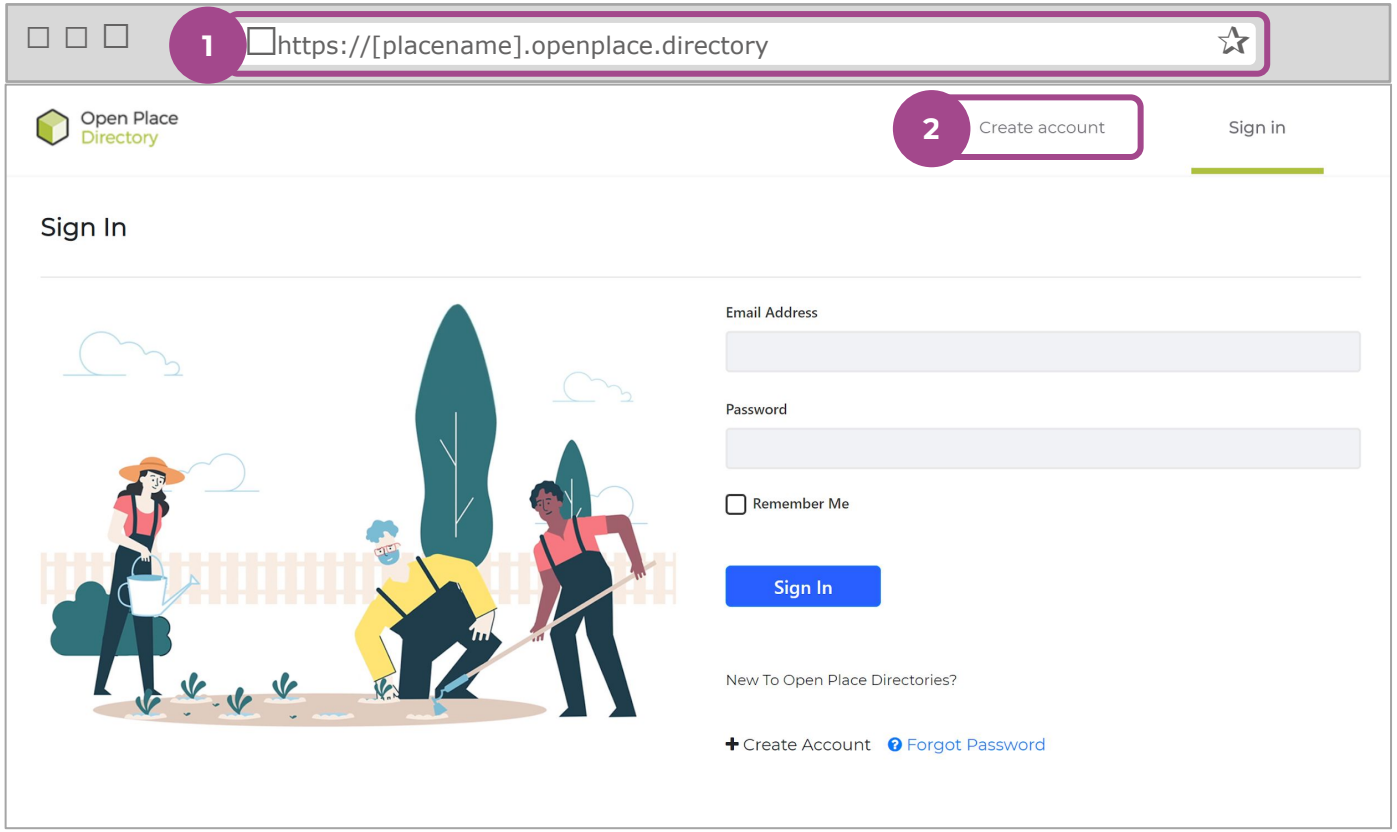
OPEN PLACE DIRECTORY GET STARTED

Getting Started

Access to Open Place Directory

1. Input the appropriate URL (as provided by your assurer) into your internet browser to open up the sign in page. It will look like this… https://[place name].openplace.directory
2. Click 'Create Account' at the top of the screen



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OPEN PLACE DIRECTORY GET STARTED

Getting Started

Create an account

3. Tick the 'I am a service provider box' and enter your organisation's name in the box. This will enable an Assurer to establish the link with your organisation.

4. Enter your name and email address, then create a password

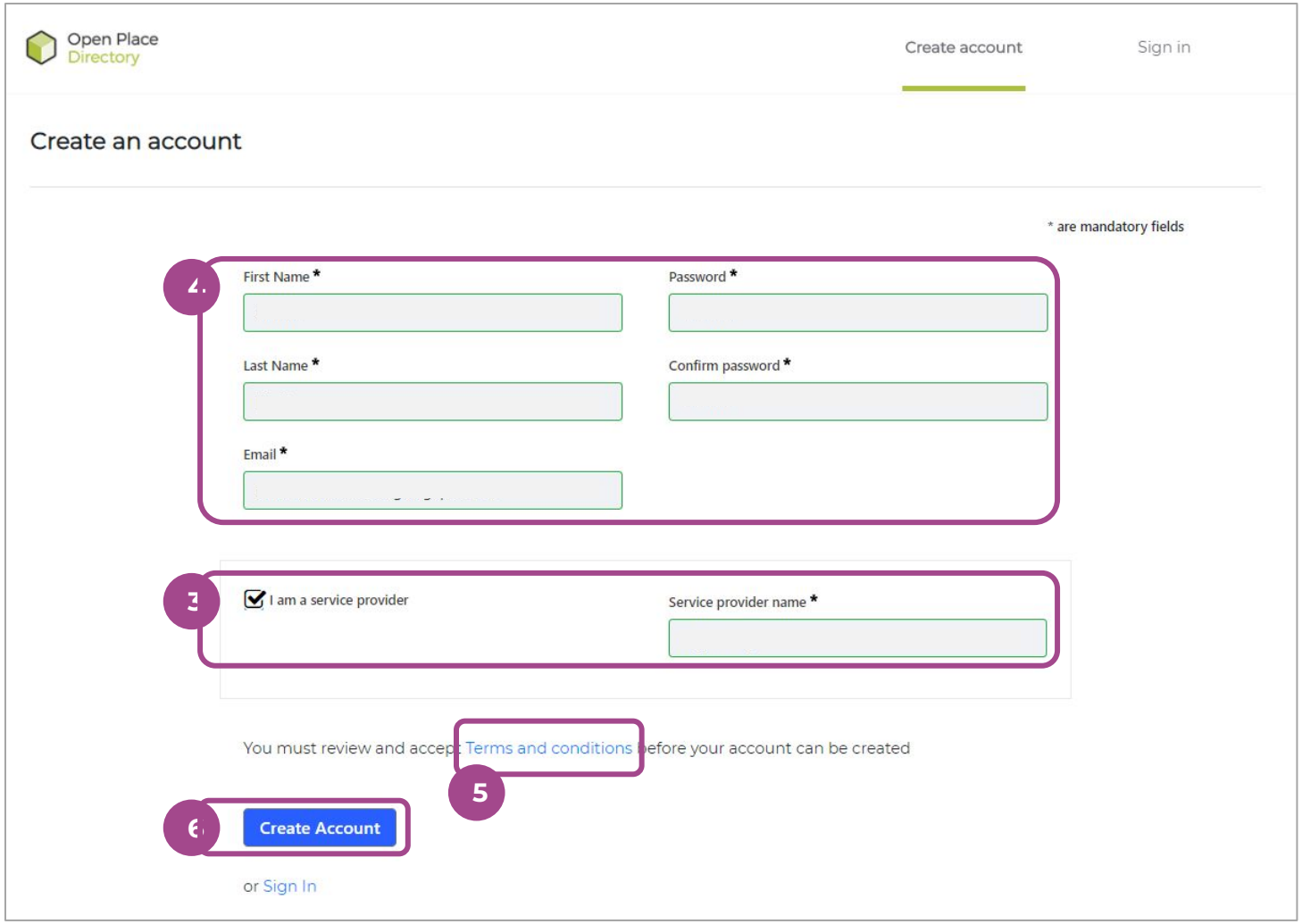
5. Review, then *Accept* the 'Terms and Conditions', by clicking on the highlighted link

6. Finally, click 'Create Account'

After you have created your account, an Assurer will review the information and approve your account.

You will be notified by email that your account has been approved. The final step is that you need to verify your email address. To do this simply sign in with your email and password, as created in step 4. You will be sent a verification code to your email address. Please check your Junk Mail if this hasn't appeared in your inbox.

It is recommended that you copy and paste the verification code into the window. You will then have completed the account registration process and you can then start to add information about your services.



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FINDING YOUR WAY AROUND OPD

Navigation

Service Provider functionality is designed for your desktop computer or laptop. Whilst you should be able to access the same functionality on your tablet or other mobile devices, it is possible that some of the screens will be presented differently to those on your computer or laptop.

Primary navigation is delivered through a combination of tabs and icons, which sit permanently across the top of the screen (the page header). This is illustrated by the image at the bottom of this page. The tabs and icons that each user will have are dependent on the role(s) they are linked to and therefore the permissions they have to use the different features. The image below shows a Service Provider users view.

There are tabs for each of the items that you can work with – Services & Venues, In addition, there is a a 'My Account' icon (head and shoulders) which you can click on to reveal the 'Sign Out' option.

Views

Each of the named tabs will take you to a dedicated dashboard for each of those items. The dashboard includes a list of relevant items (eg. Services), and a series of shortcuts and options against each, which are described in the relevant sections of this document.

Each dashboard also includes appropriate search, filter and sort functionality, as well as pagination options. Again, this is described for each of the dashboards within the relevant sections.

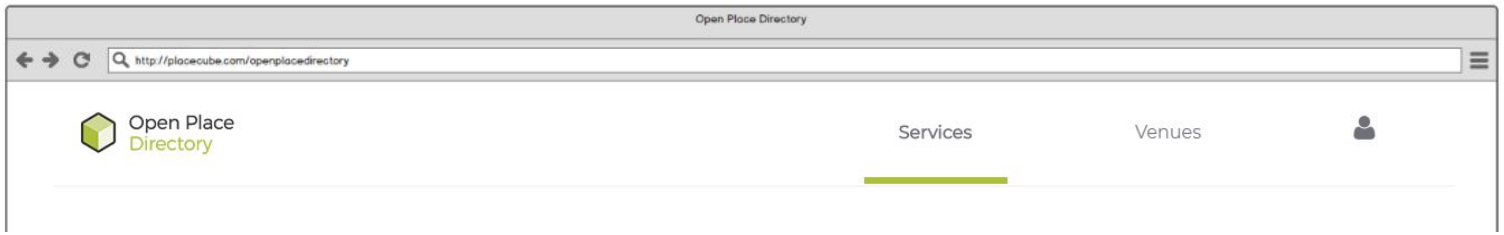
In the top right of each dashboard, a large '+' button gives you the ability to add a new record to that list, be it a Service or Venue. Clicking this will open up the appropriate form, allowing users to create the new record, which can then be saved, assured or submitted for review and assurance, dependent on the form type.

Other Interactions

In addition to the dashboards and forms detailed in the previous column, there are a number of temporary 'pop-up' interfaces. These support more complex functionality, such as tagging, or are part of the in-built workflow processes. Their function and use are described in the relevant sections of this document.

At the bottom of all desktop screen you will find 4 links which will open up fixed content designed to support users. This includes local Terms and Conditions, Privacy Statement, About the system and Local Contact information for users.

Desktop Navigation



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Section Six

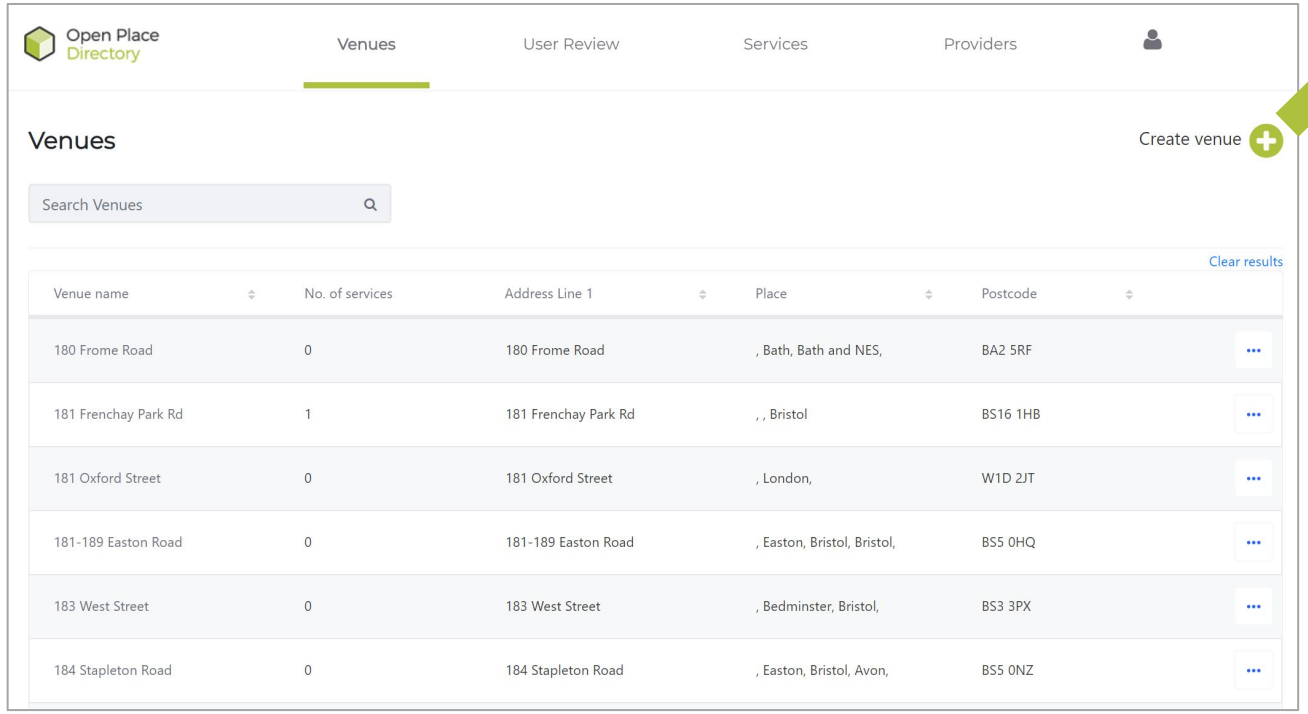
Venues

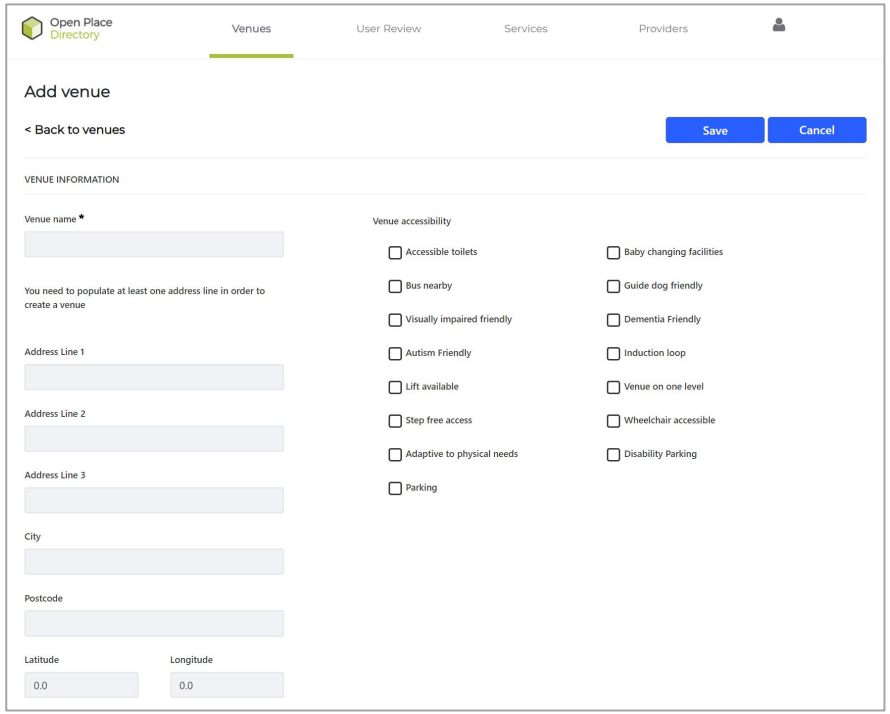
VENUES

Venues

Venues Dashboard

All venue information is kept and maintained in a dedicated database, which can be found via the Venues tab in the horizontal navigation bar. All venues will be listed in alphabetical order, by Venue name, by default. The Venues Dashboard allows you to search venues, as well as sort by Venue Name, Address Line 1, Place or Postcode, in both ascending and descending alphabetical order. The button with three small dots at the end of each row (ellipsis) opens up options enabling you to edit or delete the venue in that row. It is important that venues which have services linked to them (as identified in the 'No. of Services' column) are not deleted. It is also worth noting that not all venues have a dedicated 'Venue Name' – where this is the case, the first line of the address should be used. The create venue button will open the 'Add Venue' form.





Add Venue Form

The venue form, which is used both to add and maintain venues is shown above. Venue Name is a mandatory field, along with at least one line of the address. Where there is no formal Venue Name, the first line of the address should be repeated in this field. Latitude and Longitude need to be manually entered (they can be sourced through map applications, such as Google Maps). Accessibility comprises of a series of tick boxes. You are advised to check that a venue doesn't already exist before you create it.

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Section Eight

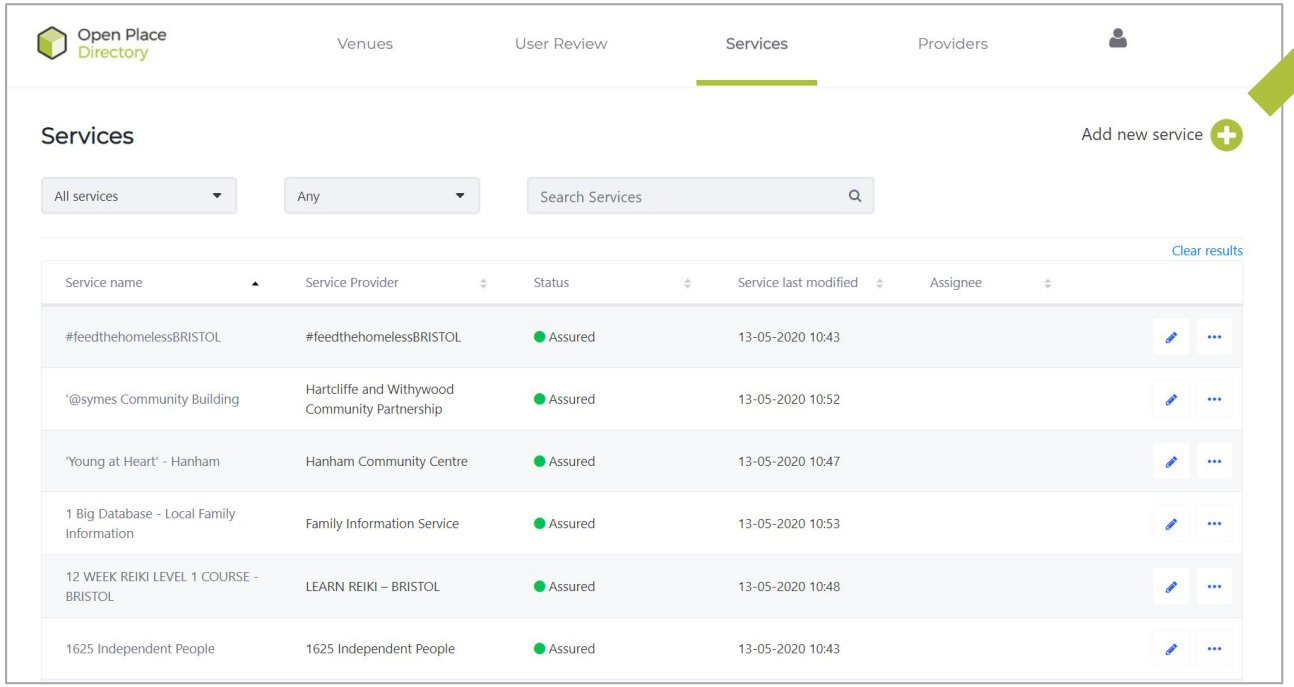
Services

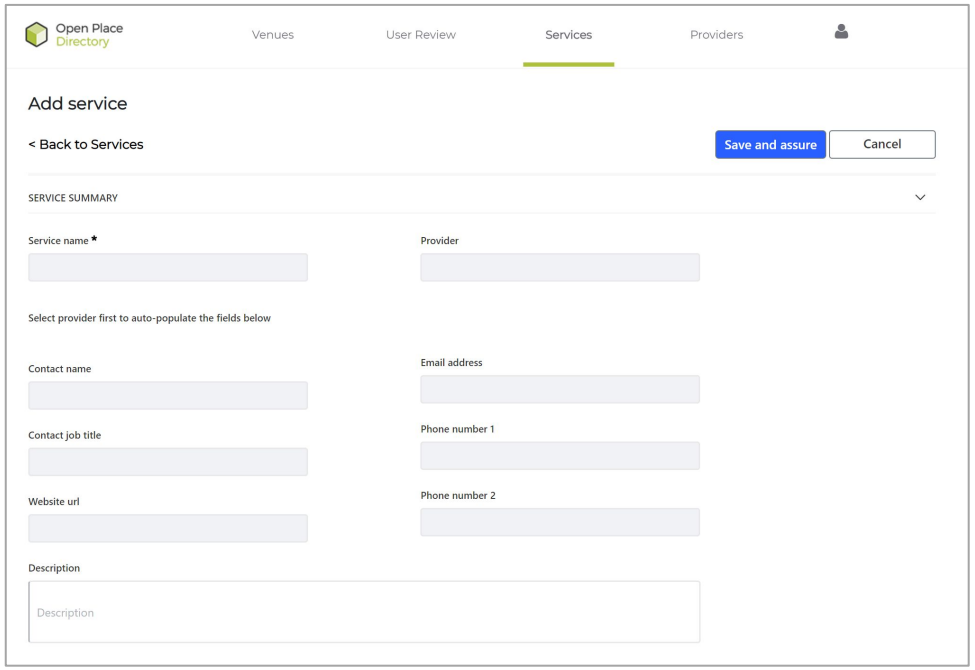
SERVICES

Services: Dashboard

Services Dashboard

All service information is kept and maintained in a dedicated database, which can be found via the Services tab in the horizontal navigation bar. All services will be listed in alphabetical order, by Service name, by default. The Service Dashboard allows you to search Services, as well as sort by Service Name, Service Provider, Status, Last Modified Date and Assignee, in both ascending and descending alphabetical order. There are also two filters, in drop down menus. The first allows you to change the dashboard view between 'My Tasks' (Default), 'All Tasks' & 'All Services. The second allows you to filter on the Status of Services. The button with three small dots (ellipsis) at the end of each row opens up options enabling you to edit, request provider review or unpublish, dependent on the current status of the service. The Add New Service button will open the 'Add Service' form.





Add Service Form

The Service form, which is used both to add and maintain Services is shown above. Service Name and Service Provider are both mandatory fields. The Provider field and contact information below will be pre-populated with your organisation name and relevant details . The Description field can accommodate both plain text and rich text (html), which can be created via this form, as well as via data import. The webservices are also designed to preserve the html format in order that Service Descriptions can be presented as such in front end applications.

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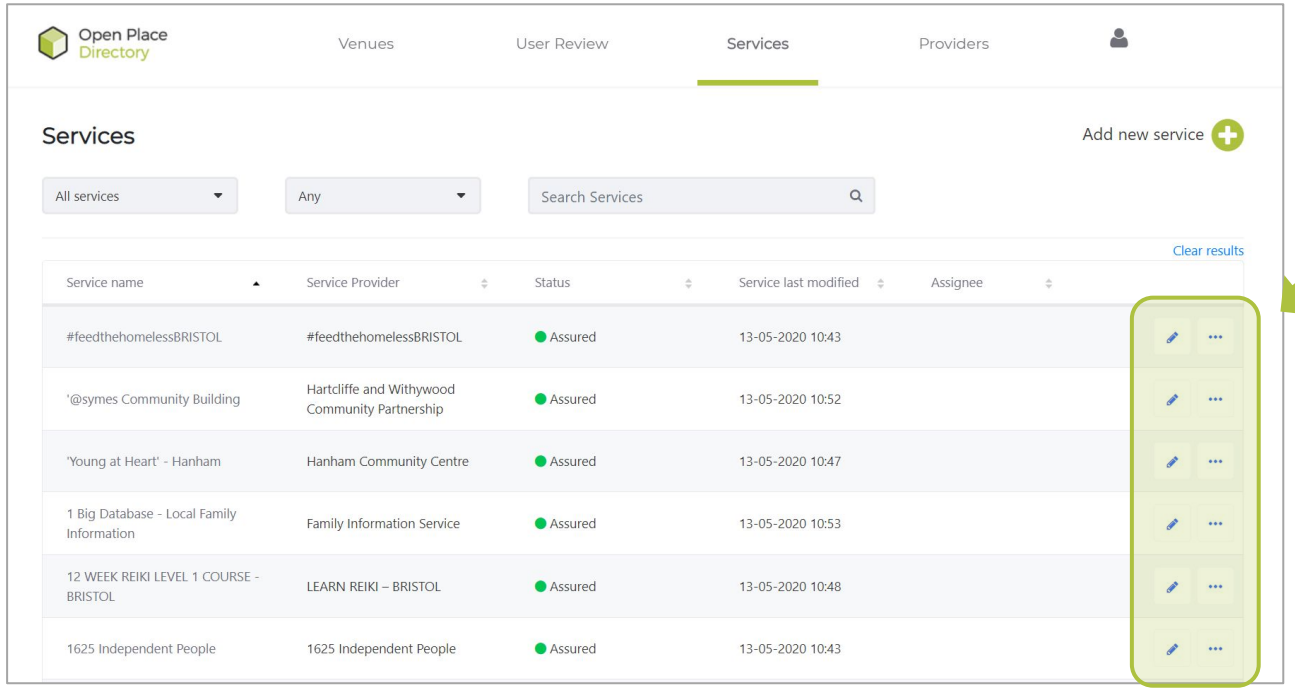
SERVICES TASKS

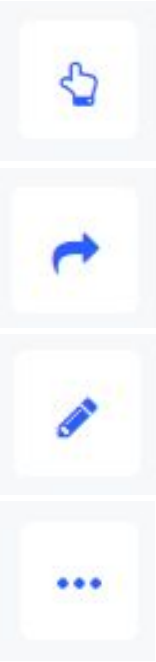
Dashboard Icons & Menu Options

At the right-hand side of each row in the dashboard you will find one or more blue Icons. Each of these will enable you to progress a task or action, associated with the Service in that row. The options available to you will depend on the status of that service.

Unassigned tasks will give you the option to assign to yourself, or to assign to any other colleague that is linked to the same organisation as you. Assigned tasks will give you the option to edit or reassign. Assured Services will give Assurers the option to edit, or via the ellipses, to unpublish the Service.

The filters across the top of the dashboard will allow you to view 'All services', 'My tasks' and 'All tasks', as well as specific statuses. New (unassigned tasks) need to be assigned to someone before they can be reviewed and actioned.





ASSIGN TO ME

ASSIGN TO ...

VIEW / EDIT

ELLIPSIS (MENU)

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SERVICE FORM STRUCTURE

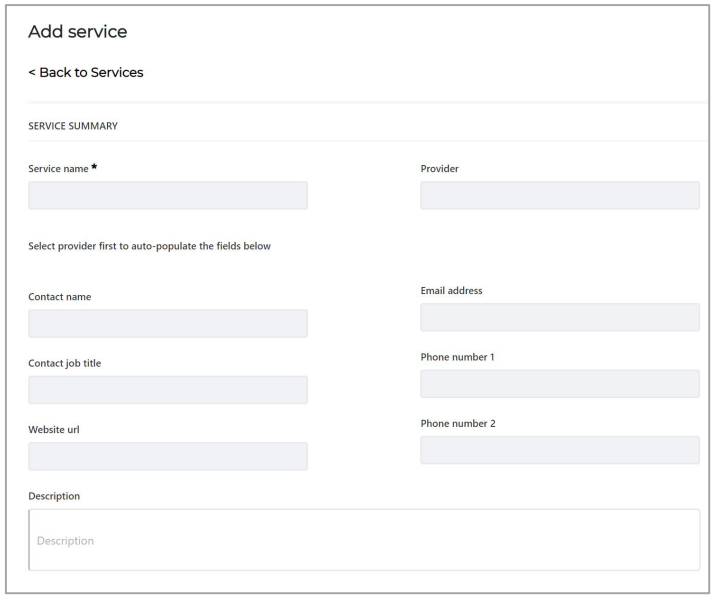
Service Form: Basics

Service Information

Each service record will detail a specific service, provided by a single Service Provider, available to service users via one or more defined sessions. The service record is the primary item of information that end users will be searching for, via third party service finders. Each individual service record is made up of core service information (which links to core service provider information), session information (which links to Venues), and a series of 'Tags' which define such things as Service Type, Target Audience for the Service and any Eligibility information. Further information such as any costs are also included. Metadata is appended to each service record, in order that users can see such information as when the service was created or last assured, who it was assured by, and their contact email address.

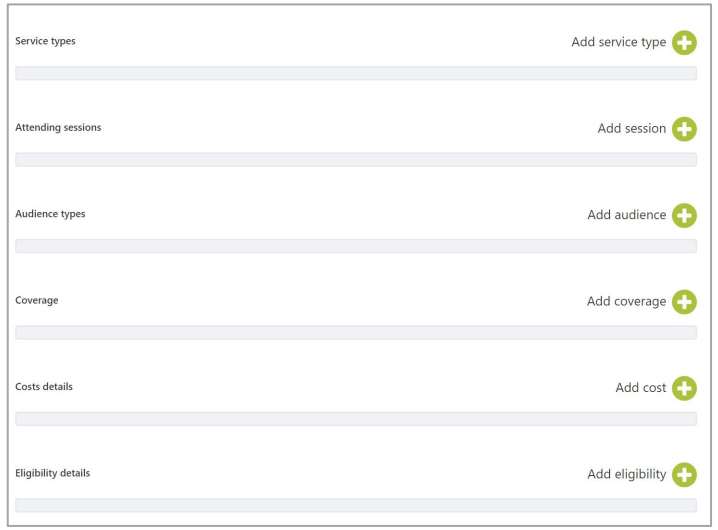
This and the next two pages provide more detail on the Service Form, which is used to create and maintain service information.

Top of Service Form



The information held at the top of the Service form includes a mandatory Service name and provider details, which are auto-populated with your organisations details. The description field is a free-form field which enables you to input both plain text and html, supported by an in-built rich text editor. There is a green 'toggle' button below this field. The webservices have also been designed to support the html in this field, meaning the format used can be replicated on front-end service finders.

Middle of Service Form



Each of these six sections are designed to capture the additional service information, that is required by the Open Referral UK Data Standard. Service Types are selected from an LGA approved standard list, either through a direct search, or through a function-based hierarchy.

The green 'Add' button on the right hand side of each row will open a pop-up window that allows users to populate, or navigate to and select the required information.

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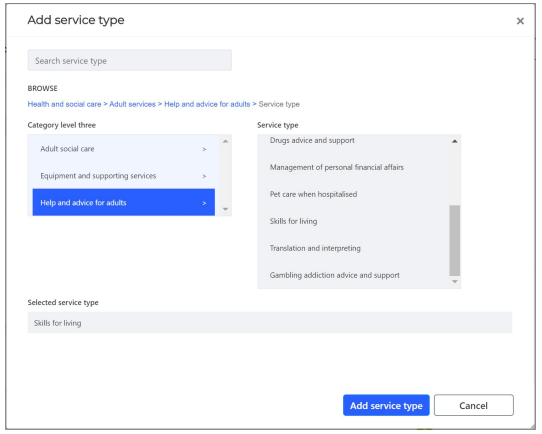
SERVICE FORM TAGS

Service Form: Tagging

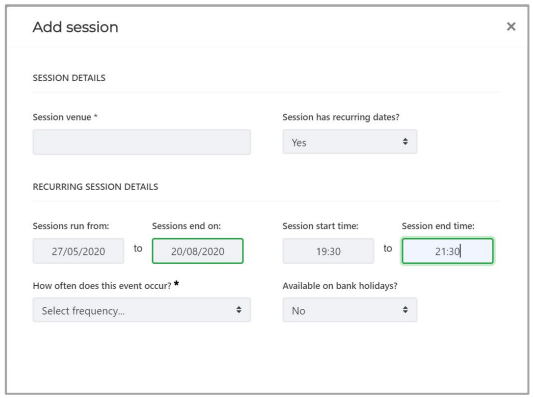
Service Type

Either use the search bar at the top, or click through the hierarchy to choose from a refined Service Type list. Service Type can be used by itself, or linked to other taxonomies, such as Needs, or Circumstances, in order to support front end searching. In addition to this, it enables Service Commissioners to evaluate the breadth of service provision, and Demand against a standard convention.
You can add more than one Service Type tag to each Service, but can only do so one at a time. A list of all default Service Types, and the functional hierarchy can be found at: https://standards.esd.org.uk/?



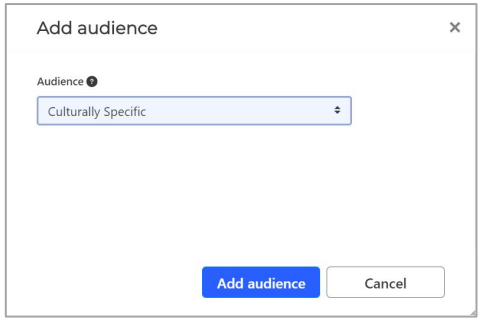
Attending Sessions

Use this pop-up to add the sessions through which the service is delivered. The venue is selected through a drop down menu, linked to the venue database.



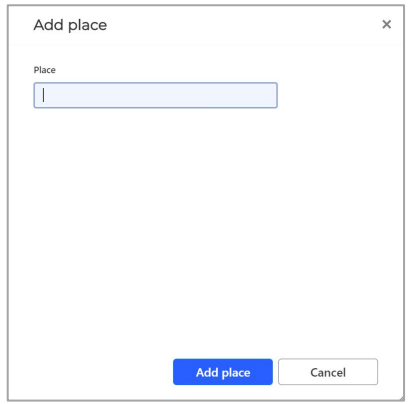
Audience Types

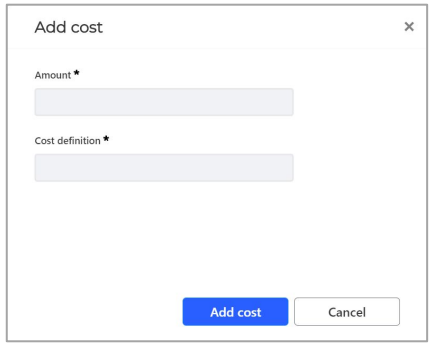
'Audience Type' tags can be selected from the drop-down menu. Please note that Audience Types are not currently part of the Open Referral UK Standard and are not currently included in the Webservices structure. This is an optional field which can be added to Webservices if required. upon request.



Coverage

This enables you to associate specific services with one or more localities or regions within your geography. This may be for funding reasons or to support specific search functions





Cost Details

Add a cost and cost definition for the service. This could be, for example: Amount: £2.00 / Cost Definition: Per Session

It is possible to add more than one cost, so for example you could add: Amount: £1.00 / Cost Definition: Concessions

Alternatively, you could add definitions such as:

- Includes hot drink, Pay at door or Pay in advance

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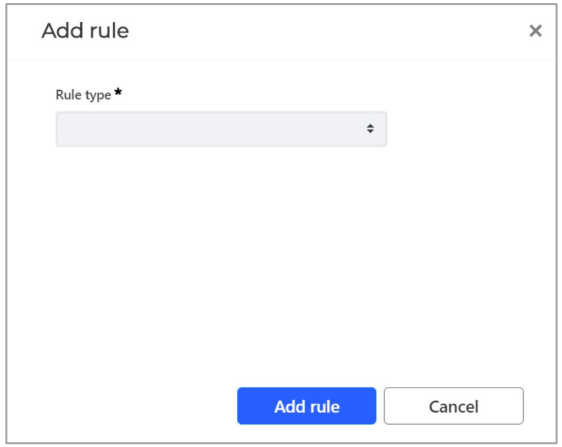
SERVICE FORM TAGS

Service Form: Tagging

Eligibility Details

Where specific eligibility criteria apply to a Service, this can be added through the Eligibility tagging. Rules are currently split into three categories, as detailed below. You can add as many rules as are required but should avoid applying any contradictory rules.



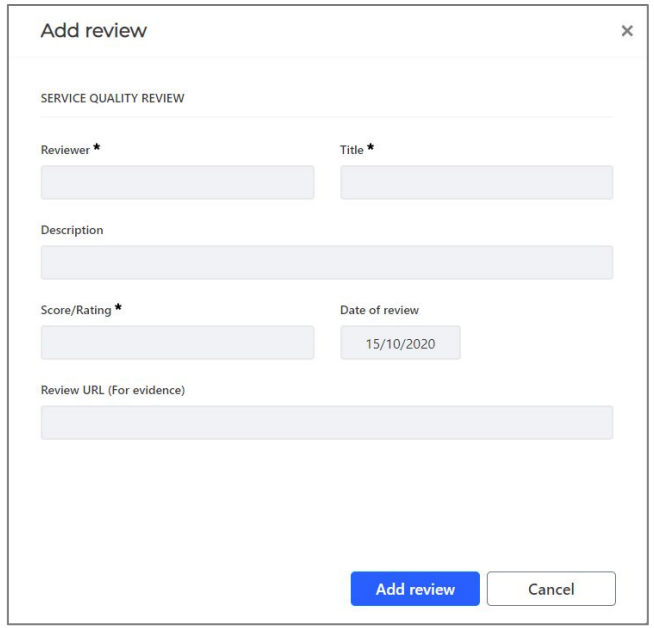
Rule Type: Gender
Rule: Female / Male / Transgender

Rule Type: Age
Rule: Minimum Age & Maximum Age
Note – Both Minimum and Maximum are required. Use '0' if there is no minimum and use '120' if there is no maximum

Rule Type: Other
Rule: Application Required / Appointment Required / Assessment Required / Referral Required / Families
Note – These are designed to be used where specific criteria need to be met in order to be able to access a Service.

Service Quality Reviews

You can use this to add details of one-off or periodic reviews of your services. This may include, for example Ofsted Inspections, or Care Quality Commission (CQC) Reviews.



Reviewer
The 'Reviewer' field has a restriction on it that only allows you to select organisations that have been set up for this purpose. You will need to speak to your Assurer to have the organisation created, if they do not already exist in the system.

Metadata

All Services will automatically be tagged with metadata in order to enable audit of Services and also to evidence the last review and assurance dates, as well as the email address of the most recent Assurer. This information is not currently part of the Open Referral UK Data Stamdard and is therefore not currently included in Web Services. The full set of metadata fields is shown in the image below, with each of these being further described in the subsequent text.

Service created: The date and time that the service was either imported, or initially created.
Service last assured: The date and time that the service was most recently assured.
Service last modified: The date and time that the service was last modified by any user.
Service last updated by: The email address (used for log in) of the last user (Assurer or Service Provider) that made an update to the service
Service assured by: The email address (used for log in) of the assurer that most recently assured the service.

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VERSION CONTROL

This is Version 2.0 of the Open Place Directory – Service Provider User Guide, published on 21st March 2025. Updates will be made available in line with system upgrades and enhanced functionality releases.

PLACECUBE

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