KNOWLEDGE PUBLISHER USER GUIDE

Version 5 August 2020

Contents

INTRODUCTION

This Complete User Guide is in PDF format and is best viewed using Adobe Reader X version 10.1.1 or above. Please click here to download the most recent version of Adobe Reader X. Clinical Knowledge Publisher has been optimized for use with Microsoft Internet Explorer 9.

About this guide

Welcome to the Clinical Knowledge Publisher Complete User Guide. This guide can be printed out in its entirety or easily navigated using the Bookmark within Adobe Reader.

Embedded within this User Guide are Hyperlinks, which are in blue and look like this, and will take you to the topic relevant area within this User Guide. Screen shots used within this guide may vary depending on the browser being used.

Glossary

The term “Click” is used throughout this document to describe the pressing of the left mouse button.

The term “Right-click” is used to describe the pressing of the right mouse button, which commonly displays a menu.

The term “Item” refers to a Node, Decision, Text box or Connection, with “Items” referring to a collection of one or more.

The term “User” refers to creators/designers of Pathway/Guidelines, for whom this user guide is intended.

The term “End User” refers to health workers using published Pathways/Guidelines.

Tips

Throughout this guide Tips symbol appears  . Tips contain explanations, alternative methods and useful information.

Section Overview

This guide is divided into the following sections:-

- 'Getting Started' outlines the initial stage of registering to use the website and then signing in with the registered email address and password.

- 'Designer' describes how to use the Designer to create and edit Pathways and Guidelines. It covers how to add Nodes, Decisions and Text boxes, and make connections between them. The user can then manipulate them and add descriptions to each of the Items. Links to nodes can be added using Link Manager to display further relevant information to the End User.

- 'Shortcuts' provides a list of keyboard strokes which offer an alternative way of performing a task. Shortcuts will not function as intended in some internet browsers.

- 'Profiles' provides details on how a user changes details on their own profile including a password change.

- 'Administration Functions' describes the functionality available to Organisation Administrators and System Administrators. This section introduces the various user roles available and describes how to manage the users. Also Included in this section are instructions on how to manage the website settings, and it also describes how to add and edit Link Categories, both global and on an Organisational level.

  Site content is also covered, which controls what the users see on the user website pages like the Home and About tabs and the Privacy, Disclaimer and Copyright pages. In addition, details on how to create and edit Styles for Items and the Pathway Viewer are also given.

GETTING STARTED

Clinical Knowledge Publisher is a web based application and is accessed by navigating to the following:

www.ckp.scot.nhs.uk
www.clinicalknowledgepublisher.scot.nhs.uk

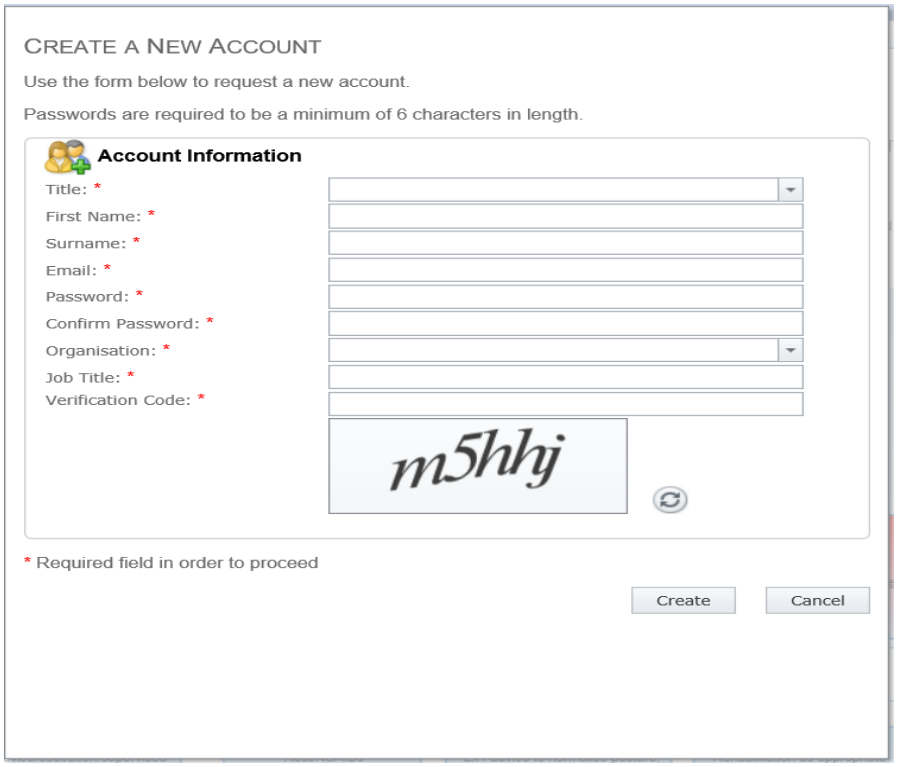
Once successfully logged into the Clinical Knowledge Publisher website, users are taken to the **Documents** tab where Pathways and Guidelines can be searched, opened, previewed and deleted. In addition, the last eight documents edited are displayed for convenience.

Registering as a New User

New users will be required to register on the Clinical Knowledge Publisher website. Once registered, approval will be required by a user with suitable security rights (System Administrator or Organisation Administrator).

To register as a new user, do the following:

1. From the Home Page select **Log in**, located in the top-right corner of the pane.
2. From the Log In screen select **Click here to register**.



3. Fill in all of the fields, selecting **Organisation** from the drop down list.
4. In the Verification Code field, enter the code that is displayed just below it.

   (If the Verification code is unclear then pressing the Reset button ( ) will create a new and different code)

5. Click the **Create** button.

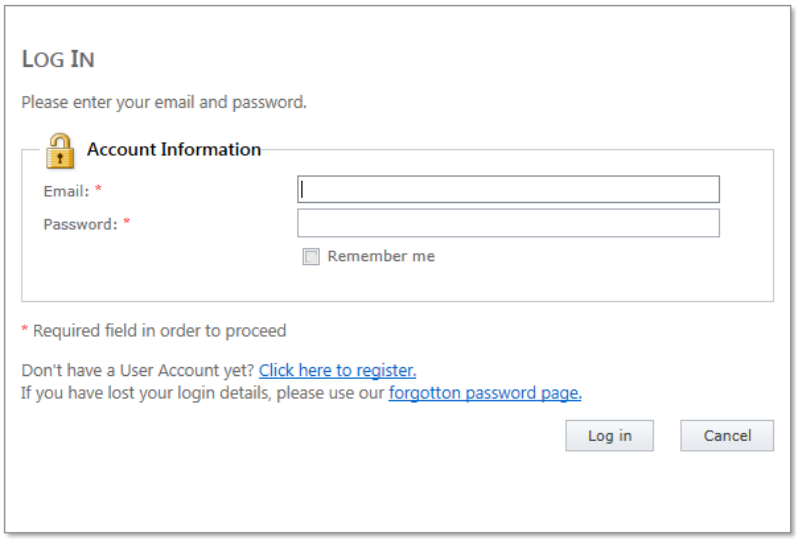
   Thank you for registering will appear to advise that registration was successful and then it returns to the Home Page. The registration request is sent for approval. An email will be sent to registered email address when the account has been approved, at which point it will be possible to log on.

Logging In

Approved users can log in from the Clinical Knowledge Publisher home page.

To log in, do the following:

1. From the Home Page select **Log in**, located in the top-right corner of the pane.



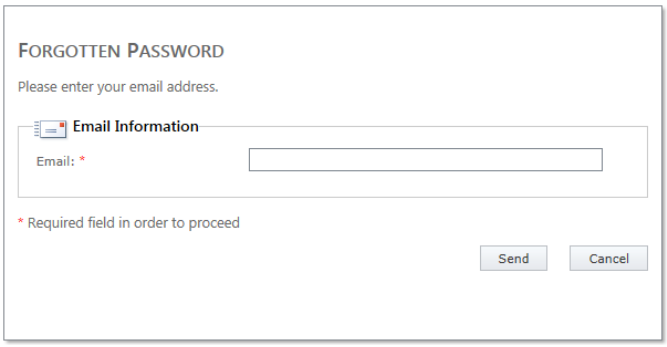
2. Enter the registered **Email** address.
3. Enter the **Password**.
4. Click to place a tick in the **Remember Me** box if you wish to remain logged in and not have to log in next time you access the website.
5. Click **Log in**.
   You will then be taken to the **Documents** tab, which displays a list of recently edited documents and allows users to open and preview their documents.

Forgotten Password

Password reminders can be emailed to users should they forget their password.

To receive a password reminder, do the following;

1. From the Home Page select **Log in**, located in the top-right corner of the pane.
2. From the Log In screen select **forgotten password page**.



3. Enter the registered **Email** address.
4. Click the **Send** button.

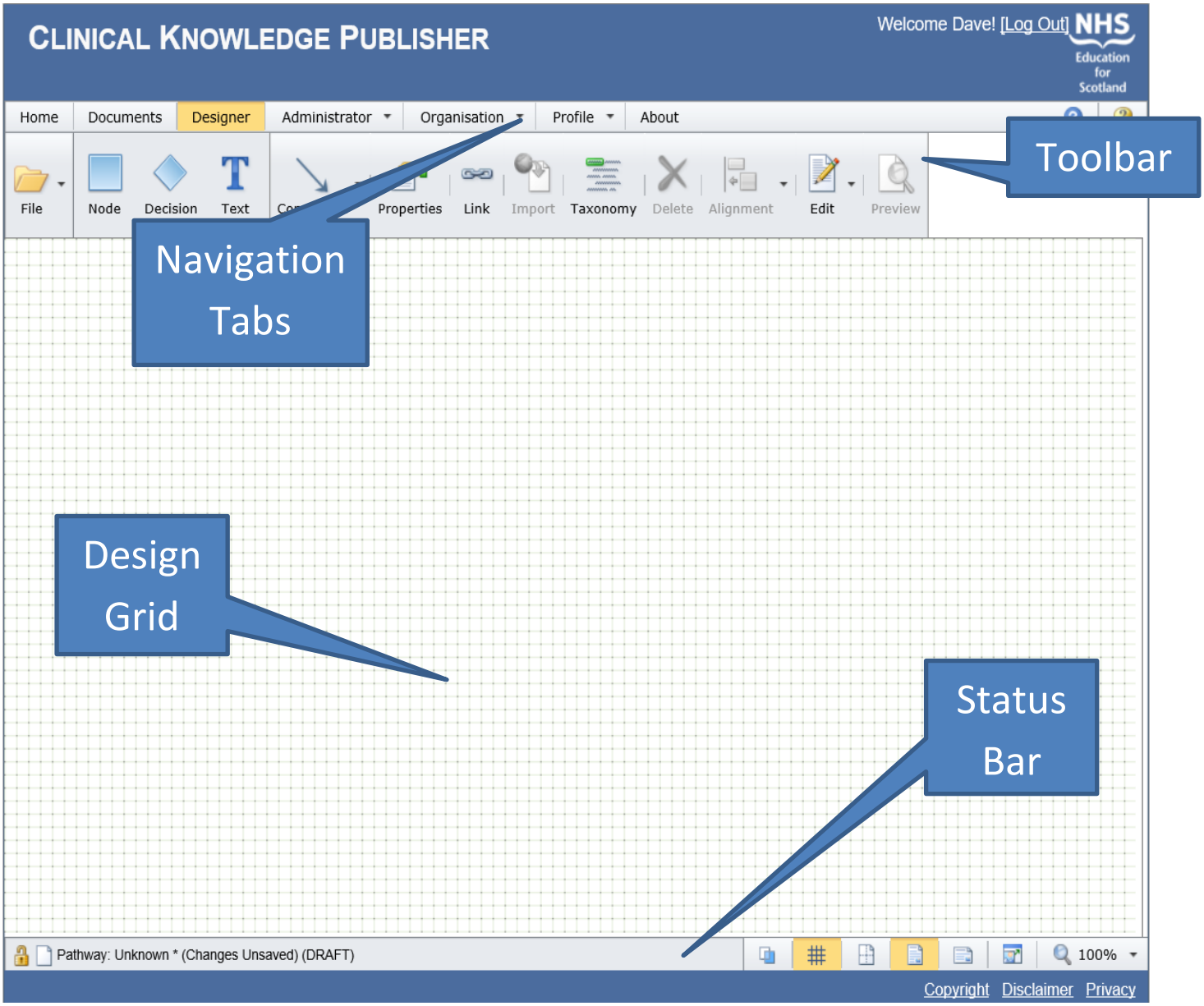
   An email will then be sent to the registered email address, which will contain the password.

DESIGNER

Designer is a blank canvas work area on which Pathways and Guidelines can be created and edited, as well as previewed and published/unpublished from. It comprises of:

- **Design Grid** – Area on which the Pathway/Guideline is designed/displayed
- **Toolbar** – Strip of icons used to control functions on the Design Grid
- **Status Bar** – Displays name of the current Pathway/Guideline and contains tools which alter the view of the Design Grid
- **Navigation Tabs** – Used to navigate to other areas of the website

Only ONE Pathway or Guideline can be open within designer at any one time. The principal of the Designer is the same whether working on a Pathway or Guideline, and only the functionality changes slightly.



Pathways

Pathways comprise of Nodes, Decisions and Text boxes. These Items can be resized, labelled and linked together using Connections to create a "Flow".

	Item	Description of Item
	Node	A Node can be linked via a Connection, to either a Decision or another Node. Text can be added via the HTML Editor which means it is WYSIWYG and can include images. In addition, Links can be added to Nodes. When the End User clicks on a Node with a link additional information is displayed.
	Decision	A Decision box can be linked via a Connection to Node or another Decision. Text can be added via the HTML Editor which means it is WYSIWYG and can include images.
	Text box	A Text box cannot be linked to any other Item. Text can be added via the HTML Editor which means it is WYSIWYG and can include images.
	Connection	A Connection is used to connect Nodes and Decisions and must always end and begin on one of these Items. Connections can have labels which can be positioned anywhere on the Design Grid.

Guidelines

A Guideline is made up solely of Text boxes. It is not possible to add Nodes, Decisions or Connections to a Guideline and this is reflected by these options being greyed out.

Creating, Saving & Opening Pathways and Guidelines

Creating a New Pathway/Guideline

To create a new Pathway or Guideline, do the following:

1. Click the **Designer** tab.
2. Click **File**, on the toolbar.
3. Click **New Pathway** or **New Guideline**.

Saving a Pathway/Guideline

To save a Pathway/Guideline, do the following:

1. Click **File**, on the toolbar.
2. Then Either:
   - Click **Save**, for a Pathway/Guideline that has already been saved.

   Or
   - Click **Save As**, for a Pathway/Guideline that has not been previously saved, or to save it as a different name (leaving the old version as it was).

Opening a Pathway/Guideline

To open a Pathway/Guideline from the **Designer** tab, do the following:

1. Click **File**, on the toolbar.
2. Then Either:
   - Click **Open**, and select the Pathway/Guideline from the list, using the Filter to help locate it. Then click the **Open** button.

   Or
   - Click **Recent**, and select the Pathway/Guideline from the list of the five most recently opened Pathways/Guidelines.

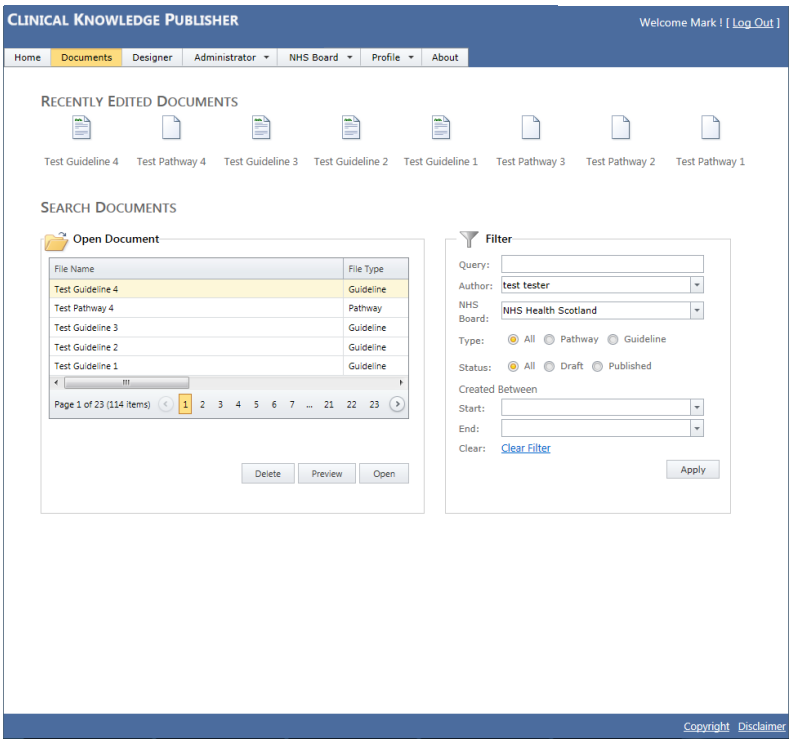
Deleting Pathways and Guidelines

Owners of pathways can delete their own Pathways and Guidelines, removing them from the system.

Administrators and Organisation Administrators can remove Pathways and Guidelines within their organisation.

To delete a Pathway or Guideline, do the following:

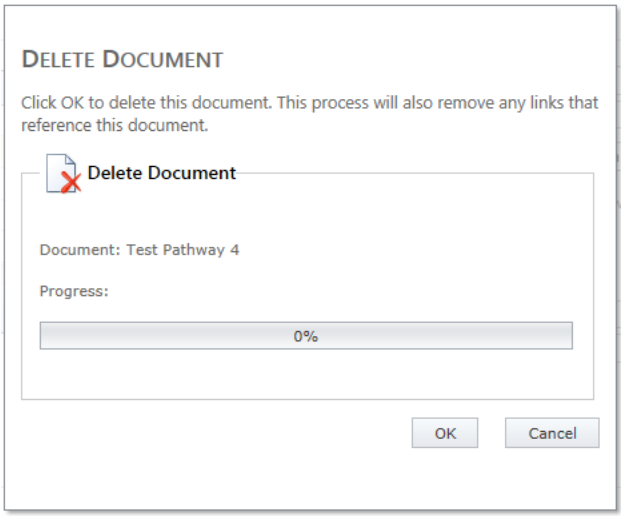
1. Click on the **Documents** Navigation tab.



2. In the **Open Document** area locate the Pathway/Guideline to be deleted.

   The filter is available to make it easier to locate the relevant Pathway/Guideline.

3. Select the Pathway/Guideline to be deleted by clicking on it.
4. Click on the **Delete** button.
   The Delete Document screen appears.



5. Click **OK** to confirm.
   (or click **Cancel** to exit without deleting)
   A message will appear to say the document has been deleted successfully.
6. Click **Close**.

When a document (Pathway or Guideline) is deleted, a record is kept with the name of the user who deleted it along with the date/time of deletion. In addition, any links that exist to the document that has been deleted will be severed.

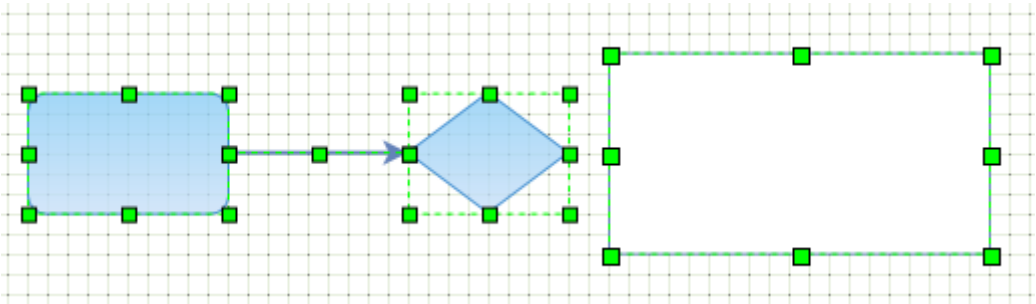
Selecting Items on the Design Grid

Selecting a Single Item

To select a single Item, do the following:

1. Move the mouse cursor over the Item to be selected.
2. Click to select the Item.

   Selected Items appear with a green dashed outline and green boxes around their perimeter as displayed below.



Selecting Multiple Items

There are two methods of selecting multiple Items.

Click and Drag Method

1. Click and hold where you wish the corner of the box to start.
2. With the click still depressed, "Drag" the blue selection box so that all Items you wish to highlight are FULLY contained within the box.
3. Release the click.

Ctrl Method

1. Move the mouse cursor over first Item to be selected.
2. Click to select the Item.
3. With the ***Ctrl*** button depressed, repeat **Steps 1 & 2** for as many Items as you wish to select.

Manipulating Items on the Design Grid

Adding a Node, Decision or Text box

Nodes, Decisions and Text boxes can be placed on the Design Grid by "Dragging" them from the toolbar. If Items on the design grid overlap then priority is given in the order of which they were added, with the most recent being on top.

To add a new Item to the Designer Grid, do the following:

1. On the toolbar, click and hold on the Item to be added to the Design Grid.
2. With the click still depressed, "Drag" the Item to the correct location on the Design Grid.
3. Release the click.
   The Item is displayed. Additional Items can be added to the Design Grid in the same manner.

Adding Connections Between Nodes/Decisions

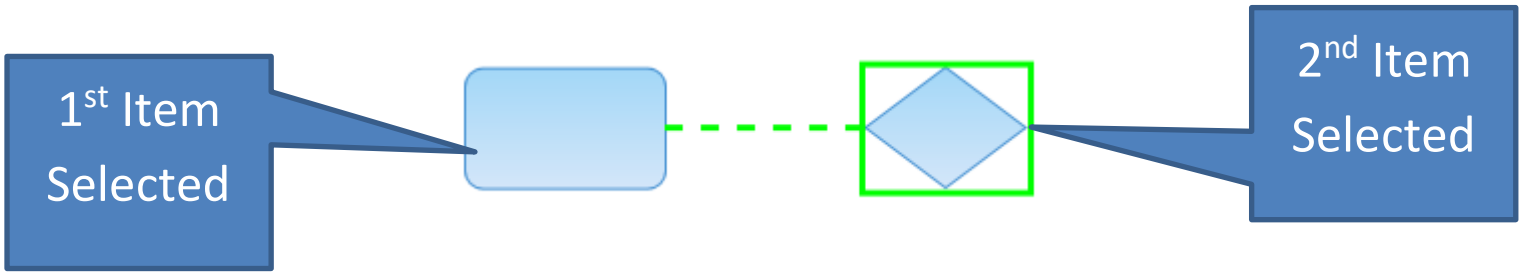
A Connection is a line joining two Nodes/Decisions with an arrow head denoting the direction of travel.

Connections can only be used to link Nodes and Decisions, and not Text boxes. More than one Connection can be made in each direction. Between two items. The direction of the arrow head on the connection is controlled by the order of which the Items are linked. To obtain an arrow head on a Connection in both directions, a Connection needs to be made in one direction and then an additional Connection in the reverse direction i.e. two separate Connections.

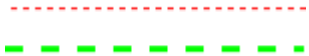
To add a Connection, do the following:

1. Move the mouse cursor over the Middle of first Item to be linked until the mouse pointer changes to the "Hand" cursor ( ).

2. Click and hold on the Item.
3. With the click still depressed, "Drag" the cursor onto the second Item to be connected. A green box appears around the second Item, indicating the connection is allowed.



A temporary dotted line is displayed from the first Item to the current cursor position. A red dotted line indicates a Connection cannot be made, and a green dotted line indicates a Connection can be made.



4. Release the Click.

The green dotted line becomes permanent blue, which means a connection has been made.

Moving a single Node, Decision or Text Box

Nodes, Decisions and Text boxes can be moved around the Design Grid as required.

To move an Item around the Design Grid, do the Following:

1. Move the mouse cursor over the relevant Item until the mouse pointer changes to the "Move" cursor ( ).
2. Click and hold on the Item.
3. With the click still depressed, "Drag" the Item to the new location on the Design Grid.
4. Release the click.
   The Item is then displayed in the location the mouse click was released.

Moving Multiple Items

Multiple Items can be moved around the Design Grid by selecting the Items you wish to move, using one of the two methods of Selecting Multiple Items, and then "Dragging" them as you would a single Item.

Resizing a Node, Decision or Text box

The shape and size of Items can be easily changed from the default size.

To resize a Node, Decision or Text box, do the following:

1. Select the Item to be resized (See Selecting a Single Item).
2. Move the mouse cursor over a small green box surrounding the Item until the cursor changes to the "Resize" cursor ( ).

3. Click and hold.
4. With the click still depressed, "Drag" the Item to a new size or shape.
5. Release the mouse click.

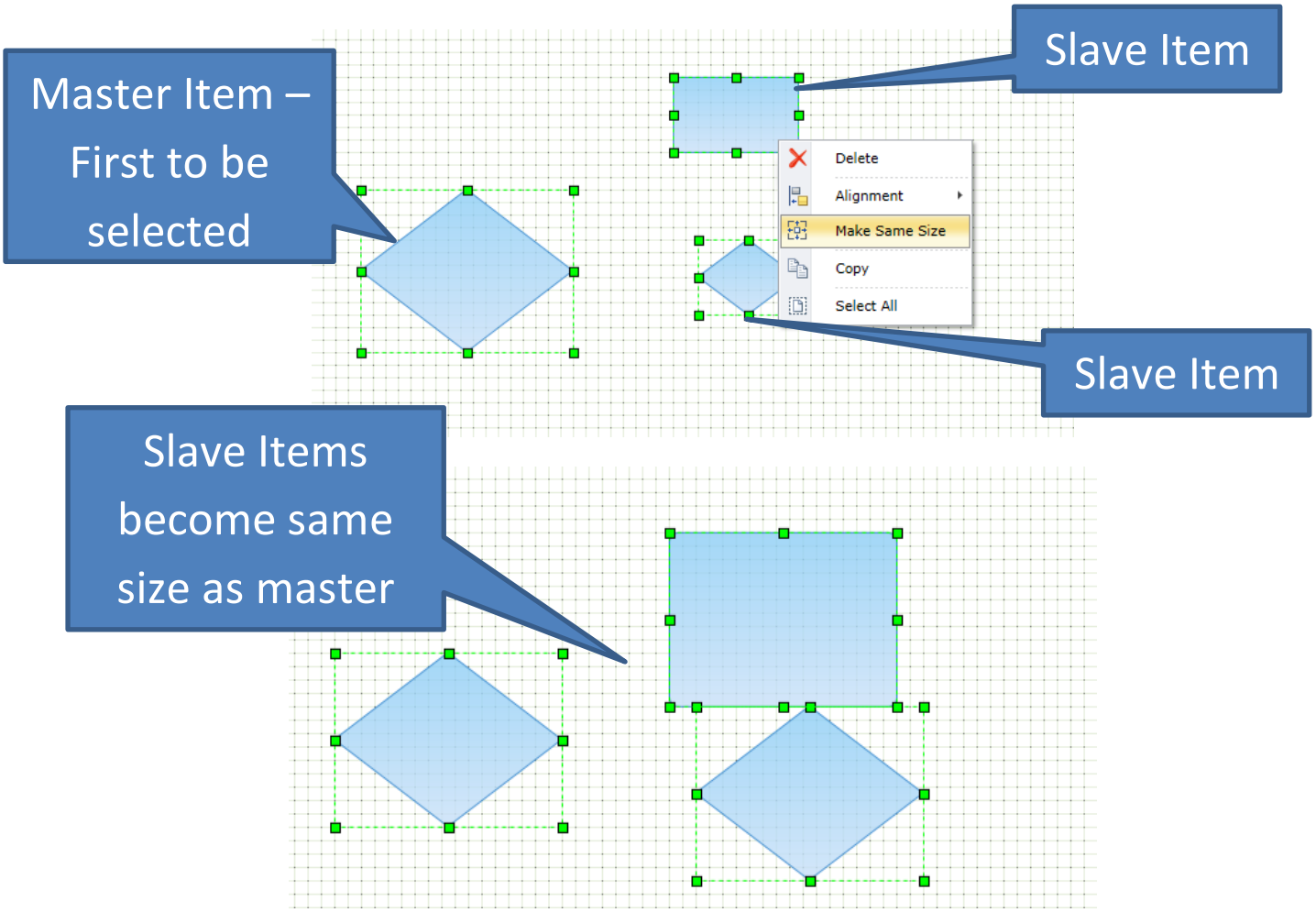
Resizing Nodes, Decisions and Text Boxes to the same size

A useful tool is available to make elected Nodes, Decisions and Text Boxes all the same size, after they have been created on the Design Grid.

This is done by selecting Items individually using the ***Ctrl*** key on the keyboard. The first Item (Node, Decision or Text box) to be selected is the termed the Master Item and each Item selected thereafter are Slave Items. Slave Items are changed so that they inherit the same dimensions as the Master Item.

To resize multiple Items to the same size, do the following:

1. Select the Master Item. This is done by placing the mouse pointer over the Item and then clicking. (See Selecting a Single Item).
   (The Master Item selected is the size that all the subsequently selected Items will be resized to.)
2. Hold down the ***Ctrl*** key and select a Slave Item. This is done by placing the mouse pointer over the Item, holding down the ***Ctrl*** key on the keyboard and simultaneously clicking with the mouse. (See Selecting a Multiple Items).
   (The Slave Items selected are those that will have their size changed to that of the Master Item.)
3. Repeat **Step 2** above for as many Slave Items as needed.
4. With mouse pointer over a selected Item, right-click and select **Make Same Size**.
   (The Slave Items selected will have their size altered to that of the Master Item, which will always be the first Item selected.)

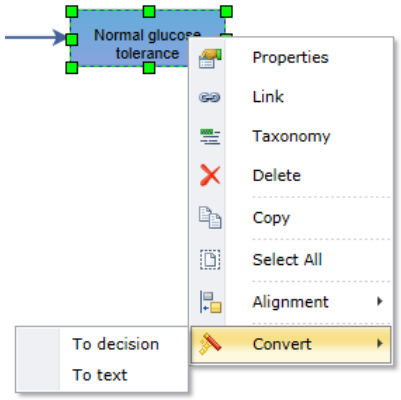


Converting Items to a Different Type

Items can be converted to a different type very easily. If for example a Decision is created and content added in the HTML Editor, it can be changed to a Node or Text box very easily.

To convert Items to a different type, do the following:

1. Right-click on the Item and select click **Convert**.
2. From the sub-menu select an option.



Change a Connection Style

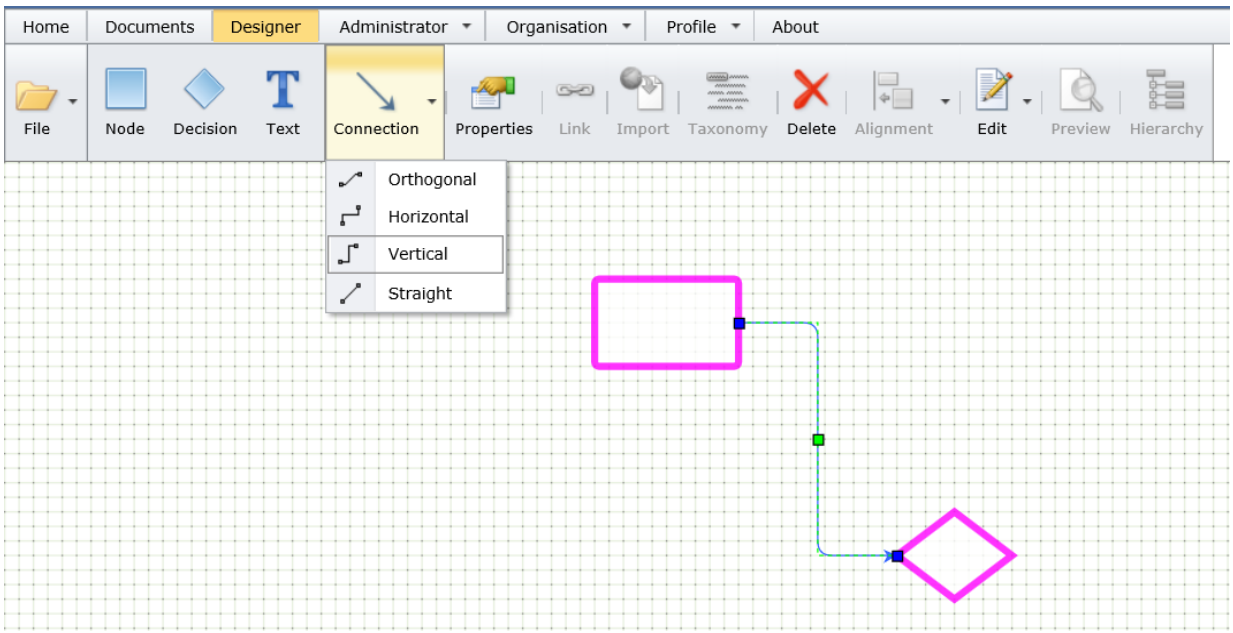
Four styles are available to link Items together depending on their relative position. When a Connection is made the Connection style used is the default one which is selected on the toolbar.

To change the default Connection, do the following:

1. Click **Connection** on the toolbar.
2. From the drop down options select a Connection type.

To change a connection that is already present on the Design Grid, do the following:

1. Select a single or multiple Connections (See Selecting Items on The Design Grid).
2. Click **Connection** on the toolbar.
3. From the drop down options select the Connection to be used.



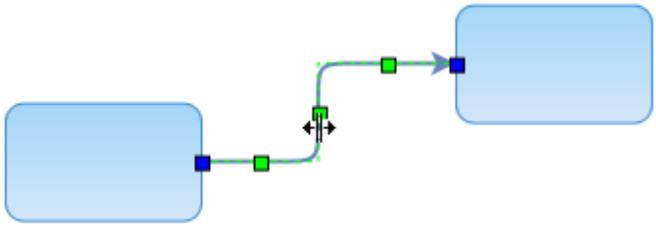
Reshaping a Connection

Connections will remain between Nodes and Decisions, even when the Node/Decision is moved or resized. When this happens, the route the connection takes will be automatically re-plotted. The shape of the Connection route can be altered manually so that it takes a desired path.

To change the shape of the Connection, do the following:

1. Select the Connection to be reshaped (See Selecting a Single Item).

2. Move the mouse cursor over a small green box on the Connection until the cursor changes to the “Reshape” cursor ( ).

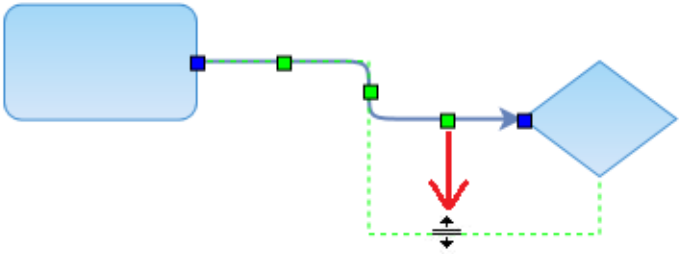


3. Click and hold.
4. With the click still depressed, “Drag” the Connection to change the shape.
5. Release the click.

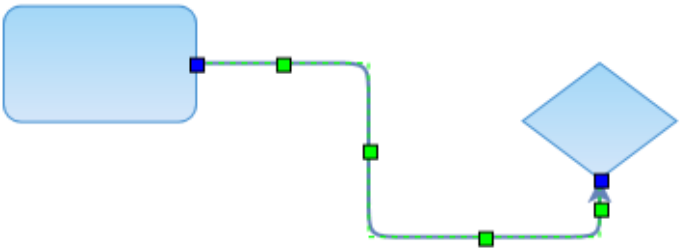
Choosing an Orthogonal Connection will allow the Connection to produce complex shapes, which may be needed to navigate around other Items. This is done by extending a plane beyond a shapes limit. In doing so a new plane is created. See Below.

Producing Connections with Complex Routes

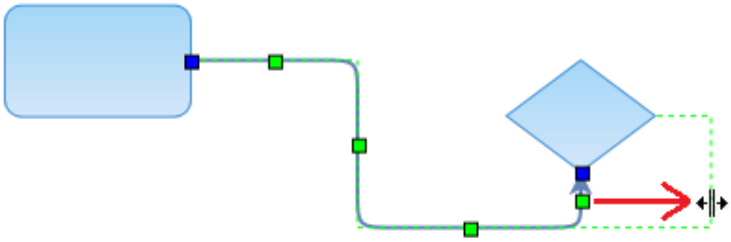
Sometimes it may be necessary to produce a Connection that takes a complex route around other Items to make it aesthetically pleasing. This can be done using an Orthogonal Connection style. Once the initial Connection is made it is necessary to reshape one of the planes beyond its "Normal" limit, as below:



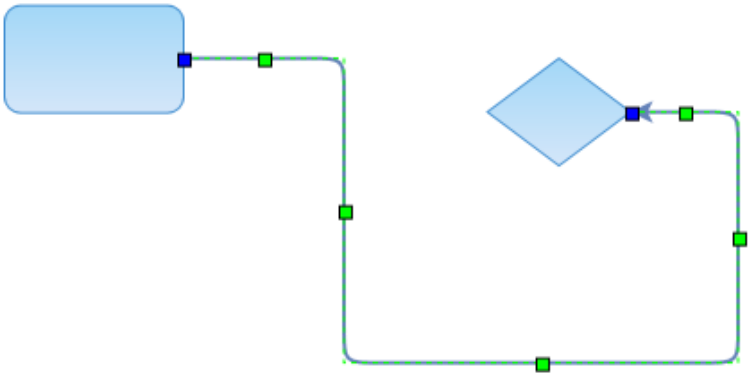
This then creates an additional plane:



This additional plane can also be reshaped:



In this way it is possible to create a Connection with potentially limitless sides and therefore routes:



Deleting a single Node, Decision, Text box or Connection

To delete an Item from the Design grid, do the Following:

1. Select Item by moving the mouse cursor over the relevant Item.
2. Then either:
   - Select the Item with click, and then click **Delete** on toolbar.

   Or

   - Right-click on the Item and select **Delete** from the menu.

   A prompt will then appear asking if you want to delete the selected Item(s).

3. Click **OK**.

Deleting Multiple Items

Multiple Items can be deleted. This is done by selecting the Items to be deleted, using one of the two methods of Selecting Multiple Items, and then deleting them as you would a single Item.

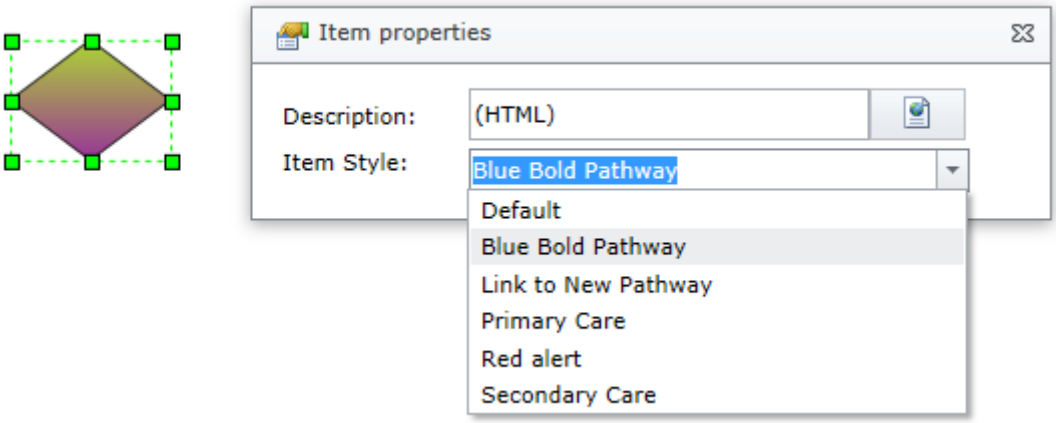
*The size of the Design grid can be increased by hiding the website header and footer bars from display, see Window Expand. An additional way of increasing the area of the Design Grid is to toggle the Browser into full screen mode. This is done by pressing the **F11** function key, and works with the majority of internet browsers. In the same way, full screen mode can be disabled by pressing the **F11** function key again.*

Changing the Style of Items

Items can have their appearance changed by assigning a Style to them. Each organisation has a set of styles set by the Organisation Administrator. A user can contact their local Organisation Administrator to request a new style for the Organisation.

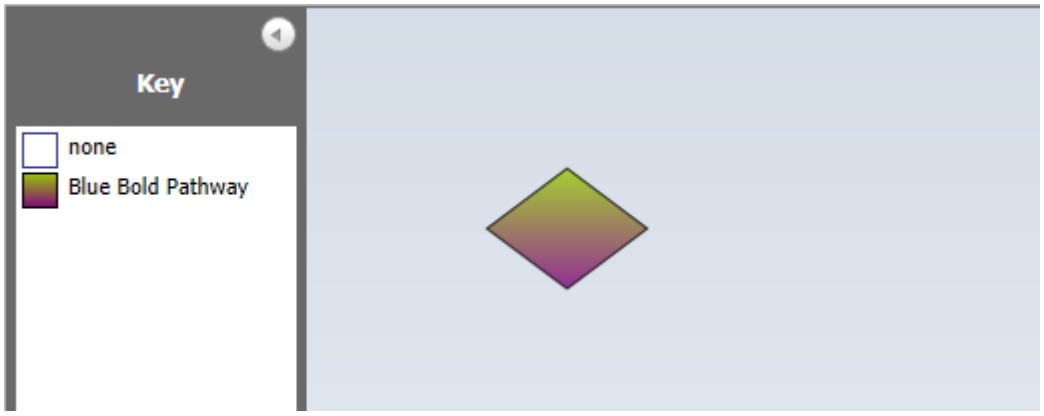
Please note that if a user is given editing rights to a document authored in a different organisation it is best NOT to change the existing styles or add new styles to the document as these may be different to those available in the document owner's organisation. To apply a Style to an Item, do the following:

1. Select the Item with a click, and then click **Properties** on toolbar.



2. Select the desired Style from the Item Style drop down box.

   The End User can see the Style name in the Key giving the nodes meaning:



Aligning Items

Items can be easy aligned using the alignment tool. Items are aligned relative to each other rather than the page. This helps to make the Pathway/Guideline look neat and structured. Items can be aligned in both the horizontal and vertical planes.

To align multiple Items, do the following:

1. Select the Items to be aligned using the **Ctrl** key.
   When aligning to Middle or Centre, the first Item to be selected is the one that is used as a reference point, therefore you must select the Items using the Selecting Multiple Items – ***Ctrl*** Method.
2. Either:
   - From the toolbar select **Alignment** and choose one of the options.

   Or

   - With mouse pointer over a selected Item, right-click, select **Alignment** and choose one of the options.

When aligning Items to Top, all the selected Items are aligned to the top most part of the top most of the selected Items. When aligning Items to Left, all the selected Items are aligned to the left most part of the left most of the selected Items. In the same way, this is true for align to Bottom, and align to Right.

When aligning Middle or Centre all selected Items are aligned to the middle or centre of the Item that was selected first, using the ***Ctrl*** key.

As Items are aligned relative to each other, single Items cannot be aligned.

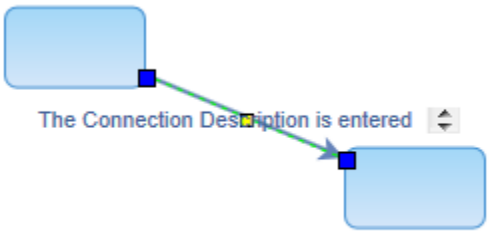
Item Descriptions

Each Node, Decision, Text box & Connection can have a description. Descriptions for Nodes, Decisions & Text boxes are displayed within them. Descriptions for Connections are displayed alongside the Connection and can be moved to a more suitable location.

Adding a Description to a Connection

There are two ways to add a description to a Connection. To add a description to a Connection, do the following:

1. Double click on the Connection.
   (A cursor then appears on the Item, with a horizontal scroll bar.)
2. Enter text, which appears on the Item.



3. Click elsewhere on the Design Grid to save.

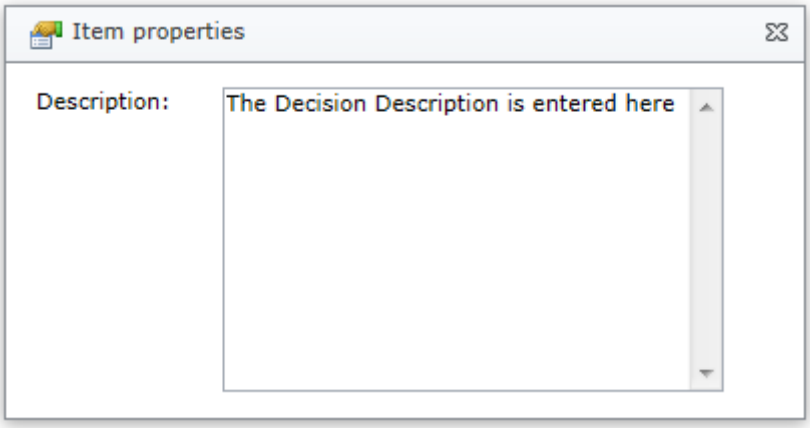
Alternatively

1. Either:
   - Select the Connection with a click, and then click **Properties** on toolbar.

   Or

   - Right-click on the Connection and select **Properties** from the menu.

2. Enter a Description in the Item Properties window.



3. Click the Close Cross ( ) in the top right-hand corner of the Item Properties window.

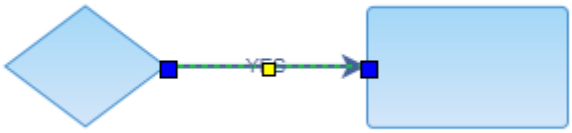
*Pressing the **Enter/Return** key to start a new line of text is a very good way of justifying the Description text.*

Moving a Connection Description

When a Description has been added to a Connection it appears centrally located, and will probably need to be moved to a more suitable position depending on the other Items that are nearby.

To move a Connection Description, do the following:

1. Select the Connection with a click (See Selecting a Single Item).
2. Move the mouse cursor over the yellow box (▫).

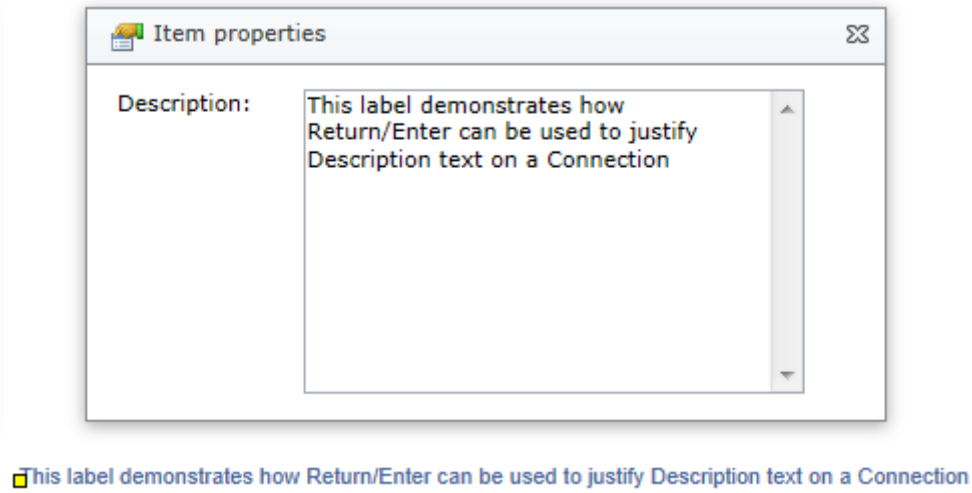


3. Click and hold on the yellow box.
4. With the click still depressed, “Drag” the yellow box to a new location on the Design Grid.

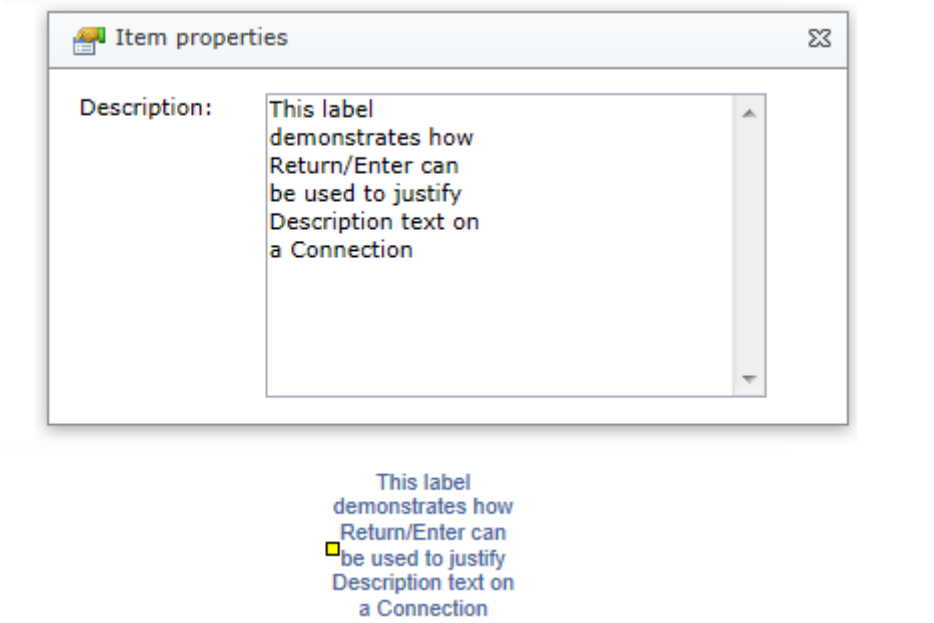
5. Release the click.
   The Connection Description is displayed where the yellow box was released.

Justifying a Connection Description

By default, the Description for a Connection appears on one line when typed into the Description box, as shown below:



For short Descriptions this may not be a problem, but it may be advisable to alter longer Descriptions so that they can fit into a given space. This is done by using the Enter/Return key to move the cursor onto the next line. By using Return/Enter, the Connection text can be changed to a more suitable shape/size.



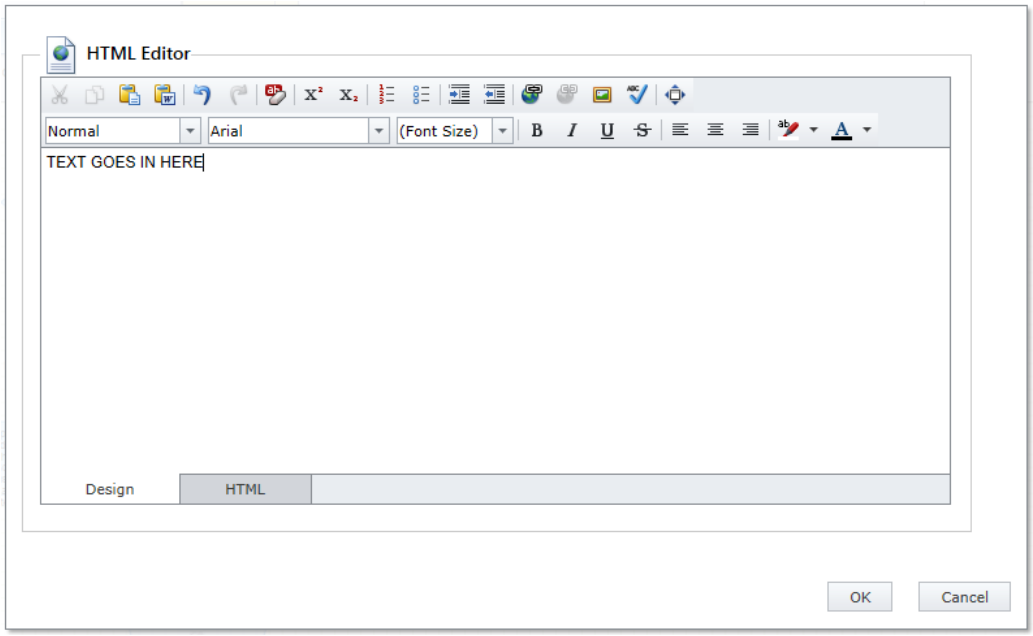
Adding a Description to a Node or Decision

Descriptions added to a Node or Decision are done in the Text Editor window. To add a Description to a Node or Decision via the Text Editor, do the following:

1. Move the mouse cursor over the relevant Item.
2. Double-click.
3. Click in the Text Area.
4. Text can then be entered and edited in Text Editor.
5. Click **OK** to save changes to Text Editor.

HTML Editor – Text Box

HTML Editor is a WYSIWYG text editor allowing the user to see the content exactly how it will appear. It works in the same way as modern word processing packages. HTML Editor is used add text or HTML code into a Text box (see Adding a Description to a Text box, above). In addition the HTML editor is used by the System Administrator to add content to various pages on the website (see Site Content).



HTML Editor comprises of a Design tab and a HTML tab. The Design tab works in much the same way as any modern word processing package, allowing the user to format and justify text, insert images and spell check the contents. The HTML tab allows HTML code to be entered / pasted in, which is then displayed in the text box.

Link Manager

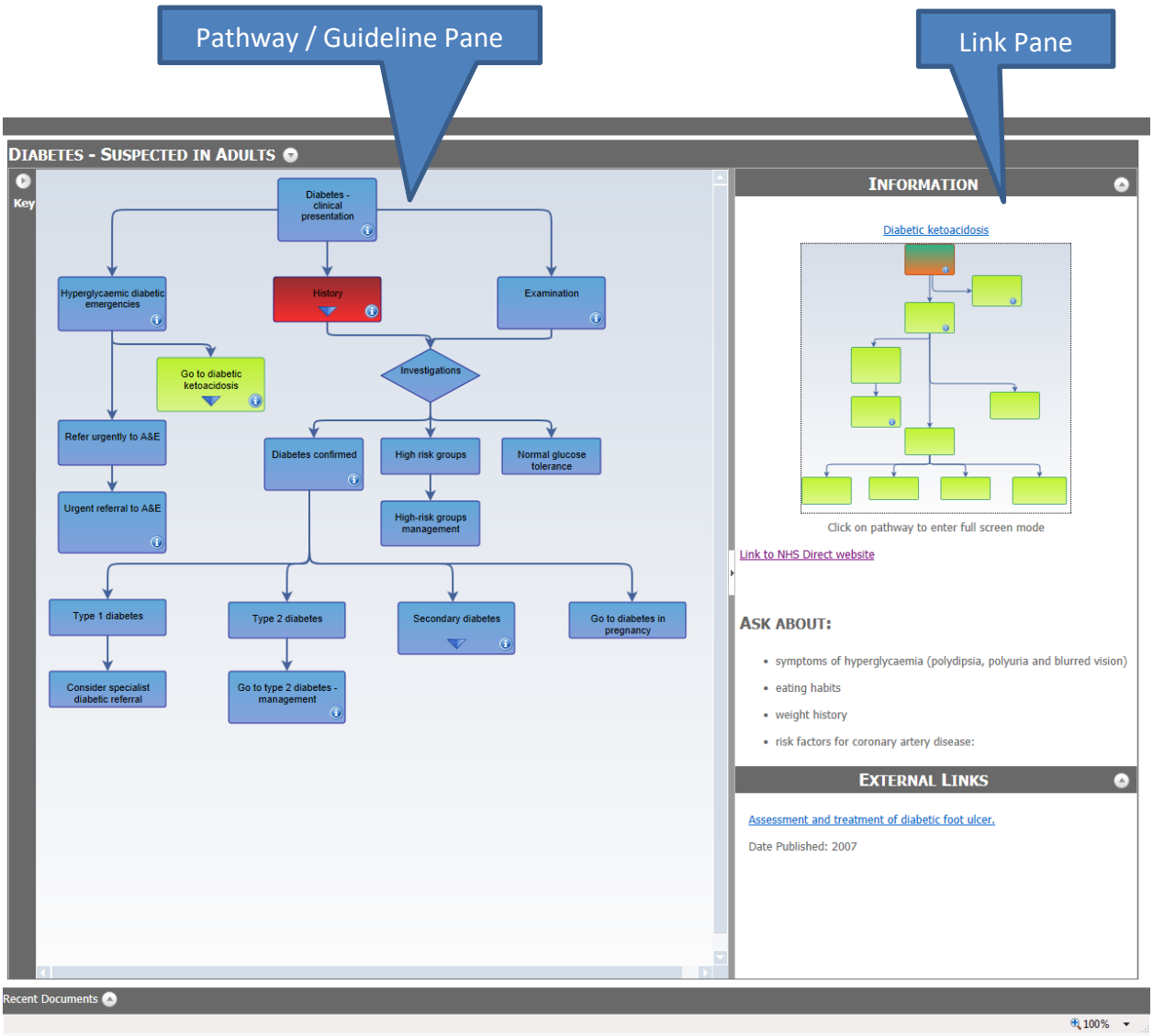
Links are a way of displaying additional relevant content in a Guideline or Pathway. Links can be applied at either:

- **Individual Nodes** - (Content displayed when Node is clicked)

Or

- **Entire Pathways/Guidelines** – (Content displayed automatically when Pathway/Guideline is opened)

Content contained within a Link is displayed to the End User in the Link pane when the relevant Node is clicked. The browser is split vertically and the Link pane is situated on the right-hand side, with the Pathway/Guideline pane on the left-hand side. In addition, the node that was selected changes colour to highlight which Node is currently selected. The default selected colour is red, but may be different if changed by the Organisation Administrator (See Organisation Node Styles).



Content displayed in the Link Pane is defined in Link Manager. The content can be any of the following:

	Icon	Description
Free Text		Free text is entered in Link Manager via the HTML Editor and appears in the Link pane exactly as displayed. Multiple free text entries can be added to each Node or Pathway/Guideline.
URL's		URL's appear in the Link pane as clickable links to websites. They must be entered into Link Manager as the full URL e.g. http://www. When clicked in the Link pane they appear either in a new windows or the current window, as defined in the URL properties. Multiple URL entries can be added to each Node or Pathway/Guideline.
Links to the Knowledge Network		Clickable links to articles are displayed in the Link pane. When the user clicks the link they are directed to the article. Multiple Knowledge Network Links can be added to each Node or Pathway/Guideline.
Links to other Pathways		Only one Pathway can be linked to each Node or Pathway/Guideline. The End User sees a thumbnail of the linked Pathway in the Link pane. By clicking on the thumbnail the Pathway opens up in a full window.
Links to other Guidelines		Other Guideline content is displayed in the Link pane. Multiple Links to other Guidelines can be added to each Node or Pathway/Guideline.
Link to NICE resources		The link to the NICE resource document is presented as a clickable text link
Link to the organisation's IPR statement		A copy of the organisation's IPR statement appears in the link pane under the link category heading

Applying Links to Individual Nodes

Links that are applied to a Node allow the End User to click on the Node, which then displays the Link pane containing the linked content.

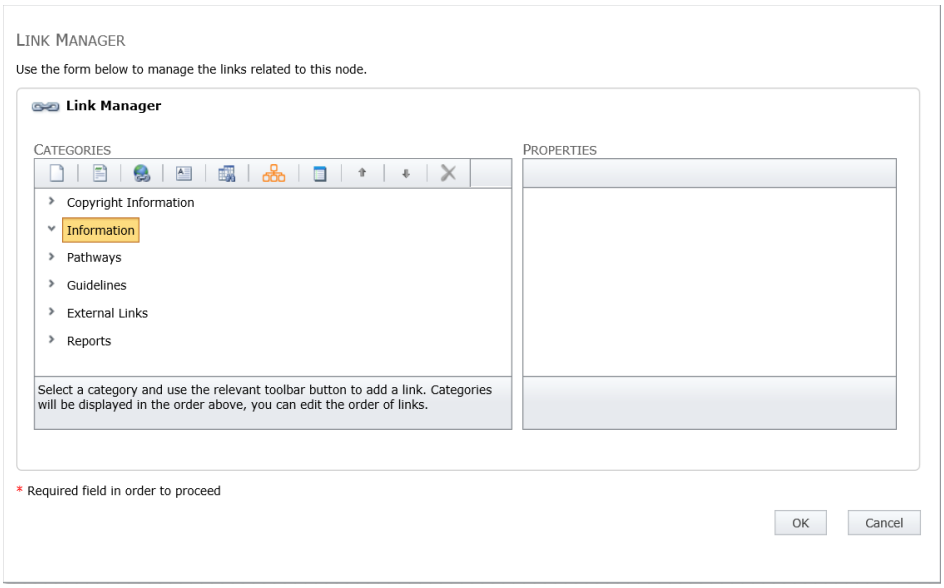
To apply a Link to an individual Node, do the following:

1. Move the mouse cursor over the Node.
2. Then either:
   - Select the Item with click, and click **Link** on toolbar.

   Or

   - Right-click on the Item and select **Link** from the menu.

Link Manager is then displayed and Link content can be added as below.



Applying Links to Entire Pathways/Guidelines

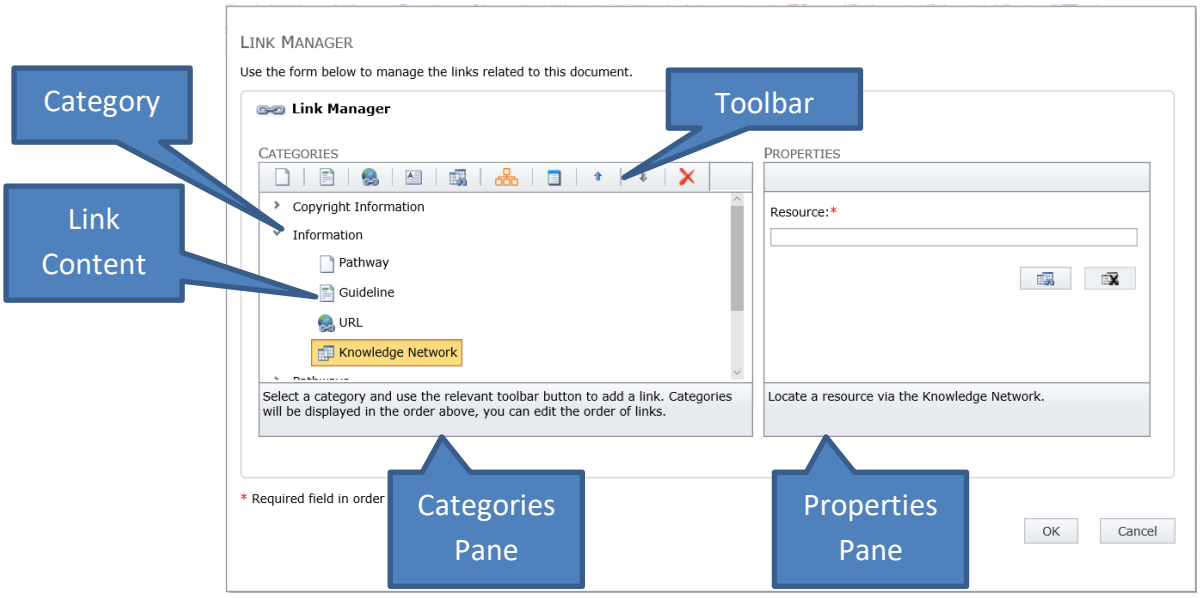
When Links are applied to an entire Pathway/Guideline, the Link pane appears as soon as the Pathway/Guideline is opened, displaying the content without the need for End User interaction.

To apply a Link to the entire Pathway/Guideline, do the following:

1. Move the mouse cursor over a blank area of the Design Grid.
2. Right-click and select **Link** from the menu.
   Link Manager is then displayed and Link content can be added.

Link Content

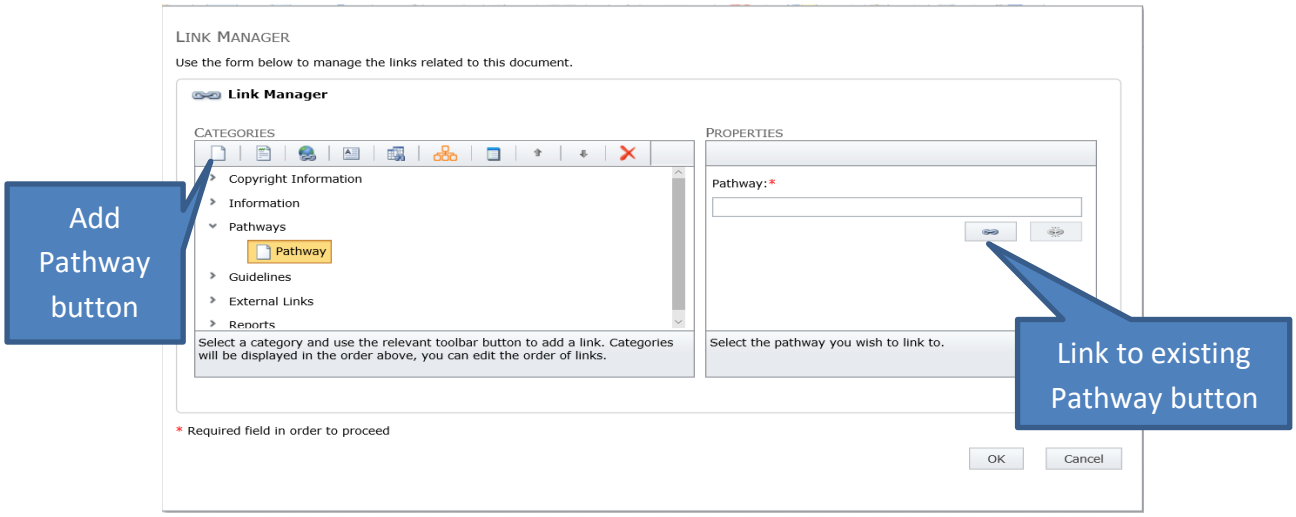
The Link pane is divided into categories for ease of use. These categories are defined by the Organisation Administrator. Link content is added to any of the categories listed.



Add a Pathway

To add a Pathway, do the following:

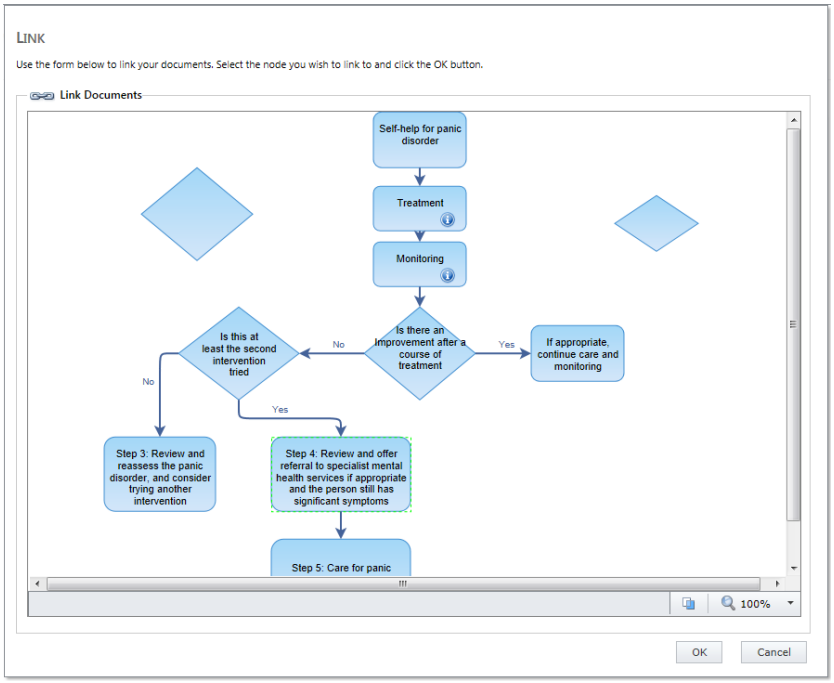
1. Select a **Category** from the **Categories** pane on the left side by clicking it.
2. Click **Add Pathway** button ( ) on the toolbar.
   (A Pathway is then added to the Category that was selected.)



3. Click **Link to an Existing Pathway** button ( ) from the **Properties** pane.

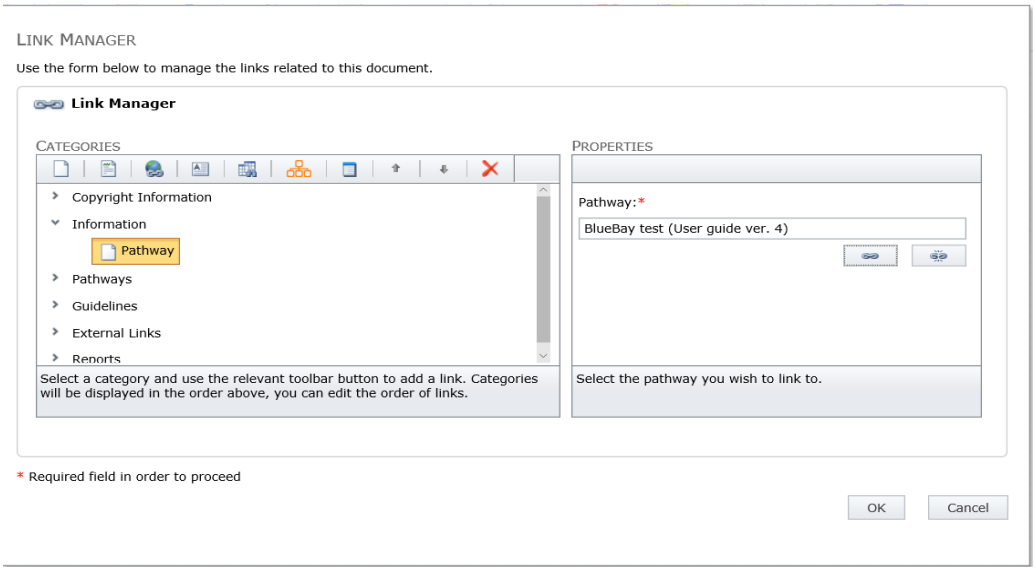
   (The Open Document window is displayed.)

4. Select the Pathway to which it will be linked and click the **Open** button.
   (The filter is available to make it easier to locate the relevant Pathway. The selected Pathway is opened in the Link windows.)



5. Click to select the Node or Decision which will be the focus point.
(A green box is placed around the selected Node or Decision.)

6. Click **OK** button.
(The selected pathway name is displayed in the **Properties** pane, indicating that it has been linked.)



7. When all changes have been made click on the **OK** button to save the changes.

If it is necessary to unlink a Pathway, click the Unlink Pathway button ().

Add a Guideline

To add a Guideline, do the following:

1. Select a **Category** from the **Categories** pane on the left side with a click.
2. Click **Add Guideline** button ( ) on the toolbar.
   (A Guideline is then added to the Category that was selected.)
3. Click **Link to an Existing Guideline** button ( ) from the **Properties** pane.

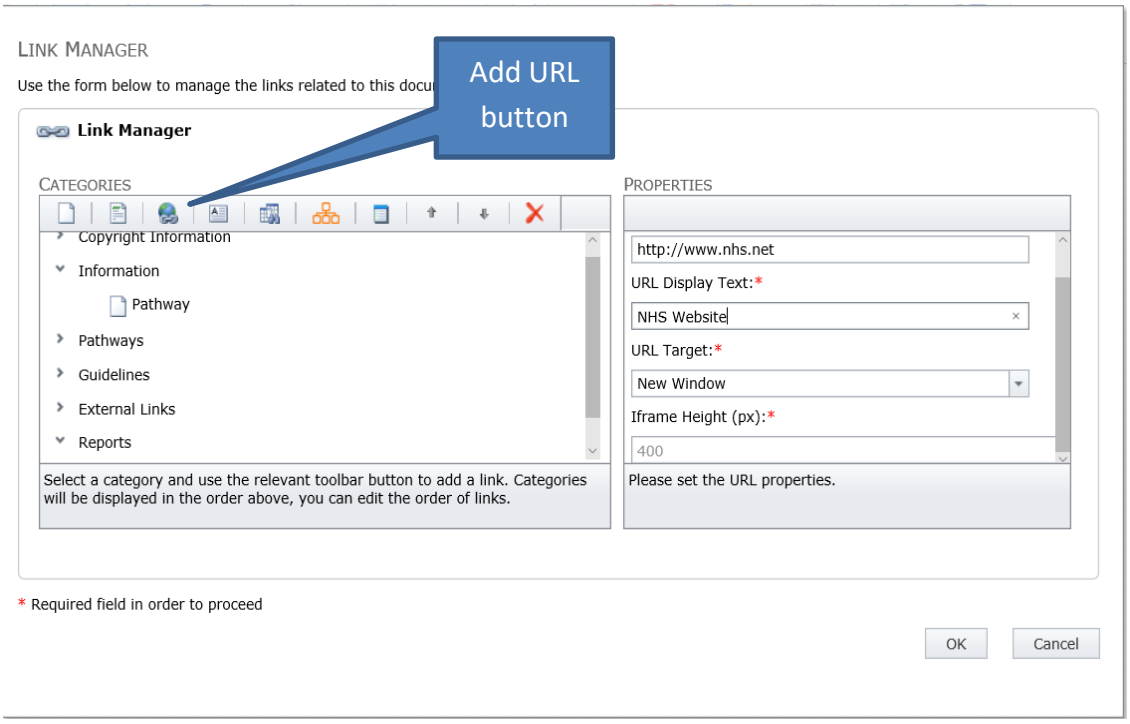
   (The Open Document window is displayed.)
4. Select the Pathway to which it will be linked and click the **Open** button.
   (The filter is available to make it easier to locate the relevant Pathway. The selected Pathway is opened in the Link windows.)
5. Select the Text box to be linked to, with a click.
   (A green box is placed around the selected Text box.)
6. Click **OK** button.
   (The selected Guideline name is displayed in the **Properties** pane, indicating that it has been linked.)
7. When all changes have been made click on the **OK** button to save the changes.

   If it is necessary to unlink a Guideline, click the Unlink Guideline button ( ).

Add a URL

To add a URL link to a webpage, do the following:

1. Select a **Category** from the **Categories** pane on the left side with a click.
2. Click **Add URL** button ( ) on the toolbar.
   (A URL is then added to the Category that was selected.)
3. Type the full URL into the **URL** box on the **Properties** pane. e.g. http://www.nhs.uk
4. In the **URL Display Text** box type the link text to be displayed.
5. In the **URL Target** drop down box select either *New Window*, *Same Window or Display in Iframe*, which dictates where the URL will open. The *Display in Iframe* option will attempt to embed web page specified in the URL directly into the viewer.
6. If the **URL Target** is set to *Display in Iframe,* the height of the Iframe can be set using the **Iframe Height (px)** field.

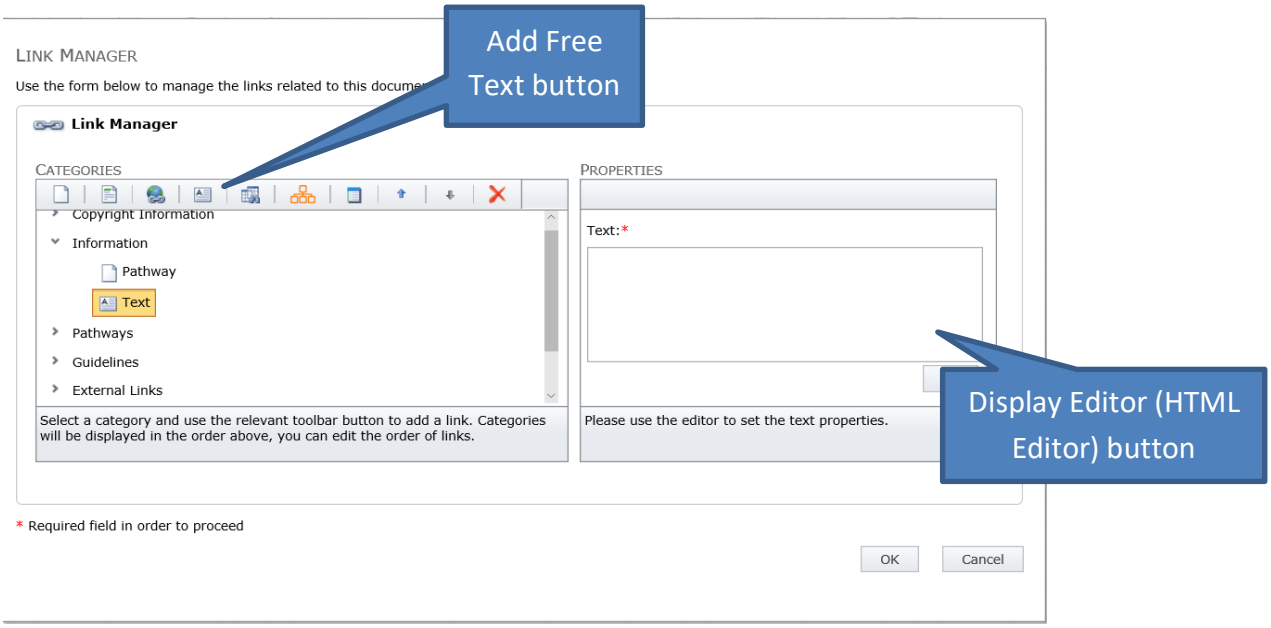


7. When all changes have been made click on the **OK** button to save the changes.

Add Free Text

To add free text, do the following:

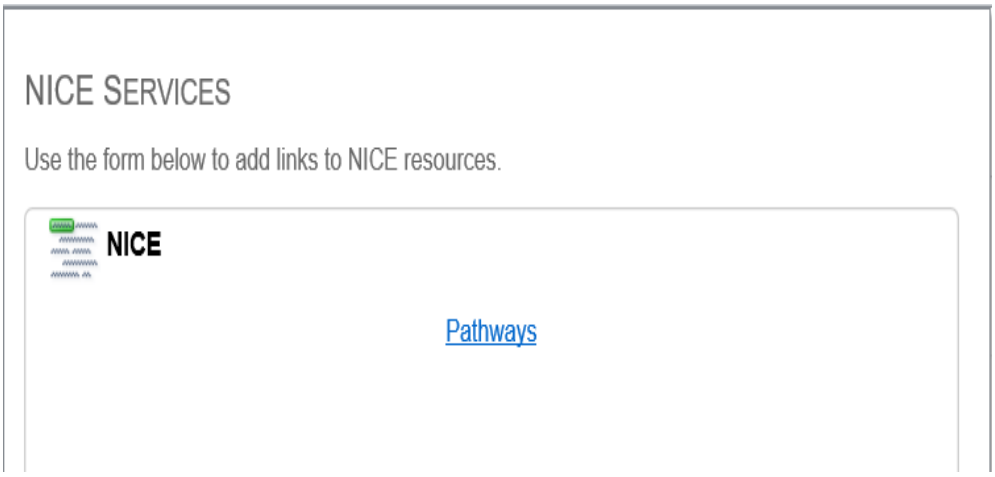
1. Select a **Category** from the **Categories** pane on the left side with a click.
2. Click **Add Free Text** button ( ) on the toolbar.
3. From the **Properties** pane, click on the Display Editor button ( ).
   The HTML Editor screen appears.



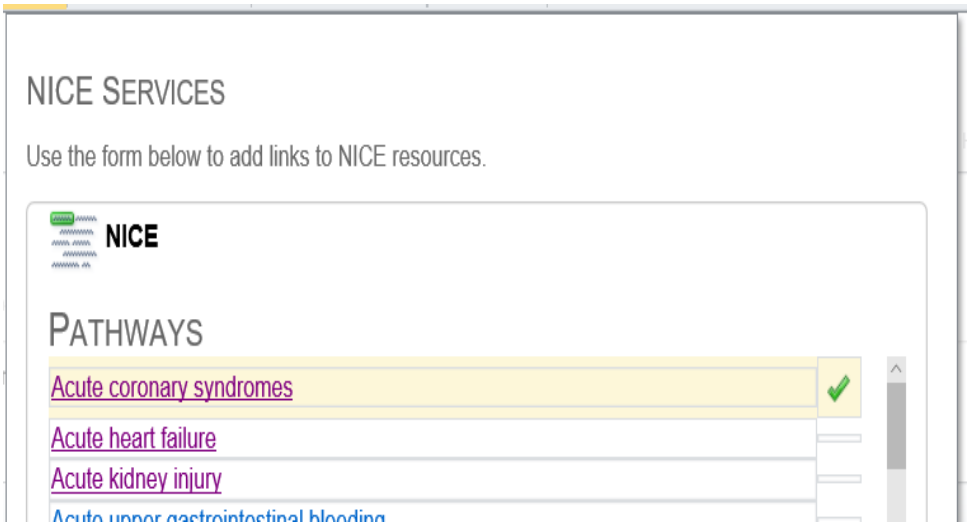
4. Text, images & HTML code can then be entered and edited in HTML Editor (See HTML Editor)
5. Click **OK** to save changes to HTML Editor.
6. When all changes have been made click on the **OK** button to save the changes.

Add a link to a NICE pathway

1. Select a **Category** from the **Categories** pane on the left side with a click.
2. Click **the NICE Search** button ( ) on the toolbar.
3. From the **Properties** pane, click on the Locate a NICE resource button ( ).
   The NICE Services screen appears.



4. Click on the Pathways option to display a list of NICE published pathways
5. A pathway is selected by clicking in the box to the right of the name:



Clicking on the pathway name will open the resource in a browser window

6. Click OK to save your pathway selection
7. When all changes have been made click on the **OK** button to save the changes.

Add Copyright Information

Documents may automatically contain a copyright statement set by the Organisation Administrator for all the pathways in that organisation or if the document is a copy of a document from another organisation it may contain the copyright statement for the original organisation. These statements are linked to the document as a whole and appear at the top of the additional information panel under the heading "Copyright Statement" in the document viewer. These statements cannot be edited or removed, except by the relevant Organisation Administrator.

Add Your Organisations IPR statement

If a document is copied from another organisation it will retain the Copyright Statement from the original organisation.

It is possible to supplement this with the Copyright Statement for the current organisation. To add this:

1. Select a **Category** from the **Categories** pane on the left side with a click.
2. Click the **Add your organisation's IPR statement** button ( ) on the toolbar.
   The Properties window will not display the statement content.
3. When all changes have been made click on the **OK** button to save the changes.

Add Your Own Copyright Information

It is possible for a user to add their own copyright statement if an Organisation one has not been set or in addition to the Organisation statement. To do this:

1. Select the Copyright Information category from the Categories pane on the left side with a click.
2. Click **Add Free Text** button ( ) on the toolbar.
3. From the **Properties** pane, click on the Display Editor button ( ). The HTML Editor screen appears.
4. Text, images & HTML code can then be entered and edited in HTML Editor (See HTML Editor).
5. Click **OK** to save changes to HTML Editor.
6. When all changes have been made click on the **OK** button to save the changes.

Change the Order of Links in a Category

To change the order of Links in a category, do the following:

1. Select a **Category** from the **Categories** pane on the left side with a click.
2. From the toolbar, click on Move the Selected Item Up button ( ) or Move the Selected Item Down button ( ).

Delete a Link

To delete a link, do the following:

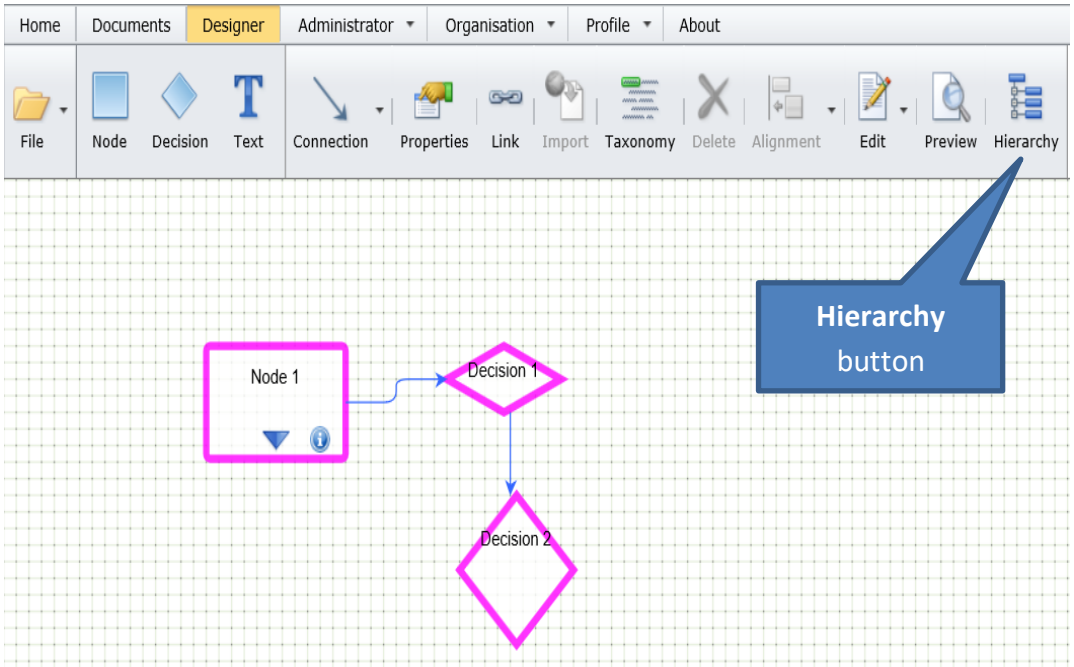
1. Select a **Category** from the **Categories** pane on the left side with a click.
2. From the toolbar, click on the Delete Selected Item button ( ).

Hierarchical Display of Linked Pathways & Guidelines

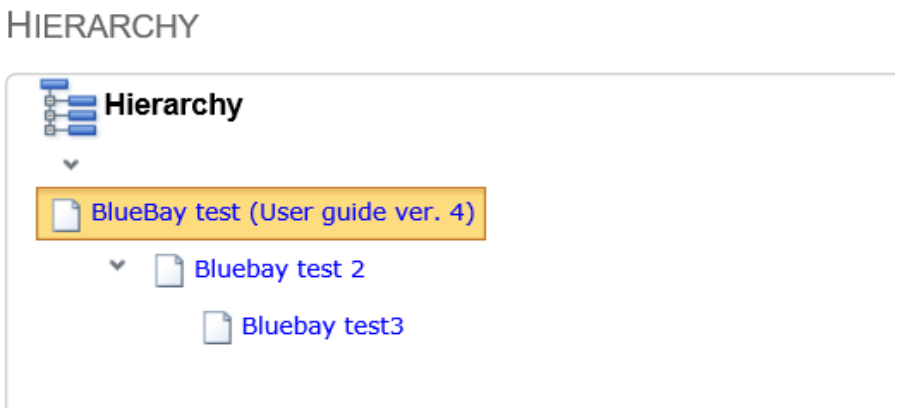
To facilitate the implementation of linked pathways & guidelines it is possible to view a diagrammatical representation of the linkages with the currently open document represented as the root node.

To see this functionality:

1. Open the document in the designer window
2. Click on Hierarchy on the toolbar



This will display a diagrammatical tree representation of linked pathways & guidelines:



In the example above **Bluebay test3** is linked to **Bluebay test 2** which in turn is linked to **Bluebay test (User guide ver. 4)**.

Double clicking on a link will open that document into the designer window.

Taxonomy Manager

Taxonomy Manager allows keyword tags to be added to Nodes and Text boxes, providing a fully searchable database of terms. It also allows keyword tags to be added to a Pathway/Guideline as a whole. Taxonomy Manager allows keywords to be chosen from a pre-defined list of terms or to be added in as free text.

Applying Taxonomy to Individual Nodes and Text boxes

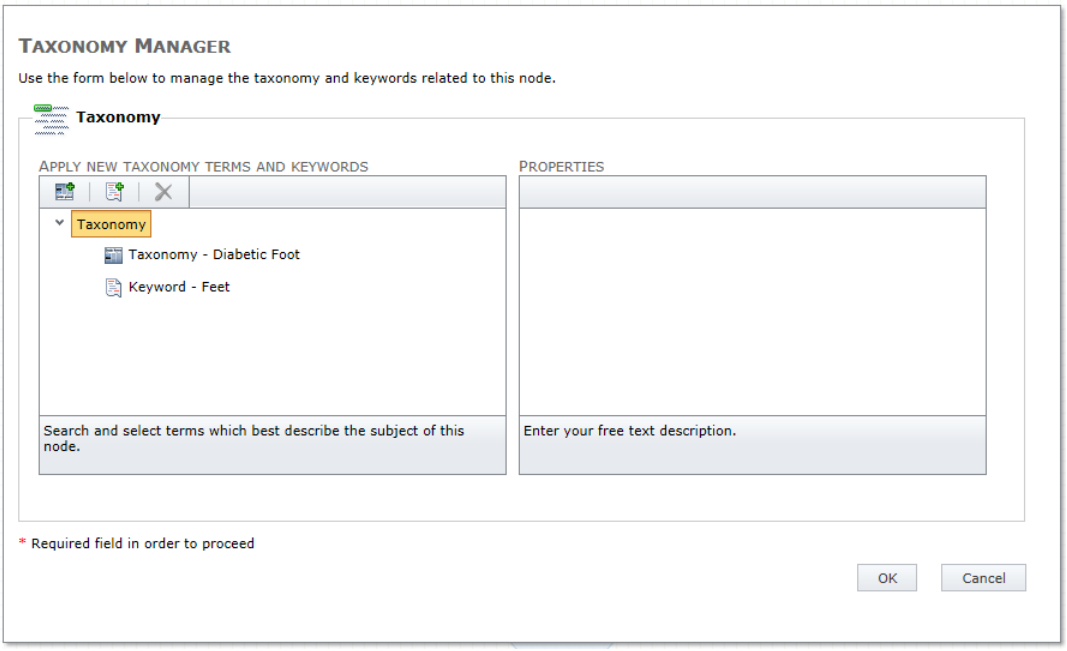
To apply Taxonomy to an Individual Node or Text box, do the following:

1. Move mouse cursor over Node or Text box.
2. Then either:
   - Select the Item with click, and click **Taxonomy** on toolbar.

   Or

   - Right-click on the Item and select **Taxonomy** from the menu.

   Taxonomy Manager is displayed.



Applying Taxonomy to Entire Pathways/Guidelines

To apply Taxonomy to the entire Pathway/Guideline, do the following:

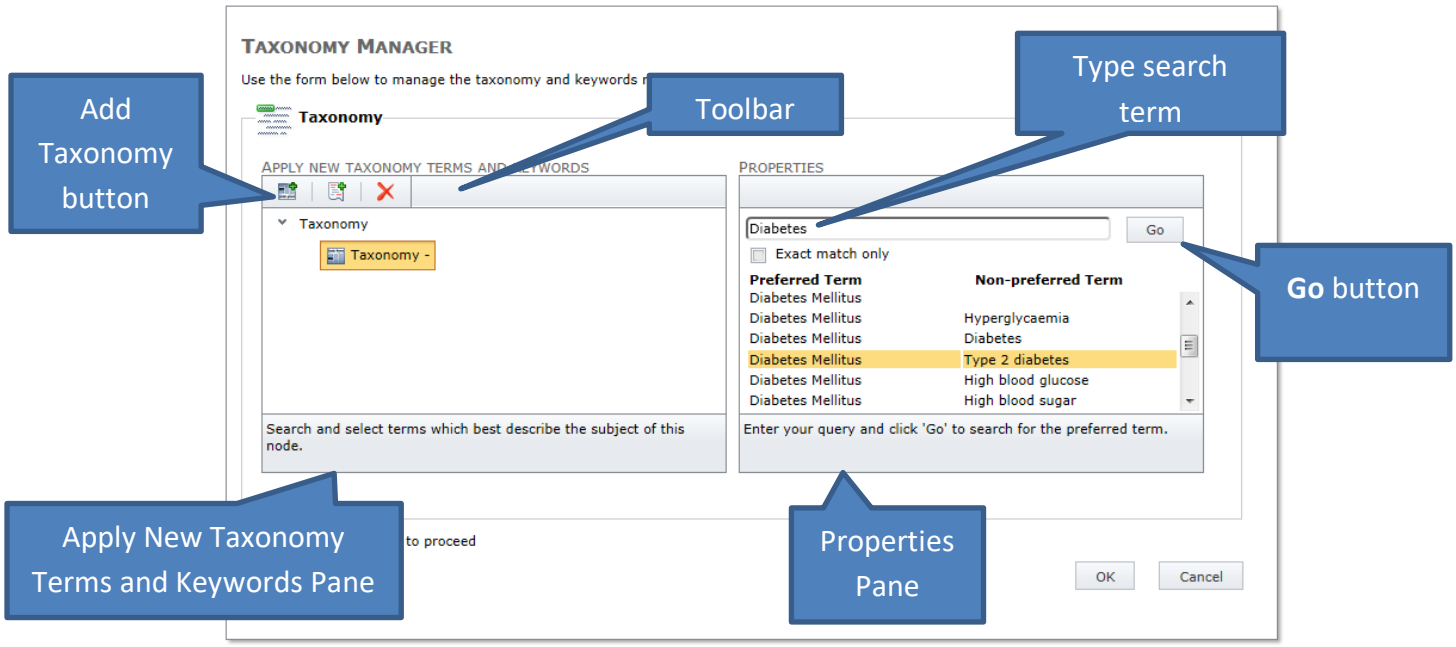
1. Move the mouse cursor over a blank area of the Design Grid.
2. Right-click and select **Taxonomy** from the menu.
   (Taxonomy Manager is displayed and Keywords can be added to the whole document.)

Add a Keyword from Taxonomy

A predefined group of keywords exists which can be associated with a Node or Text box. These are known as Taxonomy terms. When adding a keyword to a Node or Text box the keyword should ideally be taken from the list of Taxonomy terms. If no term exists in the taxonomy terms list then it can be added as Free Text (See Add a Keyword as Free Text).

To add a Keyword from Taxonomy, do the following:

1. Click **Add Taxonomy** button ( ) on the toolbar.
2. In the **Properties** pane, type in the term you wish to find and click the **Go** button. (As text is typed into the window a list of possible matches appears below which can be selected if relevant.)



3. From the list that is then provided click on the relevant term.
   The term selected is displayed alongside the word Taxonomy in the **Apply New Taxonomy Terms and Keywords** pane.
4. When all changes have been made click on the **OK** button to save the changes.

> *Placing a tick in the **Exact Match Only** tick box is a useful way of locating the correct term without producing a long list of possible terms. This is useful if you know the term you are looking for.*

Add a Keyword as Free Text

When no suitable term exists in Taxonomy then a free text one can be added.

To add a Keyword as Free text, do the following:

1. Click **Add Keyword** button ( ) on the toolbar.
2. In the **Properties** pane, type in the keyword you wish to add as free text.
3. When all changes have been made click on the **OK** button to save the changes.

Delete a Keyword

To delete a Keyword, do the following:

1. Select the Keyword from the Apply New Taxonomy Terms and Keywords pane on the left side with a click.
2. Click **Delete Selected Item** button ( ) on the toolbar.

Import HTML

HTML documents can be directly imported into a Text box.

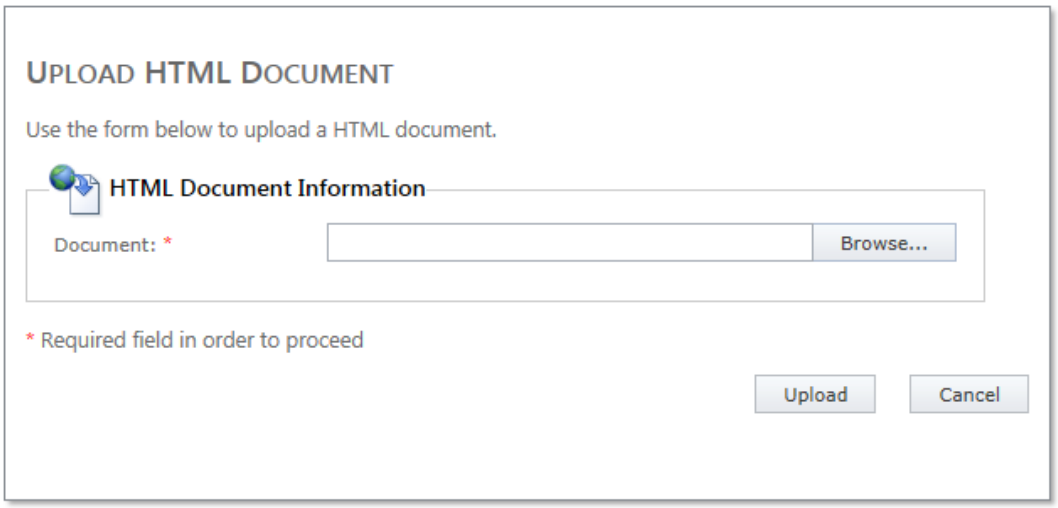
To Import a HTML document into a text box, do the following:

1. Move the mouse cursor over the relevant Item.
2. Then either:
   - Select the Item with click, and click **Import** on toolbar.

   Or

   - Right-click on the Item and select **Import** from the menu.

   Upload HTML Document is then displayed.



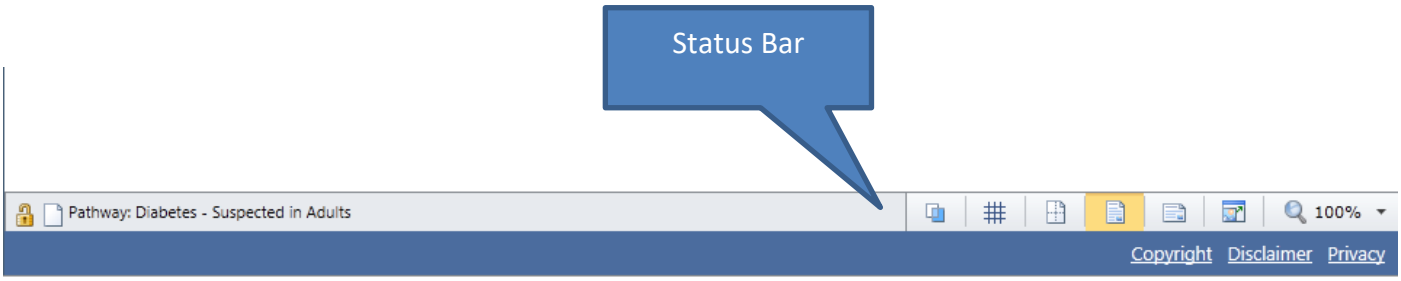
3. Click the **Browse** button.
4. Navigate to the location of the file to be uploaded.

5. Click to select the file, and then click **Open.**
   (The file selected appears in the **Document** box.)
6. Click the **Upload** button.
   (A progress bar displays what percentage of the file has been uploaded. Once uploaded the HTML document appears in the text box.)

> *The Import HTML Document facility allows HTML files to be uploaded. Only files with extensions of .HTML and .HTM can be uploaded. HTML codes may not render exactly as expected.*

Views

Certain features on the Designer can be turned on and off as well as changing the scale. These functions can be accessed from the Status Bar in the bottom right-hand corner of the browser.



Grid

For design reasons the grid can be turned on and off. This is useful to help judge the layout and give perspective.

To toggle the Grid On/Off, do either of the following:

- Click the Grid button (#) on the Status Bar.

Or

- Right-click on a blank area of the Designer and select **Grid** from the menu.

Page Breaks

A Page Break is a dashed line used to show the size of a page on the designer. This can help give an overall view of the scale.

To toggle the Page Breaks On/Off, do either of the following:

- Click the Page Breaks button ( ) on the Status Bar.

Or

- Right-click on a blank area of the Designer and select **Page Breaks** from the menu.

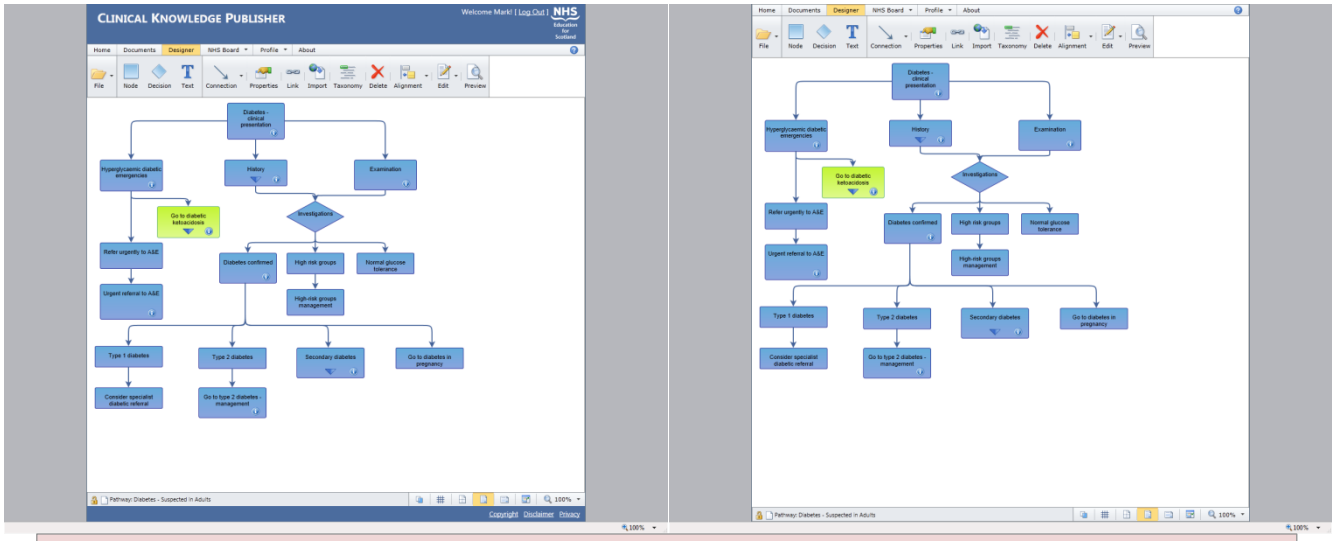
Window Expand

Window expand removes the Header and Footer from the window creating more space for the Designer grid. This is particularly useful for computers with low resolution monitors.

To toggle the Window Expand, do the following:

1. Click the **Toggle Window Expand** button ( ) on the Status Bar.

Window not Expanded **Window Expanded**



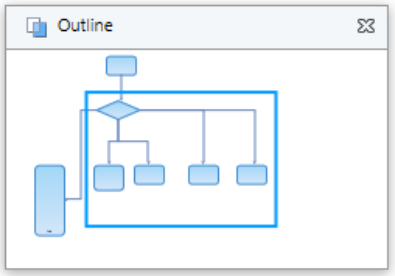
*Another way to increase the Designer working area is to toggle the browser into full screen mode. This is done by pressing the **F11** function key, and works with the majority of internet browsers. In the same way, full screen mode can be disabled by pressing the **F11** function key again.*

Zoom

The scale of the Designer grid can be changed to allow the user to zoom in and out. The zoom menu is located on the Status Bar (100%). When the Zoom menu is clicked the various options are available. The current percentage zoom being displayed is shown on the Status Bar.

Outline

Outline is a small popup window that is displayed on top of the designer. It allows the user to see which part of the Design Grid is currently being displayed in respect to the whole Design Grid. The area displayed in the large blue box is that which is currently being displayed on the Design Grid.



Toggle Outline On/Off

To toggle the Document Outline On/Off, do either of the following:

- Click the Document Outline button ( ) on the Status Bar.

Or

- Right-click on a blank area of the Designer and select **Outline** from the menu.

Move Outline Popup Window Around the Design Grid

To move the Outline popup window around the screen, do the following:

1. Move the mouse cursor over Outline title bar (where "Outline" is written) until the mouse pointer changes to the "Move" cursor ( ).
2. Click and hold.
3. With the click still depressed, "Drag" to the new location.

Change Outline View

The area currently being displayed can be moved by "Dragging" the large blue box around the designer.

To change the Outline area being displayed, do the following:

1. Move the mouse cursor over large blue box until the mouse pointer changes to the "Move" cursor ( ).
2. Click and hold.
3. With the click still depressed, "Drag" the large blue box to a new location.
4. Release the click.
   The area contained in the large blue box is now displayed on the Design Grid.

Orientation

To change the page orientation, do either of the following:

- Click **Portrait** button ( ) on the Status Bar.

Or

- Click **Landscape** button ( ) on the Status Bar.

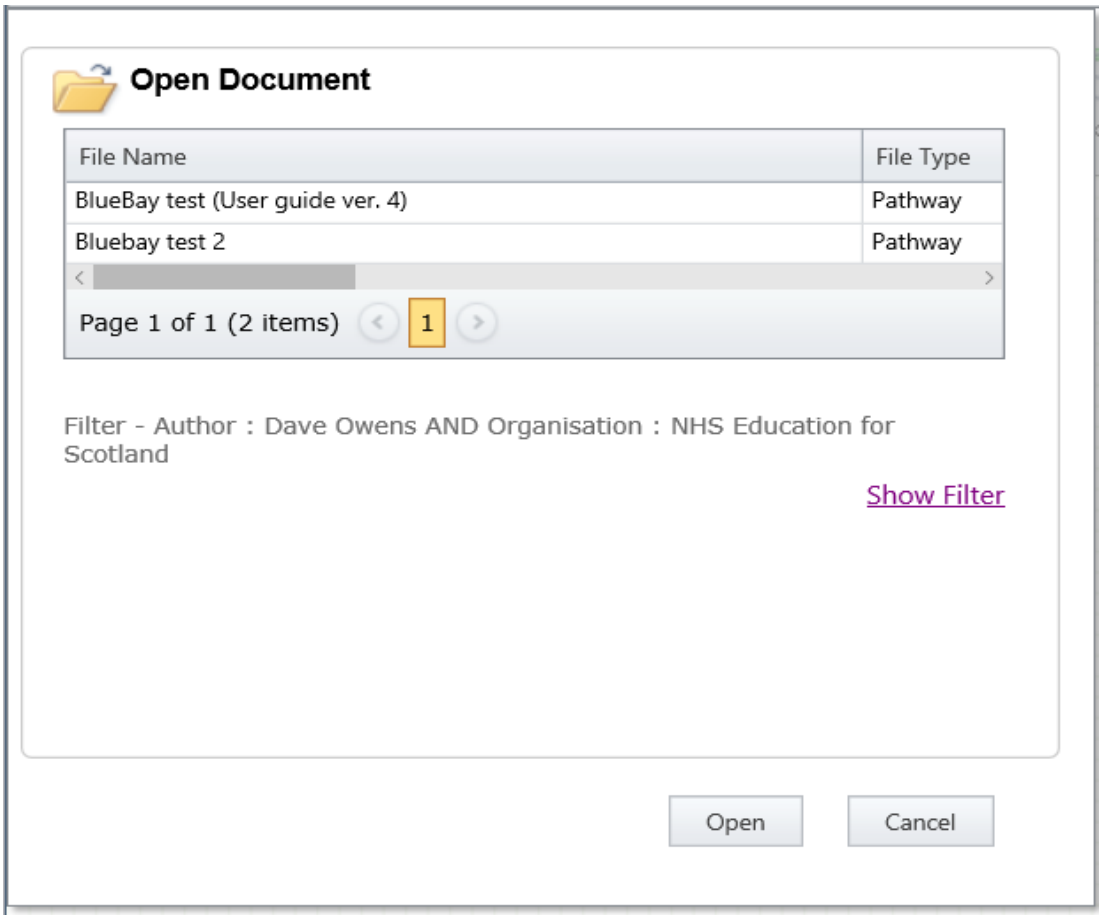
Accessing Documents Across Organisations

There are, essentially, 3 levels of access to documents across organisations:

1. Users have the ability to view any document within and outside their own organisation.
2. If the owner of a document has enabled the '**copyable**' property of a document, users can then enjoy the privilege of opening and copying a document.
3. The owner of a document can further specify users or teams across organisations to have full editing access to a document

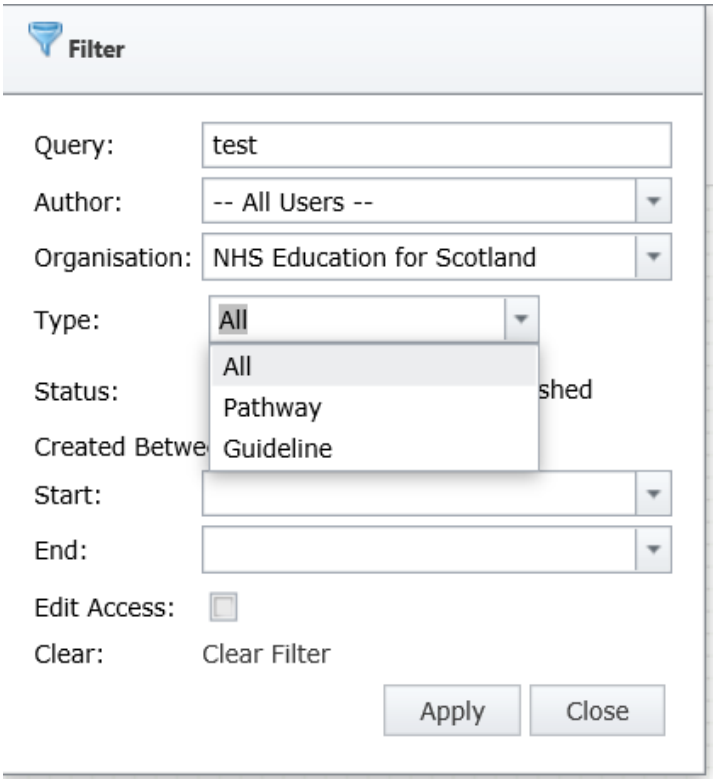
Viewing Documents Across Organisations

1. Choose the Documents tab or click on File/Open from within the Designer Canvas. The panel on the left hand side will, by default, display documents the user has created.
   The Open Document dialogue window will open:



2. The Search Filter in the right hand side panel can be used to search for documents created by other CKP users.
   The query box and drop downs can be used to retrieve documents with matching keywords in the title or matching keywords associated with the documents by the documents' authors.
   The drop downs can be used to filter the search by organisation, document author, type, status and creation date.

The Edit Access button should be checked to retrieve only those documents the user has permission to edit.



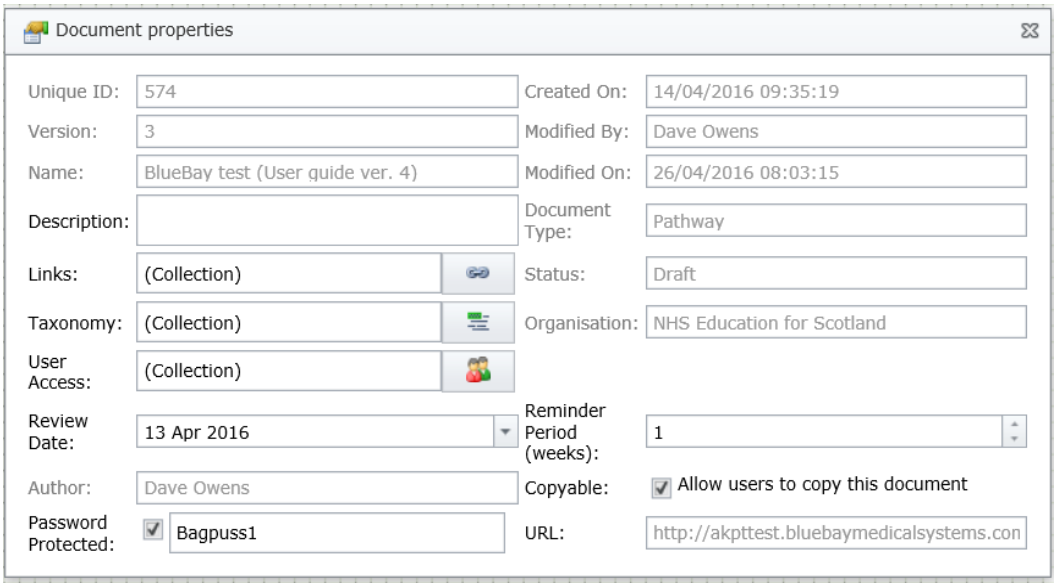
3. Click on Apply and the list of documents will be updated in the left hand side panel.

Copying Documents

Documents are NOT available to copy by default. However, the owner of a document can enable the copy property of the document. This property is independent of the access settings (described below) that allow users editing rights to a document. Setting the **copy** property allows all other users with viewing rights to the document to copy it.

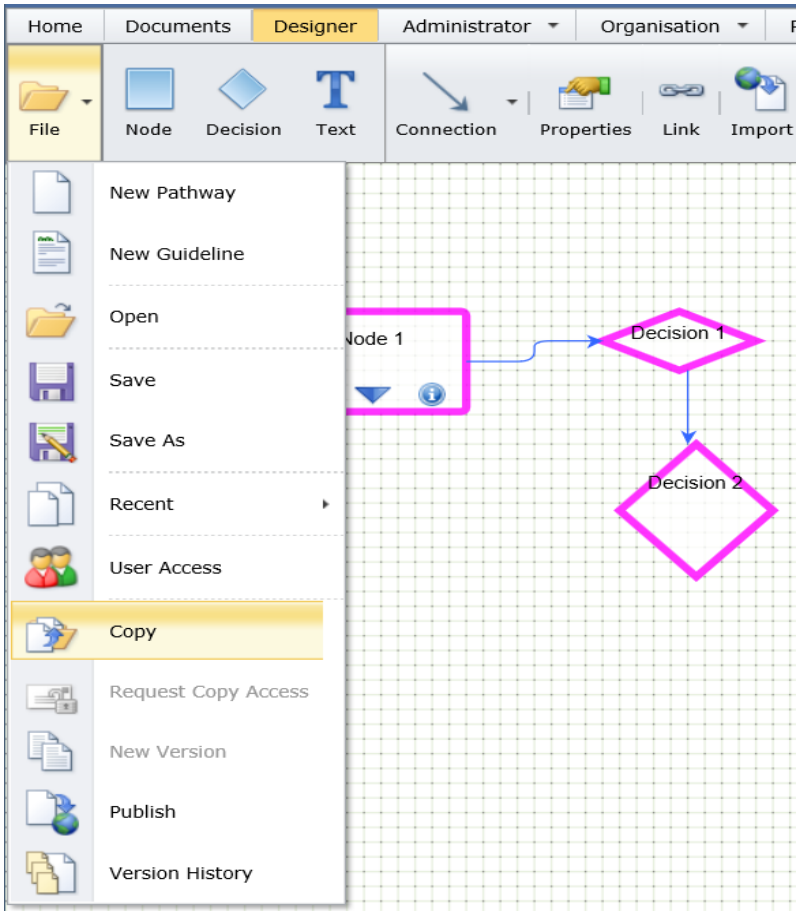
The owner sets the copy property as follows:

1. Open the document in the Designer window and click on the Properties tab on the toolbar. The Document properties window is displayed:

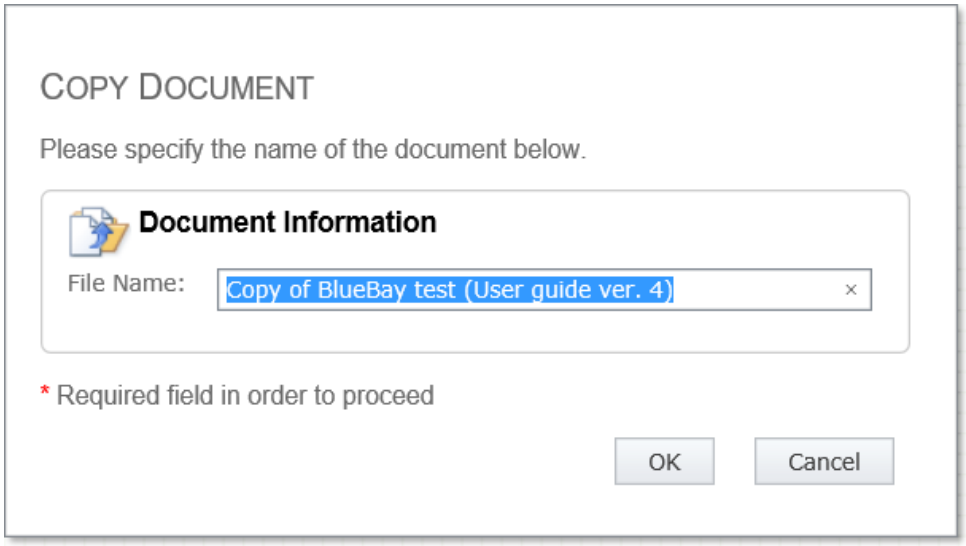


2. Tick the **Copyable** option.
3. Close the Document properties window and Save the document (the option can be unticked and the pathway resaved if in the future the document owner wishes to again disable the copy property).

When users now view this document they will see the Copy option enabled on the File menu:



Choosing the Copy option will display the Copy Document dialogue window:

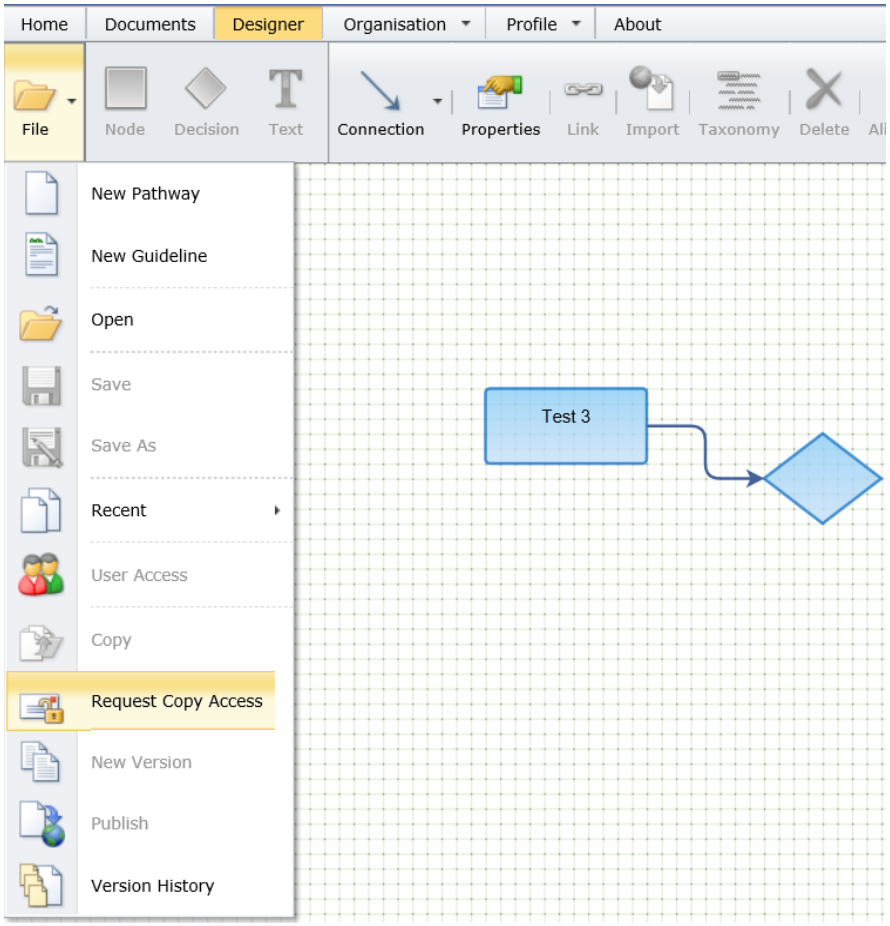


The user should enter an appropriate file name when copying the document.

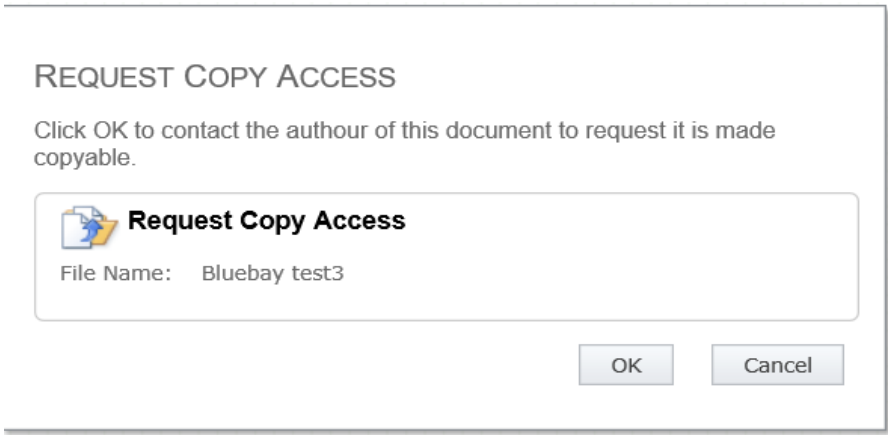
Requesting a Copy of a Document

In the event that a user does not have editing or copying privileges to a document the user may request copying access to a document as follows:

1. Open the document in the designer window
2. Click File on the toolbar
3. Choose the Request Copy Access option:



This will display the Request Copy Access dialogue window:



4. Clicking OK will send an email to the owner requesting access to the named document.

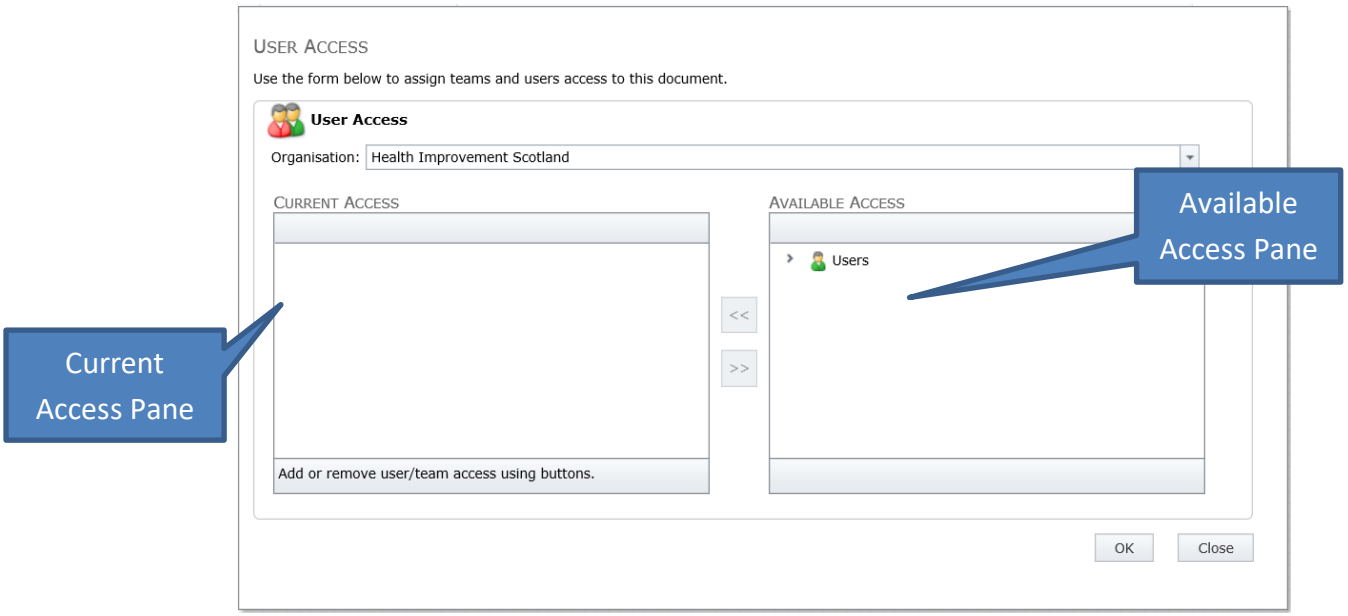
Allowing Other Users to Have Full Access to Your Documents

Users can link to anyone else's documents, but are not allowed to edit them. Document owners can allow other users or teams of users across organisations to edit documents that they specify. Teams are a group

of users who are defined and maintained by Organisation Administrators, see Organisation Teams. Once a Team has been created for your Organisation, everyone within that team can be given access in one click rather than adding each user individually. User Access is granted to each document on an individual basis. Multiple combinations of Teams and Users are allowed.

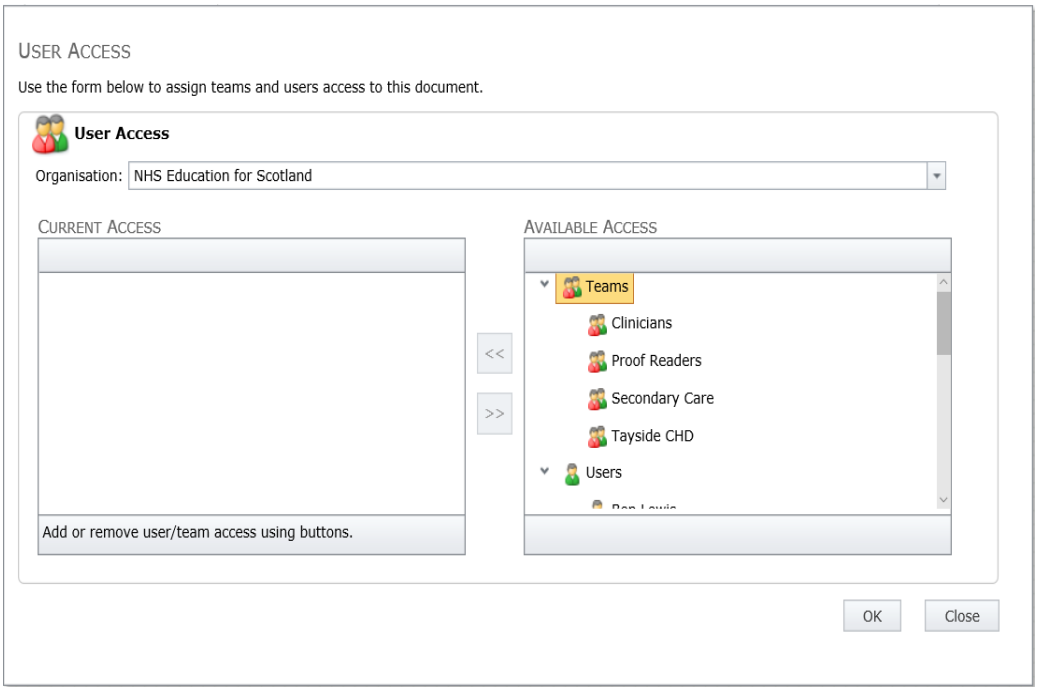
To grant **Teams/Users** access to a document, do the following:

1. Click **File** on the toolbar.
2. From the drop down menu select **User Access**.
   User Access is then displayed.



Users who currently have access to the document are displayed in the Current Access Pane.

3. Select the organisation that the user/team belongs to.
4. Click on the expand arrow (›) alongside **Teams** or **Users** to expand.



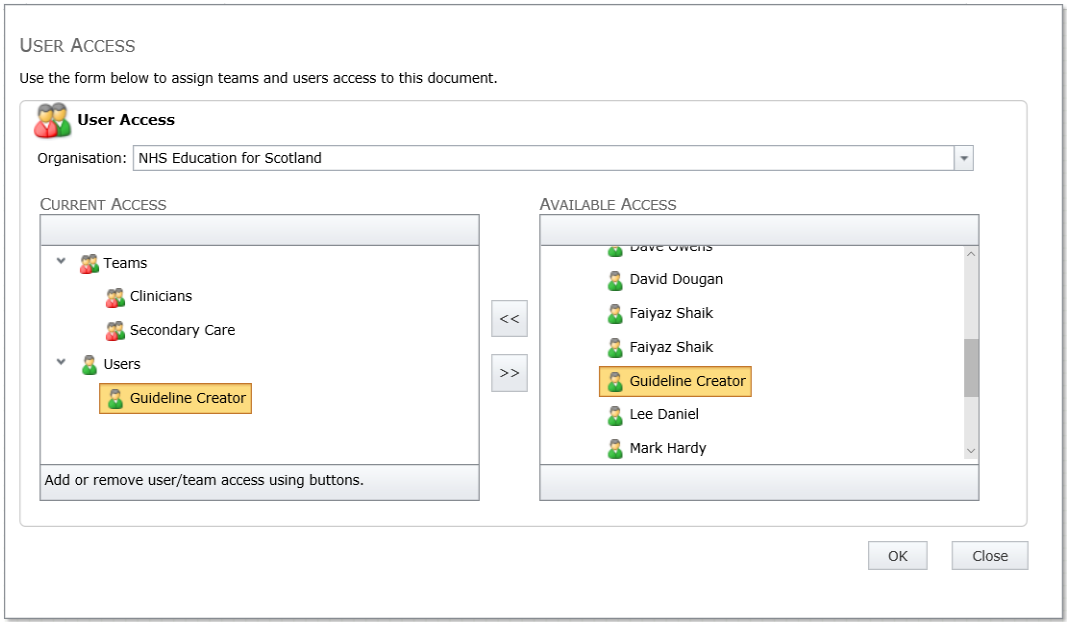
5. Highlight a **Team** or **User** by selecting the name with a click.

   A yellow box is placed around the selected. E.g. 

6. Select the Double Left Arrow (

) to send the selected **Team/User** to the Current Access (left-hand side) part of the screen.
7. Repeat **Steps 4 + 5** for all the **Teams/Users** who require access.
8. Click the **OK** button.

The window should look something like below, with the **Teams/Users** who have been granted access to the document appearing on the Current Access Pane on the left-hand side. User Access rights are granted on a per document basis.

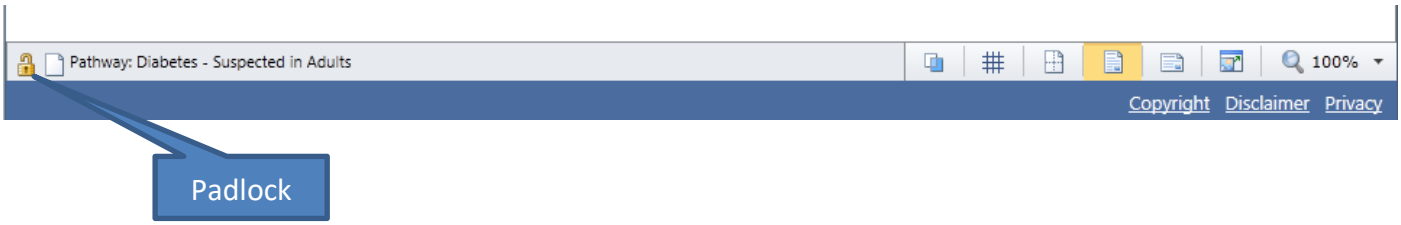


To remove access for a **Team** or **User** simply select the **Team/User** on the Current Access Pane (on the left hand side) and Select the Double Right Arrow (>>). This is exactly the same method as detailed above for granting **Teams/Users** full access except they are being removed from the Current Access Pane.

Publishing Pathways and Guidelines

When initially creating a Pathway or Guideline the document has a DRAFT status. This enables the owner to create/edit the document in the Designer.

The unlocked padlock ( ) symbol in the status bar in the bottom left corner of the screen denotes the version can be edited:



To Publish a document, do the following:

1. Click **File** on the toolbar.
2. From the drop down menu select **Publish**

The unlocked padlock symbol changes to a locked padlock ( ) symbol to denote that the document is locked and cannot be edited as its status is Published.

Maintaining Published Pathways and Guidelines

Any changes that are required to a Published document must be made to a **New Version** of the document. A new version of a published document is initiated in the following way from the Designer tab:

1. Open the document in the designer window
2. Click File on the toolbar
3. From the drop down menu select **New Version**

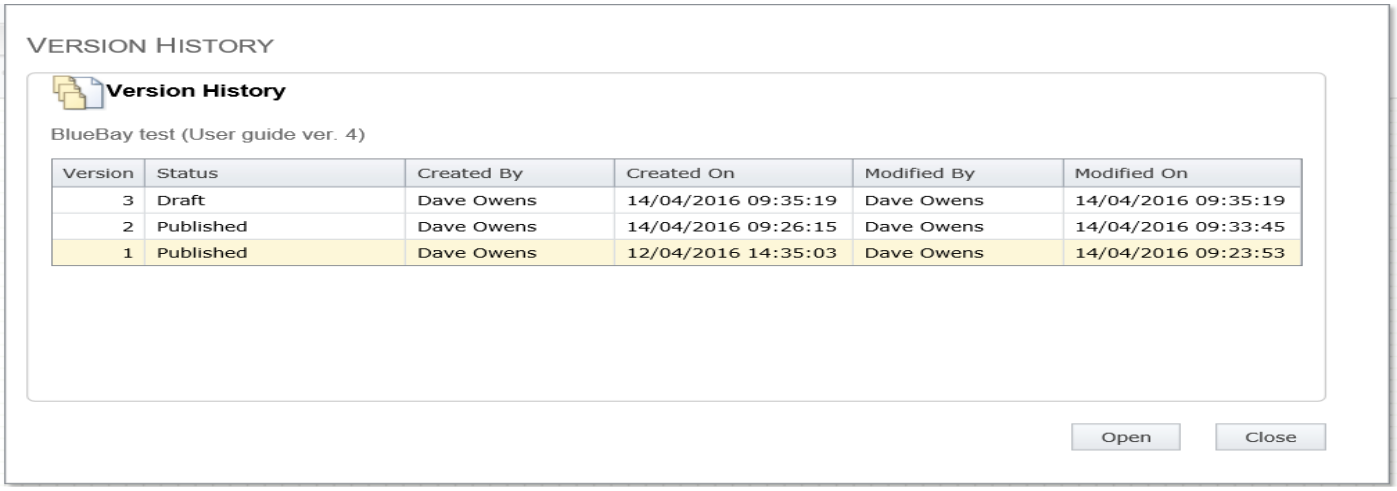
This will open a new DRAFT version of document where it will be possible to make changes without affecting the current published version for end users. When the changes have been completed on the DRAFT version it can be published and will then replace the last published version at the same URL so there is no need to update links on websites or circulated via other means.

Version History

The version history of a published document can be viewed as follows from the Designer tab:

1. Open the document in the designer window
2. Click File on the toolbar
3. From the drop down menu select **Version History**

A table of the current DRAFT version and the previously published version(s) will be displayed:



Version	Status	Created By	Created On	Modified By	Modified On
3	Draft	Dave Owens	14/04/2016 09:35:19	Dave Owens	14/04/2016 09:35:19
2	Published	Dave Owens	14/04/2016 09:26:15	Dave Owens	14/04/2016 09:33:45
1	Published	Dave Owens	12/04/2016 14:35:03	Dave Owens	14/04/2016 09:23:53

Any of these version can be opened and viewed. However, only the DRAFT version can be edited.

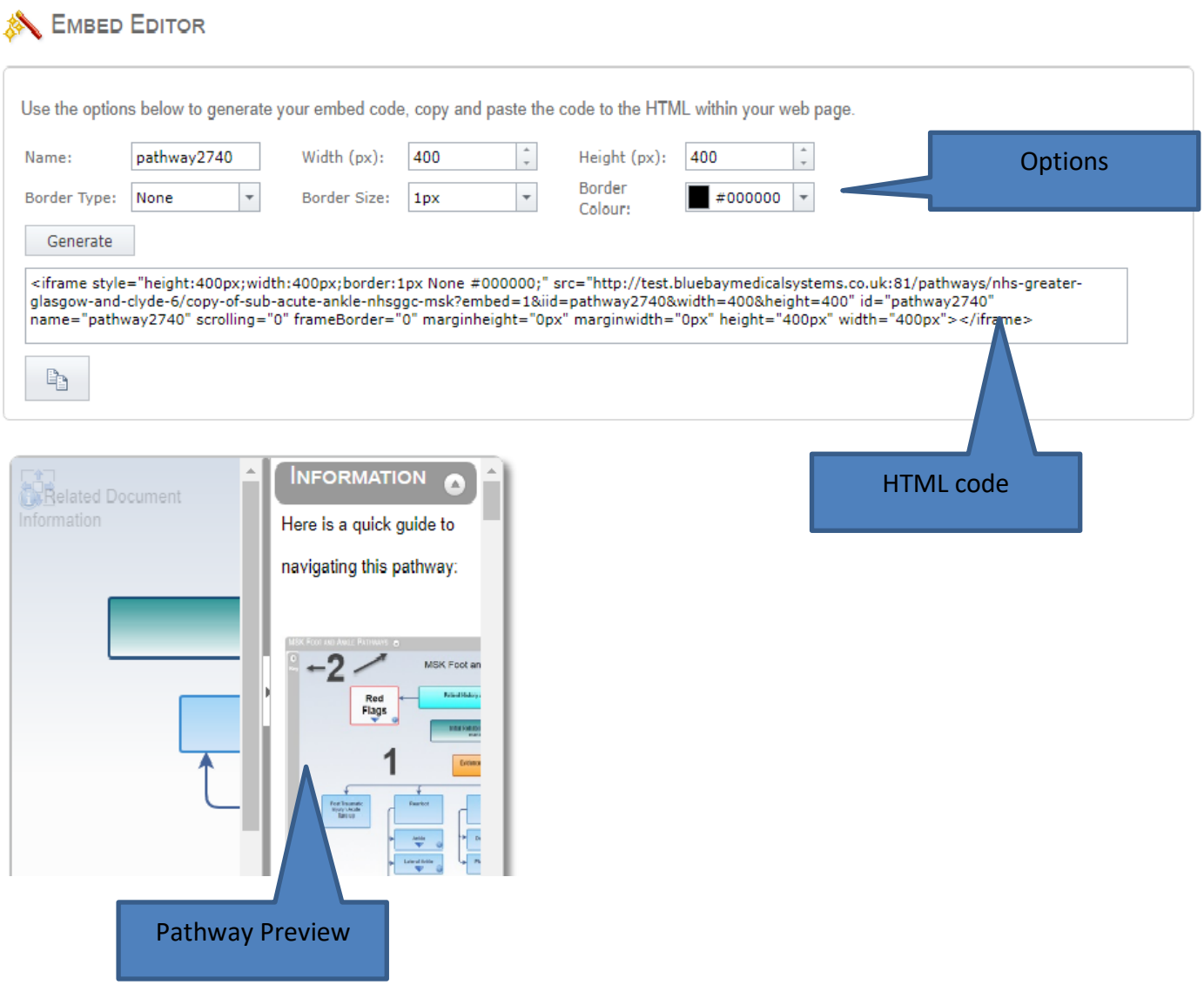
Embed Editor

The Embed Editor allows the pathway designer to generate a HTML embed code for use in web or internet pages. The Embed Editor option is available when a pathway is published.

To open the Embed Editor:

1. Open the document in the designer window
2. Click File on the toolbar
3. From the drop down menu select **Embed Editor**

The Embed Editor will be displayed.



It is possible to set the dimensions of the pathway preview, along with the border type, border size and border colour.

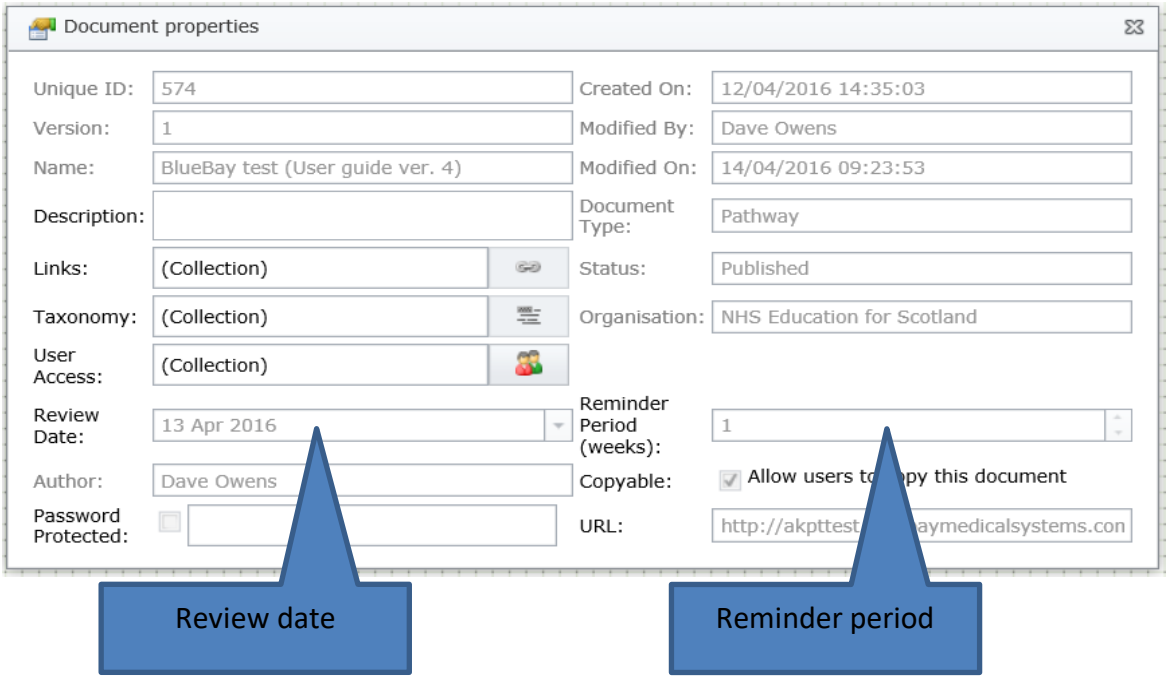
The HTML code can then be copied into the HTML code of an existing page or be used within a content management system.

Reviewing a Document and Automatic Reminders

A review date, along with a specified reminder period, can be added to a DRAFT document. This has the function of sending a reminder email to the document owner, users with editing access and organisation administrators to review the document prior to publishing it.

The review date and reminder period is set up as follows:

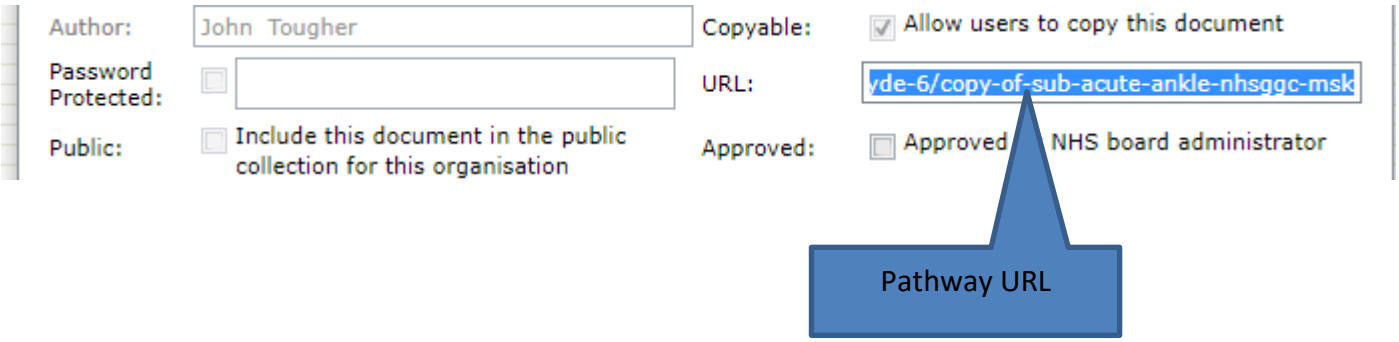
1. Open the document in the Designer window and click on the Properties tab on the toolbar. The Document properties window is displayed:



2. Add a review date and a reminder period. The reminder period is the number of weeks prior to the actual review date that the email reminder is sent out.
3. Close the Properties window and Save the Pathway or Guideline.

Pathway URL

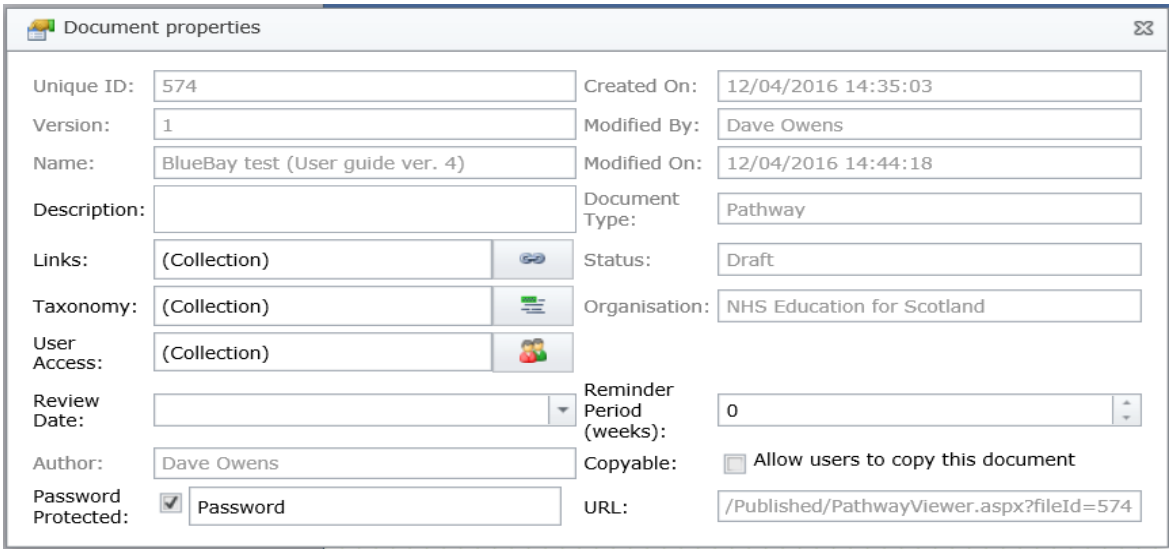
The Document Properties window contains the URL field, this is a friendly URL; to the current pathway. This URL will be in the format **http://<CKP WEBSITE>/<Organisation Permalink>/<Pathway Permalink>.** If you require to share the URL of the pathway with any other users, websites etc.. please use this URL and not the URL from the browser.



Protecting a Pathway or Guideline

The document can be password protected to prevent unauthorised access:

1. Open the document in the Designer window and click on the Properties tab on the toolbar. The Document properties window is displayed:



2. Enter your password, close the Properties window and Save the Pathway or Guideline. From here on in any user with access to the document will require the password to open the document. The password can be changed or removed in the future by returning to the Properties window, deleting the password and resaving the document.

From here on in any user with access to the document will require the password to open the document.

SHORTCUTS

Listed below are keyboard shortcuts which are available in most browsers.

Keys		Action
Ctrl + a		Select all
Ctrl + c		Copy selected Items
Ctrl + v		Paste copied nodes
DEL		Deletes selected nodes
Ctrl + y		Redo graph actions
Ctrl + z		Undo graph actions
Ctrl + l		Align selected nodes left
Ctrl + r		Align selected nodes right
Ctrl + t		Align selected nodes top
Ctrl + b		Align selected nodes bottom
Ctrl + s		Saves the document, or Save As is unsaved
Ctrl + o		Open a saved document
Ctrl + j		Toggle page break
Ctrl + g		Toggle Grid

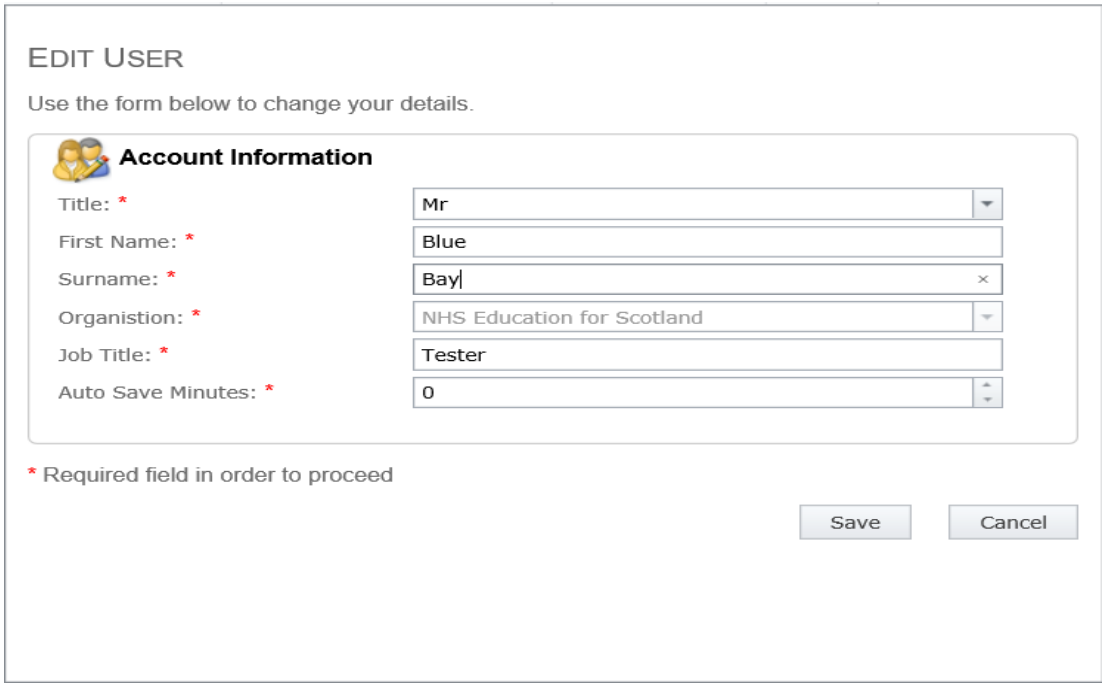
PROFILES

Editing User Profile

Users can edit their own profile if any of their profile information is incorrect. These include correcting a misspelt name, altering a job title, job role or Organisation.

To edit a user profile, do the following:

1. Click on the **Profile** Navigation tab, and then select **Edit Profile** from the drop down list.
   (The Edit User window appears.)



2. Make changes as necessary.
3. Click **Save** to store the changes.
   (or click **Cancel** to exit without storing changes)

Auto Save Documents

Auto save is the ability of a document to automatically save itself after a set period of time. This is set by the logged on user to a save the document at intervals of between 1 and 10 minutes. By default, the auto save function is set to 0 minutes, which is off. Once defined the settings are saved for the current user only. Auto save only becomes active after the first time the document is saved.

To set up auto save, do the following:

1. Click on the **Profile** Navigation tab, and then select **Edit Profile** from the drop down list.
2. In **the Auto Save Minutes** box, select or key in the number of minutes.

(This value has to be between 0 and 10 minutes, where 0 turns the auto save function off.)

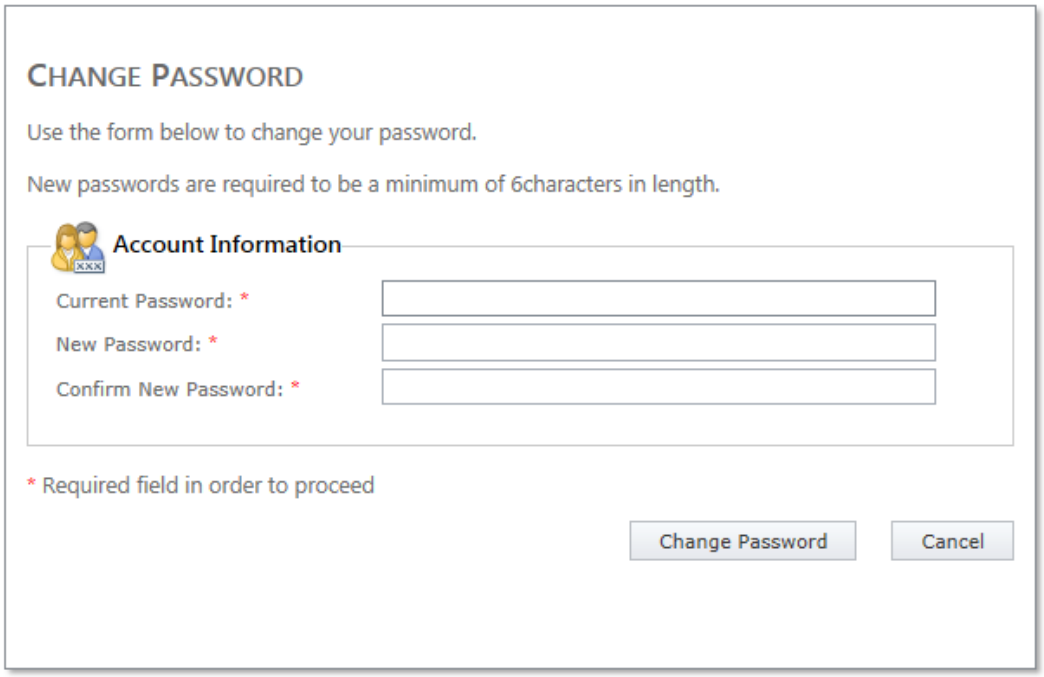
3. Click **Save** to store the changes.
(or click **Cancel** to exit without storing changes.)

Changing User Password

Users can change their own passwords if required.

To change a user password, do the following:

1. Click on the **Profile** Navigation tab, and then select **Change Password** from the drop down list.



2. Type the **Current Password**.
3. Type the **New Password**.
4. Retype the **New Password**.
5. Click **Change Password** to save the new password.
(or click **Cancel** to exit without storing changes)

If the current password is keyed in incorrectly then a message appears:
Password incorrect or New Password invalid.
If the new passwords do not match then a red explanation mark ( ) will appear next to the new password entry box.

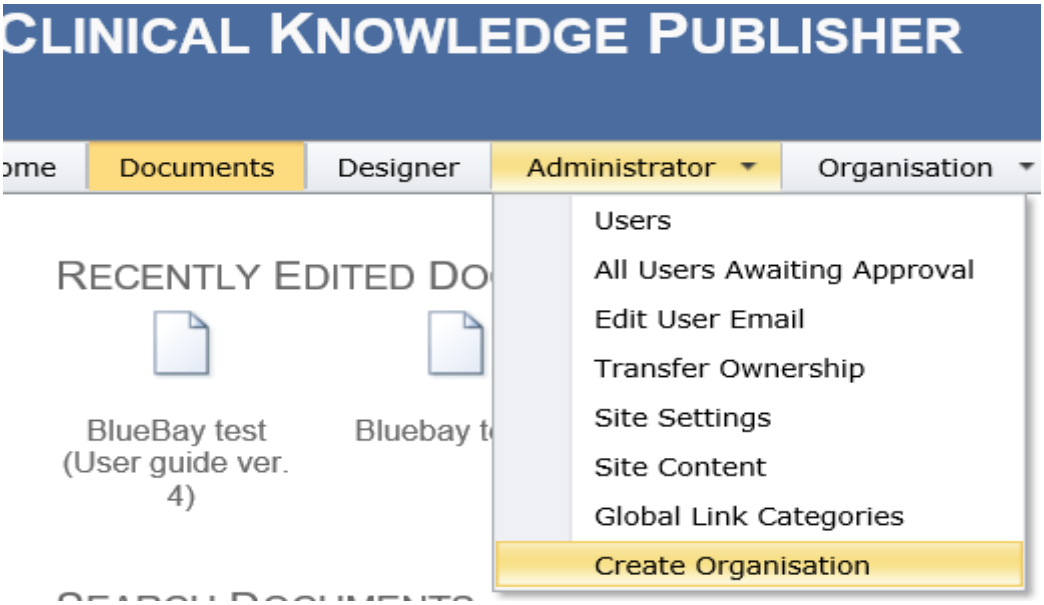
ADMINISTRATION FUNCTIONS

Creating Organisations

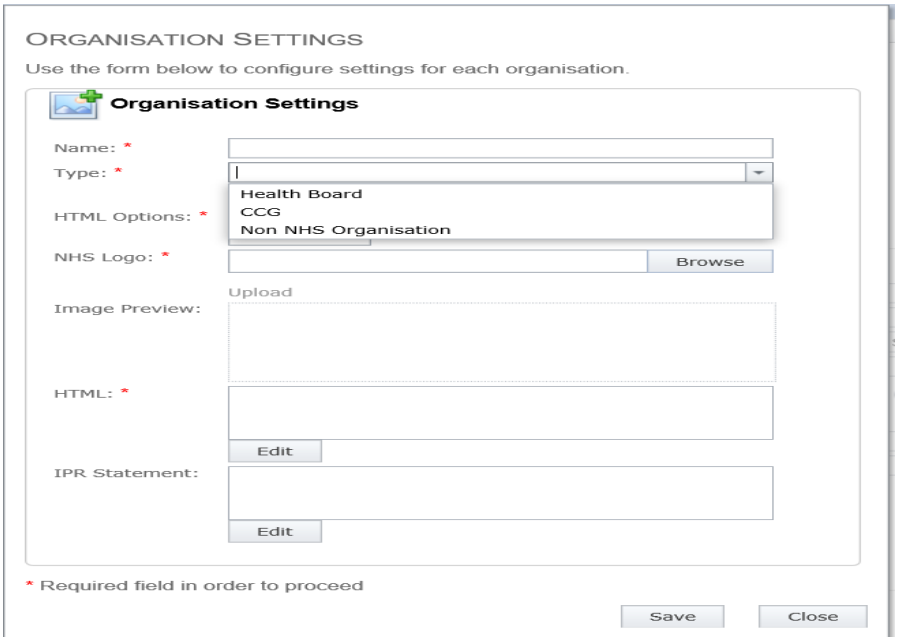
This is the responsibility of the System Administrator

To add a new organisation:

1. Click on the Administrator navigation tab
2. Click on the Create Organisation option from the drop down menu:



3. Fill in the details on the Organisation Settings window:



4. Click the Save button to save the record

Roles

Each user is allocated a Role by the System Administrator when they are approved after registering as a new user. If a new user is not allocated a Role, then their account status is Unallocated. In this case the user is able to log into the website but will not have access to the designer. Five levels of access (Roles) are available depending on the functionality that the user requires. The roles and a description of their functionality are shown below:

Role Name	Description of Role
Creator – Pathways/Guidelines	The Creator role allows the user to create and edit Pathways and Guidelines. Creators can preview and publish those they own.
Creator – Pathways	The Creator – Pathway role is similar to that of the Creator role, except it only allows the user to work with Pathways.
Creator – Guidelines	The Creator – Guideline role is similar to that of the Creator role, except it only allows the user to work with Guidelines.
Organisation Administrator	The Organisation Administrator role is same as the Creator role, with the additional functionality of being able to configure the logo and HTML displayed in the title bar of the published Pathway/Guideline. It allows the Global Link Categories set by the System Administrator to be Configured and overwritten. The CSS Styles and Node styles can be set, and locks on documents can be cleared. In addition this role allows editing Pathways and Guidelines of other Organisation users.
System Administrator	The System Administrator role is the top level role with permission to configure Users, Site Settings, and Global Link Categories as well as all the functionality of the other roles. In addition this role allows editing Pathways and Guidelines of all other users, and transfer ownership of documents from one user to another.

Shown below is a comparison of the functionality that that applies to each of the roles:

	Creator – Pathway	Creator - Guideline	Creator	Organisation Administrator	System Administrator
Create/Edit Pathways	✓		✓	✓	✓
Create/Edit Guidelines		✓	✓	✓	✓
Edit your Documents	✓	✓	✓	✓	✓
Edit Documents of other Organisation users				✓	✓
Edit anyone's Documents					✓
Configure Organisation Settings Logo for your Organisation (Logo and HTML displayed in the Title Bar of the published/previewed Pathway/Guideline)				✓	✓
Configure Organisation Settings for any Organisation (Logo and HTML displayed in the Title Bar of the published/previewed Pathway/Guideline)					✓
Configure Link Categories your Organisation				✓	✓
Configure Link Categories for any Organisation					✓
Configure Global Link Categories which apply to all Organisations					✓
Create/edit Node Styles for users who belong to your Organisation				✓	✓
Create/edit Node Styles for all users					✓
Edit CSS Styles for your own Organisation				✓	✓
Edit CCS Styles for any Organisation					✓
Edit your own Profile	✓	✓	✓	✓	✓
Edit Profile of all Users					✓
Add/Edit Notes on any User's Profile					✓

Activate/Deactivate Users					✓
Change your Password	✓	✓	✓	✓	✓
Turn on Auto Save and set save interval for your own profile	✓	✓	✓	✓	✓
Change Password of all Users					✓
Approve your Organisation Users who have registered and are awaiting approval				✓	✓
Approve all Users who have registered and are awaiting approval					✓
Change Users Roles					✓
Give Users/Teams full access to your Pathways/Guidelines	✓	✓	✓	✓	✓
Create Teams for your Organisation				✓	
Transfer Ownership of Pathways/Guidelines					✓
Clear locks on documents within your Organisation				✓	✓
Clear locks on any documents					✓
Edit Site Settings					✓
Delete your documents	✓	✓	✓	✓	✓
Delete documents within your organization				✓	✓
Delete Users				✓	✓

Managing Users

Only the users with an Administrator role can manage users. The User Registration Cycle is as follows:

Users register as a New User via the website (See Registering as a New User).

An email is sent to the relevant Organisation Administrators. This informs them that a new user from their organisation has registered and needs approval. If an Organisation Administrator does not exist for the organisation, an email will be sent to System Administrator instead.

Users are given a Role by an Organisation Administrator (Assigning Roles to Users). At this stage the user will not have access to the Website.

Users are approved by an Organisation Administrator (See Approving New User Requests).

When the user is approved an email is automatically generated and sent to the users registered email address informing them that they are approved and can now log on.

Assigning Roles to Users

If a user has been approved but has not been assigned a role, the user can log into website but will have limited functionality.

To assign a role to a user, do the following:

1. Either:
   - Click on the **Organisation** Navigation tab, and then select **Organisation Users** from the drop down list.

   Or

   - Click on the **Administrator** Navigation tab, and then select **Users** from the drop down list.
2. Click **Edit** alongside the user.
3. Click one of the five available roles in **User Roles**.
4. Click the **Update** button.
   (or click **Cancel** to exit without storing changes)

Approving New User Requests

After new users have registered via the website they need to be approved before they can log in. This can only be done by Organisation Administrators or System Administrators. Once a user has been approved they automatically receive an email to their registered email address, informing them they have been approved and can log onto the system.

To approve new user requests, do the following:

1. Either:
   - Click on the **Administrator** Navigation tab, and then select **All Users Awaiting Approval** from the drop down list.

   Or

   - Click on the **Organisation** Navigation tab, and then select **Organisation Users Awaiting Approval from** the drop down list.

#	#	Email	Creation Date	Is Active
Approve	Edit	support@bluebaymedical.co.uk	06/06/2012 17:45	☐

1. Either:
   - Click **Approve** alongside the user to be approved.

   Or

   - Click **Edit** alongside the user to be approved, place a tick in the 'Is Active' box and click the **Update** button. (or click **Cancel** to exit without storing changes)

Please note: the list of approvals will include any user accounts that have been deactivated – 'Is Active' tick removed.

Editing User Profiles

System Administrators can edit the user profile of any user; Organisation administrators can edit the profile of user accounts within an organisation.

Editing functions include: inactivating a user, changing a user's password or profile details, adding notes to a user, or changing the user's role. The date the user was created is also shown in the user's profile.

To edit a user's profile, do the following:

1. Either:
   - Click on the **Administrator** Navigation tab, and then select **Users** from the drop down list.

Or

- Click on the **Organisation** Navigation tab, and then select **Organisation Users** from the drop down list.

2. Click **Edit** alongside the user.
3. Edit the information as necessary.
4. Click the **Update** button.
   (or click **Cancel** to exit without storing changes)

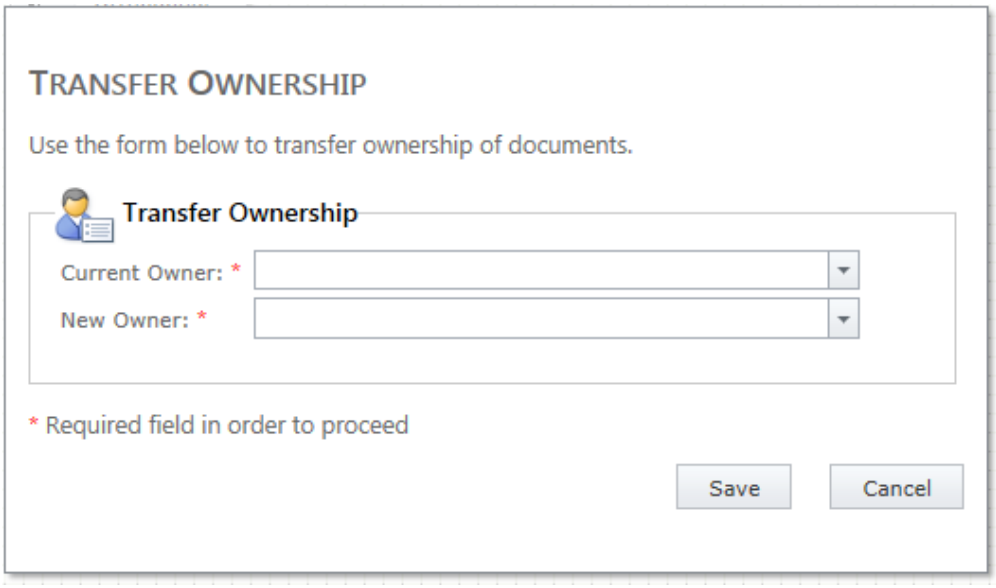
Please note: an individual user can edit their own profile but will not have access to the user roles or the account status flag – see the **Edit Profile** option under the **Profile** navigation tab

Transferring Ownership of Pathways/Guidelines

When a user leaves it may be necessary to transfer all his/her Pathways and Guidelines to another user. This can be done by changing the ownership of the documents from the old user to the new one through the Change Ownership screen. Only System Administrators have this function.

To transfer ownership of a user's Documents, do the following:

1. Click on the **Administrator** Navigation tab, and then select **Transfer Ownership** from the drop down list.



2. From the **Current Owner** drop down list select the user who currently owns the documents.
3. From the **New Owner** drop down list select the user to whom the documents will be transferred to.
4. Click the **Save** button.

A message stating that the document ownership has been transferred successfully will appear. The documents will then appear as having been created by the New Owner.

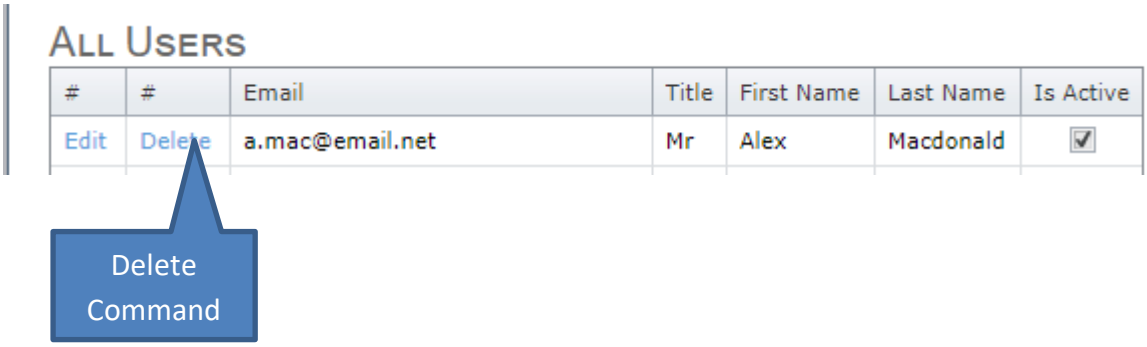
Using the transfer ownership functionality transfers ALL the user's documents (Pathways and Guidelines) to the new user and cannot be done on an individual document by document basis.

Deleting Users

Administrators or **Organisation Administrators** may delete any users that are no longer own any documents. To ensure a user no longer owns any documents, use the **Transfer Ownership** functionality above to transfer the user's documents to another user.

As an **Administrator**, click the **Users** option the **Administrator** drop down menu to view a list of users in the system.

As an **Organisation Administrator**, click the **Organisation Users** option from the **Organisation** drop down menu to view a list of users in your organisation.



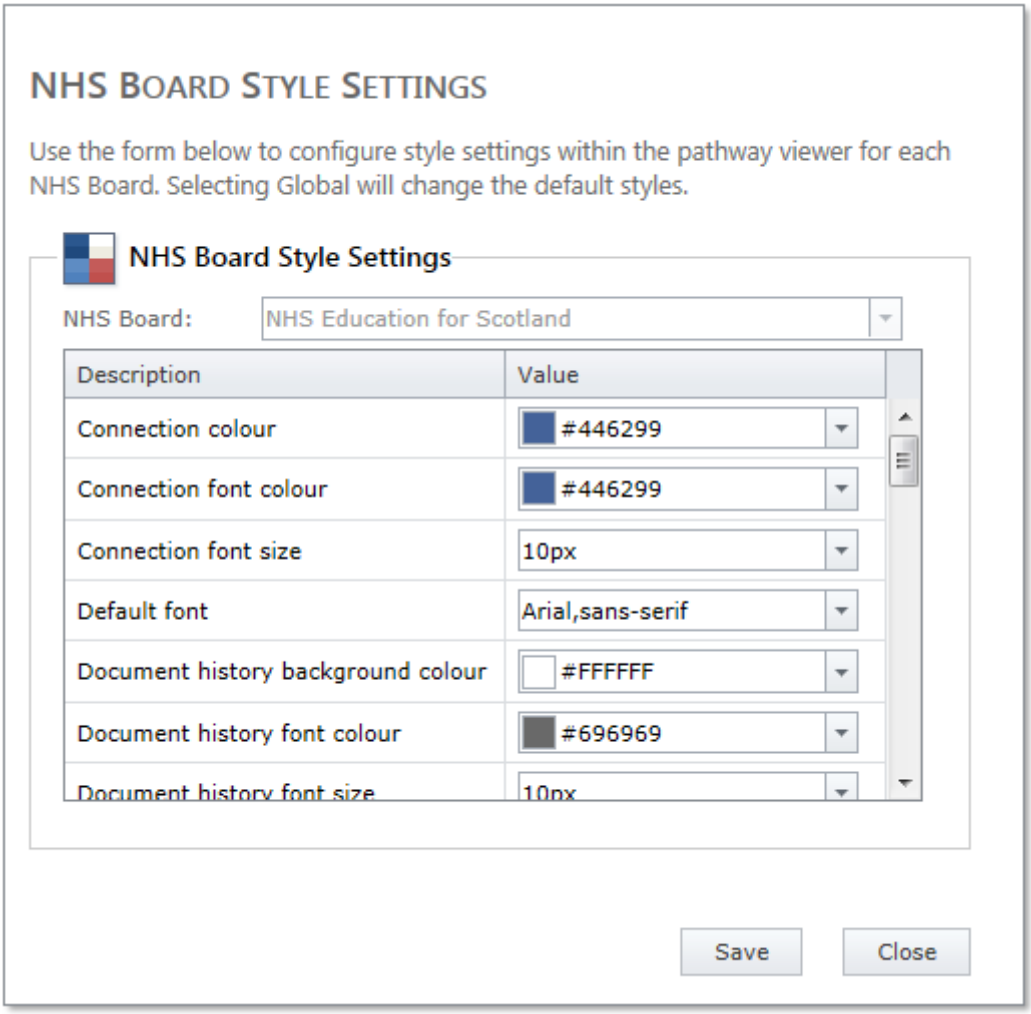
From the grid you can select the delete command to remove the user from the system.

Organisation CSS Styles

The fundamental style of the Pathway viewer can be defined by the Organisation Administrator. Organisation Administrators can define CSS Styles for their Organisation, and System Administrators can define CSS styles for all Organisations.

To set CSS Styles, do the following:

1. Click on the **Organisation** Navigation tab, and then select **Organisation CSS Styles** from the drop down list.



2. From the **Organisation** drop down list select the relevant Organisation.

   (This step is only applicable to **System Administrators**. **Organisation Administrators** will only be able to see their own Organisation.)

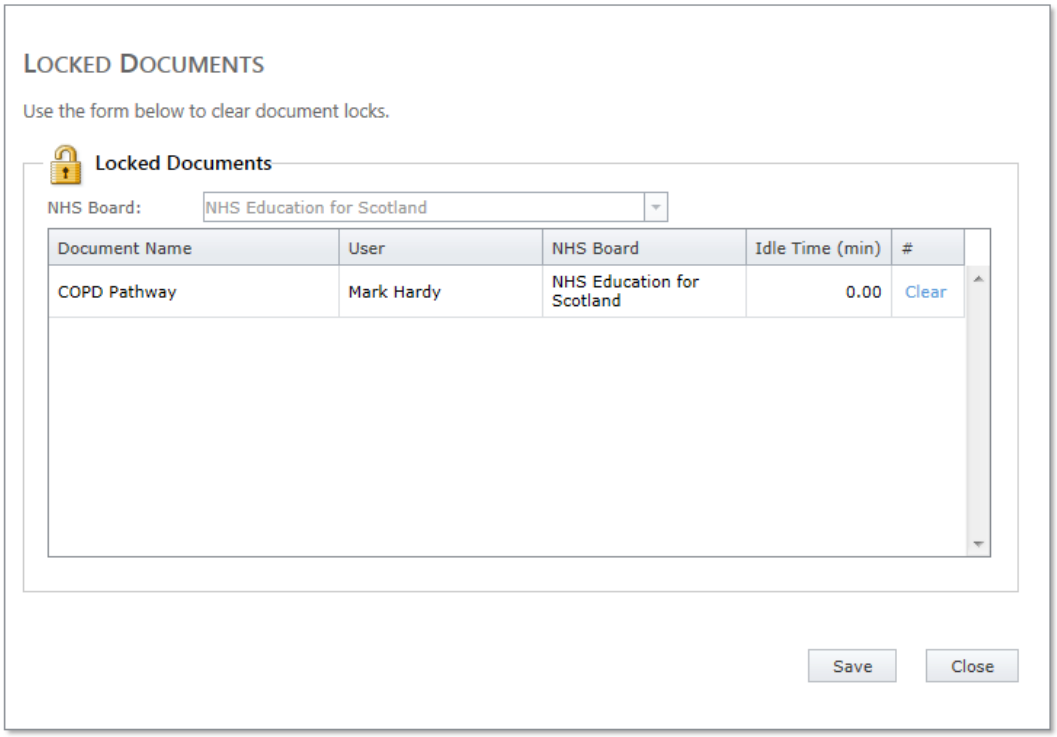
3. Change the settings as necessary. The Descriptions are self-explanatory.
4. Click **Save** to save changes.

Clearing Locks on Documents

When a Pathway/Guideline is opened in Designer, a lock is applied to the document, which prevents other users from subsequently editing it. This is to prevent corruption of the document. On occasions it will be necessary to clear the lock to enable another user to edit e.g. if internet connectivity is lost and the document remains locked.

To clear locks on a document, do the following:

1. Click on the **Organisation** Navigation tab, and then select **Clear Locks** from the drop down list.



2. From the **Organisation** drop down list select the Organisation to which the user is a member of.

   (This step is only applicable to **System Administrators**. **Organisation Administrators** will only be able to see their own Organisation.)

3. Locate the relevant document from the list of locked documents, and click on **Clear**.
4. Click the **Save** button.

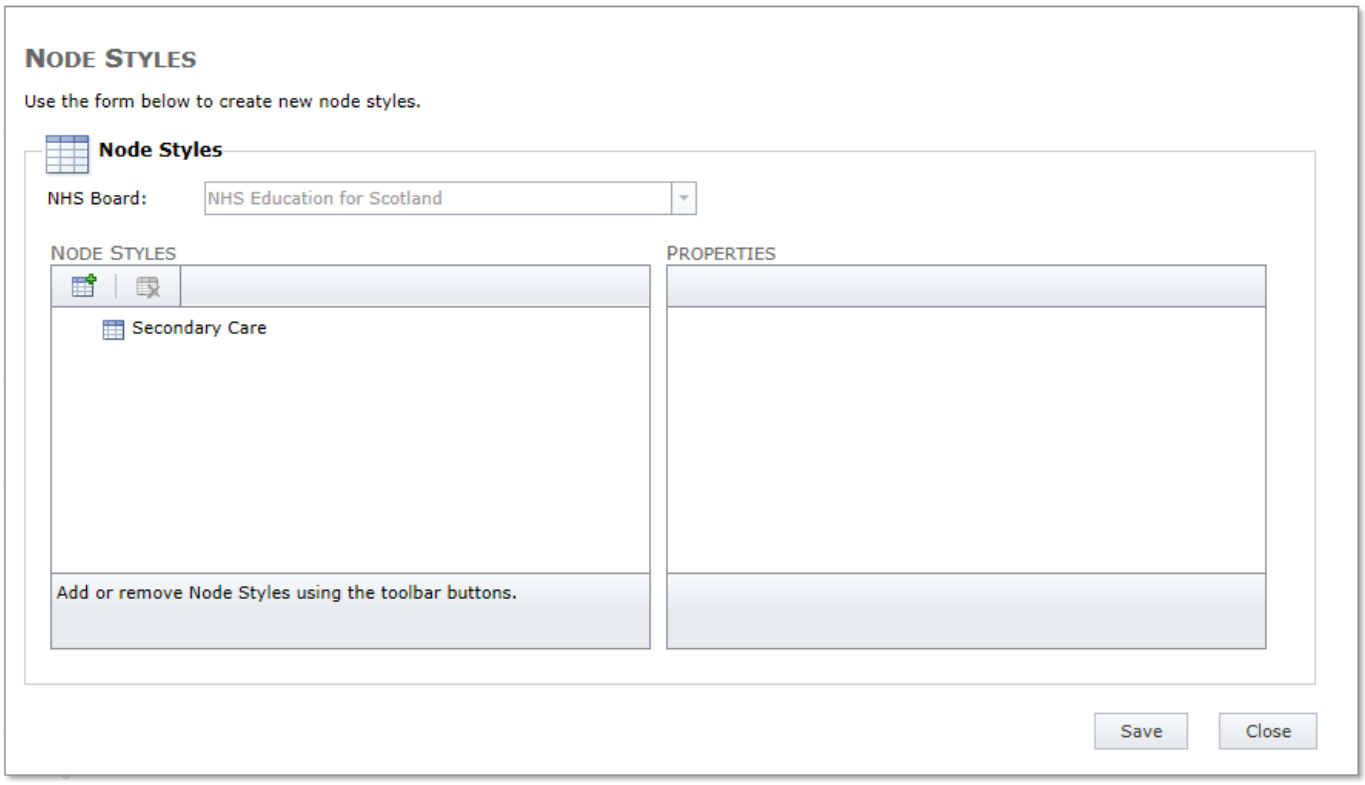
Organisation Node Styles

Predefined styles can be created by Organisation Administrators, which can then be assigned by Users to individual Nodes, Decisions, Text boxes and Connections. Styles are defined per Organisation.

Accessing Styles

To access Node Styles, do the following:

1. Click on the **Organisation** Navigation tab, and then select **Organisation Node Styles** from the drop down list.



2. From the **Organisation** drop down list select the Organisation to create/edit the style for.

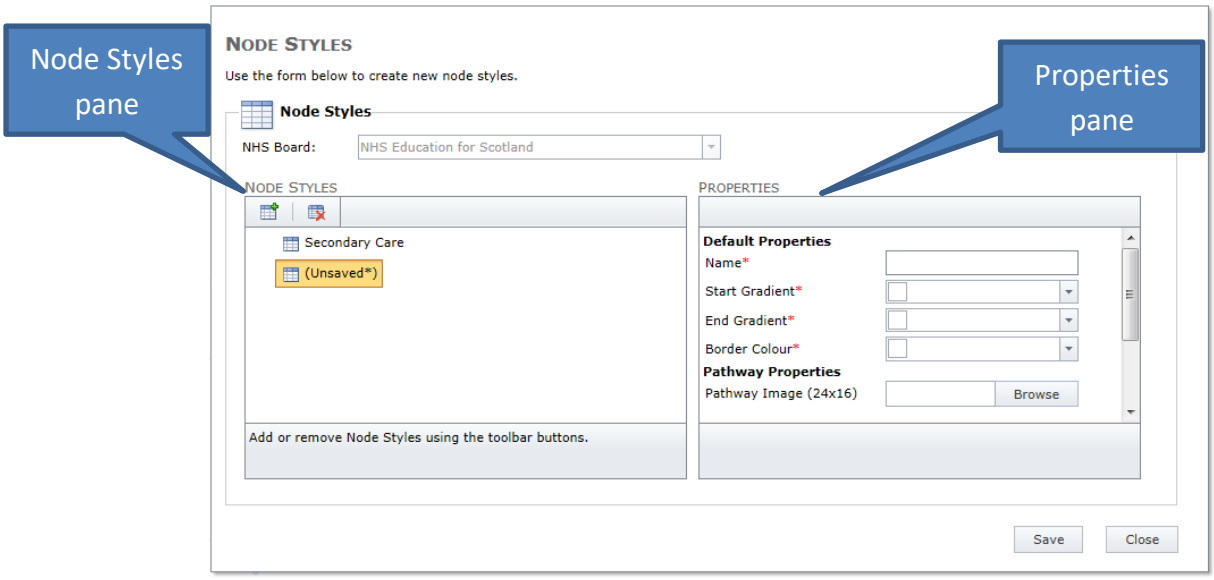
   (This step is only applicable to **System Administrators**. **Organisation Administrators** will only be able to see their own Organisation.)

3. Additions and modifications can be made as necessary as detailed below.
4. Click the **Save** button.

Creating a New Style

To create a new Style, do the following:

1. Click on the **Add Node Style** button ( ) on the **Node Styles** pane of the screen.



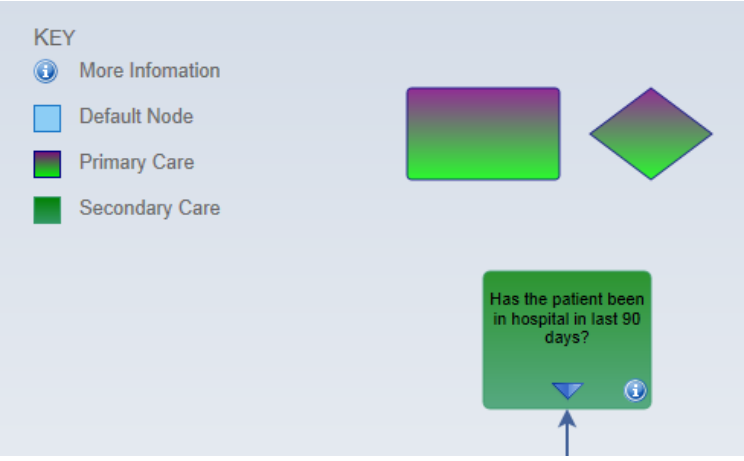
2. Set the Properties in the **Properties** pane of the screen as detailed below:

<u>Default Properties – Sets properties of Nodes</u>

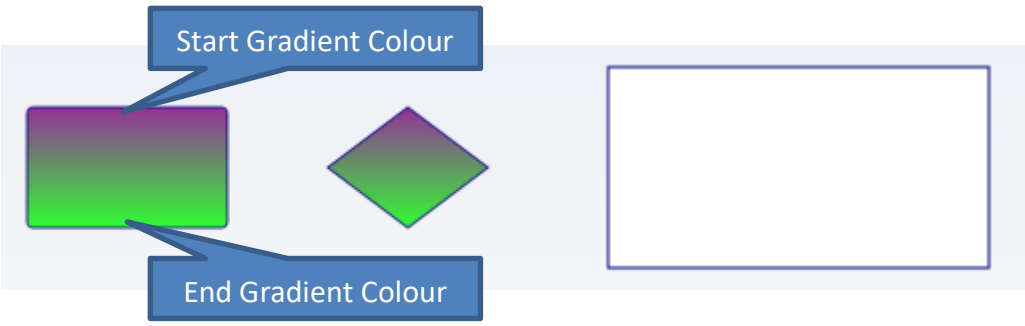
Default Properties define the properties of normal Items. Items appear in Blue by Default:

The colour can be changed by altering the following settings:

Name – Enter the Name for the Style. This name will be displayed in the key on the document.



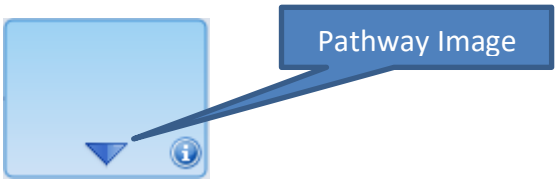
Start Gradient – Select a colour for the top part of the Item.
End Gradient – Select a colour for the bottom part of the Item. The colour of the box will be a blended gradient changing from the start colour at the top of the Item, to the end colour at the bottom of the Item. If a single colour is required, the **Start Gradient** and the **End Gradient** should be the same.



Border Colour – Select a colour for the surrounding border of the Item.
Border Style – Select the style of the border, Solid, Dotted or Dashed. This can also apply to connections.

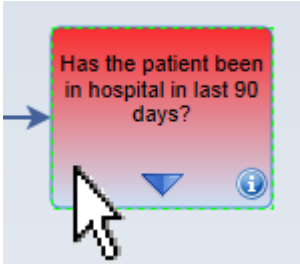
Pathway Properties

Pathway Image – Click **Browse** to select an image to replace the default blue triangle displayed on a Node, which signifies that a Pathway is linked. When the Image is clicked it takes the End User to the full Pathway. Image size should be 24x16 pixels.



Selected Properties – Sets properties of Nodes when selected (i.e. Clicked on)

Selected Properties defines the properties of Nodes when they are selected by the End User, e.g. clicked on. When a node is selected by the End User it changes colour. The default colour is Red as displayed:



It can be changed by altering the following settings:

Start Gradient - Select a colour for the top part of the Node.

End Gradient - Select a colour for the bottom part of the Node. The colour of the box will be a blended gradient changing from the start colour to the end colour. If a single colour is required, the **Start Gradient** and the **End Gradient** should be set the same.
Border Colour – Select a colour for the surrounding border of the Node.

3. Click **Save** to save changes.

*When Item Styles are applied to a Connection, only the **Start Gradient** is applicable. The colour of the connection is entirely that of the colour chosen as the **Start Gradient**. When Item Styles are applied to a Text box, only the **Border Colour** is applicable, being that set to the Text box border.*

Editing a Style

To make changes to a Style, do the following:

1. Click the Style from the **Node Styles** pane on the left-side of the screen.

   (The selected Style appears highlighted in yellow (Secondary Care).)
2. Make changes to the Style in the **Properties** pane of the screen as described in Creating a New Style.
3. Click **Save**.

Deleting a Style

To Delete a Style, do the following:

1. Click a Style from the **Node Styles** pane on the left-side of the screen.

   (The selected Style appears highlighted in yellow (Secondary Care).)
2. Click on the **Delete Selected Node Style** button ( ) on the **Node Styles** pane of the screen.
3. Click **OK**.

   (The selected Style is removed)

When Item Styles are created/edited, they will only be available to users when their browser is refreshed e.g. when they close it down and open it up again, or press F5 to refresh.

Site Settings

Stored within the site settings are configuration settings for the entire website for all users. These settings should only be edited by authorised persons as changes made can adversely affect the websites operation.

Warning: Changes to Site Settings may result in the website not functioning correctly.

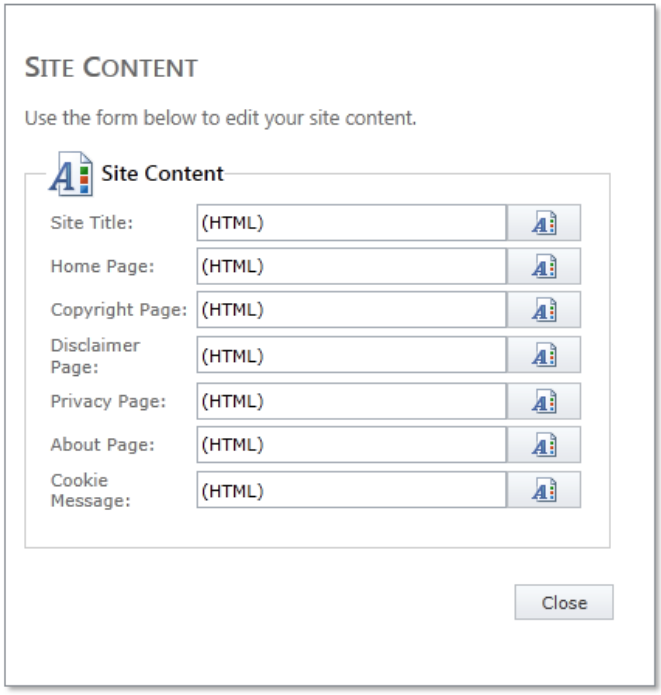
Site Content

Content within areas of the website are administered by the System Administrator using the HTML Editor. These areas are:

- Site Title
- Home Page
- Copyright Page
- Disclaimer Page
- Privacy Page
- About Page
- Cookie Message

To administer the content for any of these pages, do the following:

1. Click on the **Administrator** Navigation tab, and then select **Site Content** from the drop down list.



2. Click the Set button ( ) alongside the page to be administered.

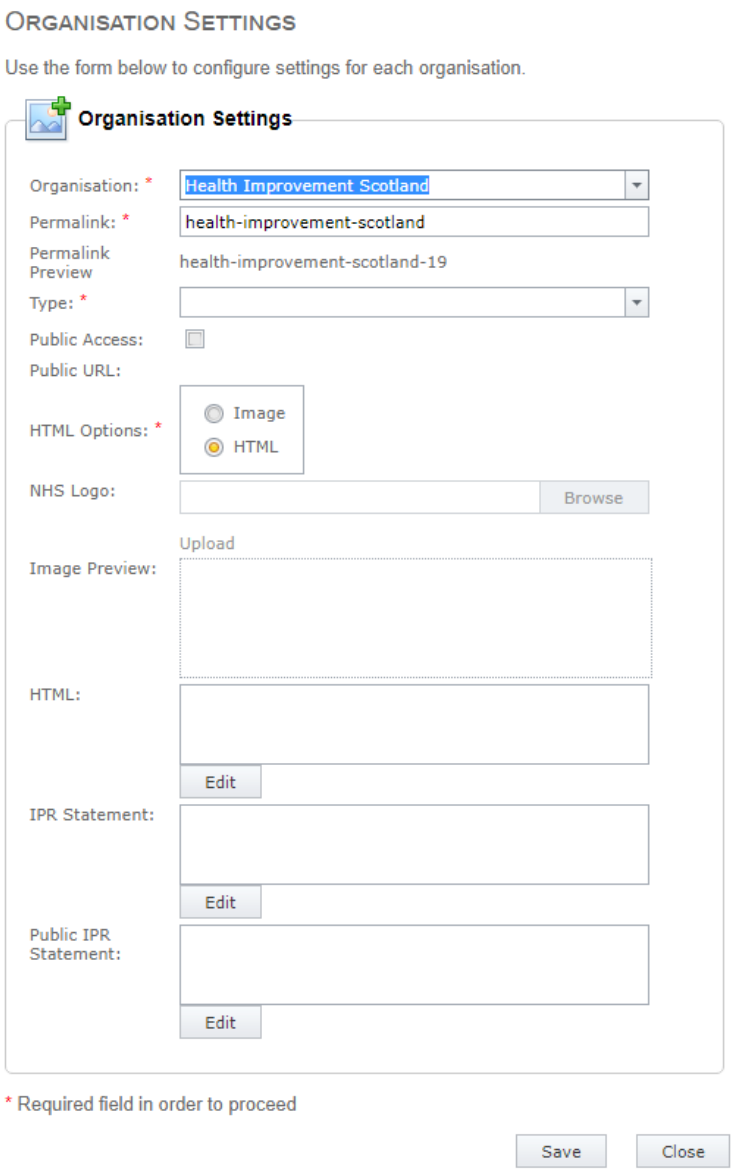
3. Text, images & HTML code can then be entered and edited in HTML Editor (see HTML Editor).
4. Click **OK** to save.

Organisation Settings

Organisation Settings control the display in the top right-hand corner of the viewer when the End User views a Pathway/Guideline. This can be either an Image or HTML code.

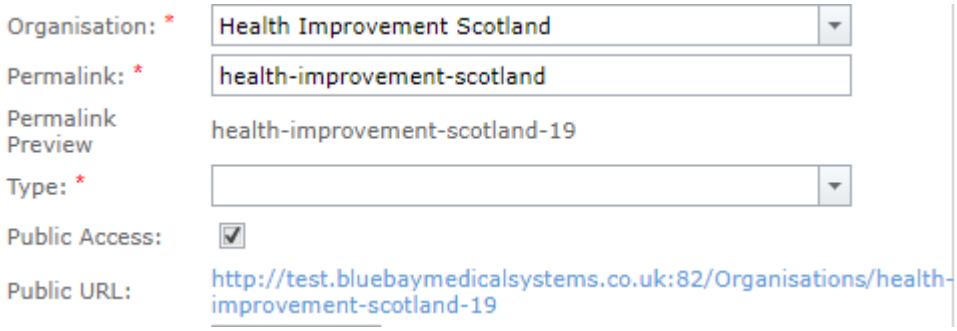
Once an Image or HTML code is assigned to an Organisation, it appears on all Pathways and Guidelines that are created by users within that Organisation.

Organisation Administrators are allowed to link an Image or HTML code only to the Organisation they are a member of. System Administrators have access to the Organisation Settings for all Organisations.



To add an Image in Organisation Settings, do the following:

1. Click the **Organisation** Navigation tab and select **Organisation Settings.**
2. Select the **Organisation** you wish to edit from the drop down list.
   (The **Organisation** drop down list will only be available to **System Administrators**. **Organisation Administrators** will have their **Organisation** preselected).
3. The **Permalink** will form part of the URL to any pathways that are owned by that Organisation. This is required for easier indexing by search engines such as google and yahoo. The URL of pathways will be in the format:
   http://<CKP WEBSITE>/<Organisation Permalink>/<Pathway Permalink>.
4. The Public Access check box indicates if the organisation will be displayed on the public facing website or not. If an organisation allows public access the URL will then be displayed in the **Public URL** field, using the permalink created in step 3.



5. Select **Image** in **HTML Options**.
6. Click **Browse** button and select the image to be used.
7. Click **Open**.
   (The Image to be used is displayed in the **NHS Logo** box. To change this image click on the red delete cross (✕) and repeat **Steps 4 + 5**.)
8. Click **Upload**.
   (When the Image is uploaded it will appear in **Image Preview**.)
9. Click **Save** to store changes.
10. Click **Close**.

To add HTML code in Organisation Settings, do the following:

1. Click the **Organisation** Navigation tab and select **Organisation Settings**.
2. Select the Organisation you wish to edit from the drop down list. (The Organisation drop down list will only be available to System Administrators. Organisation Administrators will have their Organisation preselected).
3. Select **HTML** in **HTML Options**.
4. Click **Edit** button.

5. Text, images & HTML code can then be entered and edited in HTML Editor (see HTML Editor).
6. Click **OK** to save.
7. Click **Save** to store changes.
8. Click **Close**.

To add an IPR statement in Organisation settings, do the following:

1. Click the **Organisation** Navigation tab and select **Organisation Settings**.
2. Select the Organisation you wish to edit from the drop down list. (The Organisation drop down list will only be available to System Administrators. Organisation Administrators will have their Organisation preselected).
3. Click on the Edit button below the IPR statement section.
4. Text, images & HTML code can then be entered and edited in HTML Editor (see HTML Editor).
5. When you have completed the IPR statement close the HTML Editor window, changes are saved automatically.
6. Click **Save** to store changes.
7. Click **Close**.

Link Categories

Nodes can contain Links, which allow the End User viewing the Pathway/Guideline to click to display further relevant information. When the node is clicked on, the browser pane is split vertically with the right hand side of the screen containing the Links. Links are defined in Link Manager and can be:

- Free Text
- URL's
- Links to the Knowledge Network
- Links to other Pathways
- Links to other Guidelines

Links are displayed under predefined category headings for ease of use. Global Link Categories are the basic categories that apply to everyone, and are set by System Administrators.

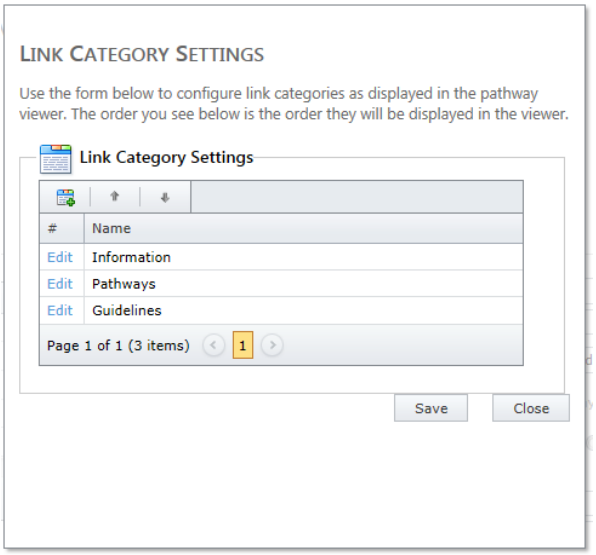
These globally defined categories can then be taken and altered by Organisation Administrators on an Organisation basis, affecting only the particular Organisation.

Global Link Categories

Global Link Categories apply "Globally" to all users and are set by System Administrators.

To edit Global Link Categories, do the following:

1. Click the **Administrator** Navigation tab, and select **Global Link Categories** from the drop down list.



2. To make alterations, do any of the following:
   - To Add Categories
     i. Click on the Add Link Category button ( ) on the toolbar.
     ii. Type in the *name* of the new Category.
     iii. Click **Add**.
   - To change the order in which the Categories appear
     i. Click a category to select it.
     ii. Use the up ( ) or down ( ) arrows to promote or demote the category in the list.
   - To Edit current Categories
     i. Click **Edit** on the line of the Category to be edited.
     ii. Click in the **Name** box and make amendments.
     iii. Click **Save**.
3. Click **Save**.

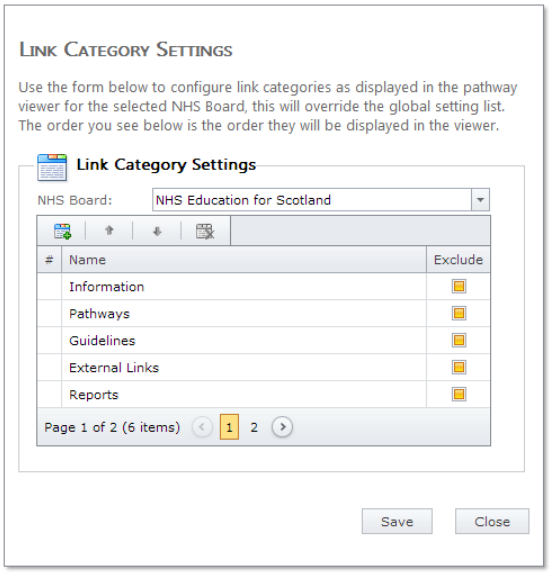
Organisation Link Categories

Organisation Link Categories are defined by Organisation Administrators. They essentially take the Global Link Categories and if necessary add new categories, or even prevent ones defined in Global Link Categories from being displayed. In this way Organisation Administrators can control which Link Categories are available for all users in their Organisation.

To edit Organisation Categories, do the following:

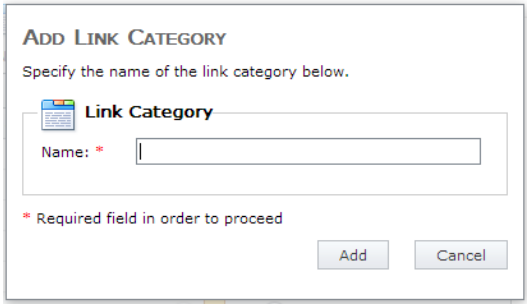
1. Click **Organisation** Navigation tab and select **Organisation Link Categories**.
2. Select the Organisation from drop down list.

(The **Organisation** drop down list will only be available to **System Administrators**. Organisation **Administrators** will have their **Organisation** preselected).



3. To make alterations, do any of the following:

- To Add Categories
  - i. Click **Add Link** Category button ( ) on the toolbar.



  - ii. Type in the *name* of the new Category.
  - iii. Click **Add**.
- To change the order in which the Categories appear
  - iii. Click to select a category.
  - iv. Use the up ( ) or down ( ) arrows to promote or demote the category in the list.
- To toggle excluding the global category
  - i. Click to select a category.
  - ii. Click on the Toggle Excluding the Global Category button ( ) on the toolbar.
    (In this way each category can be excluded.)

4. Click **Save**.

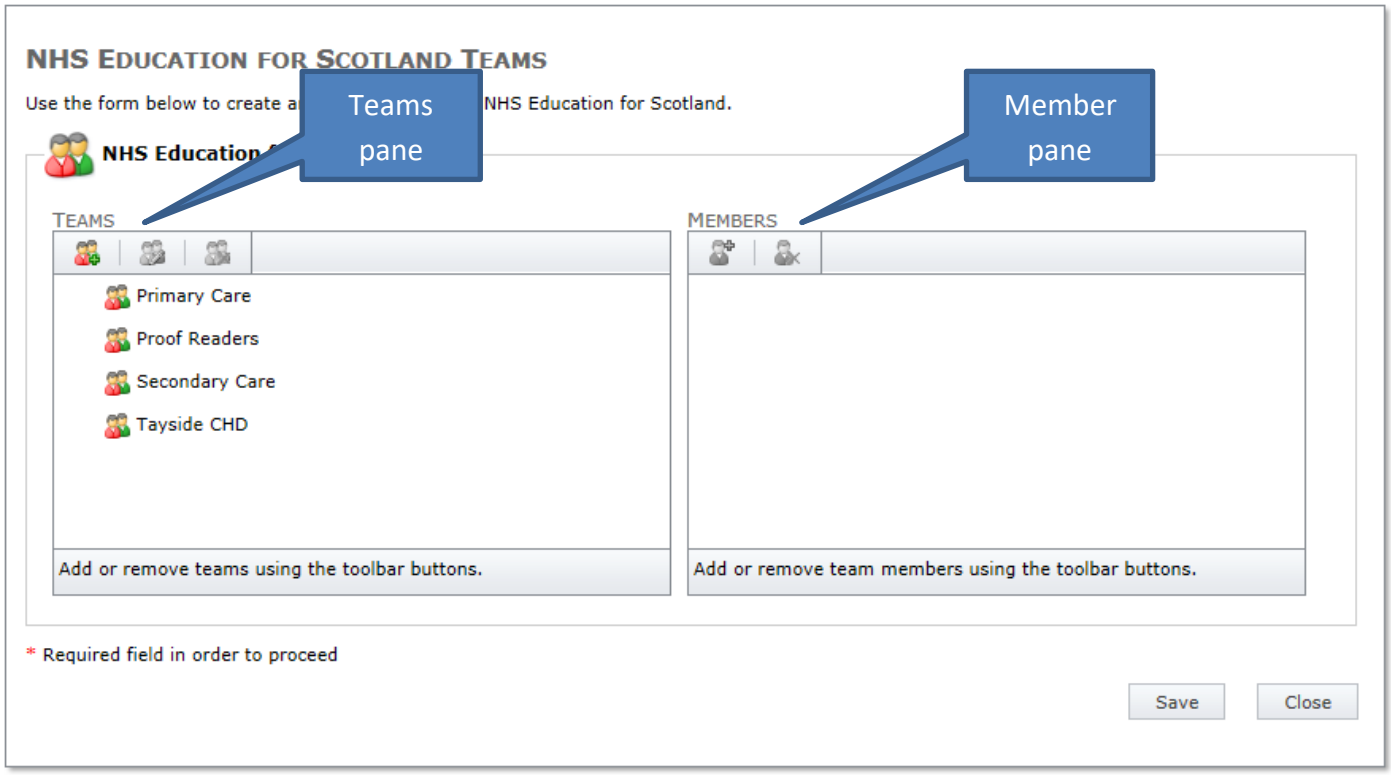
Organisation Teams

Standard users are not able to edit other users' documents by default. However, users can grant full access rights to individual users. In addition, Teams can be created which are essentially a group of users. These Teams are defined by Organisation Administrators. Rather than giving access to a lot of individual users, access can be given to Teams.

Accessing Organisation Teams

To access the area where Organisation Teams are administrated, do the following:

1. Click **Organisation** on the toolbar.
2. From the drop down menu select **Organisation Teams**.

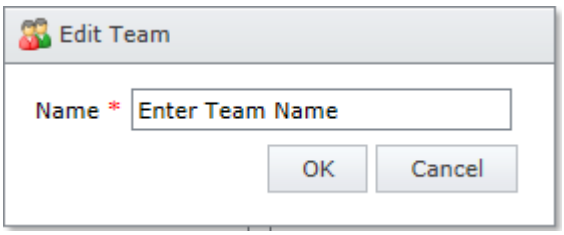


3. Additions and modifications can be made as necessary, detailed below.
4. Click **Save**.

Creating Organisation Teams

To create a **Team**, do the following:

1. Click **Add a new team** button ( ) on the **Teams** pane of the screen.
2. Enter a name for the team in the box.

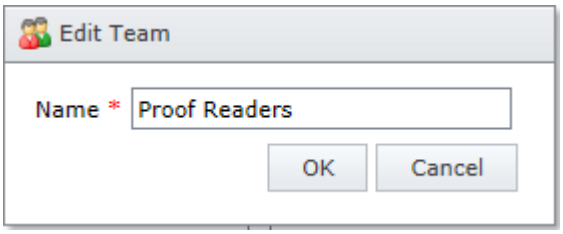


3. Click **OK**.
   (The new team appears in the Teams pane on the left-hand side of the screen.)

Renaming Organisation Teams

To rename a **Team**, do the following:

1. Click a team from the **Teams** pane on the left-side of the screen.
   (The selected team appears highlighted in yellow (Proof Readers).)
2. Click on the **Edit Selected Team** button ( ) on the **Teams** pane of the screen.
3. Edit the team name.



4. Click **OK**.

Deleting Organisation Teams

To Delete a **Team**, do the following:

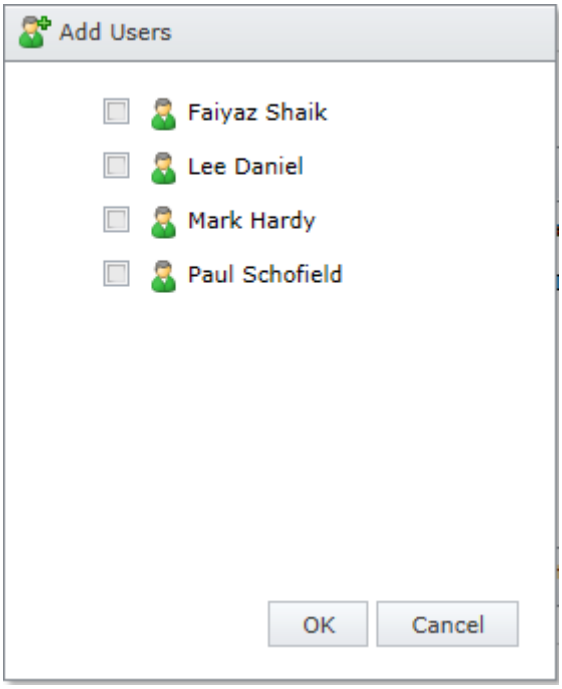
1. Click a team from the **Teams** pane on the left-side of the screen.
   (The selected team appears highlighted in yellow (Proof Readers).)
2. Click **Delete Selected Team** button ( ) on the **Teams** pane of the screen.
3. Click **OK**.

   (The team is removed from the Teams pane on the left-hand side of the screen.)

Adding Members to Organisation Teams

To add members to a **Team**, do the following:

1. Click a team from the **Teams** pane on the left-side of the screen.
   (The selected team appears highlighted in yellow (Proof Readers).)
2. Click **Add a New Team Member** button ( ) on the **Members** pane of the screen.



3. Place a tick next to each of the users to be added to the team.
4. Click **OK**.
   (The selected users appear in the **Members** pane of the screen.)

Removing Members from Organisation Teams

To remove members from a **Team**, do the following:

1. Click on a team from the **Teams** pane on the left-side of the screen.

   (The selected team appears highlighted in yellow (Proof Readers).)
2. Click on a member of the team from the **Members** pane on the right-side of the screen.

   (The selected member appears highlighted in yellow (Lee Daniel).)
3. Click **Remove Selected Team Member** button ( ) on the Members pane of the screen.
4. Click **OK**.

   (The chosen team member is then removed from the **Members** pane on the right-hand side of the screen.)

TROUBLESHOOTING

Issue	Resolution(s)
User can log into the Website but is not able to see the Designer tab.	The user has not been assigned a role yet. The system Administrator needs to assign a role before the Designer tab is available. See Assigning Roles to Users.
Users can open a Pathway/Guideline but cannot make any changes e.g. toolbars and buttons are greyed out.	The Pathway/Guideline is locked by another user. Only one user can have a Pathway/Guideline open for editing at any one time. The first user to open it locks it so other users are unable to edit it. It will remain locked until the first user closes it. If the first user is unable to close it e.g. due to loss of connectivity, then the Pathway/Guideline remains locked. In this scenario it will be necessary to clear the lock. See Clearing Locks on Documents.
The "Log Out" option to log out of the CKP website is no longer displayed on the screen.	This is because the website header and footer bars have been hidden from view. To reinstate them click on the Toggle Window Expand button ( ) on the status bar, see Window Expand.
The browser is not displaying the website as expected.	The browser may be using cached pages stored by the browser. Browser cache can be forced to refresh by Pressing *CTRL + F5* simultaneously. This will reload the page, discarding any previous versions/styles.