Introduction to Using the Clinical Knowledge Publisher

www.ckp.scot.nhs.uk

Knowledge Services
NHS Education for Scotland

knowledge@nes.scot.nhs.uk
Learning Outcomes

After today’s training session you should have an understanding of how the Clinical Knowledge Publisher tool can be used to create and share clinical care pathways and guidelines. You should know how to:

• Login to the system
• Find pathways from all NHS Scotland health organisations
• Create and edit a pathway with nodes, connectors and linked to additional information
• Add keywords to your pathway
• Preview and share your pathway with others
• Understand the role of the Organisation Administrator
Overview of Training

- Introduction to the Clinical Knowledge Publisher
  - Background information
  - What it is
  - Key benefits of the tool

- Getting started
  - Registration and log-in
  - Finding and accessing pathways

- Creating a pathway
  - Creating nodes
  - Adding text
  - Connecting nodes
  - Linking to related information and pathways
  - Applying taxonomy and keywords

- Previewing, sharing and publishing pathways
  - Pathway Properties, including making copyable, adding passwords and review dates
  - New versions or updating pathway
  - Adding pathways to public Organisation Pathway Library

- Administrator Role
  - Creating custom styles
  - Customising link categories
  - Customising node styles
  - Approving/deleting users
  - Creating teams
  - Adding an organisation copyright statement
  - Approving and managing Organisation Pathway Library
What is the Clinical Knowledge Publisher?

- A web-based system that allows logged-in users to design and publish clinical pathways and guidelines.
- It enables users to create pathways collaboratively, so that a defined team of users can edit the same pathway.
- Pathways are published directly onto the web and are publicly available.
Background and context

- Developed alongside NHS Tayside through local clinical and eHealth engagement and partnership with NES Knowledge Services
- Challenge: NHS Tayside wanted to make it much easier for busy clinicians to create and locate clinical pathways, guidelines and protocols in a consistent and reliable way
- Live system released end of 2012
- New features implemented May 2016
What are the key benefits of the Clinical Knowledge Publisher?

• User-friendly, empowering, enables local ownership

• Web-based platform – design and publish straight to web

• Enables standardised output format through common use of Organisation stylesheets

• Embedding of taxonomy and metadata means that guidance can be described using controlled vocabularies and optimised for information retrieval.

• Embedded linking mechanisms make it easy to link to supporting documentation and evidence

• Publicly accessible, searchable Pathway Libraries maintained by Organisational Admins
Click on icon to create PDF to print or to save locally.

On the PDF the key to the node styles has moved to bottom of the pathway.

Click on a node with an “i” icon to view linked information.
Mobile Pathway Viewer

- Tap on the “i” icon for additional information linked to the whole pathway and for administrative metadata
- Zoom in and out controls
- Download PDF

- Additional information opens over pathway
- Click on arrow to go back to pathway
Getting Started

- Registering and logging in
- Editing your profile
- Menu bar and online help
- Finding, opening and deleting documents
- Previewing pathways/guidelines
- Designer canvas, toolbar and status bar
- Organisation Pathway Libraries
Welcome to the Clinical Knowledge Publisher (CKP).

The Clinical Knowledge Publisher (CKP) enables you to create clinical pathway diagrams and guidelines to support evidence-based practice. The pathways enable linking out to additional information and evidence, such as patient information, published guidelines and other pathways.

Examples of use include pathways to support SIGN Guideline 136: Management of Chronic Pain or see the image below of an extract from a Greater Glasgow & Clyde pathway on Shoulder Pathology.

Please note that this site works best on Chrome or Firefox browsers. If using Internet Explorer it requires v.8 or above.

![Pathway Diagram](image-url)
Enter email address and password you used to register

If you are a new user, select the registration link
If your Organisation is not included in the drop down menu, select ‘Partner Organisation’ and use the free text box which appears to give further details. The System Administrator will assign your account to an existing Organisation or get in touch for more information.
Frome Profile menu edit your password, email address or edit your profile
From Edit Profile set how often the system automatically saves your work.
Public collections of pathways

Logged-in

Menu bar

Find your Organisational Admin on About page

Help document and animated quick start guide

“Documents” dashboard – search or browse for documents from all Organisations
Highlight pathway or guideline to:
- Delete
- Preview
- Open: in Designer mode to edit
• Default search is for own pathways
• Can also search for and view all pathways on the CKP (except those which are password protected)
• Search for a pathway title or using keywords
• Search across all pathways by selecting:
  Author: All Users
  Board: All NHS Boards

Remember to click ‘Apply’
Search across all pathways in a particular Organisation by selecting:
• Author: All Users
• Board: Appropriate Organisation

Search for all pathways by a particular author in a particular Organisation by selecting:
• Board: Appropriate Organisation
• Author: Author x
• Check the Edit Access box and search to find pathways you have permission to edit
• These will not automatically show up in your default Documents page – you must search for them

Remember to click ‘Apply’
Use File menu to:

- Create new pathways
- Open existing pathways
- Save your current pathway
- Copy a pathway/Request copy access
- Create a new version of a pathway
- View the Version History
Change views of the canvas using the Status bar:

- You can toggle a document outline on and off
- Hide/show gridlines on the designer canvas
- Hide/show page breaks
- Chose a portrait or landscape view of the canvas
- Hide the header and footer to display a larger canvas to edit
- Zoom in and out of the canvas
Select Pathway Library from the menu to open public collections.

Organisation Admins can set up and manage a page for their Organisation to be included in the library.

These collections are publicly accessible and searchable, so you do not have to be registered on the CKP to find pathways in your Organisation.
Select Organisations to view collections
Organisation Admins must set up these pages for them to appear in this list

Admins can include a logo and a Copyright Statement for their Pathway Library

Search the pathway library by
• Entering keywords in the search box
• Selecting a keyword from the tag cloud
• Only published pathways which are approved by authors and Organisation Admins will be included
Creating a Pathway
Step 1: Adding nodes

- Different types of nodes
- Drag nodes onto canvas
- Select nodes
- Resize nodes
- Move nodes around canvas
- Convert node types
- Make nodes the same size
- Align nodes
- Add text to nodes
- Node properties
Pathways can be made up of nodes, decisions, nodes and text boxes.

- Node (most flexible – can add text, links etc.)
- Decision node
- Text box
Click on node and **drag** to place a new node on the canvas.

To increase the size of the Designer canvas, press F11 on your keyboard to toggle in and out of full screen mode.
To select a node:

- Click on a node and the outline should turn green
- You can then resize and move the node around the designer canvas

You can select more than one node at a time - press “Ctrl” on your keyboard while selecting additional nodes

OR

Click and hold down your mouse and drag the resulting blue box completely over the nodes you wish to select, then release the click
To resize a node:

- Select the node
- Then hover cursor over one of the green squares until a 2 way arrow appears
- Click and hold down mouse and drag to either increase or decrease size of node
To move a node:

- Select the node
- Hover cursor within selected node until 4 way arrow appears
- Then click and hold down mouse and drag to new location
- Release mouse button

As you are moving a node, red dotted lines will appear on the canvas to help you align with other nodes.

You can move multiple items by selecting them and then dragging as you would a single item.
To move more than one node at a time

- Press “Ctrl” on your keyboard while selecting additional nodes, you can then move them as a group
- Or use your cursor to click and drag to select multiple node
To convert items to different types:
- Select the item
- Right click in the item
- Select the Convert option
- Select the desired type
To make nodes the same size:

- First select the node with the size you require
- Hold in the “Ctrl” button on your keyboard and select the other nodes you want to resize to the same size as the first node
- Then right click on the last node selected and choose “Make Same Size” option
Align nodes:
- Select all nodes to be aligned
- Right click on last node selected
- Choose “Alignment”
- Select the appropriate option
To add text to a node:
- Double click within node
- Text editor opens up
WYSIWYG editor opens
- You can add text, choose bold, underlining etc. Add bulleted or numbered lists.
- You can add in urls and images
- When complete, click on OK and text will appear within the node
CLINICAL KNOWLEDGE PUBLISHER

Item Properties

- Select a node
- Click on “Properties”
- Select from Item Style drop down menu to apply a style, e.g. to signify a red alert

Styles are customisable by administrators.
Exercise I: Start creating your pathway - add nodes and text

• Start creating a pathway based on your own requirements
• Drag in and add the first 5 or 6 nodes
• Experiment with moving the nodes around and resizing and aligning them
• Add in the text for the nodes you have created
• Experiment with changing the style of one of your nodes
• Save your pathway – suggest using a combination of your Organisation, clinical group and a descriptive title, e.g. NHS Tayside Respiratory MCN Paediatric Asthma Pathway
Creating a Pathway
Step 2: Adding connectors to nodes

• Adding connectors
• Changing connector types
• Deleting connectors
• Moving connectors
• Labelling connectors
To add a connector between 2 nodes:

- Hover cursor in centre of the first node until “hand” icon appears.
- Then click on mouse and drag to the second node.
- Release mouse click and connector appears.

Multiple connections can be added between two nodes in both directions. To get a two way arrow, add a connection in each direction, i.e. add two connections, connect the first node to the second and then the second back to the first.

Connectors can only be used to link nodes and decisions, NOT text boxes.
Change type of connector by:

- Clicking on connector to select it, then
- Either select “Connection” from the menu
- OR Right click and select new connector type:
  - Straight
  - Horizontal
  - Vertical
  - Orthogonal: the most flexible connector
Use an orthogonal connector to produce complex routes, e.g. to navigate around other nodes.
To delete a connector:
- Click on the connector to select
- Click on “Delete” on the menu OR
- Right click on the connector and select “Delete”
To move or reshape a connector:

- Click on the connector to select it
- Click and hold down the mouse on a green box and drag to the new position
- Release the mouse

If you move or resize a node after you have added a connector to it, the connector will automatically be re-plotted.
To label a connector:

- Double click on the connector - a small flashing text cursor appears
- Type in your text
- Click elsewhere on the canvas to save OR
- Select the connector, right click on it and select “Properties”
- Enter the text in the Description box which opens up and simply close the box

To move the text:

- Select the yellow box over the label
- Click and hold down the mouse and drag the text box to desired position
- Release the mouse
Exercise II: Add connectors to your pathway

- Add connectors between the nodes on your pathway
- Experiment with different types of connectors
- Try moving the connectors around
- Add a label to a connector
- Remember to save any changes
Creating a Pathway
Step 3: Adding extra content to nodes

- Opening up link manager
- Different types of links
- Information: adding additional text, images, urls
- Evidence: linking to Knowledge Network resources
- Linking to other pathways and guidelines
- Linking additional information to the whole pathway
- Adding additional Copyright Information
- Adding images, e.g. logo for local MCN
To add extra information to a node:

- Select the node
- Click on Link on the menu or right click on the node and select “Link”
Activates Link Manager

Apply different types of linked information:
- Pathways
- Guidelines
- URLs
- Free text
- NICE pathways
- IPR Statement

Organised into categories, configurable at Organisational level
Select the category you wish to add link to and then select the type of link. In this case, some free text will be added to the “Information Category”.

Double Click within the text box and the WYSIWYG editor will automatically open up.
WYSIWYG editor opens
- You can add text, choose font, bold, underlining etc. Highlight text, add bullet points, tables and align text as desired
- You can add in urls and images
- Choose the HTML editor if you are familiar with HTML and want greater flexibility

Click on “OK” when editing complete
Adding a table
Adding a URL:

- Select the text you want to create a URL link from.
- Click on the URL linking icon and a window will open up.
- Enter the full URL with http:// at the start.
- The text you want to display for the link.
- Use the Tooltip to enter text which should appear if you hover over the link.
- Decide if you want the link to open in a new window.
Alternatively, you can create a list of links to external sites

- Select the category you wish to place the resources in, e.g. “External Links” or “Information”
- Click on the “Add URL” button
- A form will appear in the right hand panel
- Enter the full URL with http:// at the start
- The text you want to display for the link
- Select open in the same window (replacing your pathway), open in a new window or to display a small frame of the site in the additional information panel using the IFrame option
If you select IFrame enter your preferred height (in pixels) for the frame.

The IFrame option will work better with some websites than others, try experimenting with different sites and also different IFrame size options.

If it doesn’t work with the website, go back to displaying the site in a new window.
Iframe display works OK on the SIGN website but better with BBC News.
Adding a link to a NICE pathway:

- Click on Pathways category to select
- Then click on the “NICE pathway icon”
- Panel on right opens
- Click on the “search” icon
Click on “Pathways” to browse for particular NICE pathway.
<table>
<thead>
<tr>
<th>Pathways</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acute coronary syndromes</td>
</tr>
<tr>
<td>Acute heart failure</td>
</tr>
<tr>
<td>Acute kidney injury</td>
</tr>
<tr>
<td>Acute upper gastrointestinal bleeding</td>
</tr>
<tr>
<td>Acutely ill patients in hospital</td>
</tr>
<tr>
<td>Advanced breast cancer</td>
</tr>
<tr>
<td>Alcohol-use disorders</td>
</tr>
<tr>
<td>Anaemia management in people with chronic kidney disease</td>
</tr>
<tr>
<td>Anaphylaxis</td>
</tr>
<tr>
<td>Antenatal and postnatal mental health</td>
</tr>
<tr>
<td>Antenatal care</td>
</tr>
<tr>
<td>Antibiotics for early-onset neonatal infection</td>
</tr>
<tr>
<td>Antimicrobial stewardship</td>
</tr>
<tr>
<td>Antisocial behaviour and conduct disorders in children and young people</td>
</tr>
<tr>
<td>Aortic aneurysms</td>
</tr>
<tr>
<td>Asthma</td>
</tr>
<tr>
<td>Atrial fibrillation</td>
</tr>
<tr>
<td>Attention difficulties in children and young people</td>
</tr>
<tr>
<td>Attention deficit hyeractivity disorder</td>
</tr>
<tr>
<td>Autism</td>
</tr>
<tr>
<td>Bacterial meningitis and meningococcal septicaemia</td>
</tr>
<tr>
<td>Barrett’s oesophagus</td>
</tr>
</tbody>
</table>

- Click on the box beside the pathway to select it
- Click on “OK”
NICE Pathway successfully linked

- Click “OK” to close down Link Manager and return to editing your pathway
Link to additional text, guidelines and pathways to the entire pathway as well as to individual nodes:

- Right click on empty area of designer canvas and select “Link”
- Click on empty area of designer canvas and click on “Link” in menu
Additional information appears in right hand panel of preview or published view:

- Anything linked at pathway level displays automatically
- To view links from nodes, click on i icon within node
- To view linked pathway click on the arrow icon
If your Organisation Admin has set a copyright statement for the organisation, this will automatically appear. Only Organisation Admins can remove or edit these.

Pathway authors have the option to add additional copyright information via the Link Manager.

You might do this if:

- Your pathway was created prior to May 2016 and you need to add organisation copyright information retrospectively.
- You have copied the pathway from another organisation and wish to add to their existing copyright statement, which will carry over.
- You wish to add copyright information specific to your department, etc, within your organisation.
To add your organisation’s IPR statement:
- Highlight ‘Copyright Information’ Category
- Select ‘Add your organisation’s IPR statement’ icon from options in top bar
- This text is controlled by Organisation Admins and cannot be edited
- Simply click ‘OK’

To add your own free text:
- Highlight ‘Copyright Information’ Category
- Select ‘Add free text’ icon from options in top bar
- Enter your text in text editor to the right
Exercise III: Link extra information to nodes on your pathway

- Link extra text and URLs to the first few nodes in your pathway
- Add a resource from The Knowledge Network to one of the nodes
- Link a second resource of your choice from The Knowledge Network to the same node
- Link some extra information, e.g. text or URL to your entire pathway
- Add additional copyright information to your entire pathway
Link to another CKP pathway:
In this case a link to a pathway is being associated with the “Pathway” category.

Click on the “link” button

Select a category and use the relevant toolbar button to add a link. Categories will be displayed in the order above, you can edit the order of links.

* Required field in order to proceed
The document browse panel opens:

- Browse through the documents and click to select the pathway you wish to link to
- Click “Open”

If you have too many documents to scroll through, click on “Show Filter” to display the Filter panel and you can use keywords etc. to search for pathways from all of NHS Scotland

Remember to select ‘All Users’ and ‘All NHS Boards’ to search all pathways and to click ‘Apply’
Select the node that you wish to link to in the pathway

Click “OK”
- Pathway is now linked
- Click “OK” to return to Designer canvas

Only one pathway can be linked to each node, but you can add multiple pieces of text, multiple URLs, images and guidelines.
The icon indicates that extra information has been linked to a node.

The arrow icon indicates that the node is linked to another CKP pathway.
To view how the pathway links to others click on the “Hierarchy” button.
• Click on a pathway to open it in the Designer Canvas or
• Click on “Close” to return to editing your pathway
Exercise IV: Link to another pathway

- Try linking your pathway to another CKP pathway
- Use the test pathway: NHS Education Knowledge Services Test Pathway
To add an image to a pathway:
- Drag a text box onto the desired area of the canvas.
- Double click inside the text box to open up the text editor

If you add an image within a text box rather than a node, you can choose to remove the border of the box.
• Click on the “Insert Image” button and the Image panel opens up
• Browse for the image you want to add
• Tick “More options” to change image size, position image in relation to text and to add a description
• Click on “Insert” button to add the image
Once image added, right click within the image in the text editor to make any changes required.

Click “OK” when complete.
**Fragility Fracture Risk Assessment**

Image appears in pathway

Right click within the text node, select “Properties” and uncheck the “Show border” option to remove the border from the preview and published pathway.
Exercise V: Add an image to your pathway

• Add an image to your pathway
Creating a Pathway
Step 4: Adding keywords to your pathway

• Add free text keywords or keywords from NES taxonomy
• Add keywords to individual nodes
• Add keywords to the whole pathway
To add keywords to the whole pathway:

- Click on empty area of designer canvas and select “Taxonomy” OR
- right click on empty area of canvas and select “Taxonomy”

Keywords added to pathways will be reflected in the tag cloud in your Organisation’s Pathway Library. If you approve your pathway for inclusion, it’s important to make sure these are accurate as they will help users find your pathway.
To add keywords to a node:

- Select the node
- Click on “Taxonomy” in the Menu or right click on the node and select “Taxonomy”
Taxonomy Manager opens:

Click on the “Add Taxonomy” button

- Enter keywords into box to search from a controlled list of taxonomy terms
- Select desired term from list
- Click “Go”
• Term is chosen
• Select term and it is automatically linked to the desired node – see panel on left
• To add another keyword from the taxonomy:
• Click on the “Add Taxonomy” button again and repeat process

⚠️ Tick “Exact match only” if you know the exact term you are looking for and avoid seeing a long list of other possible terms
If a keyword doesn’t appear in the taxonomy you can still add it as a free text keyword.

Click on the “Add Keyword” button.
• Enter your keywords into the box on the right
• Once done, click on “Keyword” in the left hand panel
• Keyword will be linked to node
• To add another keyword:
• Click on the “Add Keyword” button and repeat the process
As an alternative to searching for terms, click on the “Taxonomy Tree” button to browse for terms in the taxonomy.
• The top level of the taxonomy hierarchy opens up.
• Click on the arrow beside a heading to see terms further down the tree.
Once you find the term you want, click on the checkbox beside it to select.

Click “OK”
• The term is then linked to your pathway
• When you have finished adding keywords click “OK” to return to your pathway
The pathway can now be found by searching on these keywords.

Remember users can now search all NHS Scotland pathways by title or keyword, both in the CKP and the Pathway Library, so it is essential to add appropriate keywords so others can find your pathway.
Exercise VI: Add keywords to your pathway

• Add a couple of keywords to a node
  ➢ Try adding a keyword from the taxonomy and also a free text keyword
• Add a keyword to your whole pathway
Previewing, Sharing and Publishing your Pathway/Guideline

- How to preview your pathway
- Circulate your pathway
- Share rights to edit your pathway
- Pathway properties
  - Making copyable, adding a password, adding review date
  - Adding pathways to your Organisation’s Pathway Library
- Publishing your pathway
To preview your pathway:
- Go to file on the menu and save the pathway
- Then click on preview on the menu
You can also preview pathways from the Documents page:

- Select the appropriate pathway in the “Open Document” panel
- Click on “Preview”
Click on a node with an “i” information icon and the panel on the right hand side will automatically open up with additional information. The selected node becomes highlighted.

Use the arrow symbol on the border to open and close the RHS panel.

You can resize the RHS panel by hovering over the grey border until a two way arrow appears. Click and hold down on your mouse and drag the border to a new position before releasing the mouse.

- previous fragility fracture
- current use or frequent recent use of oral or system glucocorticoids
- history of falls
- family history of hip fracture
- other causes of secondary osteoporosis¹
- low body mass index (BMI) (less than 18.5 kg/m²)
- smoking
- alcohol intake of more than 14 units per week for women and more than 21 units per week for men.

For more information on falls, see Falls (NICE clinical guideline 21).
For more information on hip fracture, see the NICE hip fracture pathway.

¹Causes of secondary osteoporosis include endocrinopathies (hypogonadism in either sex including untreated primary amenorrhea, menopause and treatment with aromatis inhibitors or gonadotrophin-releasing hormone analogues).
Fragility Fracture Risk Assessment

People presenting in any healthcare setting

People under 50 years

Women 50 to 64 years and men 50 to 74 years with risk factors

People 40 to 49 years with major risk factors

People under 40 years with major risk factors

Women 65 years and older and men 75 years and older

Consider risk assessment using FRAX or QFracture

Factors that may affect accuracy

Copyright Statement

This website and its content is copyright of NES. All rights reserved.

Any redistribution or reproduction of part or all of the contents in any form is prohibited other than the following:

- you may print or download to a local hard drive or network
- you may adapt for non-commercial purposes

This pathway has been adapted by NHS Education for Scotland.

If there is information linked to the pathway at the top level the this will automatically open up in the RHS panel when the pathway is opened

If your Organisation Admin has set up a copyright statement, this will appear here automatically. This can only be edited or removed by Admins. Any additional copyright information added by pathway owners will appear below this.
• Click on a node with an arrow icon and the right hand panel opens up displaying the linked pathway.
• Click on the title to view the linked pathway
Allow others to edit your pathway:

- Go to “File” and select “User Access”
User Access panel
This opens up and lists all the users and teams in your organisation who you can give permission to access your pathway.

- Select the appropriate organisation from the drop down menu
- The user list in the right hand panel will automatically update with all the registered users
- Click on a name of a user or team to select
- Click on the top double arrows to move the user or team over to the “Current Access” panel.
- If required choose a different organisation from the drop down and again the user list will update appropriately

Organisation Admins can set up teams of users within each organisation.
To remove permission:

- Select the user or team in the “Current Access” panel and click on the bottom arrows.
- When you are happy with the permissions set, click “OK.”
Cross-organisation editing

On Documents page: Check Edit Access Box and then search to find pathways to which you have editing access

- Edit & save pathway as normal
- Will receive an email when the pathway is published
- Will receive a reminder notification before pathway review date (if review and reminder set up)

Pathways will display in style of your organisation in edit mode, but remain as original style for viewing/publishing

- You can ask for a cross organisation group to be set up if you wish to define styles for a particular group
- Contact your local Organisation Admin if you would like to do this
**Document Properties:**
Move your cursor away from any items or connectors and right click on a clear part of the Designer canvas to open Document properties or select Properties from the menu.

Here you can:
- Set a review and reminder date
- Make your pathway copyable
- Add a password
- Approve your pathway for addition to your Organisation’s public collection
- View the permanent URL for your pathway
- View and edit user access
Ability to set up an automatic reminder of scheduled pathway review date

- Within designer canvas open up pathway properties, add a review date and select the desired reminder period in weeks
- Save the pathway
- Reminder email will be sent to pathway author, editors, and Organisation Admin (of author)

You **must** set a Reminder Period to receive an email notification when the pathway is due for review.
Pathways are NOT available to copy by default.

To make it available:
- Open in designer canvas
- Open up pathway properties
- Click on “Copyable” checkbox
- Close down pathway properties
- Save the pathway

Let requestor know that the pathway is now available to copy.

Can make unavailable again by unchecking “Copyable” and resaving pathway.

If you receive a request to copy a pathway you have already published, you will have to “unpublish” to make copyable. Simply select File and Publish once finished. This will have no effect on how end users view the pathway.
To add a password

- Within designer canvas open up pathway properties
- Check Password Protected box and enter a password
- Save the pathway
- Anyone NOT logged into the CKP trying to view the pathway will be asked to enter the password
- Pathway author & editors will NOT require password to view or edit the pathway if they are logged into the CKP
- All other logged in users (inc Organisation Admin) will require to enter password to view pathway
- Password can subsequently be removed and pathway resaved
Adding pathways to your Organisation’s Pathway Library

- Within designer canvas open up pathway properties
- Check the box to ‘Include this document in the public collection for this organisation’
- Save the pathway
- When you publish your pathway, your Organisation Admin will receive an alert and approve your pathway for the public collection (Pathway Library) or contact the author for further details if needed
- Once approved, the ‘Approved by NHS board administrator’ box will be ticked
- The pathway will now be findable in the Pathway Library for your Organisation by using the search box or tag cloud
- The tag cloud will show keywords added to the pathway in Taxonomy. Authors must make sure these are accurate to ensure pathways are findable in the Library
To publish your pathway:
- Go to File
- Select Publish
- Your pathway will no longer be editable and a locked padlock will appear at the bottom of the screen.

To edit a published pathway you need to “unpublish” it:
- Open the pathway in designed
- Go to File and select “Unpublish”
- The padlock at the bottom of the screen will appear unlocked and you will once again be able to edit the pathway.

Automatic email notification sent to author, editors & Organisation Admin when a pathway is “Published”
Exercise VII: Preview, share and publish your pathway/guideline

- Look at your pathway properties, add a review date
- Preview your pathway (making sure you have saved any changes first)
- Add a review date and reminder period
- Make your pathway copyable
- Add a password to your pathway (or don’t!)
- Request to add your pathway to your organisation’s Pathway Library
- Share your pathway with the person sitting next to you
- Check you can edit the pathway shared with you
- Publish and un-publish your pathway
New Versions and Copied Pathways

• Creating new versions of your pathway
• Making or requesting a copy of an existing pathway
To create a new version of your pathway:
• Open a “published” pathway in the Designer Canvas and select File/New Version.
• Creates a new version you can edit without affecting the existing published version available to users. Once the new version is ready, publish it and it will replace the original with the same URL.

To view Version History
• You will only see the most recent version of a pathway listed in your Documents page.
• Open Designer Canvas and go to File/Version History to view older versions.
• Unpublished, New versions are only visible when logged in and editing the pathway
• The unique pathway URL found in Document Properties will remain the same, so end users will only see the most recent, published version.
To copy an existing pathway
- Can now search for any pathway on the CKP
- Can preview or open up the pathway in the Designer canvas but not edit it (unless been given specific rights)
- Can’t open password protected pathways
- From within designer canvas can attempt to copy the pathway
- Go to File dropdown and select Copy or Request Copy Access if Copy option “greyed out”
- Automatic email sent to pathway author requesting they make their pathway available to copy

Once author makes pathway available to copy
- Go back into designer canvas & to File/Copy
- Rename pathway and click OK
- Pathway now saved in your organisation with your default styles
- You become the author of the copy
- Previous editing rights, review date, password protection etc. NOT carried over from original
- Copyright statement of original organisation IS carried over
Exercise VIII: New Versions and Copied Pathways

- Create a new version of your published pathway
- Copy an existing pathway
  - Search for ‘NHS Education Knowledge Services Test Pathway’
  - Remember to select all users/all NHS Boards
Administrator Role

• Key role:
  ➢ Ensures new users are registered and creates teams of users
  ➢ Acts as central support and guidance for the Organisation
  ➢ Cascades training across the Organisation
  ➢ Acts as digital curator, leading on areas such as governance of the pathways/guidelines, naming conventions and style of pathways/guidelines for the organisation

• Functions include:
  ➢ Managing Organisation Pathway Library
  ➢ Clearing editing locks
  ➢ Editing, sorting and excluding linking categories
  ➢ Create copyright statement for all organisation pathways
  ➢ Editing and adding new node styles
  ➢ Styling pathways
  ➢ Approving users
  ➢ Creating teams
  ➢ Notification Emails
Organisation Administrators can:

- Clear editing locks on pathways and guidelines
- Change the look of nodes and pathways
- Add a copyright statement for all organisation pathways
- Approve published pathways for addition to Organisation Pathway Library
- Add different categories of links
- Approve new users
- Create teams of users

Organisation Admins will receive notification emails of:

- Pathways published in their organisation (remember to check for inclusion in Pathway Library)
- Pathways due for review (if reminder period is set by author)

These are for information only, though can be used to ensure quality control.
To clear any documents which are locked for editing:

- Go to Organisation in the menu
- Select “Clear Locks”
- Find the relevant document and click on the “Clear” link
Organisation Administrators can add a logo to the system:
• Go to Organisation on the menu
• Select “Organisation Settings”
• Upload a logo
• Click on “Save”
Organisation Administrators can also add an organisation copyright statement:

- Select ‘Edit’ beneath the IPR Statement box
- Text entered here will automatically appear under the information panel in every pathway in that Organisation
Example of a statement that might appear in the additional info section of all your pathways.

Message and wording controlled by Organisation Admins

If pathway is copied by someone in another organisation, the original Copyright Statement will remain
Quality Education for a Healthier Scotland

Organization Admins will receive an email alert when a pathway is published in their organization. Admins must check whether authors have ticked the box to add the pathway to public collections and review the pathway before approving.

To set up a publicly accessible Pathway Library for your Organization:
- From the Organisation menu
- Select Organisation Settings
- Tick the Public Access box
- The Public URL links directly to your Organisation in the Pathway Library

Set a copyright statement to appear on your Organisation Pathway Library

Organisation Admins will receive an email alert when a pathway is published in their organisation. Admins must check whether authors have ticked the box to add the pathway to public collections and review the pathway before approving.
To approve pathways for inclusion in Organisation’s Pathway Library:

- From the Organisation menu
- Select Approve Public Access
- From the box which appears, select the appropriate pathway
- Click to Allow or Remove
- Click OK
- Both DRAFT and PUBLISHED pathways will appear if the author has approved for inclusion
- Admins will only receive an alert for Published pathways

Pathways will only be added to Pathway Library when published and approved by Organisation Admins. These can be draft or published, though Admins only receive alerts for published pathways.

Admins should review pathways before approving inclusion in Pathway Libraries, including keywords added in taxonomy as these dictate what appears in the tag cloud. Note that only pathway authors can edit these.
To add a new link category for your Organisation:

- Click on the icon with the green plus sign
- Enter a name for the category
- Click on “Add”
- You can then re-order the list of categories to suit

Administrators can:

- Add new categories of links
- Exclude existing default categories
- Re-sort how the categories are listed on the system and the pathways
To exclude one of the default categories for your Organisation:
• Click on the category to select
• Click on the icon with the red cross to exclude the category
• Click “Save”

To add a new link category for your Organisation:
• Click on the icon with the green plus sign
• Enter a name for the category
• Click on “Add”
• You can then re-order the list of categories to suit

To reorder the list:
• Click on the category to move to select it
• Click on the arrows to move the category up or down the list
• Click on “Save”

You can add the category back in again by:
• Selecting the item
• Clicking on the item with the red cross again
• Click “Save”
To create a new style of node:

- Go to “Organisation” on menu
- Select Organisation Node Styles
- Click on the icon with the green plus sign – a panel will open on the right hand side and allow you to add a name for the new node style, colours and images for the node
- Scroll down the right hand side panel to see options for setting the colour of the node when is selected
- Click on “Save”

When item styles are applied to a connection only the start gradient is used, so that the connector is one solid colour.

When item styles are applied to text boxes only the border colour is applicable.
To delete an existing node style:

- Click on the style to select it
- Click on the icon with the red cross sign
- Click on “Save”
To change the style of pathways for your Organisation:

- Go to Organisation on the menu
- Select Organisation CSS Styles
- You can then change colours, borders, font etc. on a per Organisation basis
- Click “Save”
To approve a new user:

- Go to Organisation on the menu
- Select “Organisation Users Awaiting Approval”
- Click on “Edit” to assign a role to the user
- Tick the “Is Active” box
- Click Update

If you “Approve” the user before assigning them a role, the user will be able to log into the system but will have limited access to the functionality.

To delete a user:

- Select the Delete option on the left
- Confirm in the pop up box which appears
- This can be done from Organisation Users or Users Awaiting Approval

Any pathways belonging to users must be deleted or transferred to another user before their account can be deleted.
Choose one of the 5 user roles:

- **Creator role** means that the user can create, edit, preview and publish pathways they own or are given explicit permission to edit by another user.

- **Organisation Administrator role** can also configure the link categories, the available style of the nodes and the pathway style for their organisation. They can also clear locks on documents, edit pathways and guidelines of any user in the Organisation and approve new users.
To create a team of users in your organisation:
- Go to Organisation in the menu
- Select “Organisation Teams”

Creating a team means you can all easily work on a document together – just give the team permission to edit your pathway.
Click on the People icon with the green plus sign

Enter a name for the team and click on “OK”
The team name will appear in the left hand panel.

Select the person icon with the green cross in the right hand “Members” panel.
A list of users registered in your Organisation will appear.

Click in the box beside a user name to add that user to your team.

Once you have added all the users you want click on “OK”.

* Required field in order to proceed.
To remove a user:

- Highlight the team in the left hand panel
- The list of team members will appear in the right hand panel
- Select the user to be deleted and click on the person icon with the red cross
Edit the team name or delete the team:

- Select the team in the left hand panel and either
- Click on the people icon with the pencil to edit the name OR
- Click on the people icon with the red cross to delete the team
Exercise IX: For Organisation Administrators Only

- Add a copyright statement for your Organisation
- Set up a Pathway Library for your Organisation
- Check for pathways awaiting approval
- Try reordering the default link categories
- Create a new link category for your organisation
- Create a new node style for your organisation
- Create a team of users
- Experiment with changing the style of the pathway for your organisation
Any questions or comments?

Please contact

Knowledge Services
NHS Education for Scotland

knowledge@nes.scot.nhs.uk