QURIS®

Content Editing Guide

tactuum

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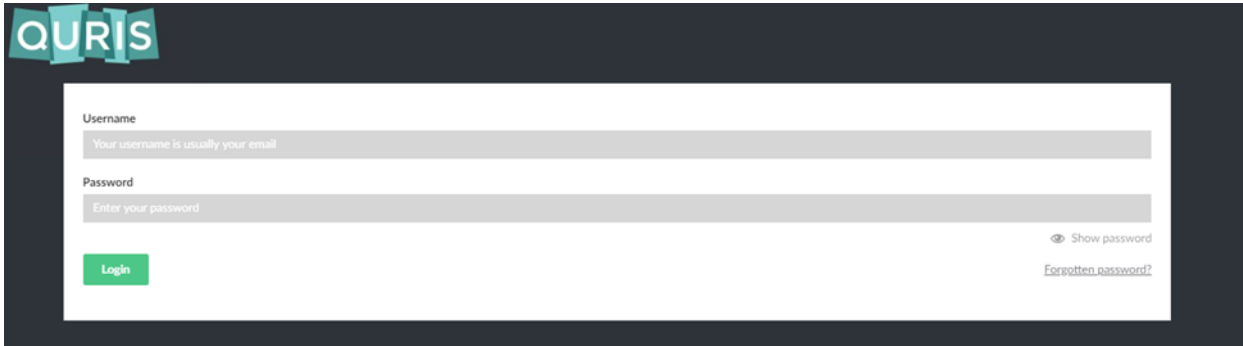**Users**

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Before You Start

You should use as up-to-date a browser as possible, preferably Chrome (latest version), FireFox (latest version).

Login

Login to the web-based Knowledge Management System (KMS). You should have received information with the URL providing access to this login page and your login credentials. Keep these safe and secure.
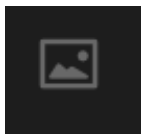

If you have problems logging in, please contact support@tactuum.com for assistance.
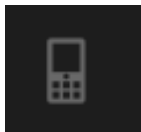
Overview

Once logged in, depending upon your role privileges, you will see one or more options on the left-hand side:
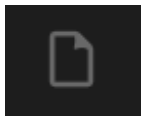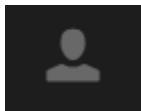
The main **content** section. This is where you will do most of your editing work.

The **media** section where you upload and manage images and electronic files, e.g. PDFs, jpegs, etc.

The mobile **publishing** section where you publish changes to the app to mobile devices.

The **user** management section where you control who gets access to the system, and what they can do. (access to this section depends on individual permissions)

Content Section

Content

Click on the Content Icon and you will see a window with 5 tabs (**icons along the left side depend on your user level (Writer vs. Editor vs. Admin**):
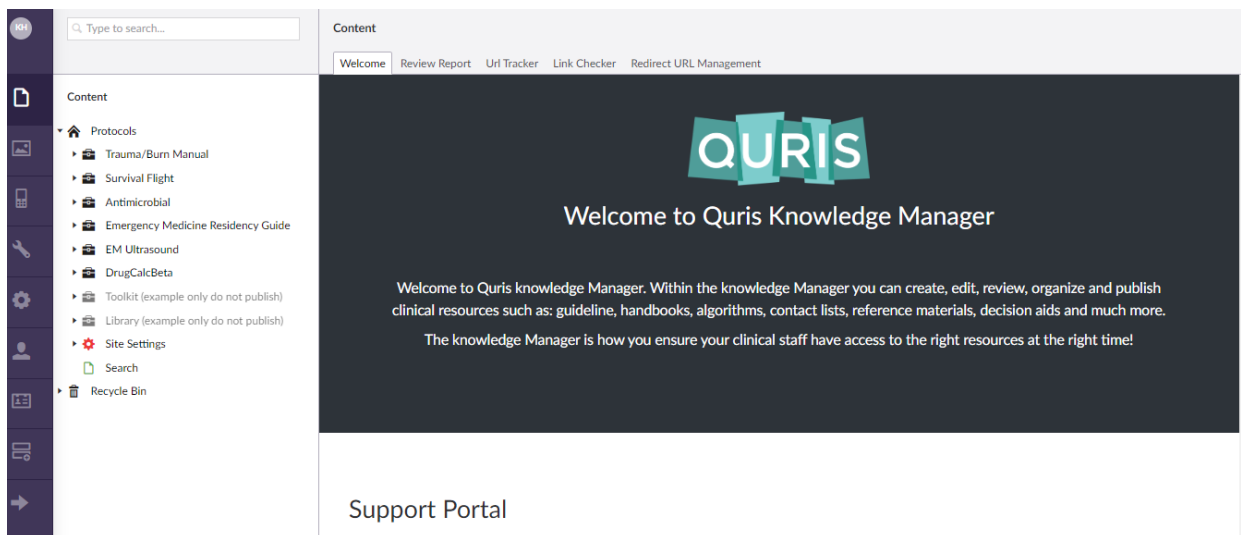
Welcome – gives you information about the program you are using

**Review Report** – gives you the ability to see expired or soon-to-be expired content

URL Tracker – Allows you to ??

Link Checker – Shows you if there are any broken links within the content

Redirect URL Management – Allows you to redirect links when they have changed so when that information is published elsewhere (for example an intranet site or page) the link will still go to the same place.

Main Heading (Name of Program – ie Protocols or Clinical Companion)

Click on the Main Heading (in this example "OCCAM") and you will see 5 tabs:
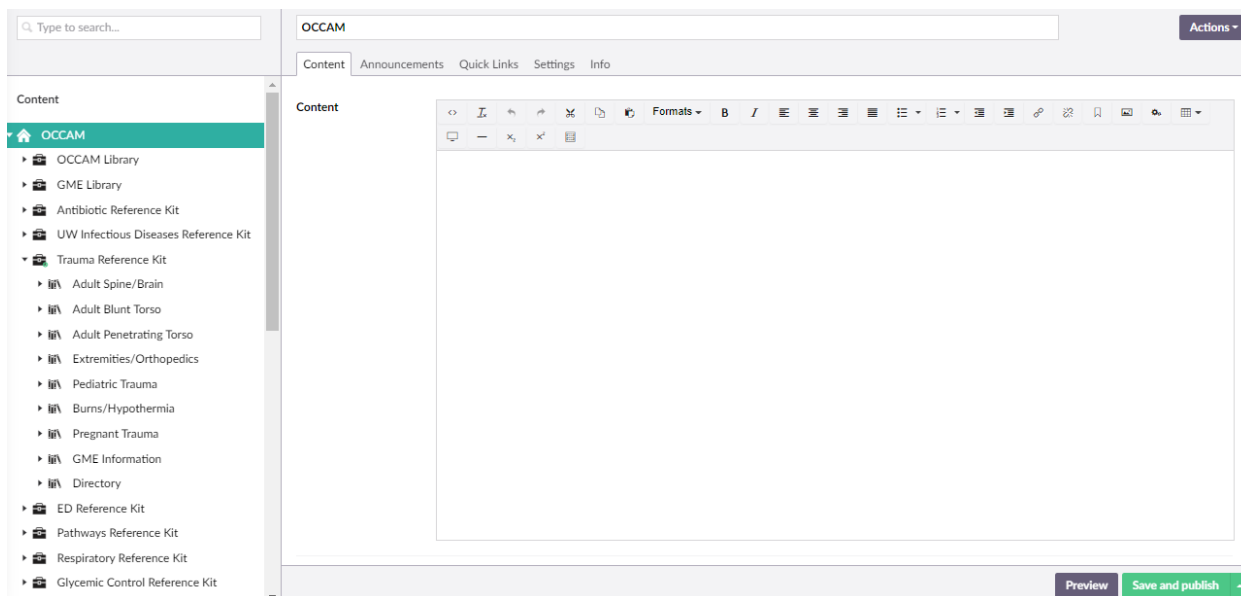
Content – This window is where you create the main content of what is seen on the front page of your website

Announcements – If you have announcements you want people to see as they open the website, this content will show at the top page

Quick Links – This tool is used to bookmark content for quick access from the front page of the website

Settings – The Settings tab is located on all content pages and allows the user to set how the content is seen (or not seen) on the front end or app.

Info – The info tab is located on all content pages and is a way for the user to see it's publishing history, it's url, and general information

Recycle Bin

The Recycle Bin is where content goes when it is deleted above. It continues to live in there until it is permanently deleted. It doesn't hurt to keep it there and can be retrieved later if you decide you would like to reinstate it.

Actions Button vs Ellipses

If you hover over any content title (whether at the highest node level down to a single content item), you will notice an ellipses to the right of the title. Clicking on the ellipse gives you a menu of items you can create under the level you are at (Guidelines, Guideline, Resource, etc.). If you right-click on the ellipses, it will give you a menu of Actions you can do with your content. Similarly, in the top right corner of your screen, you will see a Grey Button titled "Actions." If you click on this, it will give you the same menu items as right clicking on the content title.

- Create – Gives user a list of menu items to create (same as clicking on ellipses)
- Delete – Allows user to delete that piece of content
- Create Content Template – Generally not used as this is pre-determined by developers
- Move – Allows user to move content from one node to another
- Copy – Allows user to copy content to another node
- Change Document Type – User can change document type without losing content in editorial tabs or other tabs. When doing this, make sure to sync up content sections so as not to lose content.
- Sort – User can sort list on content manually
- Rollback – User can rollback content to a previous publishing data to undo major content edits
- Audit Trail – Shows a list of when content was changed and by whom
- Publish – Publishes content to the website (same as hitting Save and Publish button below)
- Culture and Hostnames – Generally not used
- Permissions – Generally not used as this is pre-determined by developers
- Public Access – Generally not used as this is pre-determined by developers
- Notifications – Generally not used as this is pre-determined by developers

- Send to Translation – Generally not used as this is pre-determined by developers
- Reload – Same as choosing Refresh or hitting f5
- Open Associated DocType – Generally not used

Preview Button

This button is found in the bottom right of the screen and is grey. You can use this to view the page you are on to see how it will look on the website, laptop, tablet and phone.
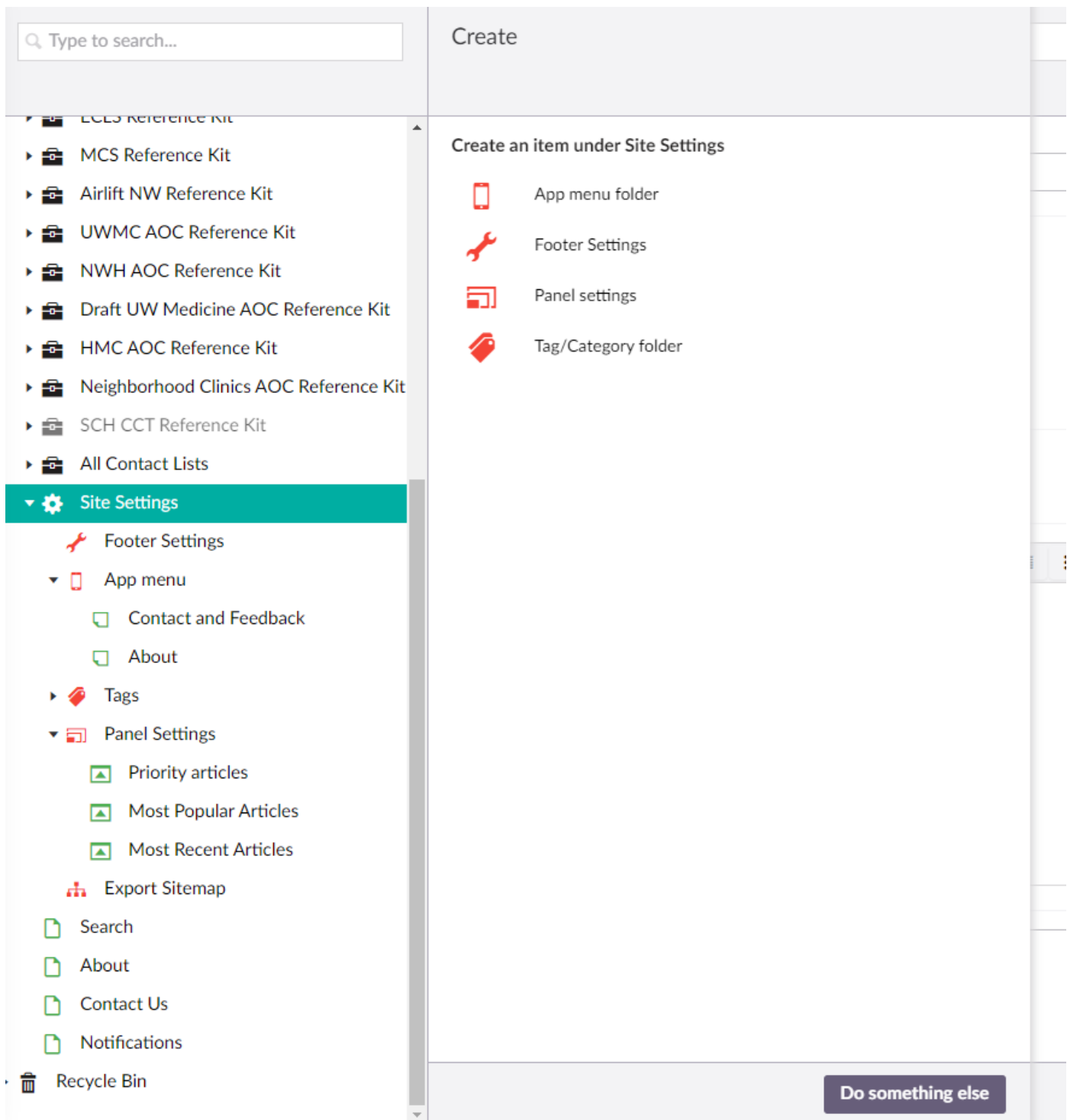
Save and Publish Button

This button is also found in the bottom right of the screen and is green. When you make changes to content, you can hit this button and it will save this content as well as publish it to the website. If you hit the arrow to the right of the words, it will pop-up a short menu of other options. You can save your content without publishing (used when working on content that isn't ready to be published). You can also unpublish content if you need it to be taken down from the website entirely but don't want to delete it from the toolkit.

Main Heading Menu

By clicking the ellipses to the right of the Main Heading (Clinical Companion, Protocol), the user can create the following:
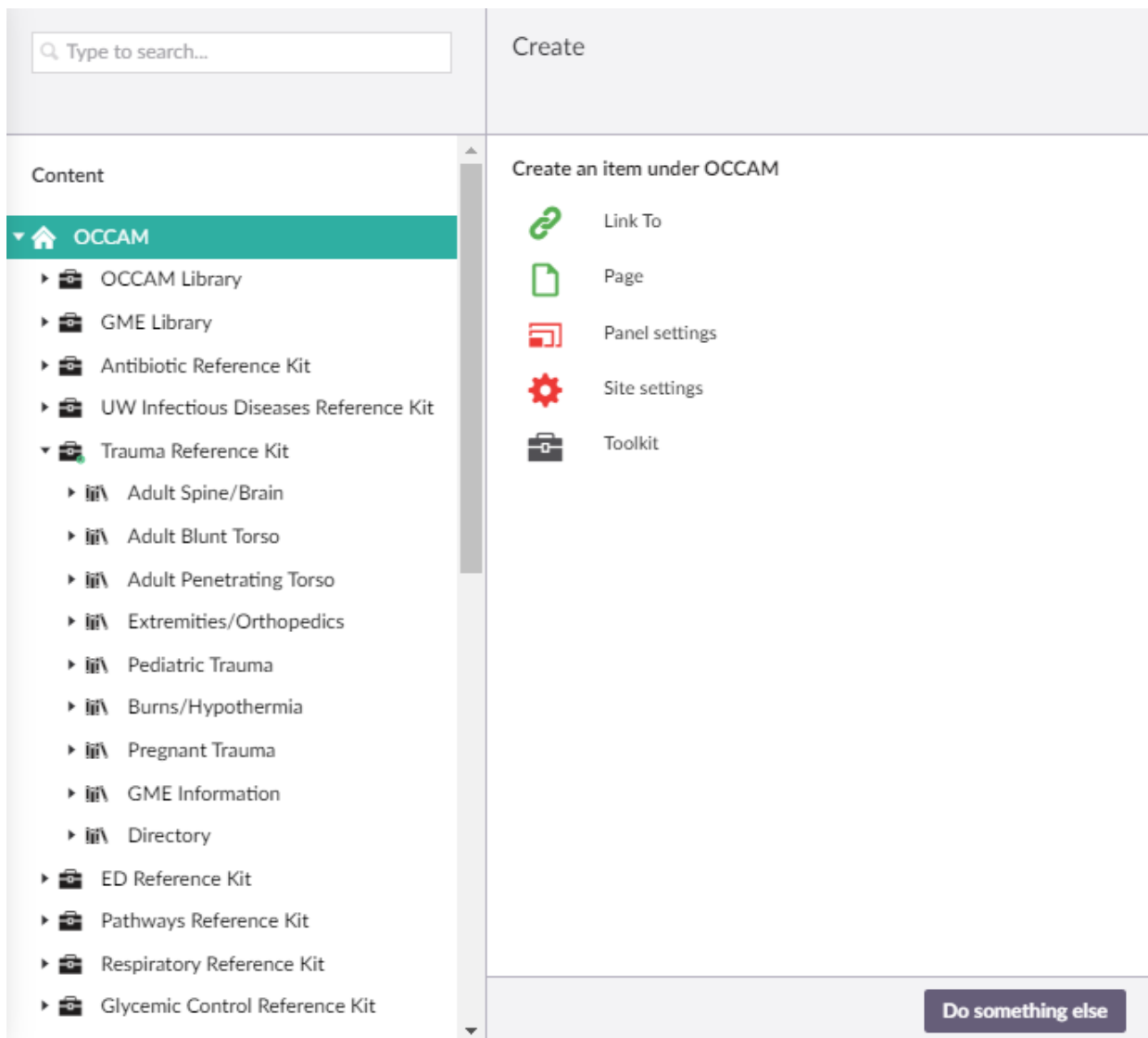
- **Link To** – Allows User to link to another place in the Knowledge Management Site
- **Page** – Allows User to create content that will be listed in the Lefthand Navigation of the front page of the website. Common items are About Us and Contact/Feedback
- **Panel Settings –** These are used to highlight content on the front page that highly used to give quick access
- **Toolkit**– These are the groups of content user creates that make up the apps. All content is grouped under these Toolkit Headings.
- **Site Settings** – This section gives user access to the look of the website.

Type to search...		Create

LCLS Reference Kit

▸ 🗄 MCS Reference Kit

▸ 🗄 Airlift NW Reference Kit

▸ 🗄 UWMC AOC Reference Kit

▸ 🗄 NWH AOC Reference Kit

▸ 🗄 Draft UW Medicine AOC Reference Kit

▸ 🗄 HMC AOC Reference Kit

▸ 🗄 Neighborhood Clinics AOC Reference Kit

▸ 🗄 SCH CCT Reference Kit

▸ 🗄 All Contact Lists

▾ ⚙ **Site Settings**

　🔧 Footer Settings

　▾ 📱 App menu

　　🔲 Contact and Feedback

　　🔲 About

　▸ 🏷 Tags

　▾ ⬒ Panel Settings

　　🔼 Priority articles

　　🔼 Most Popular Articles

　　🔼 Most Recent Articles

　🕸 Export Sitemap

🗎 Search

🗎 About

🗎 Contact Us

🗎 Notifications

🗑 Recycle Bin

Create an item under Site Settings

　📱　App menu folder

　🔧　Footer Settings

　⬒　Panel settings

　🏷　Tag/Category folder

Do something else

- **Site Settings** – User can edit the name, the logo and disclaimer
  - o Navigation – This allows the user to move around the list of items in the left hand navigation bar as well as choose to show Breadcrumbs and how the navigation works
  - o Settings – Most likely won't use this tab on the site
  - o Info – Gives user the publishing history as well as general information
- **Footer Settings** – User can add content and links to the Footer of the website
- **App Menu** – Click on toggles for appropriate viewing (Hide from Web)

- User can create pages for the Settings Section of the app. Common content is an About Page. This can be created by hovering over the ellipses, clicking and choosing "App Menu Item." Type in a title and then in the body type the information. When finished, click on Save and Publish in the lower right corner.
- **Tags** – Can be used to further categorize content. Click on ellipses to create new Tag Folders and Items.
  - **Tag/Category Folder** –Tag Category Folder is for main headings where there are multiple options to list under (ie "Location," "Department").
  - **Tag/Category Items** – Individiual categories. Can be singular, under the main Tag Menu or under a Category Folder (ie "Department" = Admin, Pediatrics, Neonatal, Cardiology, etc).
  - Make sure at any level, with any edits you make, to click on Save and Publish in the right lower corner.
- **Panel Settings** – Used to Update dynamic content on the front page such as most used content, most recent content
- **Export Site Map** – Used to download content from the CMS into a CSV file. Can download whole CMS or specific toolkits

  -
  - Click on **Add** and choose at which level you would like to download content

  -
  - Click on the node you want to download.
  - Click Save and publish in the lower right corner
  - Click Export Sitemap
  - It will take you to a different screen and the content will download, showing the content in a banner on the bottom left of your screen.
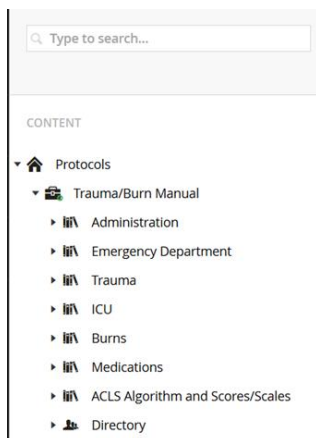
Toolkits

When a user clicks on any main heading of a Toolkit, there are 2 tabs: Settings and Info

- Settings – This is where the user can set how the content of this particular Toolkit is viewed on the Web as well as the app
  - Icon – Icons are usually not assigned at the toolkit level.
  - Access Keys – This is a passcode that allows the Toolkit to only be viewed on the web or downloaded on the app by those who have the passcode. Toolkits that include sensitive or personal information are candidates for passcodes. Passcodes are determined by the user. The passcode is the same for both the web and the Toolkit.
  - Toggle Buttons – allow user to determine if the Toolkit is viewable and found in searches on both web and mobile. It will also allow for cascading to the whole Toolkit or just not seeing the Toolkit in navigation, but the content could still show in searches
- Info – Allows user to see the Link of the Toolkit, the Publishing History as well as General information.

Navigating Around

Click on the Main Heading (Protocols in this example)
Click on the little arrow/triangle to the left of the section name you want to open. The triangle will rotate and expands the section to show the content. For example: expand the Protocols Section, then the "Trauma/Burn Manual" section.

Now click on Administration to open the section down to the guideline content level.   See the example below.
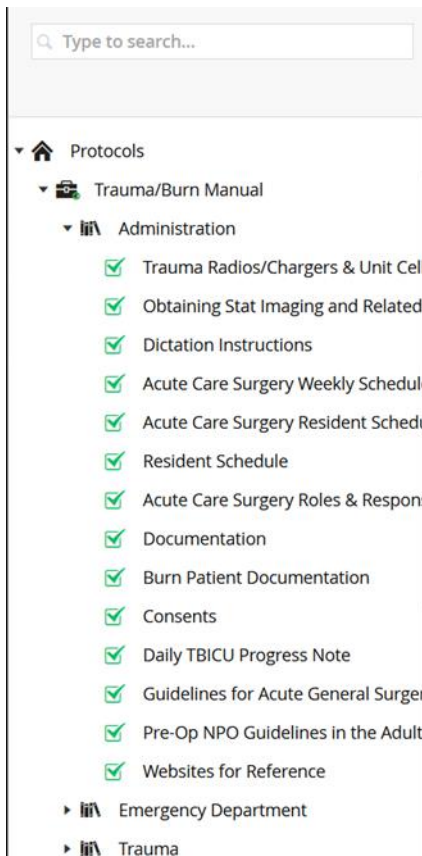
Creating Tiles/Nodes in Toolkits

After clicking on a Toolkit, click on the Ellipses and there will be a menu of items to choose from to create:

- **Contacts** – Used to create directories
- **Guidelines** – Generally used to create groups of content with similar subjects
- **Handbook** – Used to create content with chapters.
- **Link To** – Allows user to link to content in another section or to another section. By using this, the content is only edited in once place.
- **Page** – Used when there will be a single item under a tile/node. This way there is only one click to get to the content
- **Image/PDF/Resources** – Used when all the content under this tile/node are pdfs/images/hyperlinks

Tile/Node Menu

When the user clicks on the main title of the Tile/Node, they will see 5 tabs:

List Settings – Allows user to choose how content is listed in website and app

- List Depth – Not necessary to set
- Show Fast Filter – Gives a box to keyword search that section of content
- Sort Order – allows user to decide how the content should be sorted. Default is the order it is showing in the KMS currently.
    - A-Z – Content will be sorted alphabetically when shown on the website and app
    - Date, Newest First – Content will be sorted by date it was a created
    - Umbraco Order – Same as default – will show however it is currently sorted in the KMS

Notes – This allows the user to add information regarding the subject of the Tile/Node which would show above the list of content on the website:

List Tag Setup – Not really used

Settings – Allows user to choose how Tile/Node is displayed

- Icon – icons are used to convey subject matter. Click on icon square. It will open a menu for Media:

There should be an Icon Folder. Click on the folder and choose from the pre-loaded icons. Icons are generally .png files and are 120x120. Once you have selected your icon, click Submit and the icon field will now show the icon you chose. Click on Save and Publish.

Info – Allows user to see the Link of the Toolkit, the Publishing History as well as General information.

Creating Content

Much like creating Tiles/Nodes, Site Settings and other Menus, once you are in the Tile/Node heading, click on the ellipses to reveal the types of content you can create:

Guideline – The Guideline is generally used for the most robust of content. It has the most fields to use.

- **Content**
  - **Objectives**: what is the expected result for the guidance.
  - **Scope:**   The Group of patients that this might affect.
  - **Audience** – Who is expected to use this guideline.
  - **Guideline Body** – The main content of the guideline
- **Content sections tab**
  - **Content sections** – Similar to the Guideline body. This section allows sections to be an accordion type of view. With a carat to open and close the section.
  - Each section has 4 "buttons" in the top right:
    - **+** - Add a new section
    - **✛** - Move the section up or down in order
    - **⏻** - Turn on or off (it will be unpublished and not show on the front, but not be deleted)
    - **✕** - Delete the section from the list
- **Editorial Tab:**
  - **What's New** – Allows user to add a short description of what has changed
  - **What's New Expiry Date** – Can set date for content to stop showing on website
  - **Alt. Title** – Can set an alternate title to be displayed instead
  - **Authors/Email/Co-Authors:** who wrote the content and contact info
  - **Approved By:** Used if there is a department who oversees content
  - **Reviewer Names/Emails** – Who is responsible for editing that content & contact
  - **Version** – Recording versions for internal use
  - **Last Review Date** – Usually the date you are editing
  - **Next Review Date** – Used if you would like the system to show when content is out of date on the website
  - **Review Notes** – Internal use; will not show on website
  - **Keywords** – used to bulk up search results for content
  - **Document ID:**   Used if organizations have internal ID they want referenced
  - **Internal URL:** Used if there is a source site where content is kept within the organization.
- **References/Evidence Tab (on Guideline Template:**
  - **References:** List of references for the content**.** This content is at the bottom of the page and can be opened with a touch otherwise by default references are behind a button.
  - **Evidence Method:** Information about how content is gathered and discovered
  - **Related Resource:** Open text and a place to include links to sources that might be useful to support the guideline.
  - **Related Guidelines:**   Allows users to add internal links from the KMS to content that is related.
- **Tags Tab:** When tags have been established within the system it allows the user to assign tags to content items.
- **Settings Tab:**

- o **Hide Function button:** Hides the button on the app that allows users to provide feedback, pin content and add notes.
- o **Hide from web:** Keeps content from displaying on the webpage. For example, an organization may not want "Administrative On Call" content on the webpage since some of the phone numbers and policies may be considered sensitive. This only applies to the top level
- o **Cascade Hide From Web:** Applies Hide from Web down through all the content under the node
- o **Hide From Web Search:** Hides content from turning up in search results. You will still be able to navigate to page through its URL
- o **Cascade Hide From Wed Search:** Applies Hide From Web Search to everything under the node
- o **Hide from mobile:** Keeps content from displaying on the mobile app. For example, you may want an administrative policy not to show up on the app.
- o **Hide From Mobile Search:** Excludes content from showing up in search results on app
- o **Show Next and Previous Buttons:** Only applies to Page templates
- o **Show Print Button:** Turns on a feature that allows users to print content with the push of a button.

Protocols / Trauma/Burn Manual / Administration / Trauma Radios/Chargers & Unit Cell Phones

Trauma/Burn Manual	✕
Administration	⌄
Trauma Radios/Chargers & Unit Cell Phones	

Trauma Radios/Chargers & Unit Cell Phones

Next >   🖨 Print
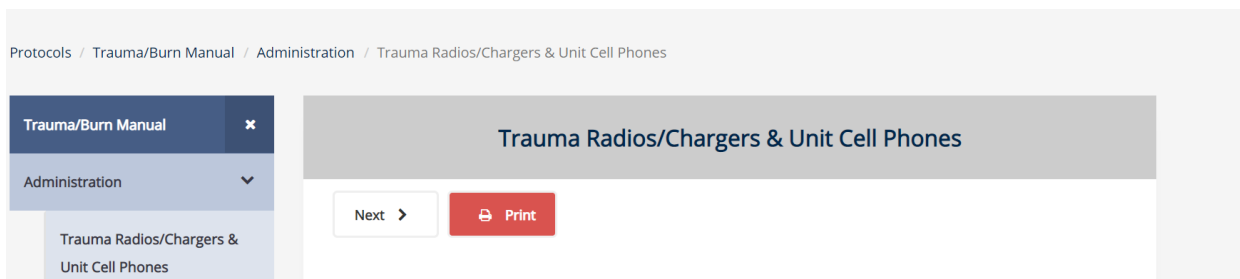
- • **Info Tab:** Provides background information about the content.

Most of the fields/information to edit is contained within the "Content" or Content sections tab (for guidance).

Make your changes using the fields provided and once you are ready with your changes you can either:
1. **Save** – this will save the changes but not publish them to the web or mobile.
2. **Save and Publish** – this will save the changes and immediately publish them to the web but NOT the mobile.
3. If you Save and not Publish, then you can **Preview** your changes to check that all is as you expect before later publishing. Using Save and Preview allows you to pass the changes to someone else to view before finally publishing.

Page – Page is very similar to Guideline. However, it has less fields on the Content tab, and no References Tab.

Image/PDF/Resource – This is used when you content item is a PDF, Image or a hyperlink to outside content.

- • **Resource Tab**
  - o **Add** (Click on this to add content, or click red X to clear content and add new)
    - ▪ **Link** – Copy/Paste or type in hyperlink
    - ▪ **Link Title** – Enter a title for Link (not required)

- **Target** – If chosen, when link is clicked, it will take you to another window instead of navigating away from the website.
- **Type to Search** – If link is internal
- **Select Media**
  - Click through folders to find your item
  - Select folder or make a new folder to add new content
    - Click upload, which will take you to your computer drives to find where PDF/jpeg/png is stored
    - Click on item and it will upload to KMS
    - Select item
- **Select** – closes menu and takes you back to Resource tab
- **ONLY PDFs, Images (jpg, png, gif), and mp4**'s are supported. NO WORD OR EXCEL files.
  - **Direct Link** – Eliminates a click by allowing users on the website to click on link and have it take you directly to content instead of to another window where you would then click on link to take you to content
  - **Abstract** – This can provide a brief description of the content, but would not allow a Direct Link
- **Editorial, Tags, Settings, Info** – Same as Guideline

Link To – Allows User to link to already created content somewhere else in the KMS. This way content is only edited in one place, instead of having to track down all the locations

- **Use Content From**
  - Linked Node – Click Add (or Remove if changing link). This brings up a menu of the content of the entire KMS. You can navigate through to find the content or can start typing in the "type to Search" box. Once you find your content, click on the title and click "Submit" in the lower right corner.
- **Settings, Info** – Same as Guideline

Guidelines – Guidelines is used to create another level of sub headings for your Tile/Node. For example, your Tile/Node might be Departments. You would create subheadings for Admin, Surgery, Hospice, etc.

For All Content

All Content, at any level, must have a Name/Title. You will not be able to save your content without one!

Most of the editing is WYSIWYG (What you see is what you get). If you are comfortable with HTML code you can select the '<>' button on the top line of the editing toolbar. Most content can be managed with the choices within the editor. (You are always welcome to send us any questions or ask for help with any content outside the norm at support@tactuum.com)

Keep in mind – if you don't put content in a section, it will not show on the front end – so don't feel like you need to fill everything

2. Media Section

The media section is where all images and pdfs are stored. This shows the folders of content that were created during uploads. The user can also create new folders and upload content in the Media Section.

Media – Clicking on Media shows you the list of Folders along the left as well as on the main screen. At the top

to the right is a square or 3 lines ⊞ or ☰ . Press this and it will give you the option to change the way you view the folders on the main section – Grid or List.

Folders – Click on any folder and you will see the content in the main section. You can change the way you view the folders – Grid or List.

- Create – Clicking here gives you the ability to create new folders or upload a file or image.
  - ○ File – Click on Choose File. This will take you to your computer to click on the file and upload it to the KMS. It will then populate the information for the file.
  - ○ Folder – Type in a name for the folder and hit Save
    - ▪ Once a folder is created, you can also grab files from your computer and drop them instead of using the drop down menu.
  - ○ Image – Click on "Click to Upload." This will take to your computer to click on the file and upload it to the KMS. It will then populate the information for the file.

3. Mobile Publishing Section

This page is used to publish content to the app. It shows a list of current Toolkits and under each toolkit is a list of the tile/nodes.

Along each tile/node listing is information about each publishing that occurs:

NodeId – This corresponds to the Id number in the General box on the Info tab of the content

Version – This lists the number of times the tile/node has been published

Date – This lists the date and time it was last published.

Size – Size of the tile/node for downloading purposes

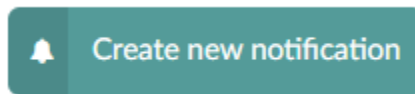**Build** – Clicking on this will publish any changes to the app

Cloud Icon – <mark>Allows user to download content to computer</mark>

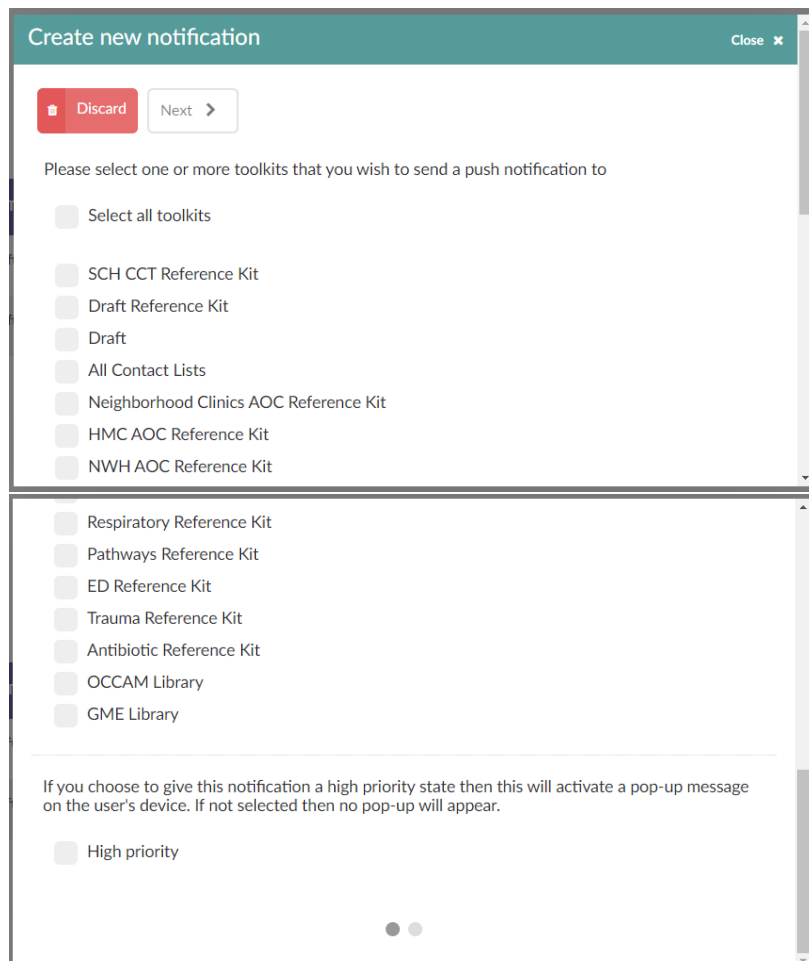**"X" button** – Allows user to delete Tile/Node from app

4. Notifications

To create a notification:

Click on the green button

🔔 Create new notification

You will want to select the tool kit you need this notification to be delivered to (or choose all toolkits if this is a system-wide notification).

Create new notification   Close ✖

🗑 Discard   Next ❯

Please select one or more toolkits that you wish to send a push notification to

☐ Select all toolkits

☐ SCH CCT Reference Kit
☐ Draft Reference Kit
☐ Draft
☐ All Contact Lists
☐ Neighborhood Clinics AOC Reference Kit
☐ HMC AOC Reference Kit
☐ NWH AOC Reference Kit

☐ Respiratory Reference Kit
☐ Pathways Reference Kit
☐ ED Reference Kit
☐ Trauma Reference Kit
☐ Antibiotic Reference Kit
☐ OCCAM Library
☐ GME Library

If you choose to give this notification a high priority state then this will activate a pop-up message on the user's device. If not selected then no pop-up will appear.

☐ High priority

● ○

If this is an important message that needs to pop-up on the phone screen, scroll down and choose **High-priority.**

If you don't choose High priority, the message will only display as a red dot on the Bell icon at the top of your app:
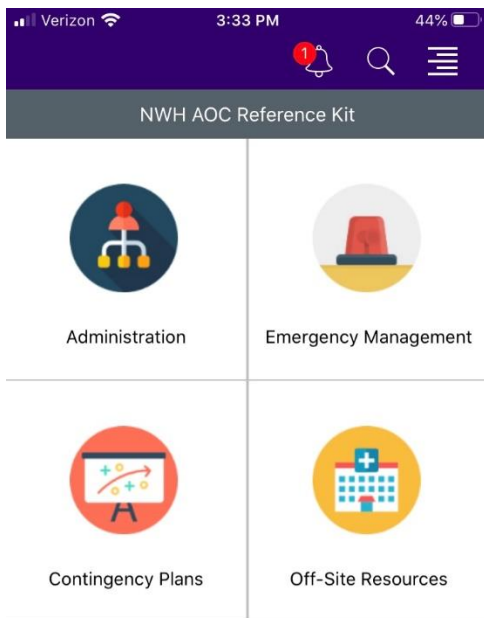

Once you have chosen your toolkit(s) and its priority, click Next to go to the next screen.

You will fill in each Section, notice that some have Character limits:

In the Content Section, you can include links to websites by one of two ways:

- Cutting and pasting your URL into the body or
- Highlight your text you want to be the link word or phrase click on the toolbar

You will open a new menu:

Enter your URL in the Link box. On the Target, you can choose to have the link open into a new window when someone clicks on it. Once you have everything set, hit Select and it will take you back to the body of your notification.

When you have your notification ready, hit Submit. It will ask for confirmation that you want to send it. Choose Yes and it will go. It should appear similar to this:
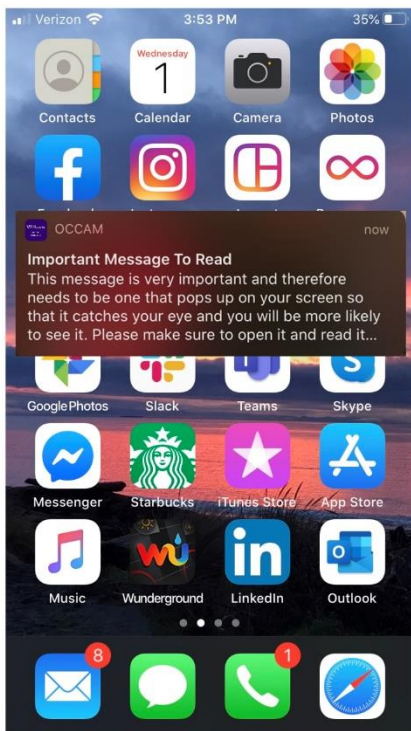
5. User Management Section

Users

      Invite User – Click on this to fill out a form and email it to someone to set-up an account. Make sure to add the appropriate group to the User – in most cases "Editors"

      Create User – Click on down arrow next to Invite User and choose Create user. Fill out the information, including group. The next window will show you the password. You will want to make sure to share this information with the New User

      Groups – Generally not used as this is pre-determined by developers

      Display Toggle – Similar to the Media section, this gives the user the choice of viewing content in grid or a list.

Editing a User

      Click on User – the window shows you all the information about that profile.
      You are able to change access email, user name, password, enable and disable their access and Delete the profile.