BEACON ADMIN USER GUIDE

Plymouth Hospitals **NHS**
NHS Trust

PURPOSE

The Beacon administration area is designed for adding and editing content that is shown within the Trusts Beacon app. Information available in the app is clinical guidelines and contact information making this information more readily available to Trust staff.

HOW TO USE THE ADMIN AREA

Access via your browser at: http://beacon.plymouth.nhs.uk:447/. Internet Explorer 11 or Google Chrome are required, with Chrome being recommended.

You should be automatically signed into the app, indicated by the presence of your username in the top right corner.

There are four levels of access to the site:

1. No Privileges
2. Content Creator – Are able to create and edit content that requires approval
3. Content Approver – Are able to create/edit/archive content and approve content
4. Site Admin – Are able to do the above and also administer departments, sub sections, users, contacts and templates

To be included as a user in any access level other than no privileges you will need to contact an existing administrator who will add you to the relevant level.

The admin site includes the following areas:

- Users
- Departments
- Department Static Numbers
- Department Sections
- Articles
- Article Approvals
- Article Templates

You will see options for whichever areas you have permissions to use. Below is a breakdown of each section and how it works.

USERS ADMIN

This is the default page you are redirected to once you load the site and lists users associated with the beacon site. It lists both site admins, people who appear in the app as contacts and users who have used the app.

You can use this page to pre-add users in one of the privilege levels or convert users who have visited the site.

Adding users

To add a user click on the add button this opens a window where you can search for the user to add (users need a valid windows login at the trust). Search using first name and surname, you can use only partial names to find users the majority of the time. For instance a search for 'Jo Bl' would return 'Joe Bloggs' in the list of users. Select the person from the list of returned names and job titles and this will add there details to a short form. At this point you should select a department for the user and give any roles.

Editing users

To edit a user click on the edit button this opens up a short form where you can change the user details such as email address and phone number plus what roles they have as described in adding a user.

Deleting users

To delete a user click on the delete button this will pop up a warning before deleting the content. This will delete the user and any roles they currently have set.

Filtering options

On page you can use the items at the top of the page to get to the user you want to find quicker.

Search...		Previous	1	Next		10 users per page ▼

Searching here searches, username, forename, surname and job title.

DEPARTMENTS ADMIN

To go to the department admin screen click on the 'departments' link in the page header. The department screen is used to set up the structure and theming of the app. Departments are categorised into containers which are also controlled on this screen. For instance the content created for the initial pilot of Beacon was departments that are all in the Anaesthetics container.

Adding department or container

To add a new department click on the add button. This opens up a new window where you can name a new department or department container and set its theming options as below.

If you choose to create a container you will be given one theme colour options which is the colour that will be used on the listings page for its background. For a department however you will see several theming options.
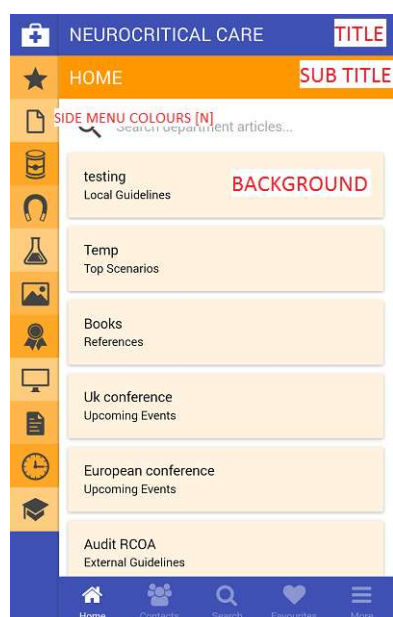
The options above reflect in the app in the way shown to the left.

Clicking on any off the theme colours on the screen pops up a palette of colours that are available to use for each area that is configurable.

Once happy with any changes clicking the add button will create the new department and make it available to the app.

Editing departments

To edit a department click on the edit button. This will open up a page with the same form described in the add department section above.

Archiving departments

Clicking on the archive button will pop up a warning telling you that this will also hide any content associated with the department or container from being available in the app.

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DEPARTMENT STATIC NUMBERS ADMIN

To go to the department static numbers admin screen click on the 'department static numbers' link in the page header. This page lists all numbers that should be shown within the app that aren't linked to users. For instance bleeps.

Add department static number

To add a new number click on the add button. This opens up a simple form page where you can select the type of number you are adding give it a title and add the number. You can also choose which department it should appear on.

Edit department static number

To edit a section click on the edit button. This will open up a page with the same form described in the add department section above.

Delete department static number

To delete a section click on the delete button. You will receive a warning once clicked.

DEPARTMENT SECTIONS ADMIN

To go to the department sections admin screen click on the 'department sections' link in the page header. This page lists out the section icons that are shown on the left hand of a department screen in the Beacon app. It lists out sections that are global but also sections that only appear for a certain department.

Add department sections

To add a new section click on the add button. This opens up a simple form page where you can name a new section tab. You can also choose which department it should appear on or select 'All' to have it as a global section and choose an icon that that will represent this section in the left hand menu of the app.

Edit department sections

To edit a section click on the edit button. This will open up a page with the same form described in the add department section above.

Archive department sections

To delete a section click on the archive button. You will receive a warning once clicked and you will only be able to delete the section if there is no live associated articles if there are associated articles then the department will be archived instead.

ARTICLES ADMIN

The articles page has the most functionality of the portal and has different functionality for people who can create content only or people who can create but also approve content.

CONTENT CREATORS AND THE APPROVALS PROCESS

Content creators can only create or edit content, they are not allowed to archive content and also when they create content they are not allowed to make that content live straight away it has to go for approval.

Content creators see the below when they try to edit a page or create a new one. They have the option for setting a page live disabled and greyed out with an explanation of why and see a toggle for saving if the content is work in progress (the default) or ready for approval (which will show the article on the article approvals page).

As the creator makes changes they can save as they go and as long as they don't mark the content ready for approval they are still able to edit the content.

Once they have marked the content ready for approval it is locked and no further changes can be made until it is either approved or rejected.

CONTENT APPROVERS/SITE ADMINS AND THE APPROVALS PROCESS

Content approvers and site admins see the following screen if they try to create or edit a page:

As they are at the approval level they can make edits to the page and make it go straight live they are also able to make changes and toggle to not live if they want to just make another revision to work on before making it live.

If however they are viewing a page awaiting approval they see the following screen:

On this screen they can see the pages main details and the live preview of it and either approve or reject the change giving a reason. If they choose to approve the content it is made live and if they reject the change the revision is marked as rejected and changed back to work in progress. When the content editor visits the page again they see

the reject reason on the editing page and are free to make more changes and send for approval again or abandon the changes.

ARTICLES EDITOR FEATURES

The article editing screen has more points of interest than other pages in the admin here is a list followed by a brief description of what each element does.

- History
- Structure
- Terms
- Images
- Live preview

HISTORY

The article history gives any visitor to the edit screen the option to swap to any revision that has been created or is being worked on as a potential update.

You can see who created the revision when and click to swap to that revision, you can also see which revision is live and which is currently loaded in the form. If you wanted to you could load an old page revision and use this as a basis for a new version of the page.

STRUCTURE

Articles use five basic elements to structure the information on the screen. (Text blocks, bullet list items, numbered list items, links and tables).

Once these items have been added to the page you can then move the page items about in a drag and drop tree structure to build the article.

TERMS

Terms can be added to pages as a way of interlinking content within the app. You can add either words or phrases here and if they match ones used within another article then a link of the content is created in the app when the article is viewed.

IMAGES

Images can be added to articles and will be shown in the app within a carousel if the app user is online. They can be added in individually or in bulk and can be changed or removed between revisions.

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LIVE PREVIEW

Live Preview

TITLE		
1 *numbered list item 1*		
SUB TITLE 1		
sub item 1		
sub sub item 1		
sub item 2		
HSCIC [External link]		
2 *numbered list item 2*		
NHSmail [External link]		

EEWRER	WERERWER	ERWWER
erewrr	werewr	erwre
were	wrwer	werw
erewr	rwerw	er
rwer	ewrew	rewr
ewrwe	werwer	ewr
rewr	were	wer
	rwer	rwe
	wer	erwerw
wer	erwer	rewr
rewr	wrewe	werwrew
	werwe	rewrwr

Any changes to the previous items that appear on the finished article as instantly shown within a live preview of the page, this preview is styled using the department theme that it is being created for and has the same page styling as the mobile app so gives a good interpretation of what the final content will look like.

ARTICLE APPROVALS

The article approvals screen shows a list of current revisions that have been marked ready for approval to give content approvers and site admins a quick way to get to the content waiting to be made live. Clicking on an approval that is waiting takes you to the edit screen described in the articles section of this document.

ARTICLE TEMPLATES

The article templates page can be used to create starting points for new pages, creating or editing a template gives users a form which only includes the structure part of the article editing screen. Site admins can set these templates up which are intended to be parts of a page that is repeated across content (as seen below in a drugs template set up for the pilot).

Once a template is set up it is available to be used on the articles page when creating new content and selection of the template pre loads this new structure to the page. Anything that is part of the template cannot then be removed from the page.