Phewl!
PROCEDURE SYSTEM

Procedure System

Administrators' User Manual

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Introduction

This manual is designed to help you manage Phew's Procedures sites. The system allows for these various building blocks of the site to be edited, deleted, added to and reordered as necessary. In addition to this a revision tracking system sits in the background to monitor any of these changes as they occur.

Conventions used in this document

This manual uses icons to illustrate comments with the following purposes.

⚠ **Warning**

✓ **Best Practice**

👍 **Useful tips**

➡ **Navigate to**

[***]   Key from PC Keyboard for example, press [Tab]

Objectives

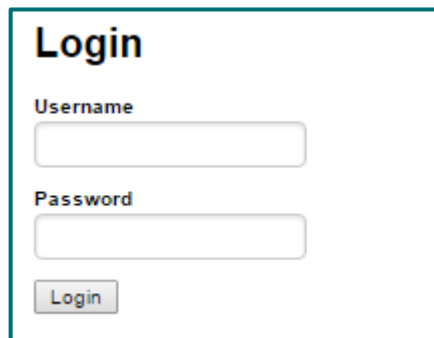This manual is designed to help you manage this system. It will cover:

> How to Login.
> Navigating when logged in.
> Adding editing a chapter.
> Revisions.
> The editor and files.

Terms and system explained

The site is divided into procedures, chapters, sub chapters, sections and paragraphs.

- A procedure is the top level of the site, e.g. 1. Safeguarding Adults Policy.

- Each procedure is made up of chapters, a chapter is the next level down, e.g. 1.1 Policy, 1.2 Key principles informing this policy.
  If required a chapter can include a sub chapter which is a further level down.

- Each chapter is made up of sections, e.g. Preface, Context. Sections are setup to break up a chapter's paragraphs into manageable chunks.

- Each section includes several paragraphs which make up the actual content of the chapter.

- Finally, there are pages which sit outside of the main contents of the site and allow extra information to be displayed e.g. contact us etcetera.
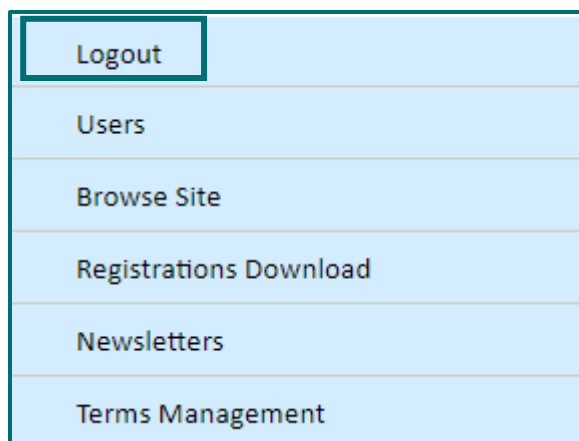
Logging in

To log in to the site simply enter your site URL followed by /admin/.

This will bring up a username and password prompt where you can enter your assigned username and password to log in. If you do not know your login details, please contact us at support@phew.org.uk
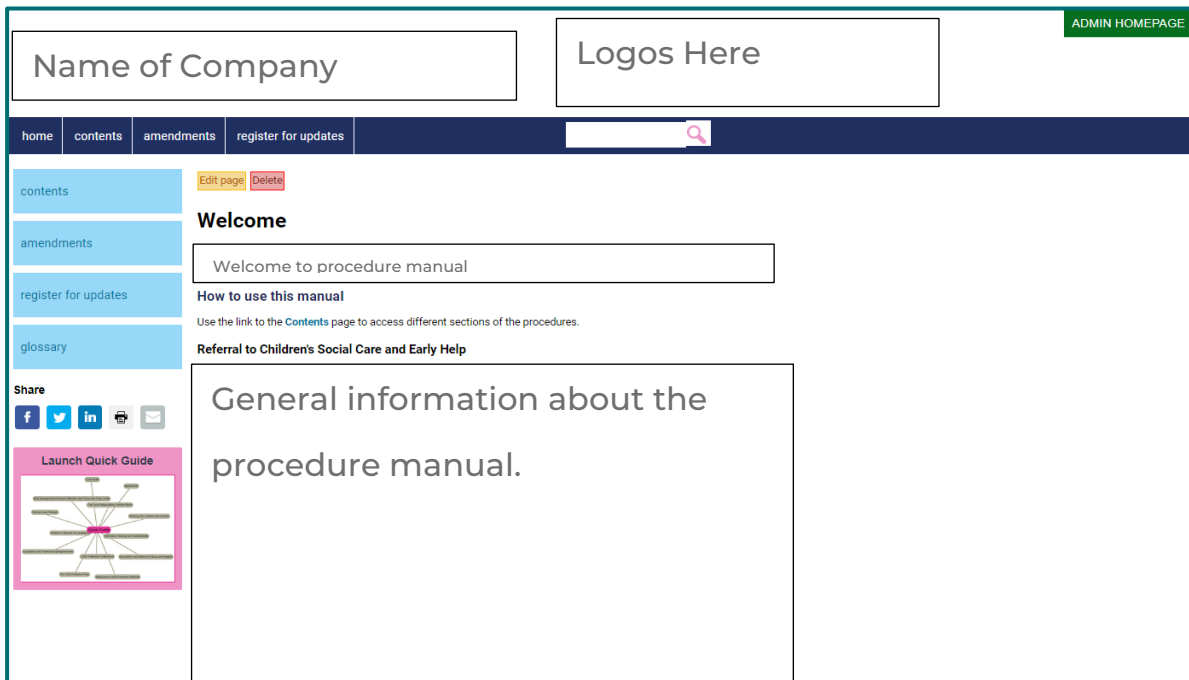
Logging out

You can logout at any time by going into a chapter, section or paragraph select Edit screen and clicking the Logout button on the left.

Click on the **Admin Homepage** button and select **Logout.**

Navigating when logged in

Once you have logged in you will be taken to the homepage of the site and can begin editing.

- At the top left hand-side will be your company name.
- Your logos will be alongside.
- Top right-hand corner will be your Admin homepage link.
- Down the left-hand side and along the top will be the main menu.
- Any shares (Facebook, twitter, Linked-in) and the printer and e-mail.
- A quick launch feature which will take you to any procedure.
- The main welcome page.
- And a search facility to search the site.

ADMIN HOMEPAGE

Click on the ADMIN HOMEPAGE button to take you to the main administrator's site.

How to add a User

To add a new user

- Name: type in name of the user.

- Email: type in the users e-mail address.

- Username: type in a username, e.g. JonesJ.

- Password: type in a password.

- Click the add user button at the bottom to create a new user.

Browse site

This takes you back to the main welcome page.

Registrations download

	A	B	C	D	E	F	G
1	firstname	surname	email	phone	role	organisation	date
2							

This will be a csv file that will give you a list of all the users that have registered on the site. The CSV file is organised as first name, surname, e-mail, phone, role, organisation and the date that they registered on the site.

Newsletters

The newsletter is availble to send out to your registered users, when you select the Newsletters button it will open up the news letter page ready for completing.

Using the editor in the HTML text is where you can put your content and when completed select Submit button you will also see a "Newsletter Added" message at the top of the screen.

The Newsletter list will appear at the top of the screen with the option to:

- Edit: ability to edit the newsletter created.
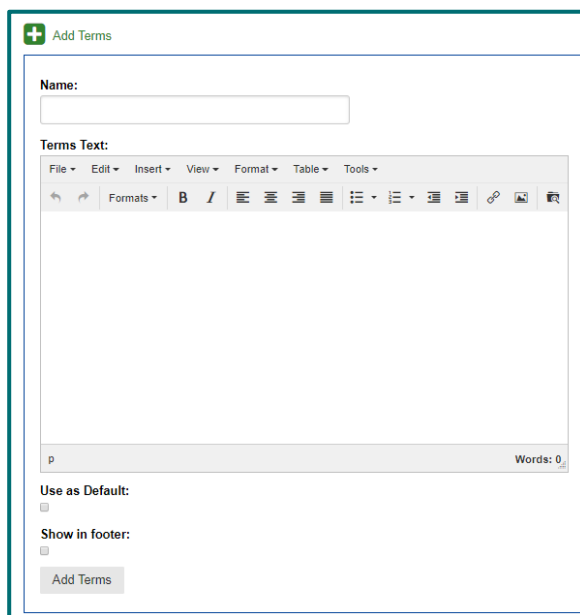- Preview: will allow you to preview the newsletter.
- Delete: will remove the newsletter.
- Send: will send the newsletter to the regisitered users.

Terms Management

- Select the Add Terms.
- Type in Name.
- In Terms Text type in content for your terms.
  These are text box options with a row of functionalities at the top which work like any form of Microsoft Word you may have used. This allows you to either manually enter your information or copy and paste it.
- use as default: select if you wish for the terms to appear, i.e. every time you go on to the site event the terms will appear.

- **Show in footer** this will display at the bottom of the page.

Edit and Delete terms

You can edit and delete terms by using the following icons next to the terms name.

Contents Page

If you click on the contents link on the left-hand side of the site and scroll down. This will display your links, chapters and paragraphs. This area gives you the option to re-order, edit, delete or add chapters.

If you were to navigate to any of the chapters from this page you would be taken to that chapter and the same options would be displayed in parts that you can modify.

In this area you can:

- Edit or delete the chapter.
- Edit or delete the section.

- Add, reorder, edit, delete, a new paragraph to each section.

Reordering Chapters and Paragraphs
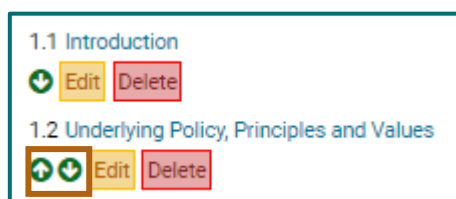
By clicking the up or down arrow this will immediately re-order that chapter or paragraph in the direction you clicked, e.g. if you were on the contents page and clicked the up arrow next to 1.2 this chapter would swap places with 1.1.

This allows you to quickly re-order chapters and paragraphs if required.

Deleting
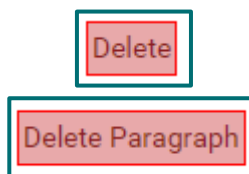
Clicking a Delete button will delete that item of content be it a paragraph, section or entire chapter.

⚠ **If you delete a chapter all the sections and paragraphs under that will also be removed.**

⚠ **If you delete a section all the paragraphs under it will also be removed.**

To ensure you do not delete something important the system will give a prompt you to ensure that you mean to delete that piece of content:
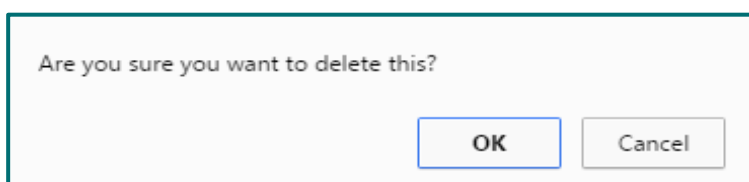
Although it will no longer be visible on the site once deleted, nothing you delete is unrecoverable.

👍 **If you delete something in error, we will be able to restore it for you.**

Editing

Clicking an Edit button will take you to a new screen which will allow you to edit the selected piece of content and save it.

Adding
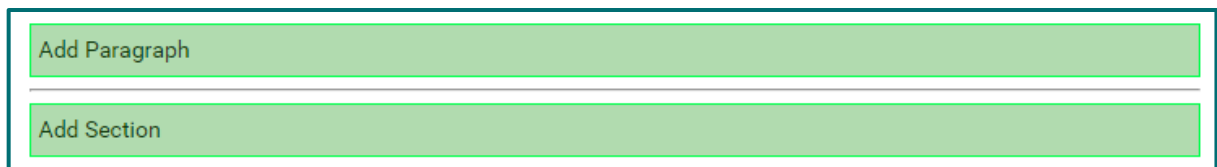
Clicking the Add button allows you to add a new piece of content to the site.

How to add a Chapter

This section relates to adding a new chapter to the site and then editing it, e.g. if we wanted to add a new chapter to Procedures number 1, we would simply go to the contents page and click the Add Chapter button at the end of the procedure.

- Title: enter a title for the chapter here.
- Order: the order number is automatically generated for you.
- Parental Procedure: is automatically generated for you.
- Parental chapter (leave blanks if second level e.g.1.1): can be manually added if it is a sub-chapter, e.g. you would select 1.8 Terminology from the drop-down menu if you wanted this new one to be 1.8.1 rather than 1.9.
- Summary: this is a fuller description which will appear at the top of the chapter.
- Contents Summary: this description will appear in the contents.
- Select add chapter at the bottom and the chapter will be added.

By clicking back on the contents button on the left-hand side, you will be directed to the new chapter where you can see the summary.

How to edit a Chapter
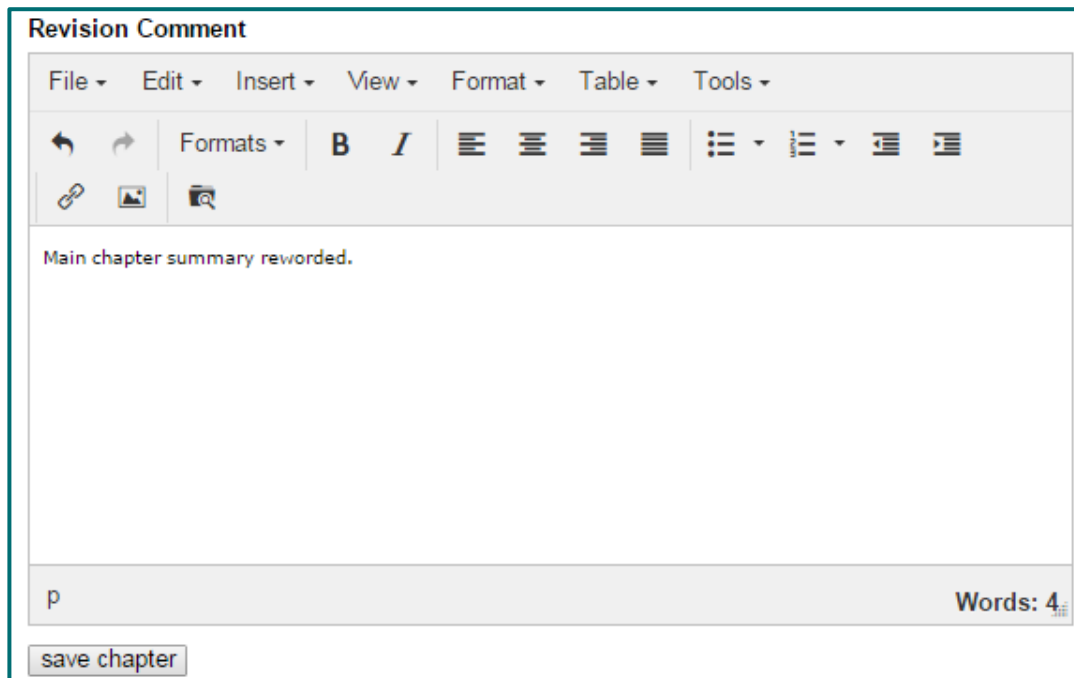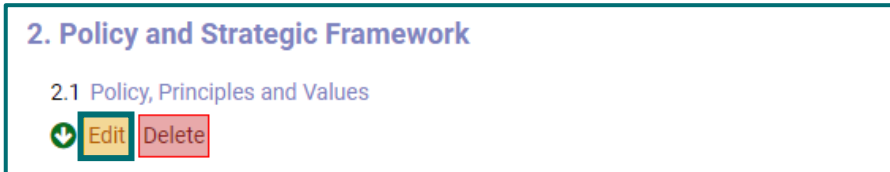
- Go to the Contents page.
- Select the Chapter you wish to edit.
- Select Edit button.
- Make your changes.
- ⚠ **There is a new Revision Comment box.**
- In the Revision Comment make a note of the changes that have taken place when editing the chapter, e.g. if you have reworded the summary you would enter main chapter summary reworded.

✓ Its very important to complete the revision comments box.

- Select Save chapter.

  Your changes will be saved, and you will be taken back to the contents page to see the changes live.

How to delete a Chapter

To remove a chapter, click on the Delete Chapter the system will ask "Are you sure you want to delete this?" select ok and the chapter will be removed or cancel to leave as is.

Add or Edit a Chapter Section

Add Section

Title

Section Title

Order

5

Parent Chapter

1.1 Introduction

Summary

File ▾   Edit ▾   Insert ▾   View ▾   Format ▾   Table ▾   Tools ▾

↶ ↷ | Formats ▾ | **B** *I* | ≡ ≡ ≡ ≡ | ⋮≡ ▾ ≔ ▾ | ⇥ ⇤ | 🔗 🖼 | 🔖

p   Words: 0

Hide Section Title
☐

Hide Section Paragraph Numbering
☐

Show In Contents
☐

add section

Edit Chapter   Delete Chapter

1.1 Procedures for Centre pass

Play is started with a centre pass at the beginning of each quarter/half and after each goal scored.

Edit Section   Delete Section

Umpires notify the teams 30 and 10 seconds

The umpires notify the teams when there are 30 seconds and 10 seconds before the satrt of a quarter or a half

Add Paragraph

Add Section

You can add a new section to a chapter by going clicking on the chapter title which will take you into the chapter. Then click the Add Section button which can be found at the bottom of the page.

Clicking this button will load the Add Section screen.

- Title: must be completed even if you tick for it to be hidden.

- Order: the order number is automatically generated for you.

- Parent Chapter: choose from the drop-down which chapter the section sits.

- Summary: type in a summary of what the section is about.

- Hide Section Title: select the tick box if you wish to hide the section title.

- Hide Section Paragraph numbering: select the tick box if you wish to hide the numbering.

- Show in Contents: select the tick box if you don't wish for this to be visible on the contents page.

- Select the add section

  You will be redirected back to the chapter where you will see your new section live.

Editing a section

Much like editing a chapter discussed in the previous section, you can edit a Section to adjust any part of it by simply clicking on the Edit Section button and then after editing selecting the Save section.

⚠ When you edit a Section, you will need also have a Revision Comment to complete.

✓ It's very important to complete the revision comments box.

Delete section

To remove a section, click on the Delete Section the system will ask "Are you sure you want to delete this?" select ok and the section will be removed or cancel to leave as is.

Add or Edit a Section Paragraph

To add a paragraph to a section, click the Add Paragraph button under the section you want.

The first field will automatically select the Section you want to add the paragraph to. However, you can change this by selecting another section from the drop-down menu.

The Order number will also automatically be generated for you.

The Summary which is to be used if you would like some content to appear above the paragraph's numbering.

Finally, there is the content field for the main paragraph text.

Clicking add paragraph will take you back to the chapter where you will be able to see the new paragraph.

Editing a paragraph

Much like editing a chapter discussed in the previous section, you can edit a paragraph to adjust any part of it by simply clicking on the Edit Paragraph button and then after editing selecting the Save paragraph.

⚠ When you edit a Paragraph, you will need also have a Revision Comment to complete.

✓ **It's very important to complete the revision comments box.**

Just like chapters and sections you can edit any paragraph by clicking the Edit Paragraph button and amending it.

In this way you could build a chapter with one or more sections with a long list of paragraphs all numbered or simply just have a single section with no title and

some text which would simply result in one page of text and all variations in between.

Delete Paragraph

To remove a paragraph, click on the Delete Paragraph the system will ask "Are you sure you want to delete this?" select ok and the paragraph will be removed or cancel to leave as is.

Revisions

When editing anything in the system a revisions comment box will appear. The system keeps a historic record of all these revisions and allows you to track them internally and summarises the changes to the public site automatically.

Internal revision tracking

Revision tracking will appear at the end of the Edit page.

On the first edit the system will save the original content so there is a copy of the original and it will also save the new revision. When additional changes are made a further revision is saved and so on. If you expand the revisions by clicking the **+** button, you will be able to see the changes in more detail.

You can see we record the date of the revision, the administration team member who edited it, the comment added to the revision notes and what the content was changed to.

There is also the option to delete a revision.

Useful if save was clicked accidentally and no significant changes were made.

⚠ Be careful when you delete revisions.

Revisions are in place for chapters, sections and paragraphs so a full history of any changes can be seen whenever something is edited.

✓ **It is good practice to add a comment of what you have changed and why.**

Front-end revision tracking

In addition to tracking in the back-end administration level, the public facing website also displays any revisions as they occur. If we were to visit the amendments section of the site, we can see our revision comment with a link to that chapter:

In addition to this if we visit any chapter, we can display any specific revision information related to that chapter and its sections or paragraphs by simply clicking the Show amendments link under the title.

8.26 Pre-Birth Child Protection Procedures

Show amendments

AMENDMENT

In March 2015, 8.26.9, Pre-Birth Multi-Agency Strategy Meeting was amended to confirm who should attend. Pre-Birth Conference was amended to include social worker(s) for the parents, if applicable should be invited and where the parent is a care leaver and the social worker is unable to attend, the service should be represented by a senior social worker, senior practitioner or Manager.

The editor and files

When editing content an editor appears which can be used to make content more dynamic instead of plain flat text. Full training will be provided on the use of this editor but in general it is very similar to Microsoft Word or any other word processor you may have used.

There are however a couple of key differences from a normal word processor that you should be aware of.
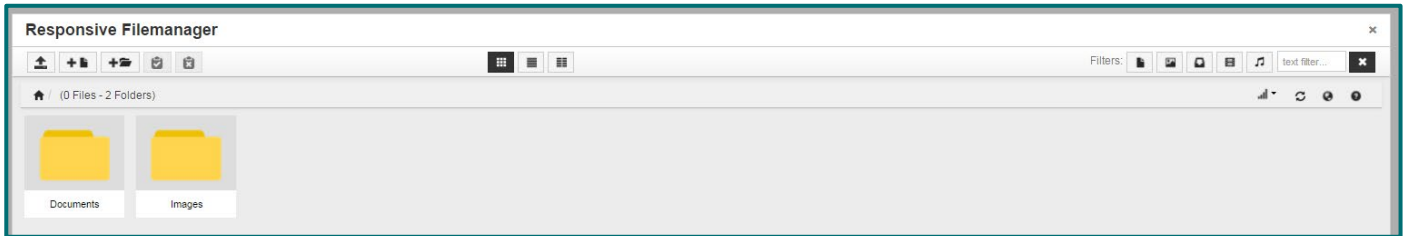
How to add files to the site

You can add and link to a file by uploading it and linking text to it on the website. This might be an image or perhaps a PDF file you want to link to.
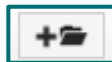
To do this click into the editor using the relevant Edit button and the click the file icon.

This will bring up the Responsive File manager with folders much like your computer.

You can click into a folder to see it's files or create a new folder using the new folder icon.

Clicking the upload icon will bring up a new window where you can upload your file from your computer.


You can do this via drag and drop or you can click on Drop files here to upload text and a file selection window will appear from which you can locate your file on your computer and select it.
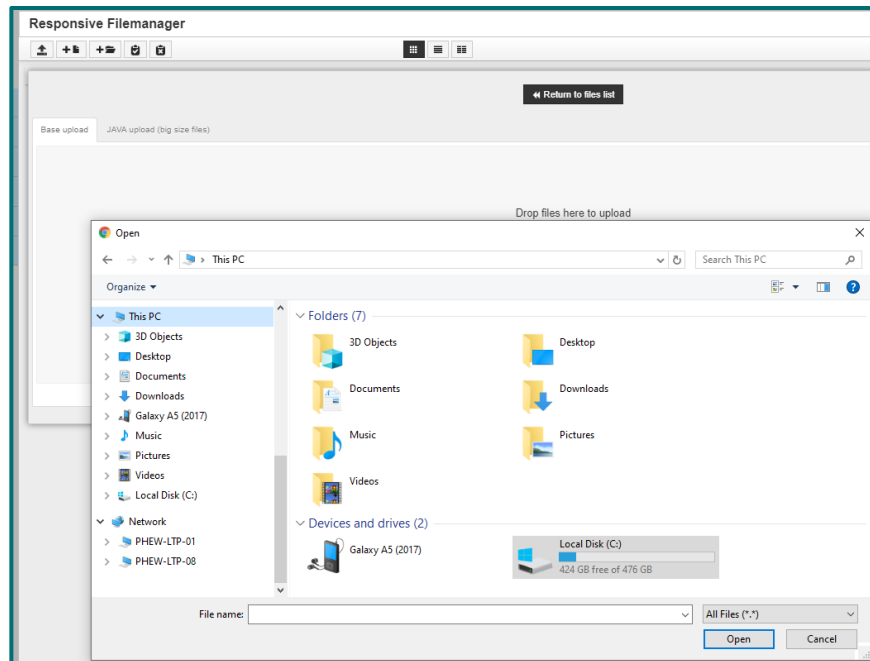
Once you have uploaded a file you simply need to select it, and the file will be inserted into your editor window. You will see the text change to a blue hyperlink colour.

If you wish to change the text for the link, either click in the middle of the link and select the Insert/edit link button from the top menu, or right click in the middle of the link and then select the Insert/edit link option.
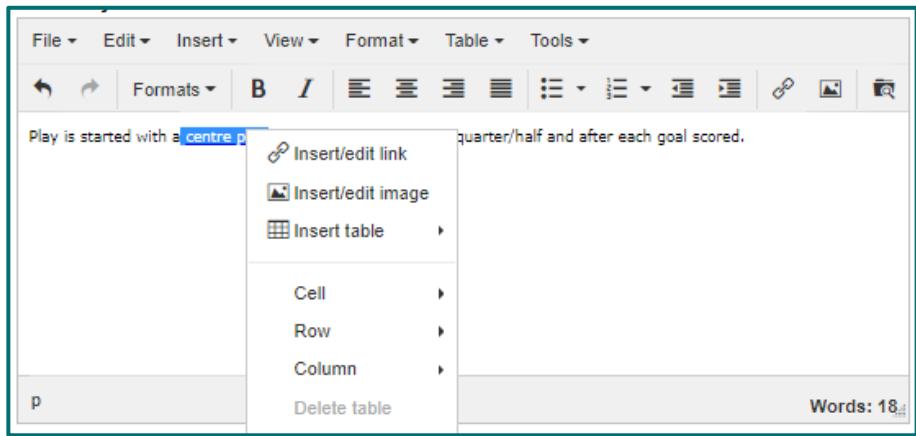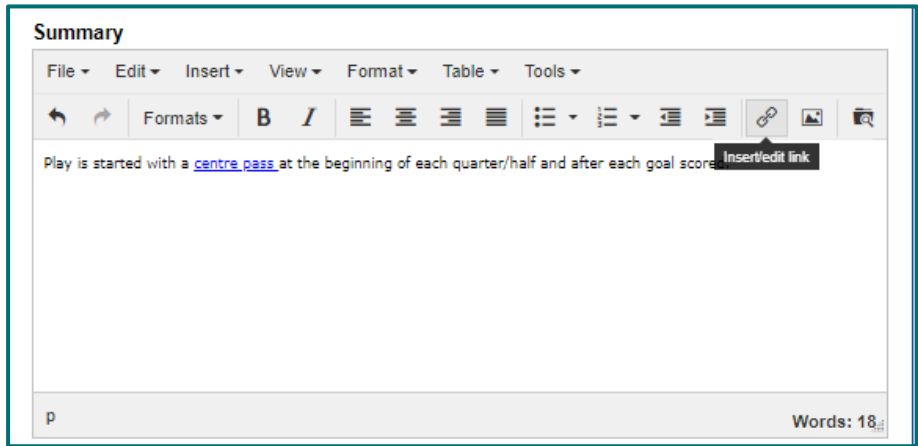
These will bring up a pop-up where you can change the text.
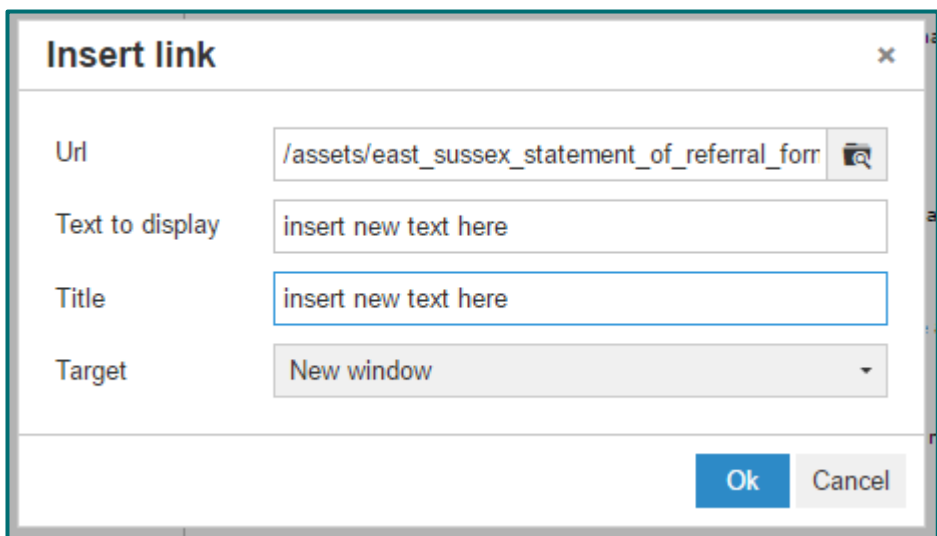
Note in the case of linking to documents or external websites it is best practice to select the New window option in the Target box as this will ensure the user is not taken away from the website when they click on the link.

Adding other links

To add a link to an external website, simply follow the same process as above to bring up the Insert/edit text pop-up box and insert the website link in the URL section. The link you want to send users to could of course be another section of the procedures site if you require.

Document Control

This document is maintained as an electronic document.

Document information

Document Title	Administrator manual for Procedures		
Author(s)	Hilary Williams		
Version number	3.00	Document owner	Hilary Williams
Date approved	05 Dec 2019	Document status	Live
Effective date	05/12/19	Approved by	Kern Roderick-Jones
Superseded version	2.00	Date of next review	05/06/20

Revision history

System Version	Revision No.	Date	Summary of changes	Revision marks
Ver 2	1.0	Nov 2016	Updated	
Ver 3		Dec 2019	Complete review of the manual and structure and update to mark new features.	

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