**Procedures Syllabus**

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| **Procedures Training** | A custom-built, user-friendly procedures platform that is adaptable for any requirement and popular with users for its innovative design and functionality, allowing for simple, straight-forward navigation. |
| **Trainer Name** | Remi Idowu |
| **Course Description** | Training on how to use the Procedures Site |

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| **Section 1: Contents** | **Training Details** | **Completed** |
| * 1. **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. |  |
| * 1. **Contents Page** | * How to Login * Navigating when logged in * Adding editing a chapter * The editor and files * Revisions |  |
| * 1. **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. |  |
| * 1. **Level of Training** | Beginner / Intermediate / Expert |  |
| * 1. **Log in/out** | Logging in  Logging out Admin Home page and select Logout  Navigating when logged in  Browse site: This takes you back to the main welcome page.  Registrations download This will be a csv file that will give you a list of all the users that have registered on the site.  Newsletters: The newsletter is available to send out to your registered users  Terms Management |  |

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| **Section 2: Contents Pages** | **Training Details** | **Completed** |
| * 1. **Reordering Chapters & 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. |  |
| * 1. **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. |  |
| * 1. **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. |  |
| * 1. **Adding** | Clicking the Add button allows you to add a new piece of content to the site. |  |
| * 1. **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. |  |
| * 1. **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.   It’s 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. |  |
| * 1. **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. |  |
| * 1. **Add a Chapter Section** | 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. |  |
| * 1. **Edit a Chapter 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. |  |
| * 1. **Deleting a Chapter 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 |  |
| * 1. **Add 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. |  |
| * 1. **Edit a Section 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. |  |
| * 1. **Deleting a 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. |  |
| * 1. **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 |  |
| * 1. **Internal revision tracking** | Revision tracking will appear at the end of the Edit page. |  |
| * 1. **Front-end revision tracking** | 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. |  |
| * 1. **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. |  |
| * 1. **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 will bring up the Responsive File manager with folders much like your computer |  |
| * 1. **Adding other links** |  |  |