

JRCPTB

Joint Royal Colleges of Physicians Training Board

Collaboration Site User Guide

collaborate.jrcptb.org.uk



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Accessing document libraries

1. After logging in to the site you will see a list of document headings on the left hand side of the screen. The number of headings you are able to see and access will depend on your permission level for the site.

The screenshot shows the JRCPTB Acute Internal Medicine website. The top navigation bar includes 'Collaboration Site', 'PTB General Area', and 'Acute Internal Medicine'. The left sidebar menu is highlighted with a red box and contains the following items:

- Documents**
 - SAC Agendas
 - Draft documents for meetings
 - SAC upcoming meeting supporting documents
 - Additional SAC documentation
 - SAC meetings minutes to approve
 - Approved SAC minutes
 - OOP application
 - CESR Applications
 - CESR Recommendations and GMC outcomes
 - Annual specialty report
 - Annual Specialty Report support documentation
 - Externality supporting documents
 - External advisor report
 - Curriculum and related documents
 - Post and Programme application forms
- Discussions**
 - Acute Medicine Forum

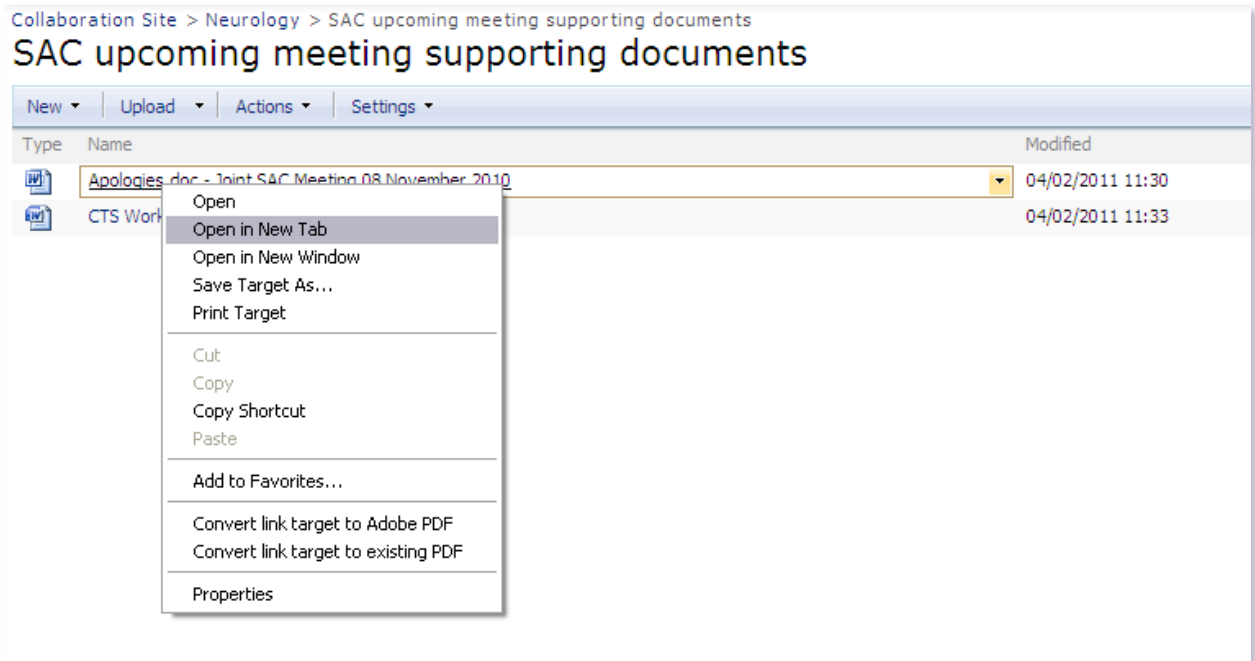
The main content area on the right includes sections for 'Latest News' (no active announcements), 'Work in Progress' (no items to show), and 'Acute Medicine Forum' (listing subjects like Curriculum, CCT, Exams, etc.).

2. By selecting one of the document headings you will be taken to that particular document library. You should then be able to list of all documents that have been uploaded to that library. You may find that these have been organised into specific folders, e.g. for an upcoming SAC meeting.

The screenshot shows a document library page titled 'SAC upcoming meeting supporting documents'. The breadcrumb trail is 'Collaboration Site > Neurology > SAC upcoming meeting supporting documents'. The page has a navigation bar with 'New', 'Upload', 'Actions', and 'Settings' menus. The 'View' dropdown is set to 'SAC supporting docs'. The document list is as follows:

Type	Name	Modified	Modified By
	Apologies.doc - Joint SAC Meeting 08 November 2010	04/02/2011 11:30	Pat.Ono@jrcptb.org.uk
	CTS Workload Division - Feb 2011 (2)	04/02/2011 11:33	Pat.Ono@jrcptb.org.uk

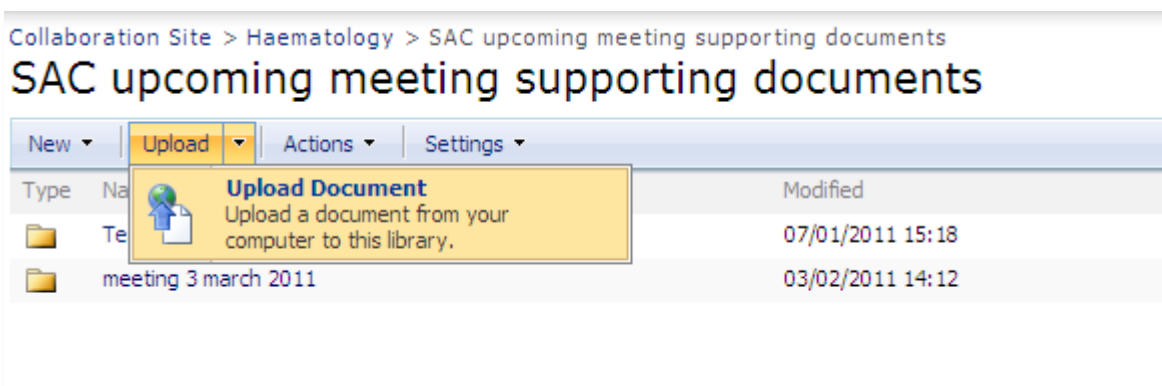
3. You can then open a document with a left click of your mouse (this will open the document in the existing screen so remember not to close it after you have finished reading) or you can right click the mouse to bring up the following options.



4. You can either choose to open the document in a new window or new tab.

How to upload a document for others to view

1. Your permission level for the site will determine whether you are able to upload documents and in which document libraries you can upload them to.
2. Select the document library in which you want to upload the document.
3. Select the Upload tab and click Upload Document.

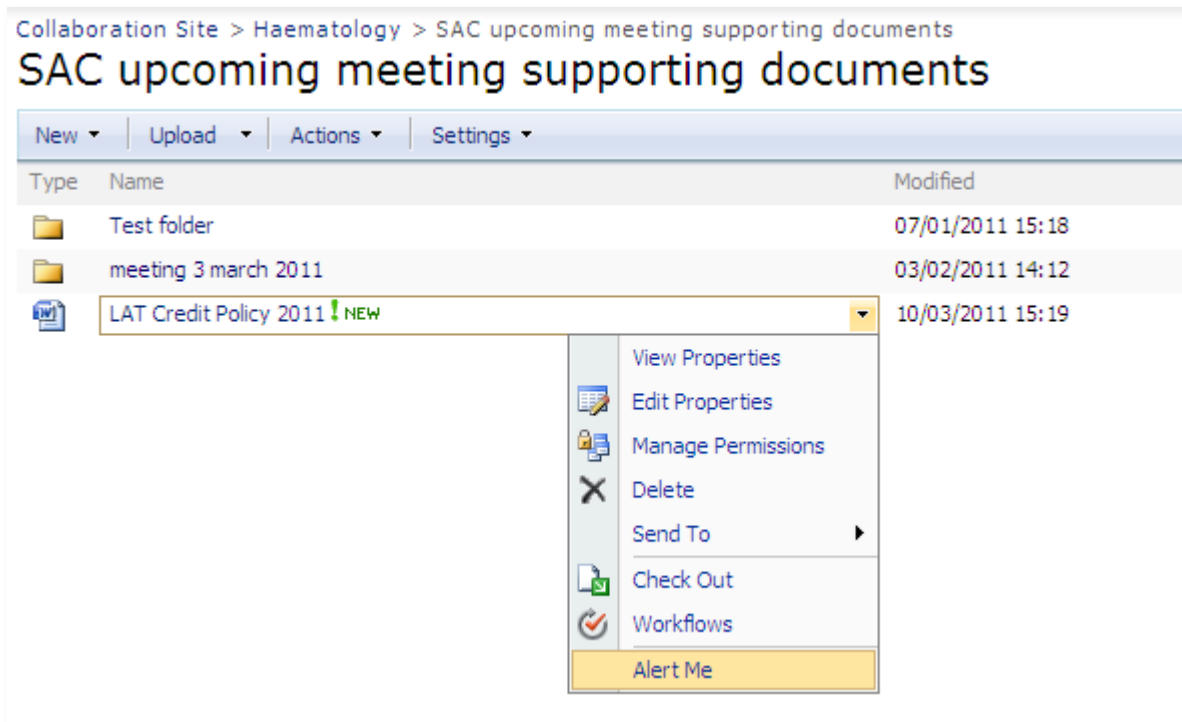


4. Select Browse to find the document you want to upload.
5. Select OK.
6. The document should then be uploaded to the document library.

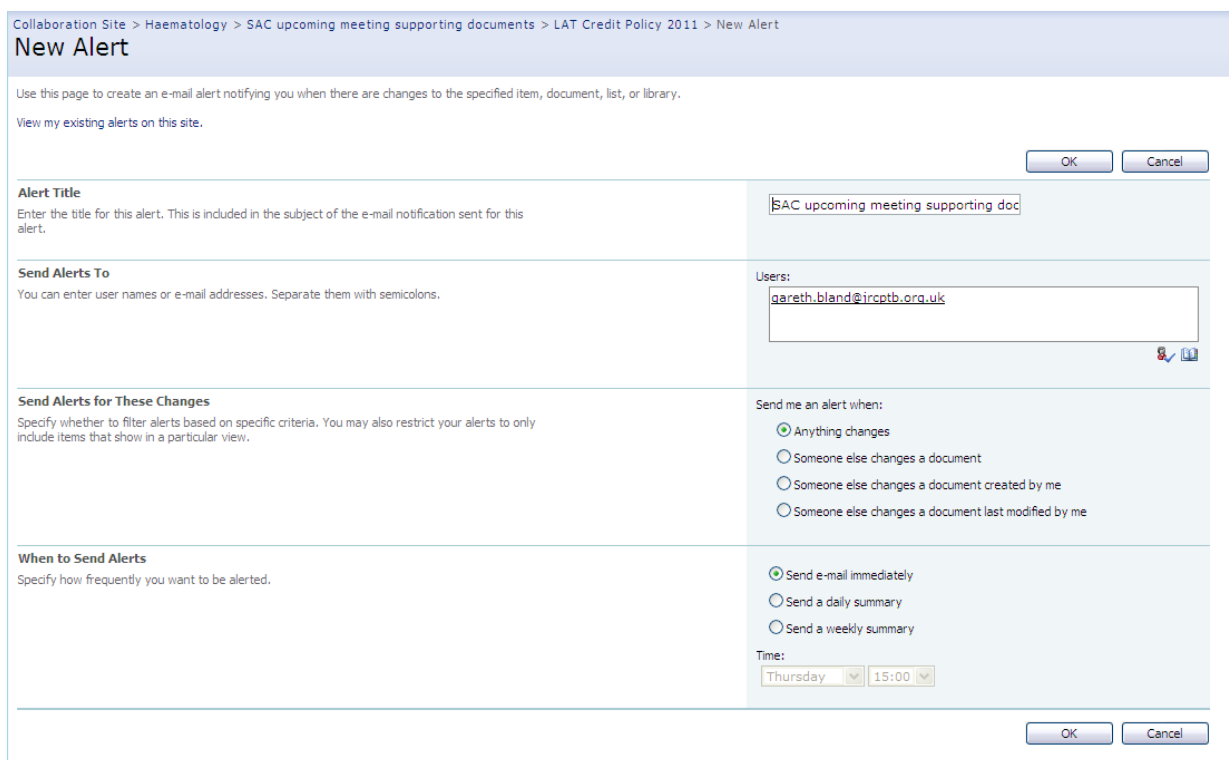
Setting up an alert for changes made to a document

If you have uploaded a document to which you then want others to contribute or make changes, you can set up an alert notifying you of any changes to that document.

1. Hover over the document and click the black triangle to activate the following menu.
2. Select the Alert Me option



3. You are then presented with the New Alert screen.



The screenshot shows the "New Alert" configuration screen. The breadcrumb path is "Collaboration Site > Haematology > SAC upcoming meeting supporting documents > LAT Credit Policy 2011 > New Alert". The page title is "New Alert". The instructions are: "Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library." and "View my existing alerts on this site." There are "OK" and "Cancel" buttons at the top right.

Alert Title
Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.
[SAC upcoming meeting supporting doc]

Send Alerts To
You can enter user names or e-mail addresses. Separate them with semicolons.
Users:
[gareth.bland@ircptb.org.uk]

Send Alerts for These Changes
Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.
Send me an alert when:
 Anything changes
 Someone else changes a document
 Someone else changes a document created by me
 Someone else changes a document last modified by me

When to Send Alerts
Specify how frequently you want to be alerted.
Send e-mail immediately
 Send e-mail immediately
 Send a daily summary
 Send a weekly summary
Time:
Thursday 15:00

There are "OK" and "Cancel" buttons at the bottom right.

4. You can then choose various options, including when you want the alert to be sent to you and what action should prompt an alert, e.g. when someone changes the document.
5. Once you have selected your preferred options click OK.

How to upload a document for approval (for PTB staff)

It is possible to upload documents which can then be approved or rejected by the SAC, e.g. SAC chair or secretary/vice chair. Such documents would include draft agendas, minutes, out of programme applications and CESR applications.


1. Select the document library where you to save the document to approve, i.e.
 - a. SAC agenda
 - b. SAC meeting minutes to approve
 - c. OOP applications
 - d. CESR applications
2. Upload the document into the library. If you want to upload more than one document, e.g. an agenda plus enclosures then you can first create a folder for these in the library.
3. Hover over the document and click the black triangle to activate the following menu.
4. Select the Workflows option and you will see the following screen.

Collaboration Site > Acute Internal Medicine > SAC Agendas > Agenda AIM SAC Meeting 23rd July 2010 > Workflows

Workflows: Agenda AIM SAC Meeting 23rd July 2010

Use this page to start a new workflow on the current item or to view the status of a running or completed workflow.

Start a New Workflow

 SAC Agendas To Approve
Routes a document for approval. Approvers can approve or reject the document, reassign the approval task, or request changes to the document.

Workflows

Select a workflow for more details on the current status or history.

Name	Started	Ended	Status
Running Workflows			
There are no currently running workflows on this item.			
Completed Workflows			
There are no completed workflows on this item.			

5. If you are in the SAC agendas folder you will see “SAC agendas to approve” under Start a new workflow. Select this option.
6. You will then be taken to the Start workflow screen. From here you can then select the approver(s), compose a message to be sent to them and set the deadline for a response, e.g. 2 weeks. You can also copy the message to another SAC member e.g. the secretary.

Request Approval

To request approval for this document, type the names of the people who need to approve it on the **Approvers** line. Each person will be assigned a task to approve your document. You will receive an e-mail when the request is sent and once everyone has finished their tasks.

Add approver names in the order you want the tasks assigned:

Assign a single task to each group entered (Do not expand groups).

Type a message to include with your request:

Due Date

If a due date is specified and e-mail is enabled on the server, approvers will receive a reminder on that date if their task is not finished.

Give each person the following amount of time to finish their task:

Notify Others

To notify other people about this workflow starting without assigning tasks, type names on the CC line.

7. Once all options have been chosen, click start to commence the workflow. The message will be sent to the approver(s) which will direct them to the document on the site you are seeking approval for.
8. The approver can then review the document and make their decision. This will automatically generate an email which is sent to you, notifying you of the approver's decision. This should then complete the workflow for that document.

How to approve a document (for SAC members)

If a member of the PTB team requires an SAC member to approve a document - SAC agenda, SAC minutes, OOP application or CESR application they will follow the previous process which triggers an email notification to the approver.

1. The SAC member will receive an email notifying them that a document has been uploaded which requires their decision.
2. Selecting the link in the email will take you (SAC member/ approver) to the login screen.
3. Enter login details
4. You will be directed to the workflow screen for the document.
5. The document will then open
6. SAC member can then review the document and submit their decision by navigating to their tasks – this can be accessed by the front page of their specialty site.
7. You will then see the following screen. This allows you to make comments and to make a decision - Approve, Reject or Cancel.

Delete Item

This workflow task applies to CESR Training Booklet (B + W).

Approval Requested

From: gareth.bland@jrcptb.org.uk
 Due by: 20/03/2011 12:22:14

Please test workflow.

Type comments to include with your response:

Other options
[Reassign task](#) [Request a change](#)

- Once the decision button is clicked an email will be sent to the JRCPTB member of staff responsible for the document, notifying them of the decision.

How to download a copy of a document

It is possible to download copies of documents from the site onto your own computer or network drive. You can then edit these and upload them back on to the site as new documents.

- Navigate to the appropriate document library in the site.
- Hover over the document you wish to download.
- The drop down list will then appear. Select Send to and then Download a Copy (see below).

Collaboration Site > Haematology > SAC Agendas > Haematology SAC agenda - 21st March

SAC Agendas

New Upload Actions Settings 1 - 20 View: SAC Agendas view

Type	Name	Modified	Modified By	SAC Agendas To Approve
	Haematology Agenda 21st March 2011	09/02/2011 14:26	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc A PTB_SAC_Full_Members[1]	09/02/2011 14:26	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc B Haem Minutes - 4th October 2010	09/02/2011 14:26	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc D SAC Quality Management Projects Update - January 2011	09/02/2011 14:27	Laura.Etheridge@jrcptb.org.uk	Rejected
	Enc Dii 2010 ASR - Haematology	09/02/2011 14:27	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc Dii Appendix Ai - MRCP(UK) Part 1 Results August 2010 ASR		ridge@jrcptb.org.uk	Approved
	Enc Dii Appendix Aiii - MRCP(UK) PACES Results August 2010 ASR		ridge@jrcptb.org.uk	Approved
	Enc Dii Appendix Aii - MRCP(UK) Part 2 Results August 2010 ASR		ridge@jrcptb.org.uk	Approved
	Enc Dii Appendix Aiv - Caveats and Provisos	09/02/2011 14:29	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc Dii Appendix Av - Analysis of MRCP(UK)	09/02/2011 14:29	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc Dii Appendix Ji - Haematology - MRCPPath Part_1_Written_autumn09_spring10	09/02/2011 14:30	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc Dii Appendix Jii - Haematology - Part_2_Practical_autumn09_spring10	09/02/2011 14:30	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc Dii Appendix Jiii - Haematology MRCPPath Part_2_Oral_autumn09_spring10	09/02/2011 14:30	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc Dii Appendix Jiv - MRCPPath Ethnic Groups for examination data	09/02/2011 14:30	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc Dii Appendix L - Impact of the EVTR on training for ASR 2010	09/02/2011 14:30	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc Dii Appendix M - ePortfolio statement for ASR 2010	09/02/2011 14:31	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc Dii Appendix N - ASR Generic Sections	09/02/2011 14:32	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc Dii Letter from Bill Burr	09/02/2011 14:32	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc Diii External Advisor Nominations - Haematology	09/02/2011 14:32	Laura.Etheridge@jrcptb.org.uk	Approved
	Enc G template for NS strategy report	09/02/2011 14:32	Laura.Etheridge@jrcptb.org.uk	Approved

1 - 20

4. Right click Download a Copy and a dialogue box should then open asking if you want to open or save the document.
5. Select Save and then choose the location where you want to save the document.

How to use the forum

The PTB general area and each specialty area of the site have their own forums. All users are able view and post on the general forum as well as the forum for their particular specialty.

Collaboration Site > PTB General Area > Site Forum

Site Forum

New Actions Settings View: Subject

Subject	Created By	Replies	Last Updated
Certification	System Account	6	03/03/2011 15:20
Site feedback	System Account	3	23/12/2010 10:46
Academic	System Account	0	22/11/2010 16:04
Quality Management of training	System Account	0	22/11/2010 16:03
Assessment	System Account	0	22/11/2010 16:03
Curricula	System Account	0	22/11/2010 16:03
Recruitment and Workforce	System Account	0	22/11/2010 16:03

Some broad forum topics have been created which users can then choose to post under or if something more specific needs to be discussed then users can start a new topic. This is done by navigating to the forum page and selecting New followed by Discussion.

If you want to add a comment to an existing discussion select the subject and then click reply next to the message to make your post.

Discussion alerts

If you want to be informed of when someone replies to a post you have made or a discussion has been added to you can create an alert. This will automatically send an email to you to notify of recent activity.

1. From within the discussion, select Actions followed by Alert me.

Collaboration Site > PTB General Area > Site Forum > Certification

Site Forum

Actions Settings

View RSS Feed
Syndicate items with an RSS reader.

Alert Me
Receive e-mail notifications when items change.

System Account

Posted: 07/01/2011 16:07

2. You will then see a set up screen for the alert. You can then choose your criteria for the alert. There are a number of different options to choose, including the type of change you want to be alerted to and when the alerts should happen. See the screen below for details.

Collaboration Site > PTB General Area > Site Forum > New Alert

New Alert

Use this page to create an e-mail alert notifying you when there are changes to the specified item, document, list, or library.
View my existing alerts on this site.

Alert Title <small>Enter the title for this alert. This is included in the subject of the e-mail notification sent for this alert.</small>	<input type="text" value="Site Forum"/>
Send Alerts To <small>You can enter user names or e-mail addresses. Separate them with semicolons.</small>	Users: <input type="text" value="garth.bland@ircotb.org.uk"/>
Change Type <small>Specify the type of changes that you want to be alerted to.</small>	Only send me alerts when: <input checked="" type="radio"/> All changes <input type="radio"/> New items are added <input type="radio"/> Existing items are modified <input type="radio"/> Items are deleted
Send Alerts for These Changes <small>Specify whether to filter alerts based on specific criteria. You may also restrict your alerts to only include items that show in a particular view.</small>	Send me an alert when: <input checked="" type="radio"/> Anything changes <input type="radio"/> Someone else changes a post <input type="radio"/> Someone else changes a post created by me <input type="radio"/> Someone else changes a post last modified by me
When to Send Alerts <small>Specify how frequently you want to be alerted.</small>	<input checked="" type="radio"/> Send e-mail immediately <input type="radio"/> Send a daily summary <input type="radio"/> Send a weekly summary Time: <input type="text" value="Thursday"/> <input type="text" value="14:00"/>

How to use the calendar

The calendar can be found on the front page of the PTB General Area. This can list anything from SAC meetings, to small working group meetings. All users of the site are able to view and post new events in the calendar.

Viewing an event in the calendar

1. Select Calendar in the PTB general area. The calendar will then open, showing events for the current month.
2. Select an event posted on the calendar.
3. A new screen will open which shows more details about the event, e.g. location, start/end time and description of the meeting.
4. It is also possible to edit the event by selecting Edit Item. This is useful if information about the meeting has changed, e.g. start time or location. If the meeting is no longer taking place then select Delete Item.
5. Select OK to update the event on the calendar.

Adding an event in the calendar

1. Select Calendar in the PTB general area. The calendar will then open, showing events for the current month.
2. Select New and New Item.

3. The New Item screen will open.
4. Enter the information about the event/meeting and select OK.
5. The new event will appear in the calendar.

How to set up a new password

If you have forgotten the password you were issued with then please navigate to the password recovery page.

[JRC PTB](#) > Recover your password

Reset Your Password

Forgot Your Password?

Enter your User Name to receive a new password.

User Name:

You are asked to submit your user name and a new password will be sent to your designated email address.

Please then login with your new password.

How to create a new user and add them to the site (PTB staff only)

According to your permission level you will be able to create new users and allocate them to groups.

Creating a new user

1. Select the "Admin Area" tab.
2. You will see the screen below. Follow the instructions for creating a new user.

Collaboration Site

JRCPTB Collaboration Site

Collaboration Site | PTB General Area | Acute Internal Medicine | Clinical Neurophysiology | Curriculum | Endo & Diabetes | Haematology

Collaboration Site > Admin Area

Create new user

User Name:

Password:

Confirm Password:

E-mail:

Security Question:

Security Answer:

The screenshot shows a web form titled 'Create new user' with several input fields and a submit button. Callout boxes provide instructions for each field: 'First Name Last Name e.g. John Smith' points to the User Name field; 'First name followed by 123 e.g. john123' points to the Password field; 'Re-enter password' points to the Confirm Password field; 'Enter email they will use to receive communication from site' points to the E-mail field; 'Enter "abc"' points to the Security Answer field; 'Enter "123"' points to the Security Question field; and 'Once all information is entered hit this button' points to the 'Create User and send email' button.

3. Once you select the "Create User and send email" button, an automated email message will be sent to the user inviting them to the site. This will contain the user name and password you issued to them.
4. They can alter their password using the "Change Password" screen

How to add users to groups

1. Select specialty site, e.g. paediatric Cardiology
2. Select "Site Actions" in right hand corner of screen then click Site Settings.



Welcome [gareth.bland@jrcptb.org.uk](#) |

This Site: Paediatric Cardiology

Respiratory Medicine | Stroke Medicine | Workforce | ChangePassword | Admin Area | **Site Actions**

Create
Add a new library, list, or web page to this website.

Edit Page
Add, remove, or update Web Parts on this page.

Site Settings
Manage site settings on this site.

Paediatric Cardiology

do not have permissions to view the people or groups.

3. Select "People and Groups" under Users and Permissions.
4. Pick a group from the list on the left hand side of the screen, e.g. Paed Card SAC member.



Collaboration Site

JRCPTB Paediatric Cardiology

Collaboration Site | PTB General Area | Acute Internal Medicine | Allergy & Immunology | Audiological Mec

Collaboration Site > Paediatric Cardiology > People and Groups

People and Groups: JRCPTB Visitors

Use this group to give people read permissions to the SharePoint site: JRCPTB

New | Actions | Settings

Picture

There are no items to show in this view of the "User Information List" list.

Groups

- JRCPTB Visitors
- Global PTB Staff member
- PAED CAR SAC member
- PAED CAR SAC Working Group Member
- PAED CAR SAC Quality Lead
- PAED CAR SAC Assessor CCT
- PAED CAR External Advisor
- PAED CAR SAC Assessor CESR
- PAED CAR PTB certification team member
- PAED CAR PTB committee manager
- PAED CAR PTB curriculum project manager
- PAED CAR PTB Quality manager
- PAED CAR SAC Secretary
- More...

All People

Site Permissions

View All Site Content

Documents

- Next, click “New” from the blue bar and then “Add Users”

Collaboration Site

JRCPTB Paediatric Cardiology

Collaboration Site | PTB General Area | Acute Internal Medicine | Allergy & Immunology | Audiological Medicine | Cardiology | Clinical Genetics

Collaboration Site > Paediatric Cardiology > People and Groups

People and Groups: PAED CAR SAC member

Groups

- JRCPTB Visitors
- Global PTB Staff member
- PAED CAR SAC member**
- PAED CAR SAC Working Group Member
- PAED CAR SAC Quality Lead

New | Actions | Settings

- Add Users**
Add users to a group or site.
- New Group
Create a new SharePoint group.

- You should then see the Add Users Screen. Type in the name of the person you want to add to the group. This has to be the exact user name you assigned to them when you created them as a new user on the site. The site will not accept abbreviations or alternatives.

Use this page to give new permissions.

Add Users
You can enter user names, group names, or e-mail addresses. Separate them with semicolons.

Users/Groups:
Joseph Blogson

Give Permission
Choose the permissions you want these users to have. You can add users to a SharePoint group (which is already assigned to a permission level), or you can add users individually and assign them to a specific permission level.

SharePoint groups are recommended as they allow for ease of permission management across multiple sites.

Give Permission

- Add users to a SharePoint group
 - PAED CAR SAC member [PTB read]
- Give users permission directly
 - Design - Can view, add, update, delete, approve, and customize.
 - Contribute - Can view, add, update, and delete.
 - Read - Can view only.
 - Full Control - Has full control.
 - PTB read - Can view only.
 - PTB Contribute - Can view, add, update, and delete.
 - PTB Approve - Can edit and approve pages, list items, and documents.
 - PTB Forum Access - Can read ,add ,reply to discussion topics
 - Approve - Can edit and approve pages, list items, and documents.
 - Manage Hierarchy - Can create sites and edit pages, list items, and documents.
 - Restricted Read - Can view pages and documents, but cannot view historical versions or review user rights information.
 - View Only - Members of this group can view pages, list items, and documents. If the document has a server-side file handler available, they can only view the document using the server-side file handler.
 - PTB sub admin - Can edit and approve pages, list items, documents and manage user permissions

Send E-Mail
Use this option to send e-mail to your new users. You can personalize the message that is sent. Links and information about the site will be added below your personal message.

Send welcome e-mail to the new users

Subject:
Welcome to the SharePoint group: PAED CAR SAC member for sit

Personal Message:

- Once you have typed the username click the small person with the green tick. If the you have typed it correctly and they exist on the site then the user name should become underlined (viewable Internet explorer only). Please note that you can add more than one user at a time by repeating this process. Make sure that you type a semi colon between each name.
- Select the “Add users to a Sharepoint Group” option.
- Untick the box named “Send welcome email to new users”.

10. Select OK.
11. The users name should now appear in the user list for that particular group.
12. Repeat as required for other users and groups.