Ignite on FHIR Custom Content Builder (CCB) User Guide

Introduction

The Custom Content Builder (CCB) module is an available add-on option for Ignite On-Demand (IOD) and Ignite on FHIR (IoFHIR). If a user has access to CCB, they will see a link to it in the upper navigation bar (FIGURE 1).
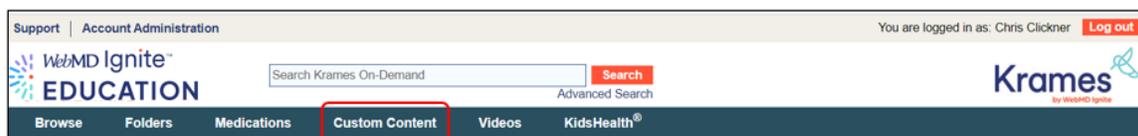

FIGURE 1: CUSTOM CONTENT BUILDER ACCESS

With CCB, clients can… 1) edit documents in most of the WebMD Ignite content collections (e.g., HealthSheets, Discharge Instructions, etc.) to meet their organization's specifications and/or 2) add self-produced (custom) documents to IOD so all the organization's patient education handouts (WebMD Ignite licensed and Client Custom) are accessible in one content repository.

End-users can work with custom documents just as they do any default IOD document:

- Use "Search" to find WebMD Ignite documents and custom documents.

- Add custom documents into custom folders for quick access.

- Print custom documents in batches along with WebMD Ignite documents.

When a CCB user clicks the "Custom Content" link in the upper navigation bar (FIGURE 1) they will be taken to the _CCB Admin Page_ (FIGURE 2).
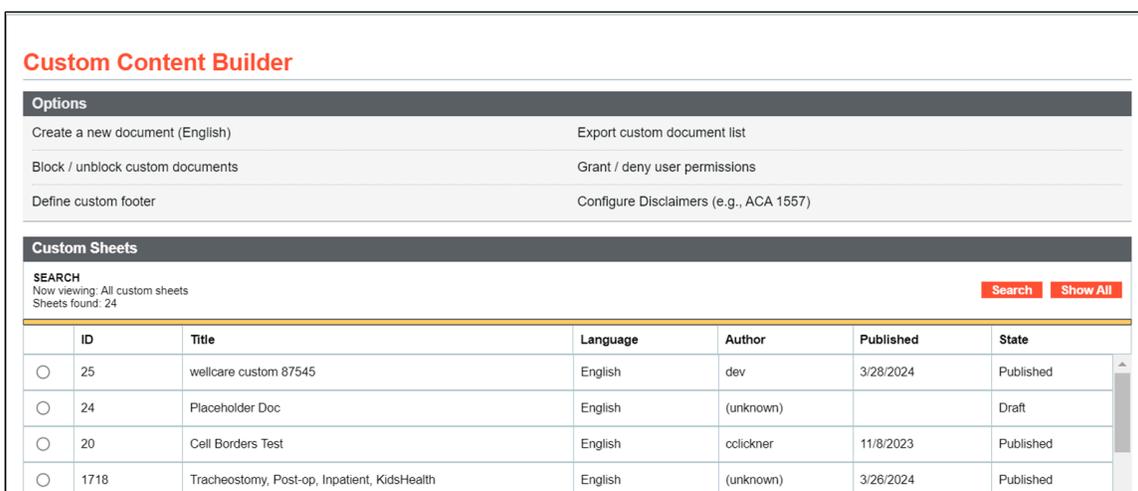

FIGURE 2: CCB ADMIN PAGE

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Custom Content Builder Permissions

The Custom Content Builder (CCB) permissions granted to a user depend on the user type (Account Manager or Group Manager) associated with a user name. By default, an Account Manager has access to all CCB options and actions, while a Group Manager only has access to options the Account Manager has given them permission to perform.

There are three options for assigning CCB permissions to a Group Manager:

1. Create a new Group Manager.

   a. Go to Account Administration.

   b. Under User Administration, click the "Add a User" button.

   c. Select "Group Manager" as the user type. Fill out any required fields.

   d. Make sure User Status is Active.

   e. Set General Permissions.

   f. Select the Custom Content Builder (CCB) Permissions the Group Manager should have.

   g. Click the "Add User" button.

2. Edit an existing Group Manager.

   a. Go to Account Administration.

   b. Under "User Administration," select a Group Manager from the dropdown box and click the "Edit" button.

   c. Confirm the User Status is Active.

   d. Confirm General Permissions.

   e. Select the Custom Content Builder (CCB) Permissions the Group Manager should have.

   f. Click the "Save Changes" button.

3. Use the CCB Admin Page (FIGURE 2 on previous page) to manage permissions for all Group Managers.

   a. Click on "Grant / deny user permissions" in the "Options" section.

   b. This takes you to the Grant User Permissions Page (FIGURE 3 on next page) where all the active Group Managers with CCB permissions are listed.

   c. Select and/or deselect permissions as needed.

   d. Click the "Save" button.

FIGURE 3: GRANT USER PERMISSIONS

Editing Existing WebMD Ignite Documents

CCB allows authorized users to create custom documents by editing WebMD Ignite content. This is beneficial if your organization likes most of a WebMD Ignite document and wants to delete something from the document and/or add something to the document to better fit your organization. The process to edit a WebMD Ignite document is slightly different than creating a new custom document, but once the user is in the CCB editor, the process is the same.

1. Search/Browse for a WebMD Ignite document to edit, drill down into the individual document, choose Edit Sheet from the Actions Drop Down Box and click the "Go" button (FIGURE 4).
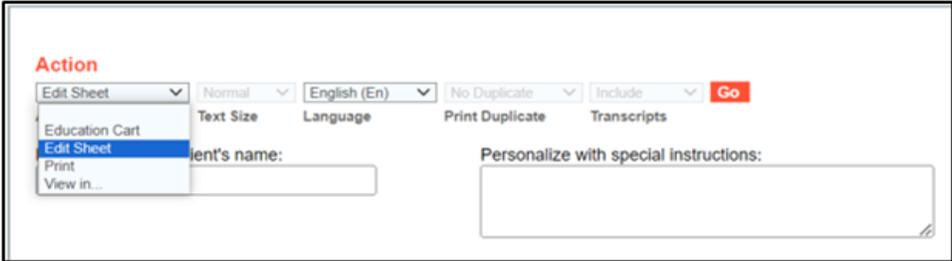

FIGURE 4: CHOOSING THE EDIT SHEET ACTION

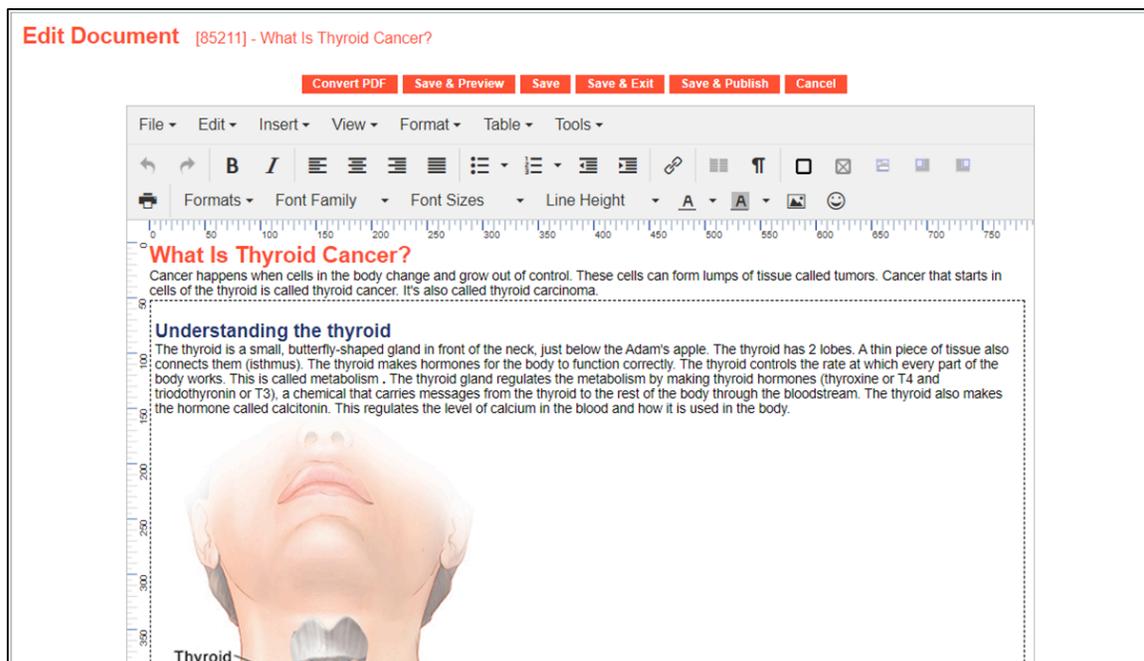2. This will take you into the "Document Editor" (FIGURE 5 on next page).

FIGURE 5: DOCUMENT EDITOR

3. Before doing anything else, click "Save".

4. Make the necessary additions and/or deletions by following the instructions under Creating New Documents on page 12 of this guide.

5. Click one of the action buttons at the top or bottom of the editor:

    a. "Save & Preview" – saves the work and opens a preview of the document.

    b. "Save" – saves the work and keeps you within the editor.

    c. "Save & Exit" – saves the work as a Draft and returns you to the CCB Admin Page.

    d. "Save & Publish" – saves the work and advances you to the Publish Custom Sheet Page (FIGURE 35 on page 33).

    e. "Cancel" – returns you to the CCB Admin Page. Any unsaved changes will be lost.

NOTE FOR CUSTOM CONTENT MAINTENANCE

It is the client's responsibility to keep all custom content (edited WebMD Ignite and self-produced) up to date. WebMD Ignite posts a quarterly report listing all the WebMD Ignite revised content. Clients should compare that list of revised content against any WebMD Ignite content they have edited and make the same changes to the custom version that WebMD Ignite made to the default version.

Navigating the Custom Content Builder (CCB) Module

To access CCB, a user must be logged into IOD as an Account Manager or a Group Manager with CCB permissions. To get to the *CCB Admin Page*:

1. Click on "Custom Content" in the upper navigation bar (FIGURE 6).

FIGURE 6: CUSTOM CONTENT BUILDER ACCESS
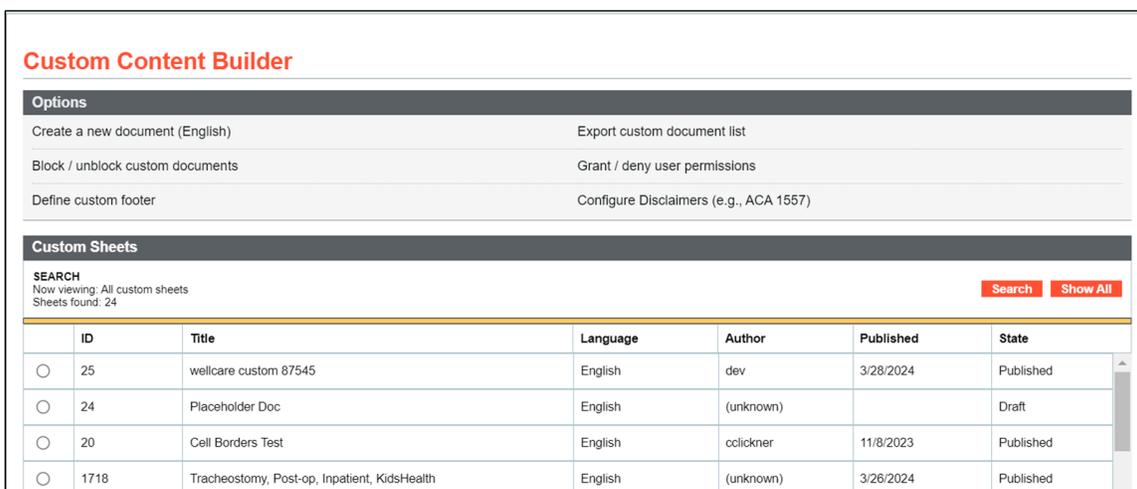
2. This takes you to the *CCB Admin Page* (FIGURE 7).

FIGURE 7: CCB ADMIN PAGE

Custom Content Builder (CCB) Admin Page

The *CCB Admin Page* has two sections – Options and Custom Sheets.

Options

There are six options available on the *CCB Admin Page*, all six of which are available to an Account Manager. Group Managers will have permission to Create a new document (English) and may have the ability to Block/unblock custom documents if granted permission.

1. Create a new document (English)

2. Block/unblock custom documents

3. Define custom footer

4. Export custom document list

5. Grant/deny user permissions

6. Configure Disclaimers (e.g., ACA 1557)

Create a new document (English)

Refer to the instructions on page 12.

Block/unblock custom documents

The CCB module has a block/unblock function that works the same way as the HealthSheet block/unblock function. If you want to make a custom document temporarily unavailable to your end-users, you can simply block it. Custom documents in the draft state are automatically blocked. Custom documents that have been "Published" can be blocked and unblocked at any time.

To block and unblock custom documents, follow these steps:

1. Click "Block / unblock custom documents" in the "Options" section of the CCB Admin Page.

2. This will take you to the Block/Unblock Custom Documents Page (FIGURE 8).

    a. Only "Published" documents will appear on this list. "Draft" documents are blocked automatically until they are published.

    b. Unblocked Custom Sheets are listed in the box on the left.

    c. Blocked Custom Sheets are listed in the box on the right. If you haven't blocked any documents, this box will be empty.
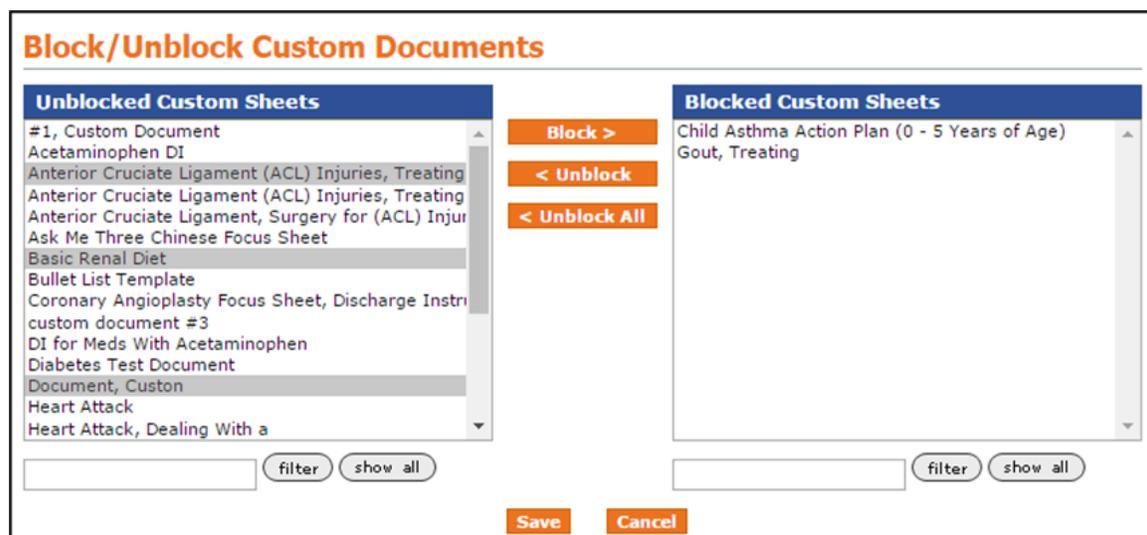

FIGURE 8: BLOCK/UNBLOCK CUSTOM DOCUMENTS

3. To select a title to block:

    a. Click the title in the left column to select; then click the "Block" button to move the title to the right column.

    b. Repeat this step to block additional titles, or you can select more than one title by holding the Control <CTRL> key while left-clicking the titles you would like to block or the SHIFT key when selecting a block of consecutive custom documents to block.

4. To select a title to unblock:

    a. Click the title in the right column to select; then click the "Unblock" button to move the title to the left column.

    b. Repeat this step to unblock additional titles, or you can select more than one title by holding the Control <CTRL> key while left-clicking the titles you would like to unblock or the SHIFT key when selecting a list of consecutive custom documents to unblock.

    c. Click the "Unblock All" button to move all the titles in the Blocked column to the Unblocked column.

NOTE FOR UNBLOCKING ALL

"Unblock All" will unblock all the blocked titles, even if you have selected just one title or filtered the list (see below for an explanation of filtering).

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5. To search either list for a specific title or titles, use the "Filter" function.

    a. Type a word that is part of the custom document's title into the textbox below the list you want to search.

    b. Click the "filter" button.

    c. If the box becomes empty, no documents match your search criterion.

    d. To unfilter, click the "show all" button.

    e. If you move a title from blocked to unblocked, or vice-versa, and the receiving column has been filtered, the title may not appear on the new list until you click the "show all" button.

6. To save changes, click the "Save" button. You must click "Save" for changes to take effect. If you leave the page and/or your session times out before clicking "Save", changes will not take effect.

7. To undo unsaved changes, simply click the "Cancel" button to restore the lists and start again.

Define Custom Footer (Account Managers only)

The Account Manager can designate a default footer for documents created in CCB. The footer will appear at the end of the custom document. It will have a specific predefined font type and size, which will remain constant across all documents regardless of the font size used for printing. A footer will usually contain copyright information, disclaimers, and any other information that should appear on all custom documents. For example:

© 2024 Company Name. All rights reserved. This information is not intended as a substitute for professional medical care. Always follow your healthcare provider's instructions.

Some clients choose **NOT** to include the copyright year so they do not have to update the footer annually and republish all their custom documents, which would be required to update all existing custom documents with the new footer.

There are two options for setting up the custom footer:

1. Default footer is required: A predefined footer appears by default on all custom documents.

    a. Individual CCB users cannot omit the footer.

    b. Ensures all custom documents carry the same copyright and disclaimer information.

2. Default footer is optional: A predefined footer appears by default on all custom documents unless an individual CCB user chooses to omit it.

    a. Use if/when CCB users will be creating documents that require a different footer or no footer at all.

    b.   Use if/when the document is in a foreign language and you want the footer to be in the same foreign language; otherwise the defined footer will be in English.

    c.   If/When the default footer is omitted, the CCB user must include the footer information in the body of the document.

To set up your footer:

1. Click on "Define custom footer" in the "Options" section of the CCB Admin Page.

2. You will be taken to the Define Custom Footer Page (FIGURE 9).

Define Custom Footer

Please enter your footer text into the box below. (Images cannot be used.)

It is recommended that your footer include copyright information and a disclaimer—for example:

© 2006 Company Name. All rights reserved.
This information is not intended as a substitute for professional medical care.
Always follow your health care provider's instructions.

Your Footer

Allow custom footer to be omitted from custom documents?
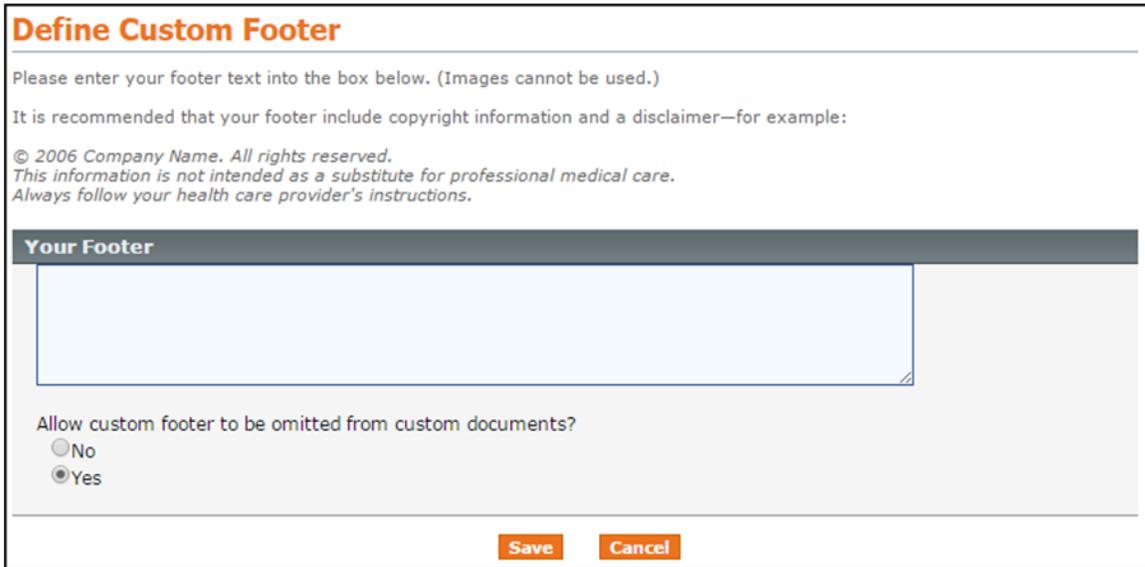○ No
● Yes

[Save] [Cancel]

FIGURE 9: DEFINE CUSTOM FOOTER

3. Enter your footer verbiage into the text box (text only). As a starting point, you can copy the example footer and then revise accordingly.

4. Click the "Yes'' radio button to allow CCB users to omit the footer. Clicking "No" will apply the predefined footer to all custom documents created in CCB.

5. Click the "Save" button to save your changes and return to the *CCB Admin Page*.

The Account Manager may change the footer verbiage or the "required" option at any time. If the footer verbiage is changed, and the new footer needs to be applied to existing custom documents, all custom documents will need to be republished.

Export Custom Document List (Account Managers only)

This feature allows the Account Manager to export a list of custom documents that can be viewed on their computer screen or downloaded into a Microsoft® Excel document. The export list includes the

Document ID, Title, and Status (Draft or Published).

To export the list:

1. Click on "Export custom document list" in the "Options" section of the CCB Admin Page.

2. This will take you to the Export Custom Sheet List Page (FIGURE 10 on next page).
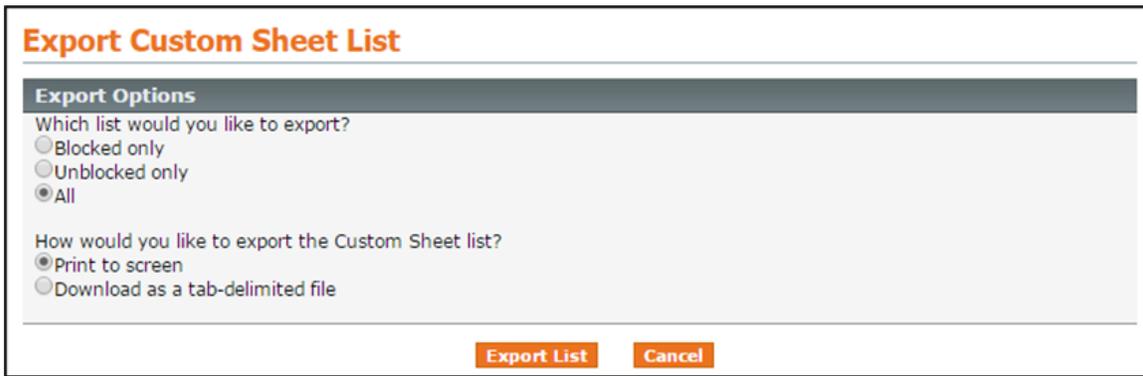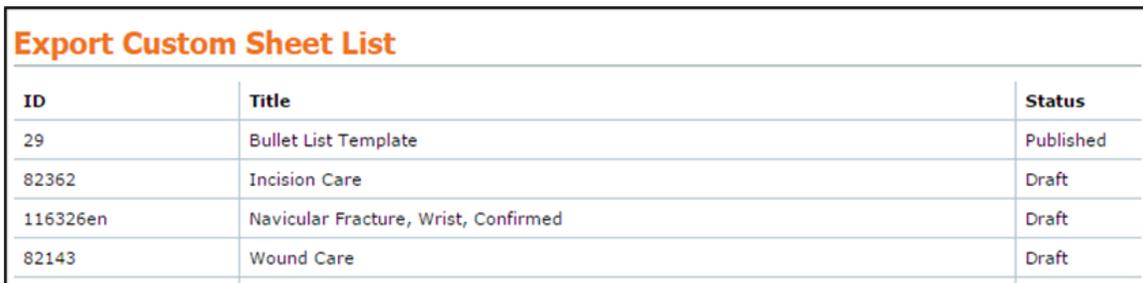
Export Custom Sheet List

Export Options

Which list would you like to export?
- ○ Blocked only
- ○ Unblocked only
- ● All

How would you like to export the Custom Sheet list?
- ● Print to screen
- ○ Download as a tab-delimited file

Export List   **Cancel**

FIGURE 10: EXPORT CUSTOM SHEET LIST

3. Select which custom documents to export:

    a. Blocked Only

    b. Unblocked Only

    c. All (this is the default)

4. Then select an export method:

    a. Print to screen (this is the default)

    b. Download as tab-delimited file

5. Click the "Export List" button.

    a. If you choose the "Print to Screen" option (FIGURE 11), the list of custom documents will appear. Click your browser's "BACK" button twice to return to the CCB Admin Page.

Export Custom Sheet List

ID	Title	Status
29	Bullet List Template	Published
82362	Incision Care	Draft
116326en	Navicular Fracture, Wrist, Confirmed	Draft
82143	Wound Care	Draft

FIGURE 11: EXAMPLE CUSTOM EXPORT SHEET REPORT

    b. If you chose the "Download as a tab-delimited file" option:

        i. CCB will download a tab-delimited excel file onto your computer.

        ii. Open the excel file and revise accordingly.

        iii. Name the file and save it in the .xls format.

Grant / deny user permission

See Step # 3 under Custom Content Builder Permissions on page 2.

Configure Disclaimers (e.g., ACA 1557)

The Configure Disclaimers functionality allows you to add a second footer to all licensed documents (FIGURE 12 on next page). If Configure Disclaimers is enabled, the second footer will appear in addition to the default WebMD Ignite footer and/or the Defined Custom Footer (if enabled and included on a document).

ALL CONTENTS ARE CONFIDENTIAL

> Please contact ABC Memorial Hospital at (800) 123-4567 if you have any follow-up questions. If it is an emergency, dial 911.
>
> © 2000-2020 The StayWell Company, LLC. 800 Township Line Road, Yardley, PA 19067. All rights reserved. This information is not intended as a substitute for professional medical care. Always follow your healthcare professional's instructions.

FIGURE 12: DISCLAIMER EXAMPLE

To add a disclaimer:

1. Click on "Configure Disclaimers (e.g., ACA 1557)" in the "Options" section of the CCB Admin Page.

2. This will take you to the Define Disclaimers (e.g., ACA 1557) Page (FIGURE 13).
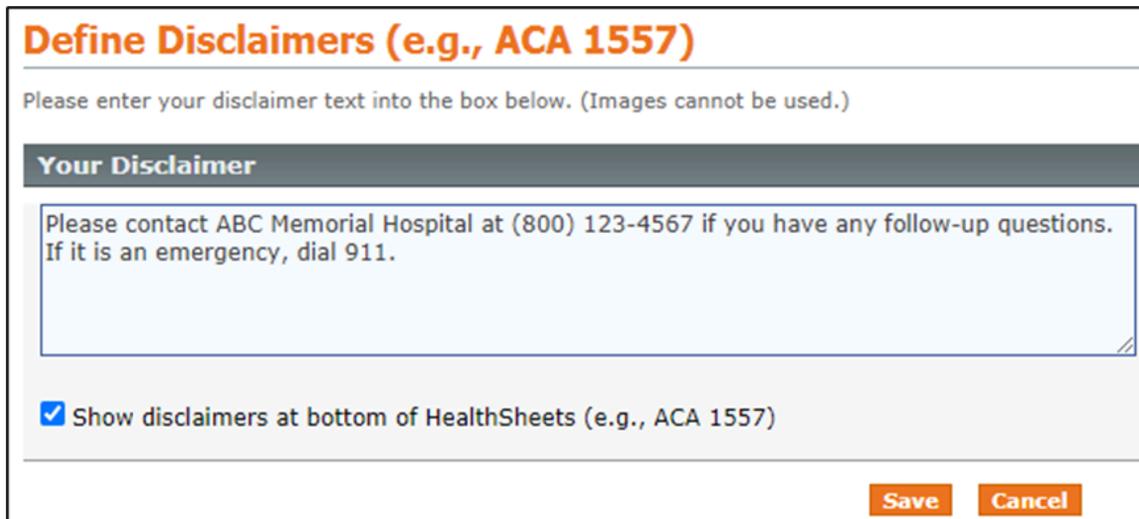
FIGURE 13: DEFINE DISCLAIMERS

3. Enter your disclaimer verbiage into the text box (text only).

4. Click the check box next to "Show disclaimers at bottom of HealthSheets (e.g., ACA 1557)."

5. Click the "Save" button to save your changes and return to the CCB Admin Page.

Custom Sheets

The bottom section (FIGURE 14 on next page) of the CCB Admin Page lists all the custom documents created in IOD. Account Managers have access to all the following custom content actions, while Group Managers may be given access to all or some of the custom content actions.

- Preview

- Edit

- Metadata

- Vocabularies

- Delete

- Duplicate

- Publish

- Add other language version in:

FIGURE 14: CUSTOM CONTENT IN CCB

Working with Custom Documents

Each custom document on the _CCB Admin Page_ displays its ID (unique document number assigned by the system), Title, Language, Author, most recent Published date and State ("Draft" or "Published"). To locate and select a current document to work with, scroll through the document list or do a search.

To search for a document:

1. Click the "Search" button in the upper right-hand corner of the Custom Sheets box.

2. A search page will appear. Enter values for one or more of the criteria listed:

    a. Content ID

    b. Document Title

    c. Document Author

    d. Published Date (enter date range)

    e. Keywords

    f. Content State ("Draft" or "Published")

    g. Language (English or Spanish)

3. Click the "Submit Search" button.

    a. Your results will appear at the bottom of the CCB Admin Page.

    b. If no results are found, no documents will be displayed.

4. To bring back the complete list, click the "Show All" button.

5. Click the radio button to the left of the document you would like to work with.

6. Click one of the function buttons below the list: "Preview," "Edit," "Metadata," "Vocabularies," "Delete," "Duplicate," "Publish" or "Add (Other language version)."

    a. The number of buttons you see will depend on the permissions granted by your IOD Account Manager.

Creating New Documents

There are two main options for adding content to a blank custom document page. The first is to draft/create the document directly within the blank page. The second, and most common, is copying from another document and pasting into CCB. Creating the document directly in CCB takes longer but doing so greatly reduces the chances of formatting errors. Copying and pasting is more efficient but provides the opportunity for formatting errors that may generate validation errors when attempting to save the document. For both ways, you must first open a blank custom document.

To begin a new English document:

1. Click the "Create a new document (English)" link in the "Options" section of the CCB Admin Page and the Create a New Document window (FIGURE 15) will appear.

Create a New Document

In the Title box below, enter a title to identify your document in the system. (You may use a different title in the document itself.)

If you wish to use a different title for the page links on KOD, enter it in the Display Title box. If the Display Title box remains empty, the system title will be used in the page links.

After filling out this page, click the "Save" button below to work on your document.

Document Information

Title:	
Display Title:	Language: **ENGLISH**
Original Author:	AcctMgr ▼

Save   Cancel

FIGURE 15: CREATE A NEW DOCUMENT

2. Under "Document Information," provide the following:

    a. Title – enter a title to identify your document in the system (You may use a different title in the document itself).

    b. Display Title – If you wish to use a different display title for the page links within IOD, enter it in the "Display Title" box. If you wish for your Display Title to be the same as your Title, then type in the Display Title or copy the Title and paste into the Display Title box.

3. Original Author – Use the dropdown arrow to choose the author's user name.

4. After completing this page, click the "Save" button to work on your document.

5. An empty document page will appear (FIGURE 16 on next page) ready for you to input your content.
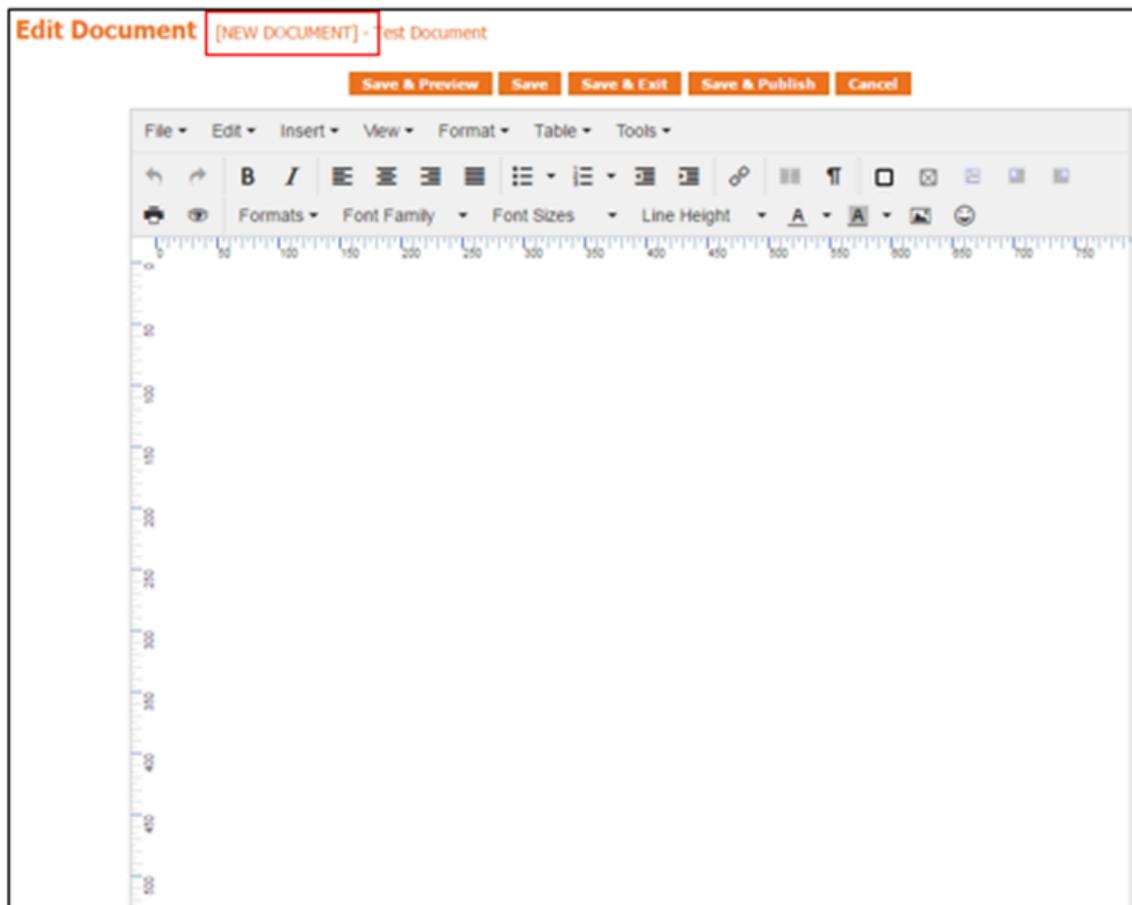
FIGURE 16: BLANK CCB DOCUMENT IN EDITOR

Entering a New Document in CCB

For best results, and to reduce the chances of generating validation errors when attempting to save your document, create/build the document directly in CCB using the below steps in the order presented:

1. Click Save – before doing anything else, click "Save" to grab the next available document number in the sequence. When you do so, the [NEW DOCUMENT] at the top of the document will be replaced with the new document id number (e.g., 10).

2. Enter your text – get all text typed into the document. Do NOT include any extra carriage returns between headings, paragraphs, images, tables and/or any other common "break" in text.

3. Apply heading styles – heading styles will add the proper spacing before and after

4. Apply list styles – list styles will add the proper spacing before and after

5. Apply text and paragraph formatting – text and paragraph formatting will add the proper spacing before and after

6. Add images – place cursor at the point in the document you would like to add the image

7. Add tables – place the cursor at the point in the document you would like to add a table

8. Preview your work and make final adjustments

9. Save & Exit saves a Draft of the document, while Save & Publish saves the document and makes it available to end-users.

IMPORTANT: Your CCB session will time out after a period of inactivity. When the session times out, any changes you have made since the last time you saved will be lost. To avoid losing your work, SAVE OFTEN.

Copying and Pasting a Document into CCB

In most cases, you are probably going to want to copy content from another source (e.g., Microsoft® Word, PDF, RTF document, etc.) and paste into CCB. This is an acceptable method of creating a custom document, but it should be noted that different applications (e.g., CCB, MS Word, PDF, RTF, etc.) apply different formatting styles to their content and that quite often the styles are not accepted from one application to the other.

NOTE ABOUT CCB TEXT/DOCUMENT FORMATTING:

WebMD Ignite stores all documents (WebMD Ignite and Custom) in a special database format called XML. XML formatting applies tags to each element (e.g., heading, body paragraph, bulleted list, image, etc.) within a document. When the document is viewed or printed, IOD applies a style sheet (HTML) that determines how each element will look. CCB and MS Word have conflicting tagging and style schemes.

When copying text from another source (e.g., MS Word) and pasting into CCB, you can try to circumvent validation errors by converting the MS Word content into plain text by "clearing" all formatting from within the MS Word document before copying or by copying the MS Word content and pasting it into a Notepad document before copying again and pasting into CCB. Both processes will remove most of the Microsoft Word formatting.

After the formatting is removed from the text, copy and paste it into CCB. To ensure all previous formatting has been removed, clear any remaining formatting from within CCB itself by selecting all the content within the document (CTRL + A), clicking the Format option and choosing Clear Formatting. Once all previous formatting has been removed, click "Save" and then use the CCB editor to format the content.

Formatting a Custom Document

All the formatting options within CCB (FIGURE 17) are very similar to the formatting options found in MS Word. While they might look the same, it is important to remember they do not act quite the same and that is why it is important to clear all previous formatting before beginning to work on your custom document.
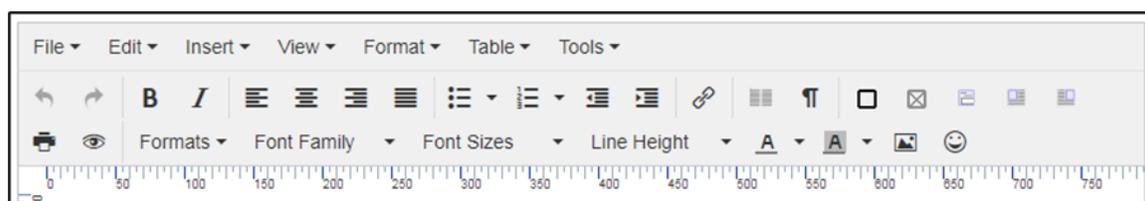

FIGURE 17: CCB FORMATTING OPTIONS

Formatting Shortcuts

- Top Row
    - Undo Changes (Ctrl + Z)
    - Redo Changes (Ctrl + Y)
    - Bold (Ctrl + B)
    - Italics (Ctrl + I)
    - Align Left
    - Align Center
    - Align Right
    - Justify
    - Bullet List
    - Numbered List
    - Decrease Indent
    - Increase Indent
    - Insert/edit link (Ctrl + K)
    - Insert Columns
    - Insert LineBreak (Shift + Enter)
    - Insert Box
    - Remove Box
    - Box Properties
    - Box align left
    - Box align right
- Bottom Row
    - Print (Ctrl + P)
    - Preview
    - Text Color
    - Background Color
    - Insert Images
    - Emoticons

Formatting Functions

- File
    - New Document
    - Print (Ctrl + P)
- Edit
    - Undo (Ctrl + Z)
    - Redo (Ctrl + Y)

- Cut (Ctrl + X)
- Copy (Ctrl + C)
- Paste (Ctrl + V)
- Paste as text
- Select All (Ctrl + A)
- Find & Replace (Ctrl + F)

- Insert
  - LineBreak (Shift + Enter)
  - Columns
  - Image
  - Insert/edit Link (Ctrl + K)
  - Special Character
  - Horizontal Line
  - Anchor
  - Page Break
  - Insert date/time
  - Non Breaking space

- View
  - Show Invisible Characters
  - Show Blocks
  - Visual Aids
  - Preview
  - Fullscreen (Ctrl + Shift + F)

- Format
  - Bold (Ctrl + B)
  - Italics (Ctrl + I)
  - Underline
  - Strikethrough
  - Superscript
  - Subscript
  - Formats
    - Headings
    - Inline
    - Blocks
      - Paragraph
      - Blockquote

- Div
- Pre
  - Alignment
    - Left
    - Center
    - Right
    - Justify
- Clear Formatting

- Table
  - Insert Table
  - Table Properties
  - Delete Table
  - Cell
  - Row
  - Column

- Tools
  - Source Code – the source code of a custom document is HTML. If you are familiar with HTML code, you may find it easier to do editing/formatting in the source code instead of the CCB editor.

Tables

There are two ways to create tables in CCB: 1) Copy and paste from MS Word, or 2) Use the table feature in the CCB editor.

Copy and Paste a Table from MS Word

1. Create your table in MS Word.

2. In MS Word apply the "Normal" style to the cells before copying it. Images in a MS Word table must be inserted into the table after it has been pasted into CCB. Use the insert image functionality (see page 22) within CCB to insert the image into the table. Copying images within a MS Word table and pasting into CCB will result in error messages.

3. In the CCB editor create a new line in your document by using the ENTER key. Place your cursor on the new line.

4. Paste the table into the CCB editor and format accordingly using the CCB editor.

Create Table in the CCB Editor

To insert a table into a document:

1. Place your cursor in the document where you want the table to reside, navigate to the Table drop-down menu and hover over the Insert Table option.

2. Choose the size of the table (anywhere from 1 X 1 to 10 X 10) by moving your mouse and then clicking on a cell.

Table Properties

This functionality allows the user to define General and Advanced table parameters such as Width, Height, Cell Spacing, Cell Padding, Border, Caption and Alignment, as well as Advanced table parameters such as Style, Border Color and Background Color.

1. Insert cursor into a table cell.

2. Select the Table Properties icon to open the "Table Properties" window (FIGURE 18).
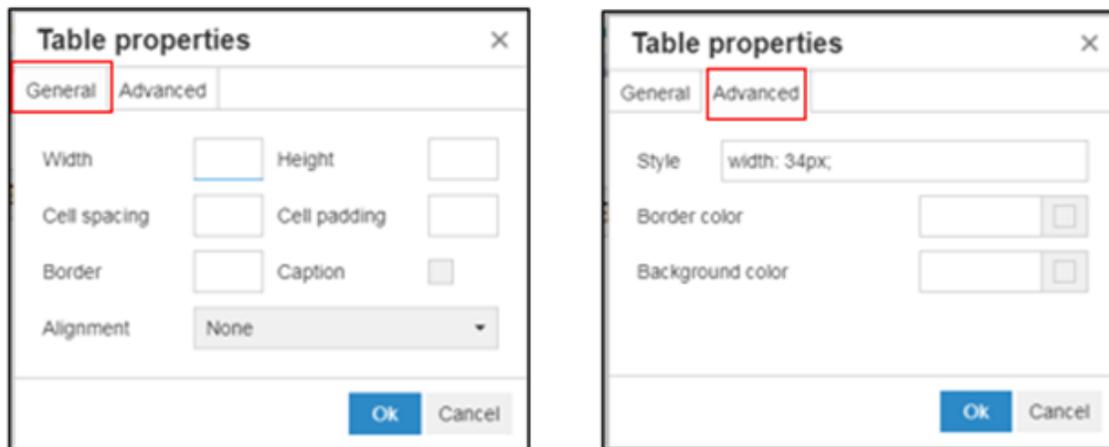
FIGURE 18: TABLE PROPERTIES

3. Enter values where needed to define the table and click OK.

Table Additions and/or Deletions

Use the table properties menu (FIGURE 19) to delete the table from the document or to add and/or delete rows and columns. You can also navigate to the Table drop-down menu and choose the appropriate options.
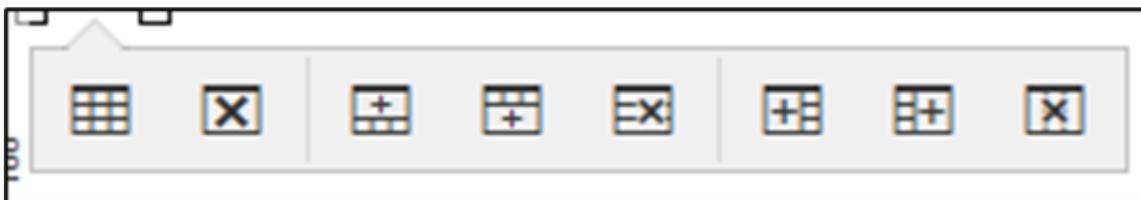
FIGURE 19: Table Additions and/or Deletions

Cells and Cell Properties

This functionality allows the user to define General and Advanced cell parameters such as Width, Height, Cell Type, Scope, Height Alignment and Vertical Alignment, as well as Advanced cell parameters such as Style, Border Color and Background Color.

1. Insert cursor into a table cell.

2. Navigate to the Table drop-down menu and hover over Cells to list the following options

 a. Cell Properties (FIGURE 20)

 b. Merge Cells

 c. Split Cells
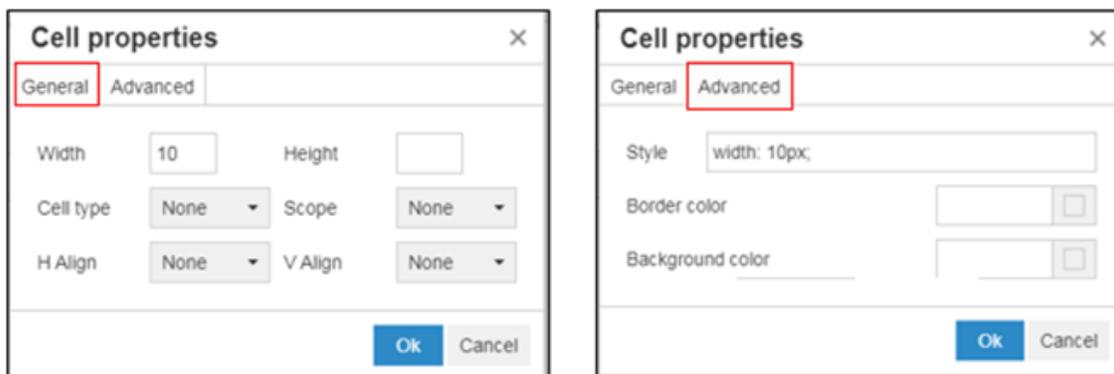
FIGURE 20: CELL PROPERTIES

3. Enter values where needed to define the table and click OK.

4. Merge Cells or Split Cells as needed.

NOTE ABOUT BORDER COLOR:

Border Color is how a user would add gridlines to a table. If the user's cursor is in a single cell and a border color is chosen, that one cell will have a grid/border. To create a grid/border around the entire table, make sure all cells are highlighted before choosing a border color.

Image Management

CCB contains a library of WebMD Ignite medical images which can be used in custom documents. These are the same images WebMD Ignite uses in its HealthSheets and Discharge Instructions. Additionally, CCB clients can create their own library of images by uploading images of their choice into the "Your Library" database within CCB. This section discusses methods to find images and insert them into a document.

Open the Image Library

In the CCB editor, select the insert image icon on the toolbar or navigate to the Insert drop-down menu to open the image library. The image library will open in a new window (FIGURE 21 on next page) that displays the different library features and instructions. Each feature will be discussed in more detail in this section.
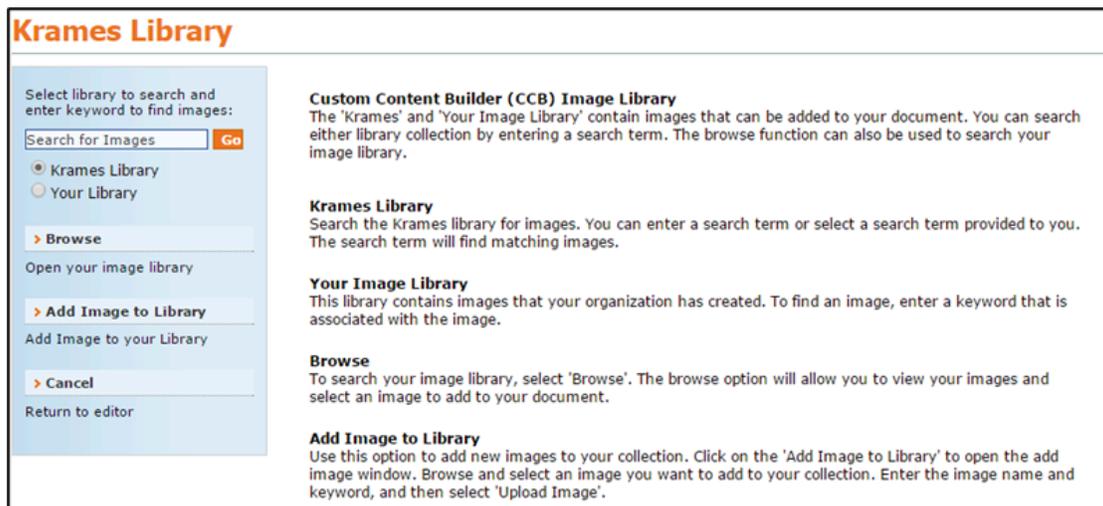
FIGURE 21: CCB IMAGE LIBRARY

Searching the WebMD Ignite Library

To search the "WebMD Ignite Library" for images:

1. Click the radio button labeled "WebMD Ignite Library."

2. Type a keyword (e.g., heart) into the search box.

3. As you type, CCB presents a list of suggested search terms (FIGURE 22 on next page).

4. Choose a search term or keep typing to enter your own search term.

5. Select Go.
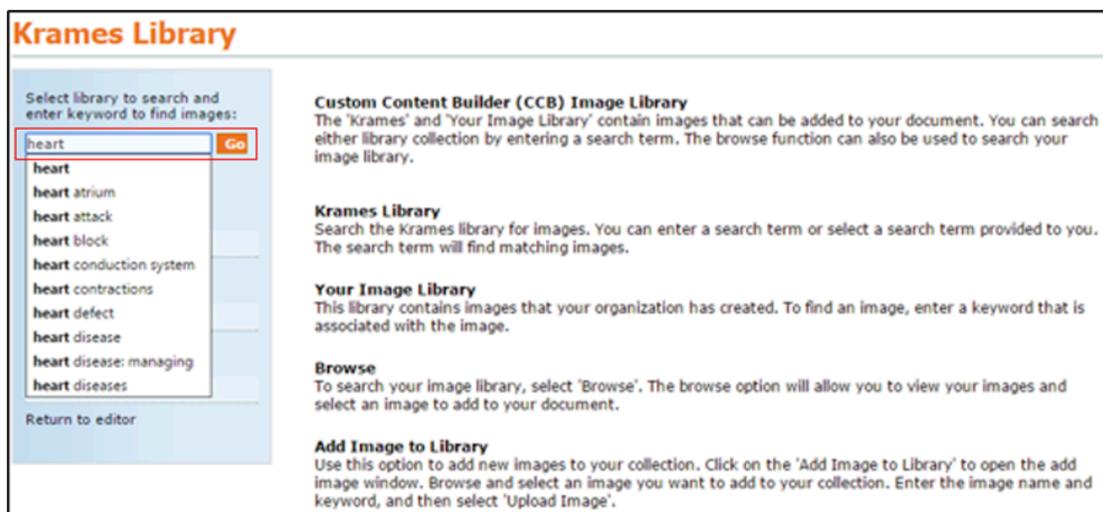
FIGURE 22: SEARCH IOD LIBRARY

The search will return all matches (12 images per page) to the search term entered (FIGURE 23 on next page). Users will have the following options:

- Mouse-over the image to enlarge it.

- Click "Full Size" to view the actual image.

- Click "Insert" to insert the image into the document.
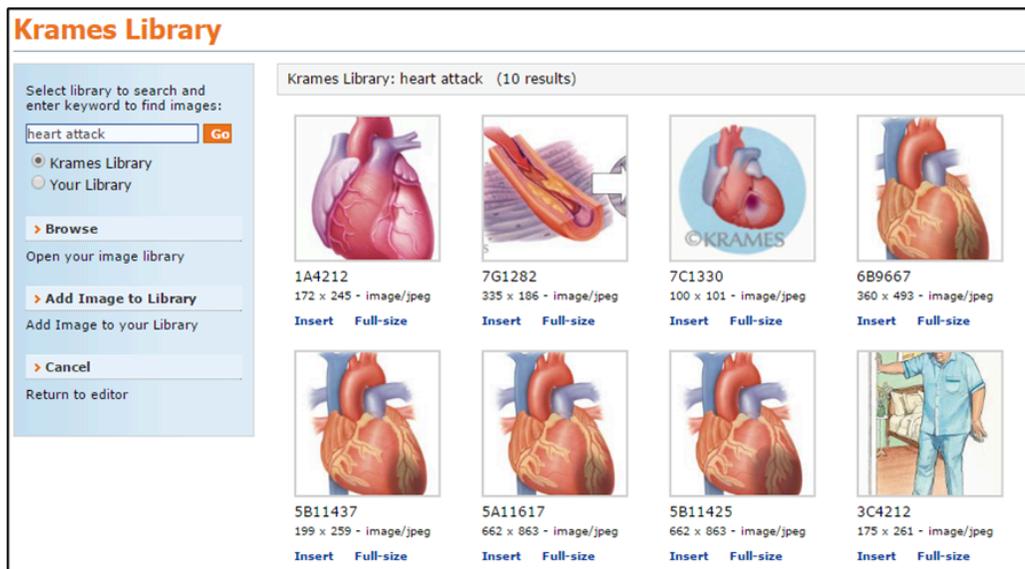
FIGURE 23: IMAGE SEARCH RESULTS

Insert an Image into a Document

1. Click the "Insert" option located under the image thumbnail (FIGURE 23).

2. "Insert" option will open a new page to view the image and add information (FIGURE 24).

   a. Enter any desired optional information in the "Caption" field.

   b. Enter any desired optional information in the "Rollover Text" field.

3. Click the "Insert Image" button.
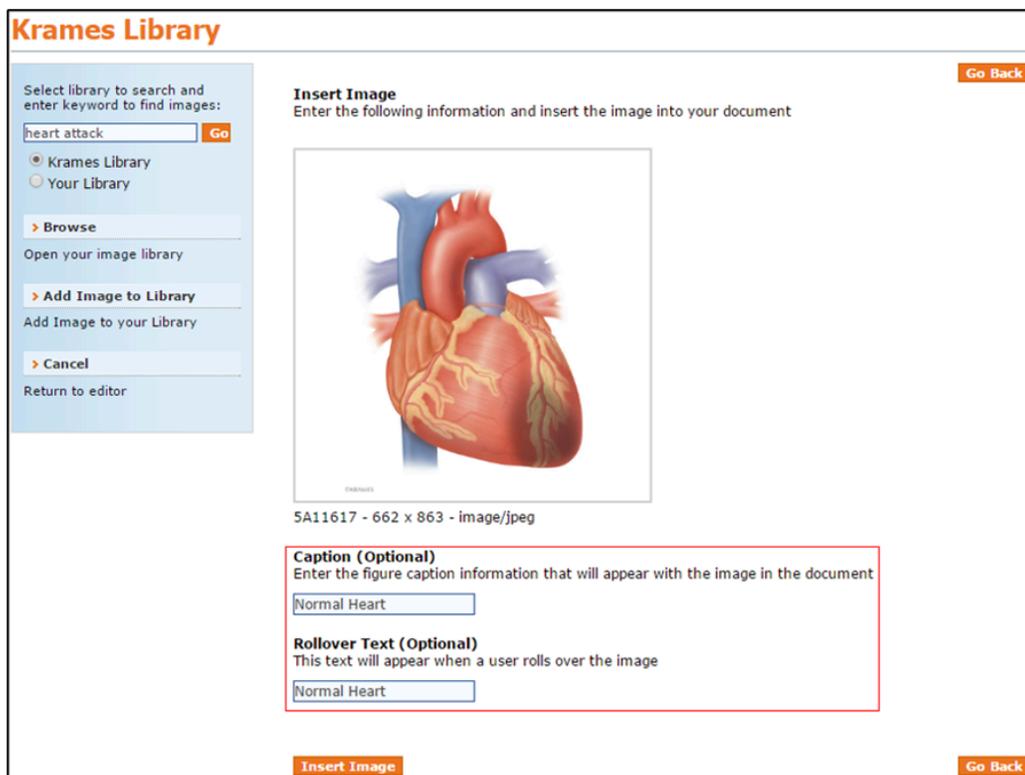
FIGURE 24: INSERT IMAGE

4. The image will be inserted into the document within a one column, two row table. The first row contains the image and the second row contains the caption (if entered). If there is no caption and you want to remove the table from around the image, do the following:

    a. Cut the image to remove it from the table.

    b. Delete the table.

    c. Paste the image back into the document.

Adjust Image Size

The image size may need to be adjusted after it has been inserted into a document:

1. Click the image in the document (FIGURE 25). Square boxes will appear on the corners of the image (as illustrated by the arrows).
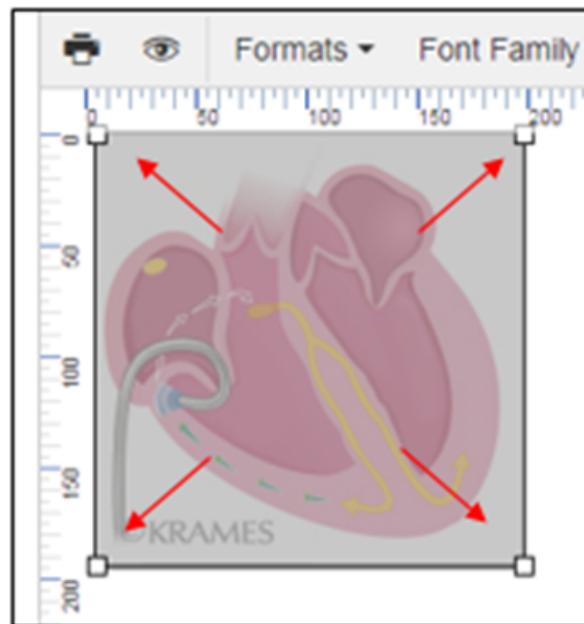
FIGURE 25: ADJUSTING IMAGE SIZE

2. Click the square in the lower right-hand corner.

3. Drag the square diagonally from left to right to size as needed.

4. Repeat Steps 2 and 3 – and/or use the other sizing arrows – until the image is the proper dimensions.

Searching the "Your Library"

Any image added to the "Your Library" database and inserted into a document is searchable. Users will need to enter their appropriate keywords to find matching images.

1. Click the radio button labeled "Your Library" (FIGURE 21 on page 20).

2. Type a keyword (e.g., heart) into the search box (FIGURE 22 on page 21).

3. As you type, CCB presents a list of suggested search terms.

4. Choose a search term or keep typing to enter your own search term.

5. Select Go.

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The search will return all matches (12 images per page) to the search term entered (FIGURE 23 on page 21). Users will have the following options:

- Mouse-over the image to enlarge it.

- Click "Full Size" to view the actual image.

- Click "Insert" to insert the image into the document.

Browsing Your Library

Users have the option to browse their image database. To browse "Your Library":

1. Click the radio button labeled "Your Library" (FIGURE 21 on page 19).

2. Click on "Browse" to open your image library.

3. All images in "Your Library" can be viewed (FIGURE 26).
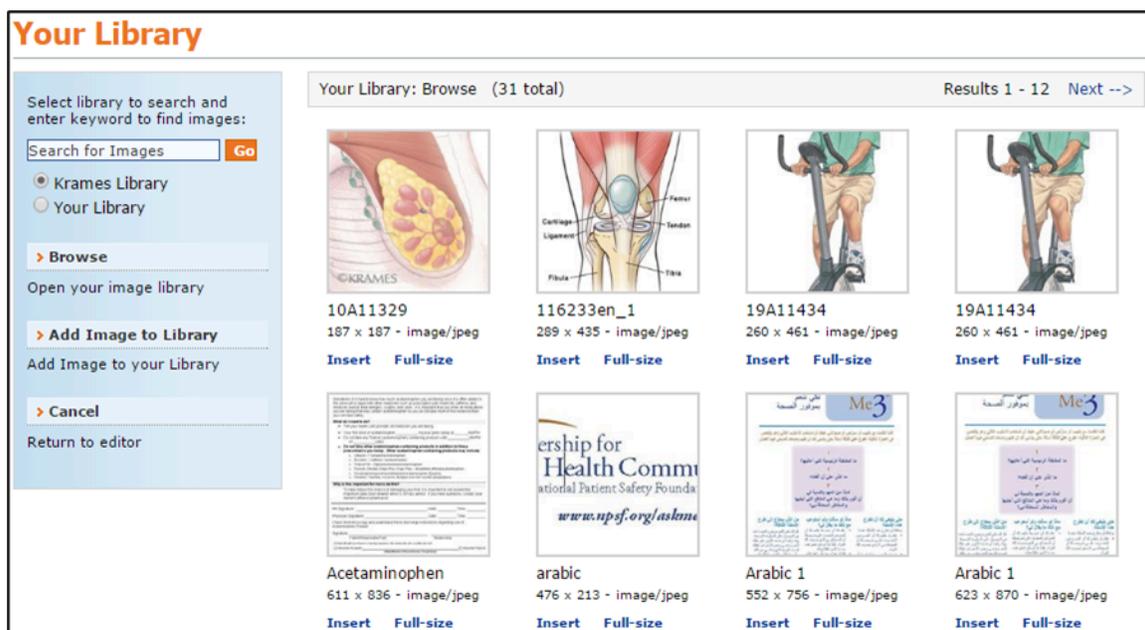
FIGURE 26: YOUR LIBRARY BROWSE RESULTS

4. Scroll through the pages (12 images per page) until you find the image you want to insert.

Add Image to Library

For a CCB user to insert an image from "Your Library" into a document, there must first be images in the "Your Library" database to insert. When an image is added to "Your Library," it must be added to a document and the document must be saved (Draft or Published). Any image not added to a saved document will be removed from the image database when WebMD Ignite indexes the content database each night. To create "Your Library":

1. Select "Add image to Library."

2. Select "Choose File" to search for an image on your workstation (FIGURE 27 on next page).

3. Select an image.

4. Assign a name to the image (e.g., Heart) in the "New Name" field.

5. Enter a descriptive keyword (e.g., Heart Valve) in the "Keyword" field.

6. Click the "Upload Image" button.

7. A green message appears stating "The image has been added to your library." (FIGURE 27).
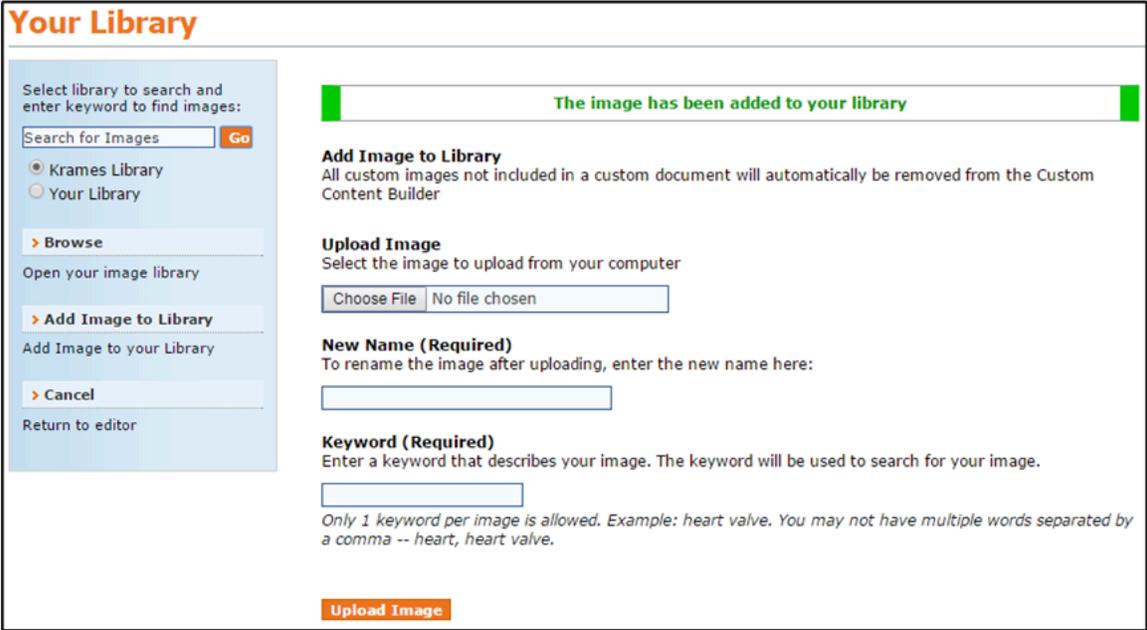
FIGURE 27: ADD IMAGE TO YOUR LIBRARY

Wrapping Text Around an Image

There may be times when you want to wrap text around an image, instead of having the text appear before or after the image. To wrap text around an image, perform the following steps.

1. Follow the steps under Create Table in the CCB Editor on page 18 to insert a one row, two column table into the document.

2. Increase the size of the table by clicking on the box in the lower right-hand corner and dragging diagonally from left to right (FIGURE 28).

FIGURE 28: INCREASING TABLE SIZE

3. Click on Table Properties and set the desired table width. 750 pixels should be the maximum width as it is the standard for an 8.5 X 11 piece of paper. You can also set the height of the row if you have a desired height. If not, the height will be the taller of your image or the text.

4. To have the text appear to the right of the image, click in the first cell and follow the steps under Insert an Image into a Document on page 22.

5. Size the cell width to the desired width of the image (e.g., 250 pixels).

6. Click in the second cell and navigate to cell properties.

7. Size the cell width to the desired width for the text (e.g., 500 pixels).

8. Type/copy the desired text into the second cell. When your text exceeds the width of the cell, it should wrap accordingly (FIGURE 29).

9. Click Save to save your work.

10. To have the text appear to the left of the image, reverse steps 4 through 8.
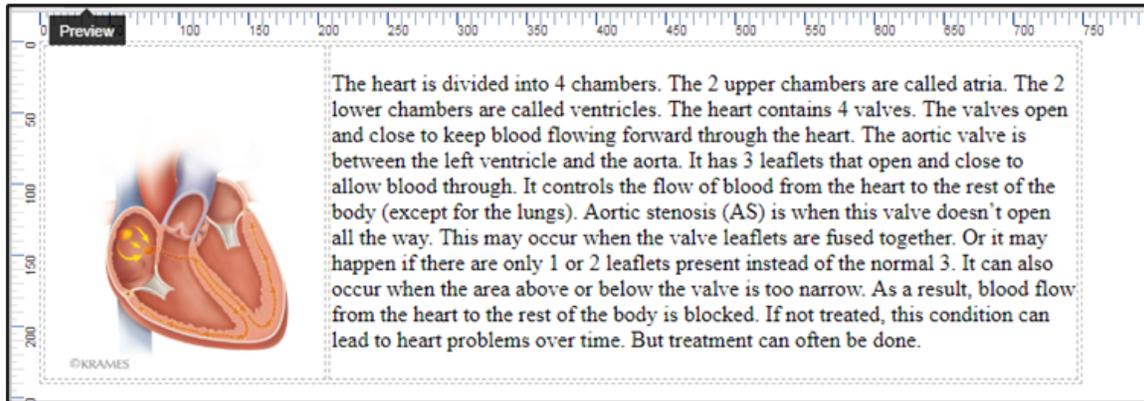
FIGURE 29: WRAPPING TEXT AROUND AN IMAGE

Document Management

The CCB editor includes multiple options to manage documents (FIGURE 30 on next page). Depending on the user, and their CCB permissions, the following options may or may not be available:

- Preview

- Edit

- Metadata

- Vocabularies

- Delete

- Duplicate

- Publish

- Add other language version

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FIGURE 30: DOCUMENT MANAGEMENT

Preview

The "Preview" function allows an authorized CCB user to view a document, but not edit it.

- "Preview" allows users to view both "Draft" and "Published" custom documents.
- If another user is editing a document, you will not be able to preview the document until the other user has finished their editing session.

To preview a document:

1. Select a document from the list on the CCB Admin Page.
2. Click on the "Preview" button.
   a. On the Preview Page, the document is rendered to show the page layout as it will print, which may look somewhat different from the layout in the "CCB editor."
   b. The Preview Page does not show page breaks. To see page breaks, view the document in edit mode. There is no defined page break, but most page breaks occur around the vertical 650–pixel mark.

If you click "Preview" and nothing happens, you may already have the preview window open. Ensure that the "Preview" function does not have another document open.

Edit

The "Edit" function allows you to make changes to an existing custom document. To edit a document:

1. Select a document from the list on the CCB Admin Page.
2. Click the "Edit" button.
3. You will be taken to the CCB Editor Page. All the same options and features are available when editing a document as when creating one.
4. To save edits and continue working, click the "Save" button.
5. To save edits and exit to the CCB Admin Page, click the "Save & Exit" button

6. To publish edits and replace the old version with the new, click the "Save & Publish" button.

7. To leave the editor without saving your changes, click the "Cancel" button.

NOTE FOR EDITING A DOCUMENT

If editing a previously published document, two versions (one "Draft and one "Published") of the document appear. You can select either version to do more editing. The "EDIT" button always links to the draft version. When the Draft is published, only the Published version remains.

Metadata

The "Metadata" function allows you to tag the custom document with certain parameters that will help the custom document be returned as suggested education when integrated within some EMR systems.

1. Select a document from the list on the CCB Admin Page.

2. Click the "Metadata" button.

3. You will be taken to the Custom Content Builder – Metadata Page (FIGURE 31 on next page).

4. Choose the metadata you would like to attach to your custom document:

    a. Age Bin(s).
    b. Gender.
    c. Reading Level (if known).

5. Add any keywords you want to attach to your custom document:

    a. Click the "Add" button.
    b. Enter a single keyword (heart) or multiple keywords (heart attack).
    c. Repeat steps a) and b) until you have added all keywords.

6. If you need to delete a keyword, click the trash can icon next to the keyword.

7. Click the "Save," "Save & Exit" or "Save & Publish" button to save your metadata choices or the "Cancel" button if you do not wish to save your changes.

FIGURE 31: CUSTOM CONTENT BUILDER – METADATA PAGE

Vocabularies

The "Vocabularies" function allows you to tag the custom document with medical taxonomies that will help the document be returned as suggested content when integrated within some EMR systems.

1. Select a document from the list on the CCB Admin Page.

2. Click the "Vocabularies" button.

3. You will be taken to the Custom Content Builder – Vocabularies Page (FIGURE 32 on next page).

4. Decide on the medical taxonomies you would like to attach to your custom document:

WebMD Ignite™

a. CPT   d) ICD-10–CM   g) NDC

b. HCPCS   e) ICD-10_PCS   h) RxNorm

c. ICD-9   f) LOINC   i) SNOMED

5. Click the "Add" button next to each medical taxonomy.

6. Enter a single medical taxonomy in the appropriate format.

7. Repeat steps 6 and 7 until you have added all medical taxonomies.

8. If you need to delete a medical taxonomy, click the trash can icon next to the taxonomy.

9. Click the "Save," "Save & Exit" or "Save & Publish" button to save your vocabulary choices or the "Cancel" button if you do not wish to save your changes.

FIGURE 32: CUSTOM CONTENT BUILDER – VOCABULARIES PAGE

NOTE FOR METADATA AND VOCABULARIES

You must click Save & Publish for the metadata and vocabularies to be saved in production. If you do not click Save & Publish it is like you never added the metadata and vocabularies in the first place.

Delete

The "Delete" function allows you to delete a custom document from the system:

1. Select a document from the list on the CCB Admin Page.

2. Click the "Delete" button.

    a. If you delete the "Published" version of a document, the "Draft" and foreign language versions of that document, if any, will also be deleted.

    b. You can delete the "Draft" version of a document without deleting the "Published" or foreign language versions.

    c. Foreign language versions can be deleted without deleting the English.

NOTES ABOUT DELETING CUSTOM DOCUMENTS

1. If you have created a custom document by editing a WebMD Ignite document, that original WebMD Ignite document was blocked. The only way to restore the original WebMD Ignite document for clinician use is by deleting the custom WebMD Ignite document.

2. It is not recommended to delete client custom documents. It is better to block a client custom document so that it can be unblocked if needed again in the future. If the client custom document is deleted, it will need to be recreated if needed again in the future.

Duplicate

The "Duplicate" function works like a "save as" feature. Use this function if you want to create two similar documents or if you want to revise a WebMD Ignite document and still have access to the original document. When you duplicate a document, CCB copies the current document – and any corresponding information (e.g., title, metadata, vocabularies) – and assigns a new unique document ID. You can then edit the content of the duplicated document and save it with a different title. This feature only works for English documents.

To duplicate a document:

1. Select a document from the list on the CCB Admin Page. If a document has both "Draft" and "Published" versions, the "Duplicate" function will always make a copy of the "Draft" version, even if you select the "Published" version to duplicate.

2. Click the "Duplicate" button.

3. You will be taken to the Create a New Document Page (FIGURE 33 on next page). The system will have named the new document by adding "Copy of" in front of the original title.

4. Change the Title and the Display Title assigned by the system and click the "Save" button.

5. Make your changes in the "CCB editor" and click "Save," "Save & Exit" or "Save & Publish" to save your changes.

FIGURE 33: DOCUMENT INFORMATION PAGE – DUPLICATING

Adding a Foreign Language Document

In IOD, foreign language WebMD Ignite documents (e.g., HealthSheets, Discharge Instructions, Lab Tests, etc.) are "linked" to a parent English document so users can view all the languages associated with a document. Because of that, a parent English document must be available in CCB before a foreign language version can be added.

To add a document in a foreign language:

1. Select a published English document from the list on the CCB Admin Page. You cannot create a foreign language version from a Draft.

2. Click the drop-down arrow in the box next to the "Add other language version in" functionality and choose the appropriate language.

3. Click the "Add" button.

4. You will be taken to the Create a New Document Page (FIGURE 34) The system will have named the new document by adding the foreign language in front of the original title.

FIGURE 34: DOCUMENT INFORMATION PAGE – FOREIGN LANGUAGE

5. Change the Title and the Display Title assigned by the system and click the "Save" button. It is recommended the title remain in English so users can recognize the document; however, if you choose to rename the title in the foreign language, you must type the title(s) in that language.

   a. Account Managers will have the option to change the original author for the foreign language version using the dropdown box that appears.

   b. Group Managers will not have the option to change the original author.

6. Click the "Save" button to work on your document. If WebMD Ignite already has a document in the foreign language chosen, the WebMD Ignite version of the document will be loaded. If WebMD Ignite does not have a foreign language version, the editor will be pre-populated with the English version of the document, including any images. Authors can:
    a. Use the existing English version as a guide for creating the foreign language version, or
    b. Delete the English version and start with a blank document.

NOTE FOR CREATING DOCUMENTS IN A FOREIGN LANGUAGE

It is important to note IOD does **NOT** translate the English document into the foreign language. The author of the document will need to have a translated version of the English document available and then will have to type (or copy) the new document in the appropriate foreign language.

Publish

There are two content states in CCB: "Draft" and "Published."

- When a new document is created and saved, it is saved in the "Draft" state. The "Draft" document will remain invisible to IOD end-users until it has been "Published."

- The "Published" state means the content has been reviewed and approved and made available to end-users for general use.

- When a CCB user edits a document after it has been published, a copy of the published document is created with the same document ID, but with a different content state of "Draft." At this point, the same document ID is listed twice in the custom document list, but with different content states. The "Draft" version is not visible to IOD end-users and the "Published" version remains available unless it is blocked.

- When the "Draft" copy is "Published," it becomes the new "Published" version, and the previous "Published" version is deleted. There is no "versioning" in CCB.

To "Publish" a document:

1. When a document has been reviewed, approved, and is ready to be "Published," select the document from the list on the CCB Admin Page.

2. Click the "Publish" button.

3. You will be taken to the Publish Custom Sheet Page (FIGURE 35 on next page). The system will have pre populated the Title, Display Title and Original Author. If necessary, modify the Title and Display Title. Only the Account Manager can change original author.

4. If previously created, a predefined custom footer is displayed. If CCB users have permission to Omit the footer, you will see the options to include or omit. If CCB users do not have permission to omit the footer, only the custom footer will be seen. If you omit the predefined footer, you can still type a footer at the bottom of your custom document.

5. When the information on the Publish Custom Sheet Page is finalized, click the "Publish" button.

6. The custom document is now available to end-users.

FIGURE 35: PUBLISH A CUSTOM SHEET