

# Wagtail Content Management System for Patient Portal user guide

Version	Date	Comments	Author
V1.0	18/12/2024	First version of the guide	Matheus Canal
V1.1	11/02/2025	Update on how to add Locations	Matheus Canal
V1.2	13/02/2025	Screenshots updates and final review	Lynsay Redwood Matheus Canal

## Introduction

Wagtail is a powerful and intuitive Content Management System (CMS) that simplifies Patient Portal's website management. It is your hub for creating and editing pages, uploading images, managing documents, and reusing components.

This guide is designed to help you get started with creating, editing, and publishing pages, news and FAQs in Patient Portal quickly and efficiently. Whether you're looking to update a location detail, create context-specific content, news about your service, or simply add a new question to the FAQs, Wagtail provides a user-friendly platform to create content tailored to your needs.

Stay tuned as we delve into the functionalities and capabilities of Wagtail for Patient Portal, guiding you through its features, best practices, and starting points for creating your content.

## Accessing Wagtail CMS

To manage the content for the Patient Portal UAT Test:

- Please access it via the URL <https://uat-test-patient-portal-api.riviam.net/cms/>. Please enter your username and password on the login page and click Sign in. Any updates made here will be reflected in the Patient Portal UAT test site <https://uat-test-comm-patient-portal.riviam.net/booking>

To manage the content for Patient Portal LIVE

URLs to the Wagtail CMS and Patient Portal are TBC.

When received, please enter your username and password on the login page and click Sign in.

## User interface overview

Wagtail provides a versatile content management system interface designed to streamline content creation and organisation. Key features include:

- **Dashboard:** The central hub for managing content, displaying an overview of moderation tasks, recent edits, and locked pages. Users can customise their dashboard views based on roles and permissions.
- **Sidebar navigation:** A collapsible menu offering quick access to sections like search, documents, snippets, forms, reports, and settings. This ensures efficient navigation across the platform.
- **Explorer:** Facilitates hierarchical content management. It allows users to manage parent-child relationships, reorder pages, and quickly access editing options through an intuitive tree structure.
- **Content editor:** Wagtail's editor allows an easy way to create content for different page types. Users can save content as a draft and collaborate with other team members before publishing it.

Take note of the steps and screenshots below. They are your way to navigate the CMS whenever you need to create or edit content.

Upon signing in, the dashboard is presented.

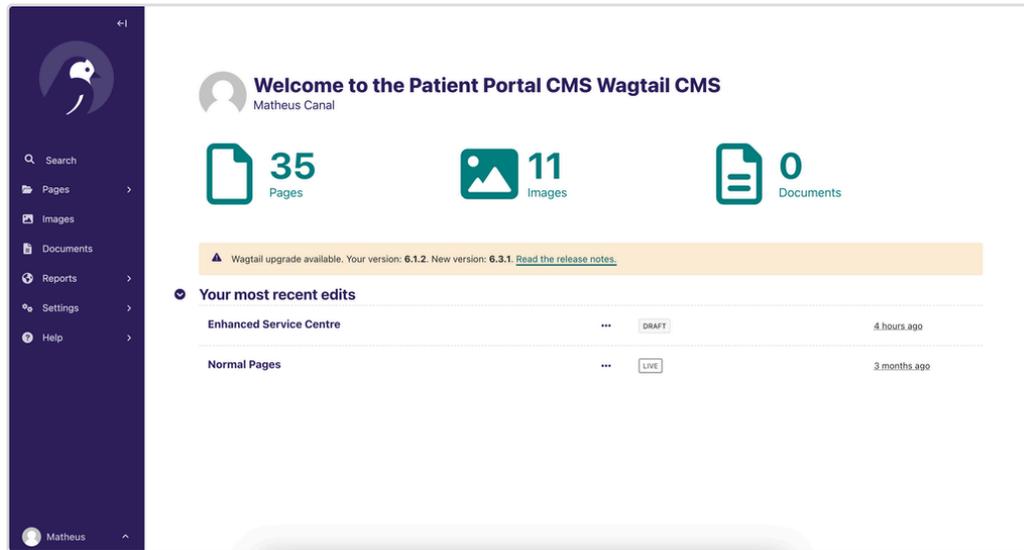


Figure 1 Wagtail Dashboard

Using the sidebar, navigate to the Pages section. RIVIAM has added some content already named “Patient Portal Content UAT”. Click on the item ‘Patient Portal Content UAT’ to start managing/ editing the content.

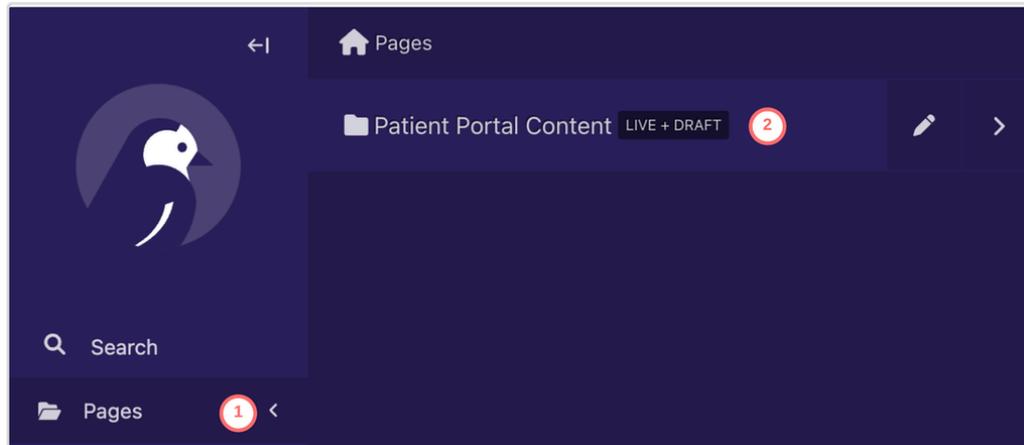


Figure 2 Sidebar navigation to Patient Portal content

The explorer lists the four types of pages used in the Patient Portal:

- News
- Clinic site locations
- FAQs
- Normal Pages

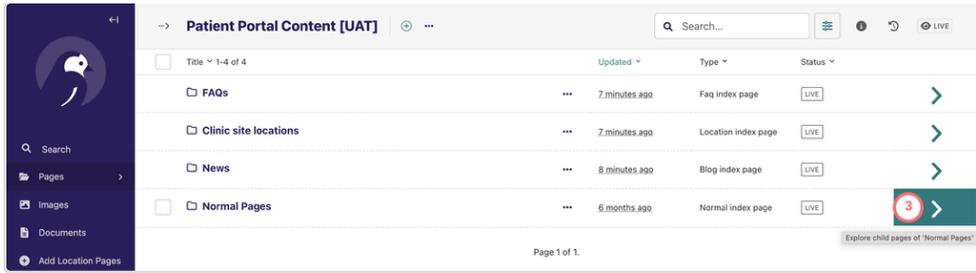


Figure 3 Explorer listing types of pages used by the Patient Portal

Click on the chevron button “>” on the right-hand side to open a folder and view its child pages.

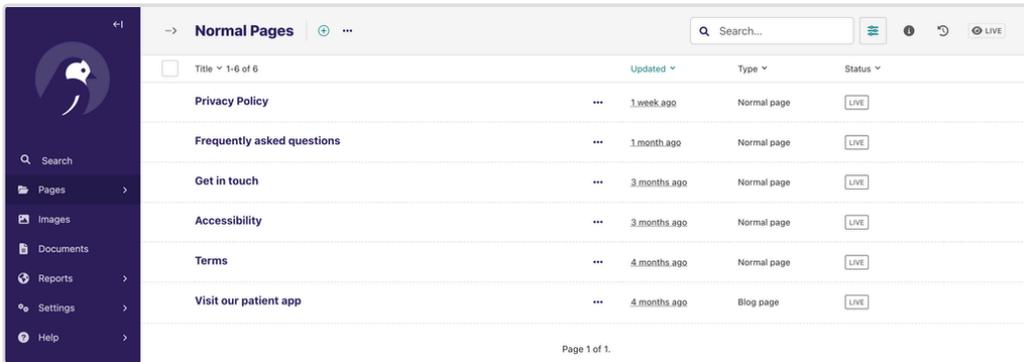


Figure 4 Explorer listing Normal pages from the Patient Portal

## Normal Pages

Normal Page types are designated pages for whole-screen content using text and media, for example, the **Privacy policy** or the **Terms and Conditions**.

### Adding normal pages

Please note you can create new Normal pages, but RIVIAM would need to be involved as they are coded to the application and require development. You can, however, edit existing normal pages content without RIVIAM’s help.

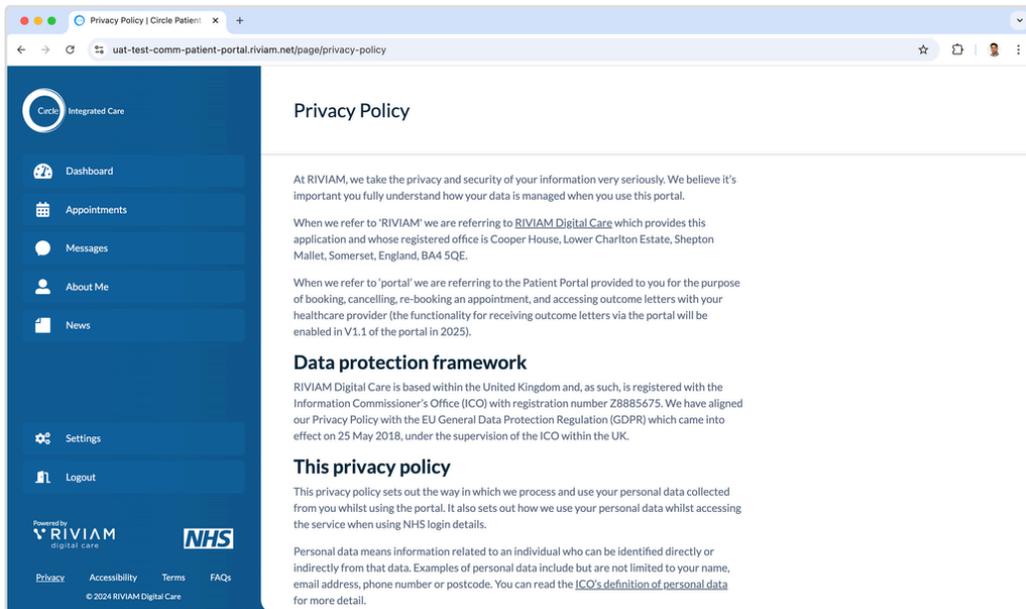


Figure 5 Example of a normal page

## Editing normal pages

To edit existing normal pages, sign in to Wagtail CMS for the Patient Portal and follow the steps described in the section 'User interface overview' to navigate to the 'Normal pages' folder.

Once there, select a page to edit by clicking on its name or the menu action button and select 'Edit'.

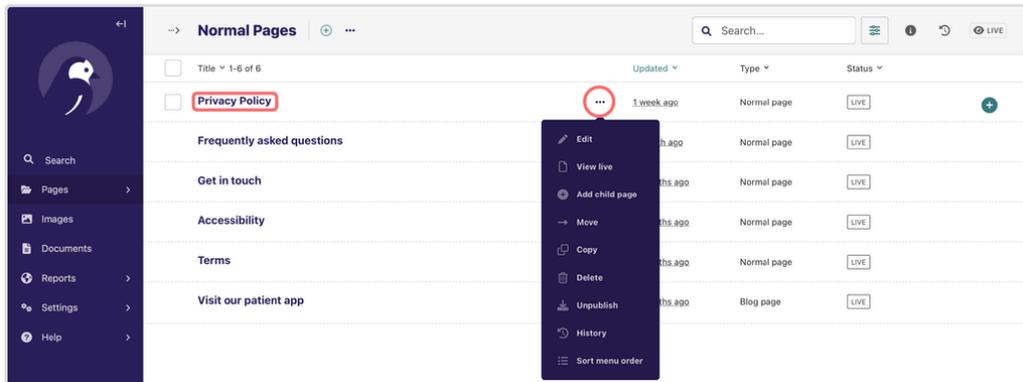


Figure 6 Editing normal pages

In the content editor, you can choose a title for your page and insert blocks of paragraphs and images. The rich text editor provides features like bold and italic styling, text alignment, lists, hyperlinks, and media embedding.

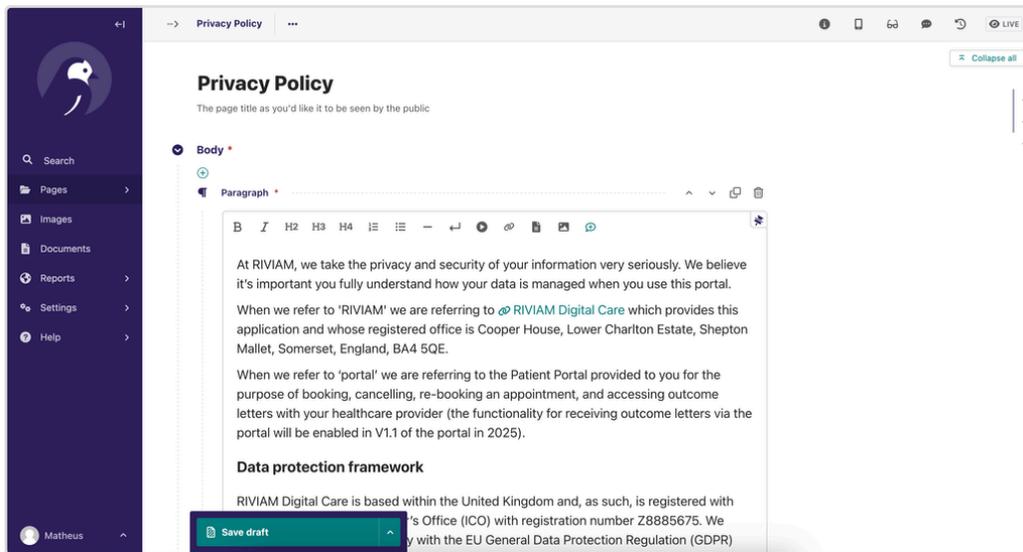


Figure 7 Editing a normal page on the content editor

## Save Updates/ Publish/ Unpublish/ Submit for moderators approval

You can save any changes as a draft page for further work, and when you are ready, publish it to the website. To remove an existing page, click on 'Unpublish'. Click on the green 'Save draft' button to save your changes and to publish/unpublish, click on the up arrow and choose that option as required.

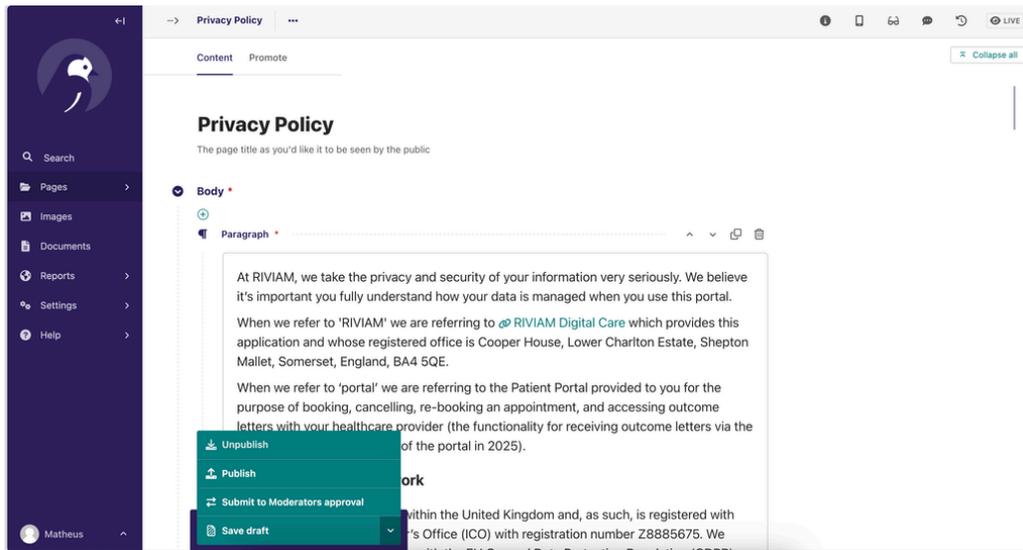


Figure 8 Saving a normal page on the content editor

A confirmation message should appear at the top of the screen to advise if the update was successful. Please note that the 'View live' option is still being developed.



If you select **Submit for moderators approval**, the CMS content moderator will be emailed to notify them that changes have been made and are awaiting their approval. The moderator will log in to the CMS system and have the option to make changes or approve and publish.

## News

News pages are used for communicating the latest news, and unlike Normal Pages, there isn't a restriction on the number of pages you can create. So, let's get creative!

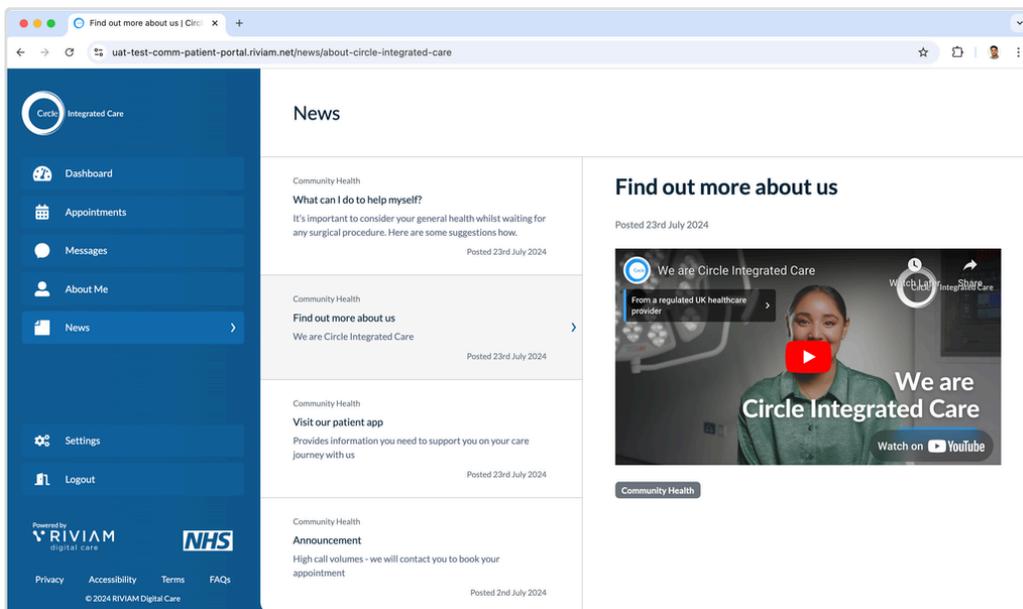


Figure 9 Example of a blog page

## Creating news pages

To create new news pages, sign in to Wagtail CMS for the Patient Portal and follow the steps described in the 'User interface overview' section to navigate to the '**News**' folder, which represents the News section.



Figure 10 Adding new child page

Once there, click + '**Add child page**' at the top of the screen, and select the option '**Blog page**'.



Figure 11 Adding a new news page

You will be presented with a form to fill in the title of the page, post date, and a short introduction, which is placed underneath the page title, the content body, and tag any category related to the content you are creating.

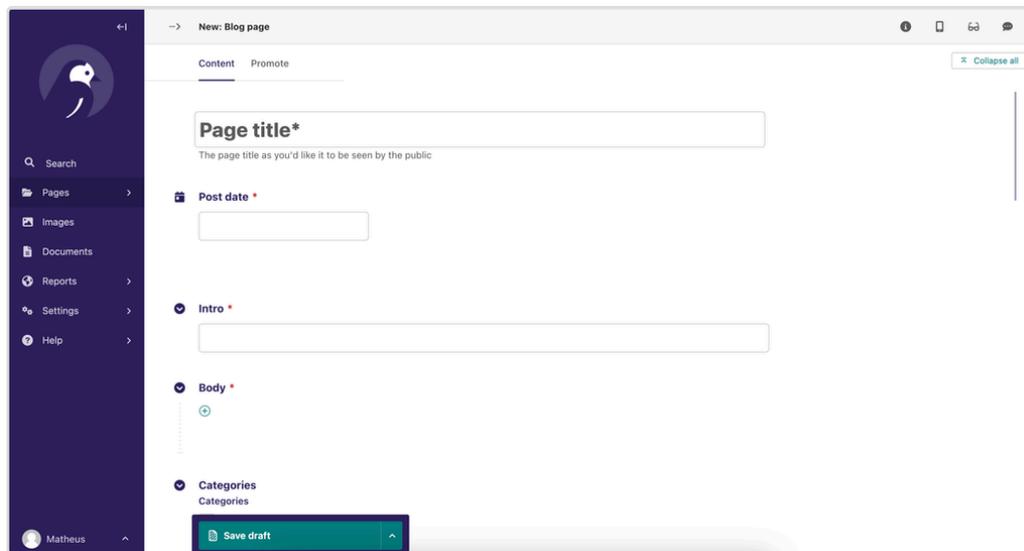


Figure 12 Creating the blog page

You can add three different types of content on the body of your blog page:

1. Paragraphs
2. Images
3. Embedded content.

You can choose by clicking on the plus button in the body section.

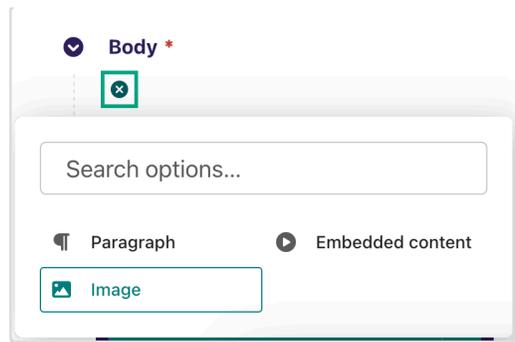


Figure 13 Choosing a type of content

Just as on the Normal Pages, the paragraph is enabled by a rich text editor, which allows a dynamic and creative approach to your content.

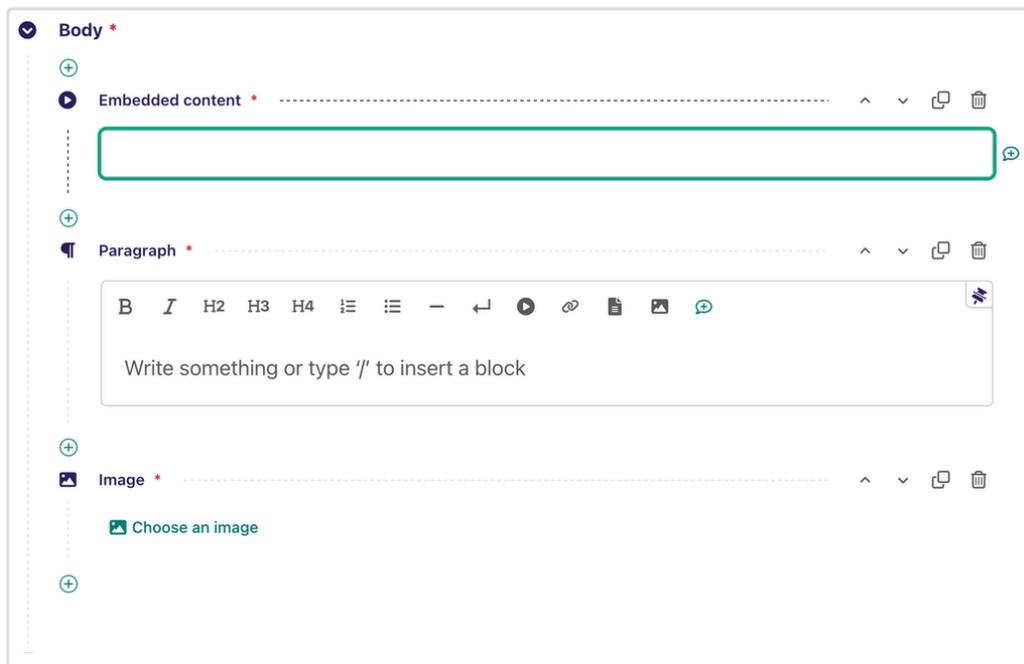


Figure 14 Creating the body content from the options

If you choose to add images, you will be prompted to upload your image or search within existing uploaded ones.

**i** A recommended image resolution to use on the internet is 92 dpi

Upon uploading, you can add a title and tags to the image, making it easier to categorise and future search.

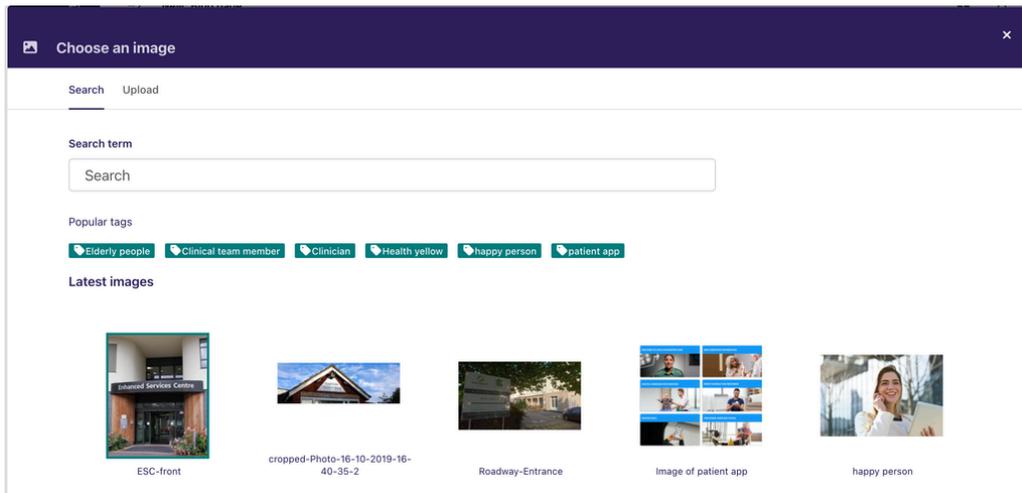


Figure 15 Adding an image

Lastly, the embedded content will load the URL within the page, for example, a video from YouTube, or a post from X (Twitter).

Just like Normal Pages, you can save it as a draft page for further work, and when you are ready, publish it to the website. To remove an existing blog page, click on 'Unpublish'.

### Editing an existing news page

To edit an existing blog page, navigate to the News folder and click on the name of the page you would like to edit, or on the three-dots button, and select 'Edit'.

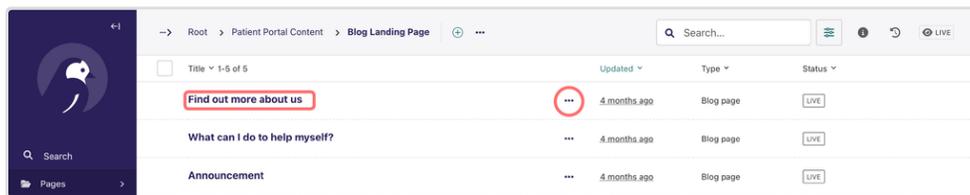


Figure 16 Editing an existing blog page

## FAQs

FAQs are useful, particularly in reducing support requests, as they answer the most common questions regarding your services.

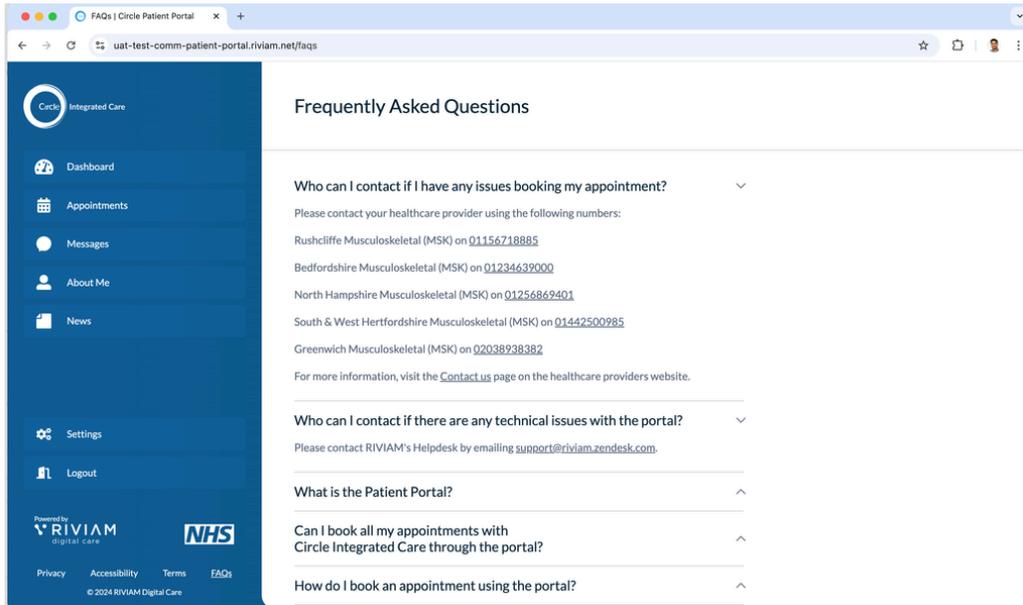


Figure 17 FAQ page in Patient Portal with questions

## Creating a question for the FAQs

To create a new question, sign in to Wagtail CMS for the Patient Portal and follow the steps described in the 'User Interface Overview' section to navigate to the **'FAQs' folder**, which holds the questions. Click on the chevron >, and the list of FAQs already added will appear.

## Adding a new FAQ

To add a new FAQ, select the + button to add a child page, then select the option **"FAQ page"**

**i** Future iteration will allow association between a question and a Service area (contract)

You can define the question on the Page title and the answer in the field below. Unlike Blog and Normal pages, this text editor has limited functionality. However, it is still dynamic, allowing lists, hyperlinks, images and embedded content.

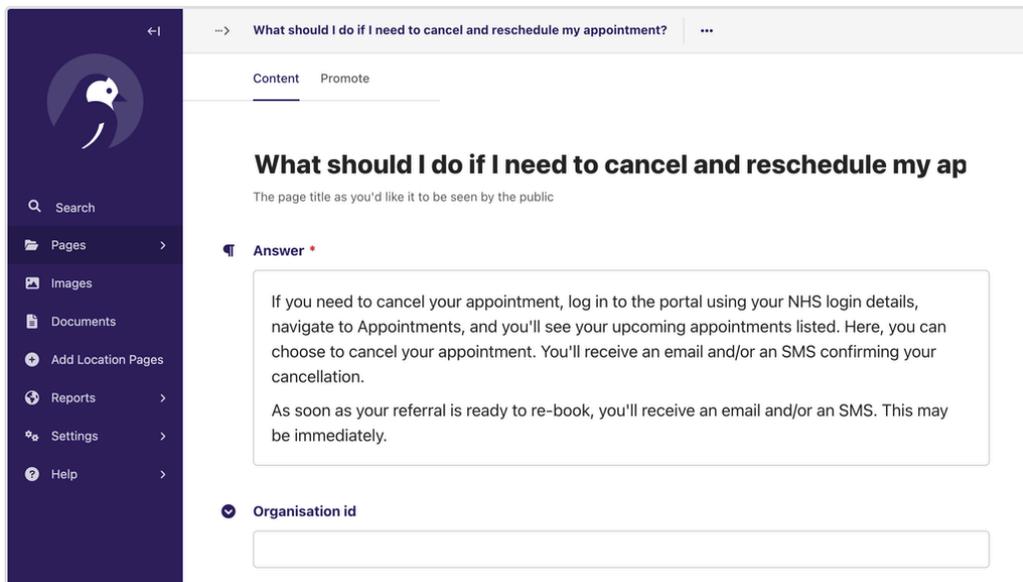


Figure 17 New question form

As with the other pages, you can save a question as a draft for further work, and when you are ready, publish it to the website. To remove an existing question, click on 'Unpublish'.

## Editing an existing FAQ

To edit an existing question, navigate to the FAQs' folder and click on the name of the page you would like to edit, or on the three-dots button, and select 'Edit'.

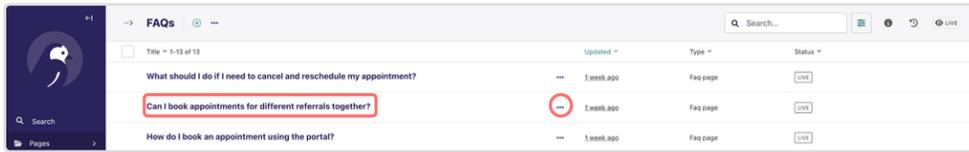


Figure 18 Selecting an existing question

## Clinic site locations

Clinic site location pages are designated for helping the patient by providing detailed information on a clinic's physical location and attributes. They are presented on the Patient Portal under the Appointments section.

This could include directions on how to get to the location, availability of public transport nearby, how accessible the building is, parking details, and anything that is useful to the patient.

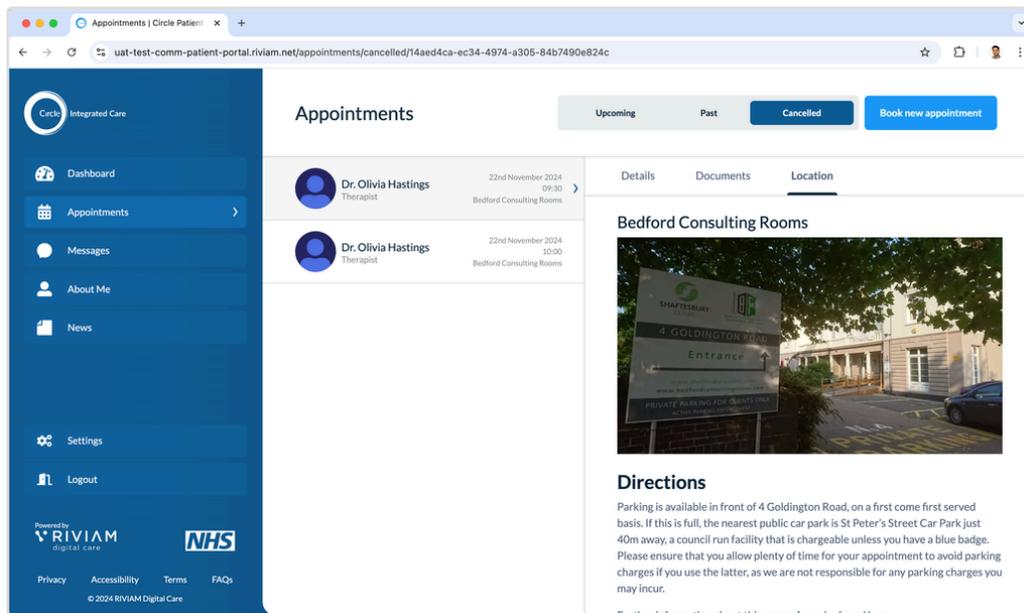


Figure 19 Example of a Location detail in Patient Portal

## Creating a new clinic site location page

To update clinic locations automatically, click on the left-hand navigation menu option **"Add Location Pages"**. If there are any new locations available, they will appear on the list below.

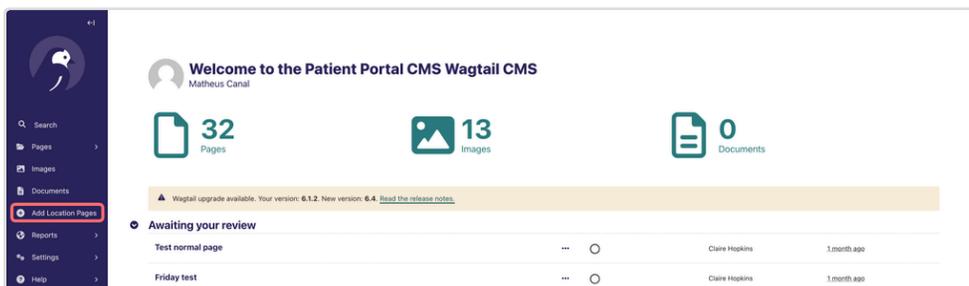


Figure 20 Adding new location pages

To view the locations already created, navigate to the '**Clinic site locations**' folder. Select the chevron >, and this will list the locations already set up. To add a new location, select the + **add child page** and then '**Location page**'.

The screenshot shows the Wagtail CMS interface for editing a location page. The left sidebar contains navigation options like Search, Pages, Images, Documents, Add Location Pages, Reports, Settings, and Help. The main content area is titled 'Bedford Consulting Room Clinics' and includes a 'Content' tab. The form fields are: 'Location id' with the value '779f0e39-ad1e-432a-a028-34dcc49c1e70', 'Contract name' with 'Bedfordshire MSK', and 'Phone' with '01234639000'. Below these is a 'Description' field containing an image of a building entrance with the caption 'Roadway-Entrance'.

Figure 21 Location page form

The clinic locations will be created with their name, id, contract and telephone. You will be asked to complete only the description of the location, e.g., parking information and accessibility.

In the content editor, you can insert blocks of paragraphs and images. Similar to Normal Pages, the rich text editor provides features like bold and italic styling, text alignment, lists, hyperlinks, and media embedding.

As with the other pages, you can save a location page as a draft for further work, and when you are ready, publish it to the website. To remove an existing location page, click on 'Unpublish'.

### Editing an existing clinic site location page

To edit a new location detail page, sign in to Wagtail CMS for the Patient Portal and follow the steps described in the 'User interface overview' section to navigate to the '**Clinic site locations**' folder.

Click on the name of the location you would like to edit, or on the three-dots button, and select 'Edit'.

The screenshot shows a list of location pages in the 'Clinic site locations' folder. The list has columns for 'Title', 'Updated', 'Type', and 'Status'. The 'Alton Health Centre' entry is highlighted with a red box, and its edit icon (three dots) is also highlighted with a red circle.

Title	Updated	Type	Status
Alton Health Centre	1 month ago	Location page	LIVE + DRAFT
Anjullia Court Care Home	1 month ago	Location page	LIVE + DRAFT
Asplands Medical Centre	1 month ago	Location page	LIVE + DRAFT
Barton Le Clay Village Hall	1 month ago	Location page	LIVE + DRAFT

Figure 22 Selecting an existing Location detail page

As with the other pages, you can save a location page as a draft for further work, and when you are ready, publish it to the website. To remove an existing location page, click on 'Unpublish'.

## Settings

Administrators can manage users, categories, workflows and other administrative tasks. You need the correct role to access this area.

### Creating or editing users

To manage users, select Settings on the left menu and then the option 'Users'. You will be presented with a list of existing users and their details.

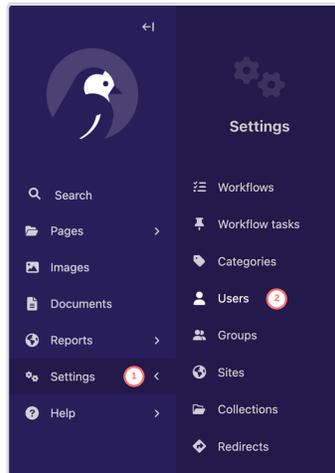


Figure 23 Accessing Users

You can select one or more users to perform collective actions, such as deletion, activation or deactivation and role assignment. To create a new user, click on the 'Add a user' button at the top of the screen.

<input type="checkbox"/>	Name ^	Username v	Access level v	Status v	Last login v
<input type="checkbox"/>	tim@riviam.com	...	tim@riviam.com	Admin	<input type="button" value="ACTIVE"/>
<input type="checkbox"/>	John Askew	...	john@riviam.com		<input type="button" value="ACTIVE"/> 9 months ago
<input type="checkbox"/>	Gareth Butt	...	gareth@riviam.com		<input type="button" value="ACTIVE"/> 9 months ago
<input type="checkbox"/>	Matheus Canal	...	matheus@riviam.com	Admin	<input type="button" value="ACTIVE"/> 17 hours ago

Figure 24 Users list

You will add the user's email, name and a temporary password. Next, you can assign one or more roles from the options:

- **Administrator:** Full access to all admin interface features, including user management.
- **Moderator:** Can create drafts and publish content but cannot access the Settings section.
- **Editor:** Can create drafts but cannot publish them or access the Settings section.

The screenshot shows a 'New: User' form with the following fields and instructions:

- Email \***: A text input field.
- First Name \***: A text input field.
- Last Name \***: A text input field.
- Password \***: A text input field with a warning message: "Your password can't be too similar to your other personal information. Your password must contain at least 8 characters. Your password can't be a commonly used password. Your password can't be entirely numeric."
- Password confirmation \***: A text input field with the instruction: "Enter the same password as above, for verification."

Figure 25 Create a new user screen

## Creating or editing categories

Categories are very useful for classifying your news content. You can add new categories, and edit or delete existing ones via the menu Settings, option 'Category'.

The screenshot shows a 'Categories' list with the following data:

Name	Edit	Delete
Community Health	Edit	Delete
Mental Health	Edit	Delete
AI	Edit	Delete
Technology	Edit	Delete

Page 1 of 1.

Figure 26 Categories list

## Feedback

We are committed to continuous improvement and value your input in enhancing the Wagtail CMS for the Patient Portal. Your feedback is crucial in helping us identify areas of strength, opportunities for improvement, and innovative ideas to make the tool more user-friendly and efficient. Whether you have suggestions for new features, changes to existing functionalities, or general comments about your user experience, we want to hear from you!

### How to provide feedback

Send your thoughts and suggestions via email to [support@riviam.zendesk.com](mailto:support@riviam.zendesk.com). We welcome all forms of feedback, from quick suggestions to detailed proposals.

### What happens to your feedback?

Our team reviews every piece of feedback. Whilst we may not be able to implement every suggestion, we ensure that your ideas are considered carefully. Here's what we do with your feedback:

- **Prioritisation:** Feedback is categorised and prioritised based on factors such as the number of requests for a similar feature, impact on the user experience, and alignment with our product roadmap.
- **Development planning:** High-priority feedback items are incorporated into our development planning process. We strive to keep the community updated on what we are working on and potential release timelines.

- **Continuous updates:** We regularly update our users on new features, improvements, and fixes that your feedback has influenced. Monitor the tool's update logs and newsletters for these announcements.

### **Your role in shaping the future**

Your insights play a vital role in shaping the future of Wagtail CMS for the Patient Portal. By sharing your experiences and ideas, you contribute to a collaborative effort to create a more powerful, intuitive, and user-centric tool. We look forward to hearing from you. Thank you in advance for your valuable input.