



Members

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Members

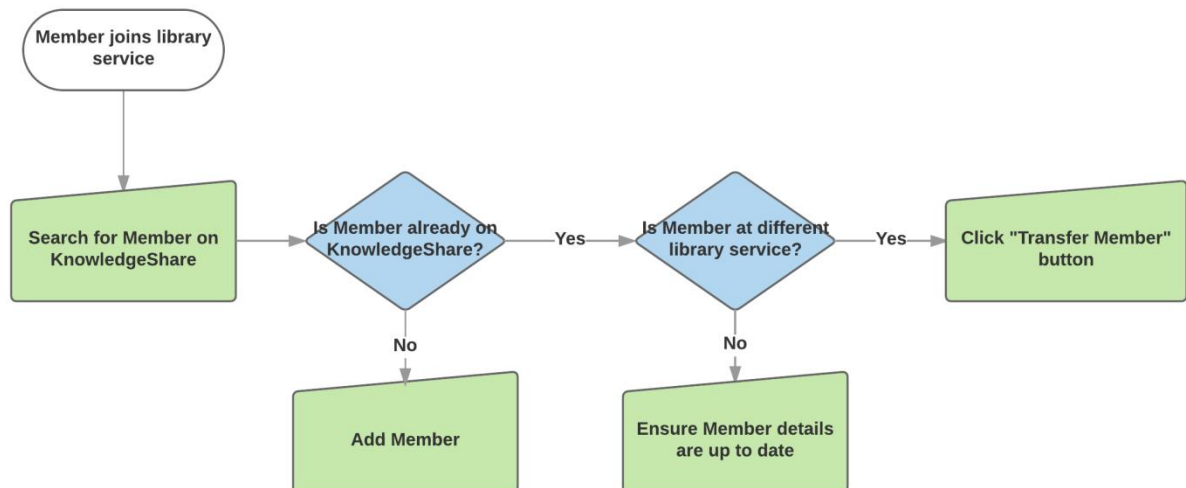
What is a Member?

Member is the term given in KnowledgeShare to users of the systems who are library members but not library staff.

A member can self-register on KnowledgeShare or be added by Library Staff.

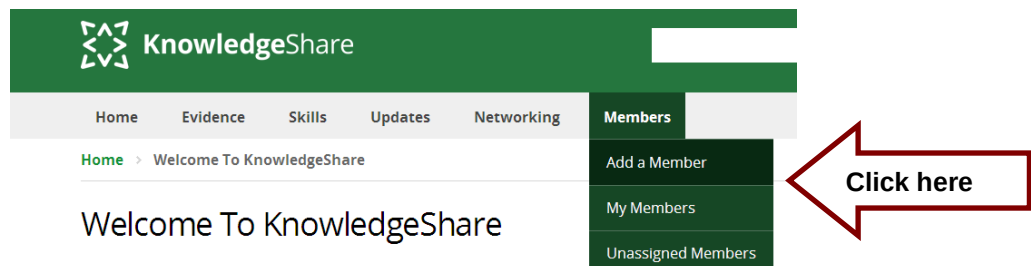
2.0 Staff adding a new Member

Best practice before adding a new member is to search to see if they already have a record on KnowledgeShare



2.0.1 Add a new Member

- Hold cursor over **Members** and then click **Add a Member**.



- Yellow coloured fields are mandatory, and the record will not save until these are filled in



2.0.1.1. Login Details

KnowledgeShare was designed to use the NHS OpenAthens Persistent User ID (PUID) in users record to give members access when they log in with their Username and Password. OpenAthens no longer recommends the use of the OpenAthens Persistent User ID and now encourages the use of the more secure pseudonymous user identifier, the Targeted ID. <https://docs.openathens.net/libraries/about-released-attributes>

The Targeted ID can only be shared between computer systems and cannot be manually added to a KnowledgeShare member record.

Work is being done to future proof the system so members will be able to access KnowledgeShare when the NHS OpenAthens Persistent User ID (PUID) is no longer available. Newly added members can use the link in the Welcome to KnowledgeShare email to access the system, which captures the Targeted ID as part of the authentication process. Additionally, any member who logged in or self-registered on KnowledgeShare since 30 June 2020 will have had their Targeted ID captured in addition to their PUID.

While NHS OpenAthens continues to provide a PUID for new members, KnowledgeShare will be able to use this ID to provide access.

2.0.1.1.1 Manually Adding OpenAthens Username and OpenAthens Persistent User ID

Access to KnowledgeShare for Members can be provided by adding the OpenAthens Persistent User ID to their record. This is optional.

Login Details	
OpenAthens username	OpenAthens persistent user ID

- OpenAthens Username
 - This field enables you to record the OpenAthens username of the member
- OpenAthens Persistent User ID
 - This field enables you to record the OpenAthens Persistent User ID of the members
 - The OpenAthens Persistent User ID can be found by:
 - Login into OpenAthens admin
 - Use the advance search function to find the library member
 - In the search results screen click **Show/hide columns** icon

Dashboard > Advanced search > Search results

← Refine search You searched for **all accounts** that are **activated** or **not activated** that are **banned** and belong to **me** [More...](#)

Personal **1** Access **0** Administrator **0** Deleted **0**

Show/hide columns

Group

USERNAME	FIRST NAME(S)	LAST NAME	EMAIL ADDRESS
----------	---------------	-----------	---------------

- Scroll down the list of column titles and select **Persistent user identifier**. Click **Set Columns**

Choose visible columns.

☒ Eligibility expiry date

☐ I agree to be contacted occasionally by NIC...

☐ Acceptance of general terms and conditions

☐ Contract Type

☒ Persistent user identifier

☐ Unique ID

☐ Creation date

☐ Expiry date

☐ Organisation

Cancel Default **Set columns**

- Copy the Persistent user identifier from the column and paste into the **OpenAthens Persistent User ID** field of the Members record.

Dashboard > Advanced search > Search results

← Refine search You searched for **all accounts** that are **activated** or **not activated** that are **banned** and belong to **me** [More...](#)

Personal **1** Access **0** Administrator **0** Deleted **0**

Group

Show 25 50 100 << First < Previous Next > 1-1 of 1

USERNAME	FIRST NAME(S)	LAST NAME	EMAIL ADDRESS	ELIGIBILITY EXPIRY DATE	PERSISTENT USER IDENTIFIER	STATUS
☐ nhsgabrieloak100	KnowledgeShare	Test Member	elaine.watson13@nhs.net	31 March 2023	c7764204016d723	active

What should I do after “The username you entered already exists in the database. Please try an alternative name.” error message?

Add a Member

The data you entered contained one or more errors. Please recheck your input and try again.

User Information

Login Details

OpenAthens username

nhselainewatson001

The username you entered already exists in the database. Please try an alternative name.

OpenAthens persistent user ID

c3f71004:01f29c1

OpenAthens ID is already assigned to another user.

When an NHS OpenAthens account expires, the username is recycled and given to the next person whose name matches the initial letter of their first name and surname combination.

The error message “The username you entered already exists in the database. Please try an alternative name.” is usually generated when there is a member record on KnowledgeShare with an expired NHS OpenAthens account as KnowledgeShare only allows one member record per NHS OpenAthens account.

- When you add a member’s OpenAthens username and OpenAthens persistent user ID (PUID) and get the error message “The username you entered already exists in the database. Please try an alternative name.” You should:
 - Check your member’s OpenAthens account details are correct on Athens Admin
 - If member’s OpenAthens account is correct, search for NHSOpenAthens username on KnowledgeShare using the basic search field
 - If the NHSOpenAthens username search matches a member at another library service in KnowledgeShare, send a request to uhsussex.knowledgeshare@nhs.net to have the username deleted from the member’s record
- Once the username and PUID has been deleted from the other record you will then be able to save these details on your members’ record without the error message being generated.

2.0.1.1.2 Access via the Welcome to KnowledgeShare email

Access to KnowledgeShare for Member can also be provided via a link within an email with the subject heading **Welcome to KnowledgeShare**.

An email, with the subject heading **Welcome to KnowledgeShare**, is automatically sent to a new member when Save is clicked on the Add New Member page. The email includes a link that allows members to add their NHS OpenAthens details to their newly created KnowledgeShare record so they can log in directly to the system.

The email also ensures that all members are told how we are processing their information, and that they have easy access to their own data so that they can check what we hold about them and make changes, or request changes be made.

The email will appear to come from the member of staff who has added the new Member record to the system

- When the Member clicks on the **[confirm registration]** link in the email, they will be asked to enter their email address. This email must match the email on their KnowledgeShare record for the registration to be successful

System Level Email Template Name: NewMemberInvitation
Subject Line: Welcome to KnowledgeShare

Dear Dr Smith,

As a member of Brighton and Sussex University Hospitals NHS Trust, I have just added you to KnowledgeShare. We use this system to provide and manage your access to library services, such as evidence updates, provided by Brighton and Sussex Library and Knowledge Service.

Please log into KnowledgeShare and check your details:

- Click: [\[confirmation link\]](#) *Please accept cookies to allow this process to work*
- Enter the email address this email was sent to
- Log in with your NHS OpenAthens username and password

You will then be able directly access KnowledgeShare using your NHS OpenAthens login. If you don't have an NHS OpenAthens username and password you can self-register at: <https://openathens.nice.org.uk/>

We are committed to safeguarding your information. The information you supply will be used to contact you about services or resources you have requested from the Library and Knowledge Service. For further information on how we keep your information secure, and your rights to access it, read the full KnowledgeShare [Privacy Policy](#).

Yours sincerely,
Elaine

Elaine Watson
Knowledge Management Librarian | elaine.watson@bsuh.nhs.uk
Brighton and Sussex Library and Knowledge Service | www.bsuh.nhs.uk/library

----- Sent out by KnowledgeShare-----

This page is showing public data. To access protected content you must be logged in using OpenAthens. [Log in](#) [Sign up for OpenAthens](#)

KnowledgeShare [Search](#)
Advanced Search

[Home](#) [Help](#)

The site uses cookies in order to remember who you are and to provide a better user experience. Without cookies, every time you go to a new page it will be as if you are a brand new visitor, and this may limit the site's usefulness. A cookie has already been set for this purpose, but you can tell your browser to delete it and to block all cookies from this site (though parts of the site may not work correctly if you do so). By continuing to use the site you consent to our use of cookies. [Dismiss this message.](#)

[Home](#) > [Confirm email](#)

Welcome to KnowledgeShare

To complete the sign-up process, you will need to **confirm your email address**, to ensure that we link you to the correct member record.

Once your address is confirmed, you will be redirected to login via OpenAthens. Completing the login will link your Athens login to your KnowledgeShare account. If you are not registered with OpenAthens, then follow the link at the top-right of the page and return here once your OpenAthens sign-up is complete.

Confirm email address:

[Confirm address and proceed to OpenAthens login](#)

[About](#) | [Terms & Conditions](#) | [Privacy Policy](#) | [Accessibility](#) | [Credits](#) © Copyright 2013 - 2016, BSUH NHS Trust

Provided by Brighton and Sussex University Hospitals In consultation with swiis Built by MALDABA

- The Member is then given the option to enter their NHS OpenAthens username and password or find their institution

Sign in with an OpenAthens account

Username

Password

[Sign in](#)
[Problems signing in?](#)

Find your institution

Search

OR

By using this site you agree to us setting cookies. Please see our [privacy and cookie information](#).

Powered by OpenAthens

- The Targeted ID of the members NHS OpenAthens account will now be associated with the members KnowledgeShare record. They will now be able to log in directly to KnowledgeShare

2.0.1.2. Personal Information Details

Personal Information

Welcome to KnowledgeShare

Profile Picture


 No file chosen

How would you like to be addressed in emails?

☒ Address formally ☐ Address informally

Title **First name(s)** **Last name**

Email address **Additional Emails**

Use this address for communications ☒

Phone number

LinkedIn **Twitter**

www.linkedin.com/in/ @

- Profile Picture
 - Click **Browse/Choose file** (depending on the browser) and select an image which will appear at the top of the Member Profile page

Home Evidence Skills Updates Networking Members

Home > Dr Walter Bray

 Dr Walter Bray

 (no number stored)

 walter.bray@nhs.net

 Haywards Heath Health Centre
Heath Road

OpenAthens username
nhswalterbray103

Job title
Consultant

- Title
 - *Mandatory Field* when **Address formally?** is checked

How would you like to be addressed in emails?

☒ Address formally ☐ Address informally

Title **First name(s)** **Last name**

Dr Walter Bray

- *Not Mandatory* when **Address formally?** is unchecked

How would you like to be addressed in emails?

☐ Address formally ☒ Address informally

Title **First name(s)** **Last name**

Dr Walter Bray

- Select one of the options from the pull-down list
 - Canon
 - Dr
 - Lt Col
 - Miss
 - Mr
 - Mrs
 - Ms
 - Mx
 - Professor
 - Reverend
 - Sgt
 - Sqn Ldr
- First Name(s)
 - *Mandatory Field*
 - Capitalise the first letter of the members first name
 - It is not necessary to include middle names
- Last Name
 - *Mandatory Field*
 - Capitalise the first letter of the member's last name
- Address formally? (*How would you like to be addressed in emails?*)
 - *Default setting is checked*
 - Use this field for how the Member likes to be addressed in correspondence. If member likes to be addressed Dr Smith or Mr Jones check the Address formally? box. If a member likes to be addressed by their first name then uncheck the **Address formally?** box
- Preferred Name (*Edit if preferred name is different from first name*)
 - Use this field if the Member likes to be addressed by an abbreviation or version of their first name. If a member is called Elizabeth but likes to be addressed as Liz, Elizabeth would be in the **First Name** field and Liz would be entered in **Preferred Name**.

How are Member names displayed?

The text under Welcome to KnowledgeShare displays how the member will be addressed in emails

If **Address formally?** is checked:

Welcome to KnowledgeShare,
Dr Bray

How would you like to be addressed in emails?

☒ Address formally ☐ Address informally

If **Address formally?** is unchecked:

Welcome to KnowledgeShare,
Walter

How would you like to be addressed in emails?

☐ Address formally ☒ Address informally

- Email Address
 - *Mandatory Field*
 - *Default setting for Use this address for communication is checked*
 - Each Member must have at least one email address in their KnowledgeShare record.
 - The checkbox under the email address indicates that this is the email address the system will use to send current awareness updates and searches.

Use this address for communications ☒

Why have I got the 'Email must be a valid email' error message?

The 'Email must be a valid email' error message may appear if you copy and paste an email address. Delete any empty spaces at the start and end of the email address and resave

Email address

Email address must be a valid email.

Use this address for communications ☒

At least one email must be marked "Use this address for communication"

The 'Email must be a valid email' error message may appear if you copy and paste an email address containing an apostrophe in a type KnowledgeShare doesn't accept. If the email contains a curvy apostrophe, or single closing quote mark, KnowledgeShare will reject the email:

Email address

Email address must be a valid email.

Use this address for communications ☒

At least one email must be marked "Use this address for communication"

Copy and paste the email address into a Notepad file and replace the apostrophe. In Notepad this will be a straight apostrophe or true apostrophe, which will be accepted when copied and pasted into KnowledgeShare:

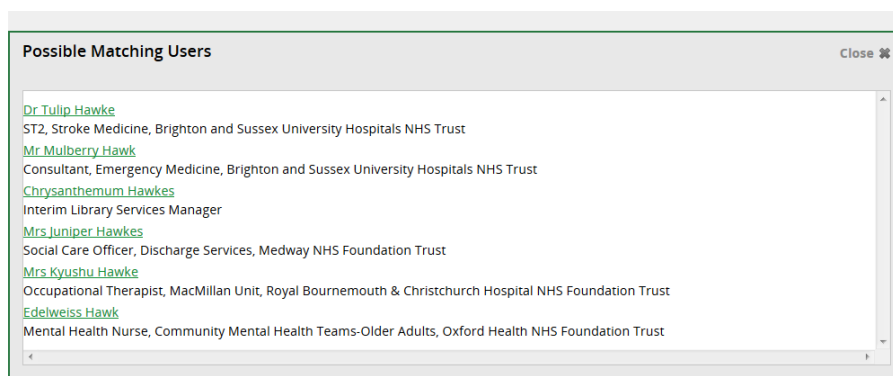
- **Additional Emails**
 - Click **Add Email** to create an additional email field
 - If the “Use this address for communications” box is checked the system will send current awareness updates and searches to this email as well as the first email address.
 - A Member can switch between email addresses. E.g. choosing to switch to their personal email from their work email when they go to a conference
- **Phone Number**
 - Do not enter personal mobile number unless Member has specifically given permission to share this information
- **LinkedIn**
 - This field enables members to add their LinkedIn Profile name

LinkedIn	Twitter
www.linkedin.com/in/	@

- **Twitter**
 - This field enable members to add their Twitter (X) username

2.0.1.3. Possible matching Members

After first name, last name and email are entered into the Add Member page a pop up screen showing possible matching Members will appear



- Clicking on a possible match will cancel the adding Member function and take you to the selected record
- Click **Close** to remove the pop-up screen

2.0.1.4. Organisation and Role

Organisation and Role

Organisation

Job Title

Department

Job Group

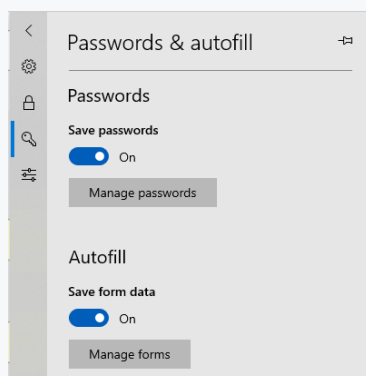
Job Role

- Organisation
 - *Mandatory Field*
 - Select from pull-down menu of Organisations
 - If the member's Organisation is missing from the list inform your KS administrator
- Job Title
 - *Mandatory Field*
 - Capitalise the first letter of the job title
- Job Group
 - *Mandatory Field*
 - Select one of the options from the drop down list
- Job Role
 - *Mandatory Field*
 - The list of Job Roles changes due to the Job Group selected. Select one of the options from the drop down list.
 - These are based on 'A Guide to Staff Group, Job Role and Area of Work classifications used in ESR: Appendix B Job Role Definitions v9.0' by NHS Digital:
 - <https://digital.nhs.uk/data-and-information/areas-of-interest/workforce/national-workforce-data-set-nwd-guidance-documents>
- Department
 - *Mandatory Field*
 - Do not enter Ward names in this field - use the Address Line 1 field instead.
 - For GPs use **General Practice** as the department and add the GP surgery name into the Primary Location field

Why are departments and location not appearing in the drop-down list?

On the Add a member page, if you have selected an organisation but there are no options in the department and location fields, are you using Edge as a browser? If you are using Edge the autofill option is turned on and blocking the drop-down list.

To turn off autofill, go to Setting, select Passwords & autofill and set to Off. If you don't wish to change this setting, then use another browser when adding members



2.0.1.5. Address

Address

Room / Ward / Building Primary location

- Room / Ward / Building
 - Use this to provide additional information on the Member's physical location, such as Room, Floor, Ward or Building which are additional to the Primary Location
 - Click **Add Address Line** to add an additional field to capture further information on the member's location.
- Primary Location
 - *Mandatory Field*
 - Select from pull-down menu of Locations

2.0.1.6. Library and Knowledge Service

Library and Knowledge Service

Library and Knowledge Service

Library and Knowledge Service Membership Number

- Library and Knowledge Service
 - *Pre-selected*
 - This will match the Library and Knowledge Service of the member of staff adding the Member
 - Selecting 'Member is no longer assigned to an LKS' from the drop-down list will unassign the member from the Library and Knowledge Service
- Library and Knowledge Service Membership Number
 - Allows the member's library membership number to be added to their KnowledgeShare record
 - This aids identifying whether the member is a member of the Library and Knowledge Service already.

2.0.1.7. Privacy Settings

Privacy Settings

Who should be able to view your contact information?

Librarians only

Who should be able to view your professional interests?

Librarians only

Send me news and bulletins from my Library and Knowledge Service ☒

Why do we ask the Privacy Setting questions?

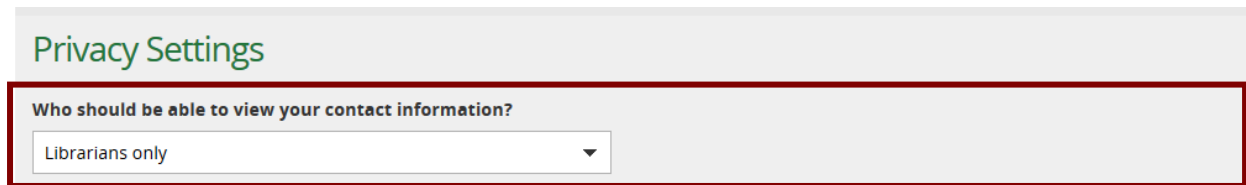
The KnowledgeShare Privacy Policy states:

“All registered users can see the most basic information that we hold about you: your name, job title, department, and organisation.

You may choose to share further contact information (including your professional interests) with other registered users in your own organisation or with other registered users on KnowledgeShare. In addition, you may choose to let other users know that you have requested an evidence search (you may choose to share or not share this information on a request-by-request basis). You may change your privacy settings by logging into KnowledgeShare.”

https://www.knowledgeshare.nhs.uk/index.php?PageID=help_privacy

2.0.1.7.1 Who should be able to view your contact information?

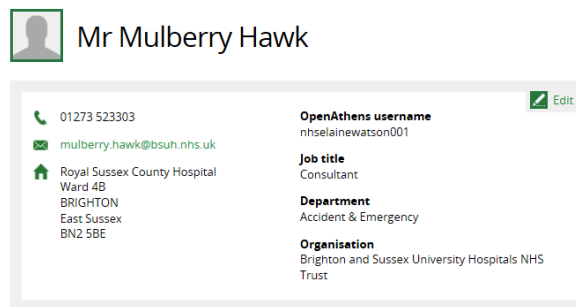


Privacy Settings

Who should be able to view your contact information?

Librarians only

- Who should be able to view your contact information?
 - Default: *Librarians only*. **LKS Staff should not change this default when adding a new member.**
 - Members may select one of the options from the pull-down list:
 - All KnowledgeShare members
 - Librarians and staff of your organisation
 - Librarians only
- The selection determines who will see the Member's contact information on their member profile record
 - Display for 'All KnowledgeShare members'

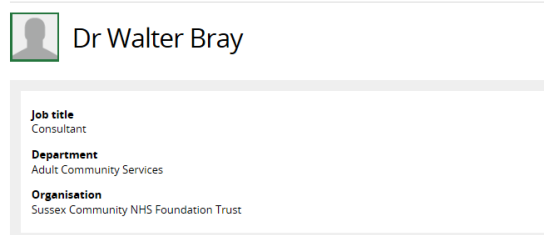


 Mr Mulberry Hawk

01273 523303	OpenAthens username nhselaineWatson001
mulberry.hawk@bsuh.nhs.uk	Job title Consultant
Royal Sussex County Hospital Ward 4B BRIGHTON East Sussex BN2 5BE	Department Accident & Emergency
	Organisation Brighton and Sussex University Hospitals NHS Trust

Edit

- Display for 'Librarians only'

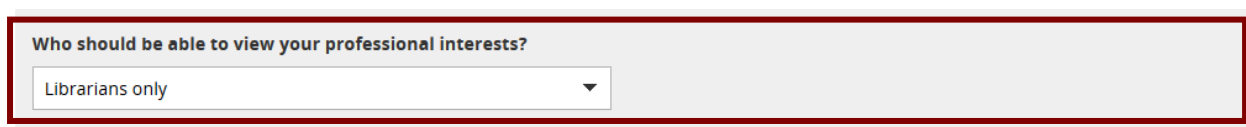


 Dr Walter Bray

Job title Consultant
Department Adult Community Services
Organisation Sussex Community NHS Foundation Trust

- The selection is synchronised with the other occurrences of this question on the:
 - Member Settings page on the Privacy tab
 - Member Professional Interests page

2.0.1.7.2 Who should be able to view your professional information?

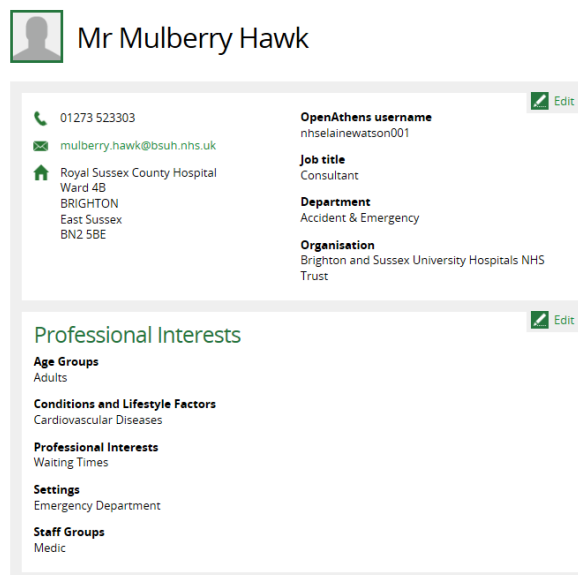


Who should be able to view your professional interests?

Librarians only

- Who should be able to view your professional interests?

- **Default: Librarians only. LKS Staff should not change this default when adding a new member.**
- Members may select one of the options from the pull-down list:
 - All KnowledgeShare members
 - Librarians and staff of your organisation
 - Librarians only
- The selection determines who will see the Member's professional interest categories on their member profile record
 - Display for 'All KnowledgeShare members'



Mr Mulberry Hawk

01273 523303
mulberry.hawk@bsuh.nhs.uk
Royal Sussex County Hospital
Ward 4B
BRIGHTON
East Sussex
BN2 5BE

OpenAthens username
nhselaineatson001

Job title
Consultant

Department
Accident & Emergency

Organisation
Brighton and Sussex University Hospitals NHS Trust

Professional Interests

Age Groups
Adults

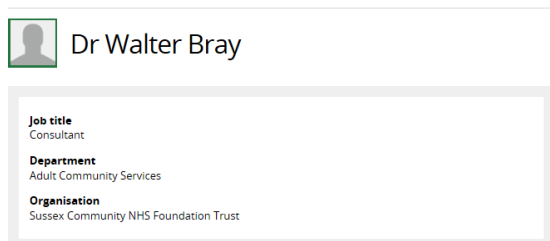
Conditions and Lifestyle Factors
Cardiovascular Diseases

Professional Interests
Waiting Times

Settings
Emergency Department

Staff Groups
Medic

- Display for 'Librarians only'



Dr Walter Bray

Job title
Consultant

Department
Adult Community Services

Organisation
Sussex Community NHS Foundation Trust

- The selection is synchronised with the other occurrences of this question on the:
 - Member Settings page on the Privacy tab
 - Member Professional Interests page

2.0.1.7.3 Receive additional bulletins or news from my library and knowledge service should be able to view your professional information?

Send me news and bulletins from my Library and Knowledge Service ☒

- Send me news and bulletins from my Library and Knowledge Service
 - **Default: checked. This allows members to receive Newsletters emailed via KnowledgeShare.**

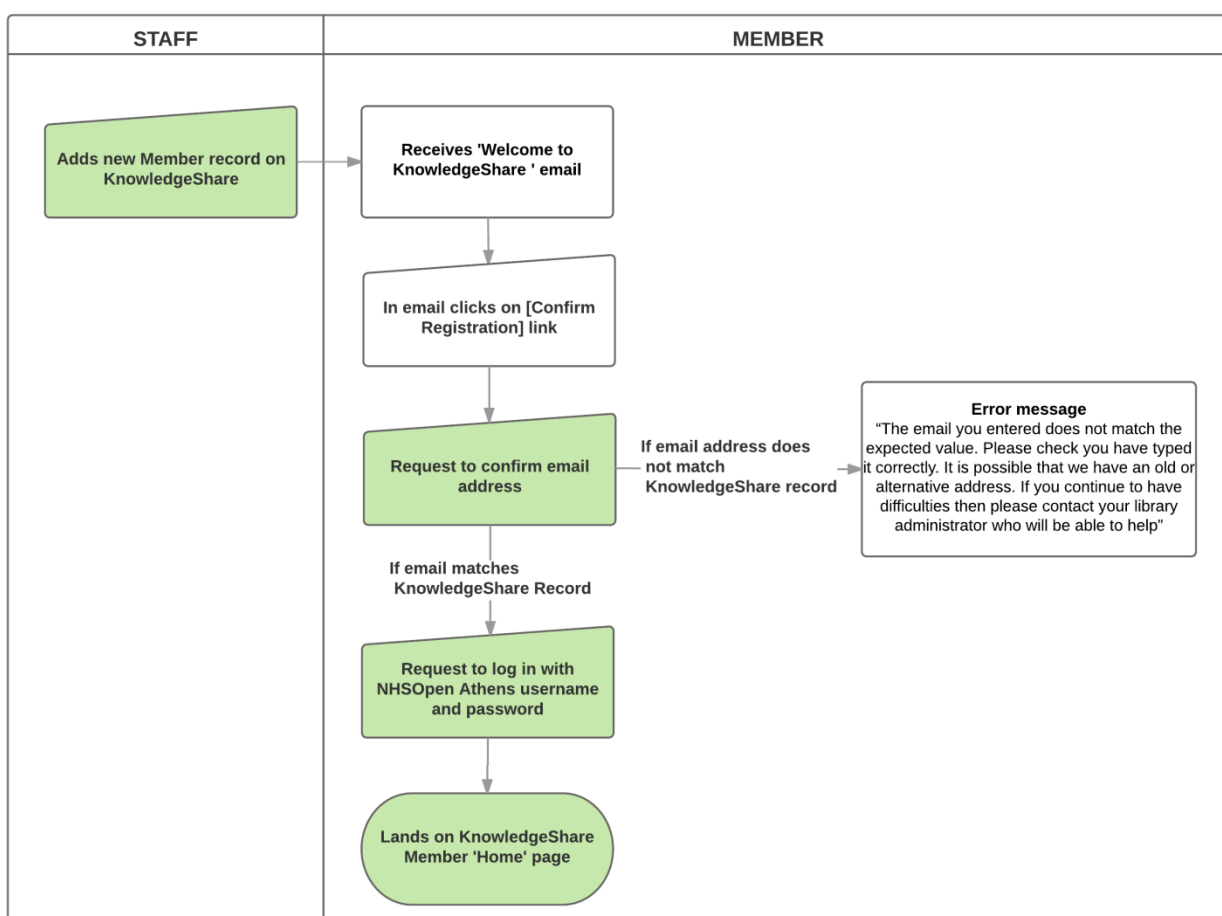
- Unselecting this option means Members will not receive Newsletters emailed via KnowledgeShare
- The selection is synchronised with the other occurrences of this question on the:
 - Member Settings page on the Communications tab
 - Member Professional Interests page

2.0.1.8. Save Options

- Depending on why a Member is being added to KnowledgeShare the next action can be selected before saving:
 - and go to their profile (*this is the default selection*)
 - and register another User
 - and register Professional Interests
 - and go to User List page
 - and add an Evidence Search Request
- Click **Save**

2.0.2 Welcome to KnowledgeShare email

An email with the subject heading **Welcome to KnowledgeShare**, is automatically sent to a new member when Save is clicked on the Add New Member page.



Who does the Welcome to KnowledgeShare email appear to come from?

The Welcome to KnowledgeShare email appears to come from the staff member who clicks Save on the Add a Member page. The idea being if the Member replies to the Welcome message this staff member will be best placed to retrieve or edit the Members details.

- As part of General Data Protection Regulation (GDPR) compliance all members will receive Welcome emails when they are added to the system to ensure that they know they have been added to the system.
- This ensures that all members are told how we are processing their information, and that they have very easy access to their own data so that they can check what we hold about them and make changes, or request changes be made.
 - The email will appear to come from the member of staff who has added the new Member record to the system

System Level Email Template Name: NewMemberInvitation
Subject Line: Welcome to KnowledgeShare

Dear Dr Smith,

As a member of Brighton and Sussex University Hospitals NHS Trust, I have just added you to KnowledgeShare. We use this system to provide and manage your access to library services, such as evidence updates, provided by Brighton and Sussex Library and Knowledge Service.

Please log into KnowledgeShare to check your details:

1. Click: [\[confirmation link\]](#) *Please accept cookies to allow this process to work*
2. Enter the email address this email was sent to
3. Log in with your NHS OpenAthens username and password

You will then be able directly access KnowledgeShare using your NHS OpenAthens login. If you don't have an NHS OpenAthens username and password you can self-register at: <https://openathens.nice.org.uk/>

When you log in you will be asked if you are happy to share your contact information with other KnowledgeShare members. Doing this helps in the sharing of knowledge across healthcare, and connecting staff together across geographical boundaries.

We are committed to safeguarding your information. The information you supply will be used to contact you about services or resources you have requested from the Library and Knowledge Service. For further information on how we keep your information secure, and your rights to access it, read the full KnowledgeShare [Privacy Policy](#).

Yours sincerely,
Elaine

Elaine Watson
Knowledge Management Librarian

----- Sent out by KnowledgeShare-----

- When the Member clicks on the **[confirm registration]** link in the email, they will be asked to enter their email address. This email must match the email on their KnowledgeShare record for the registration to be successful

- The Member is then given the option to enter their NHS OpenAthens username and password or find their institution

- The Targeted ID of the members NHS OpenAthens account will now be associated with the members KnowledgeShare record. They will now be able to log into directly to KnowledgeShare
- When the Member clicks on the **[confirm registration]** link in the email and enters an email address that does not match the email on their KnowledgeShare record they will get the error message:
 - “The email you entered does not match the expected value. Please check you have typed it correctly. It is possible that we have an old or alternative address. If you continue to have difficulties then please contact your library administrator who will be able to help”

Welcome to KnowledgeShare

To complete the sign-up process, you will need to **confirm your email address**, to ensure that we link you to the correct member record.

Once your address is confirmed, you will be redirected to login via OpenAthens. Completing the login will link your Athens login to your KnowledgeShare account. If you are not registered with OpenAthens, then follow the link at the top-right of the page and return here once your OpenAthens sign-up is complete.

Confirm email address:

j.smith@gmail.com

The email you entered does not match the expected value. Please check you have typed it correctly. It is possible that we have an old or alternative address. If you continue to have difficulties then please contact your library administrator who will be able to help.

Confirm address and proceed to OpenAthens login

2.0.3 Profile Completeness

The Profile Completeness percentage encourages members to provide contact information, beyond the mandatory fields, to help other colleagues to get in touch and share knowledge, now and also when the Networking module is released. It also encourages them to add professional interests if they haven't done so already.

Home Evidence Skills Updates Networking Members Admin Help

Home > Dr Walter Bray

Dr Walter Bray +

(no number stored)
walter.bray@nhs.net
Brighton General Hospital
Elm Grove
Brighton
East Sussex
BN2 3EW

OpenAthens username
nhsnbray999

Job title
Wessex test member - Consultant

Department
General Medicine

Organisation
Sussex Community NHS Foundation Trust

Profile Completeness

This profile is 75% complete

A complete [profile](#) and [set of interests](#) helps us to contact you and provide evidence to inform your work. It can also help other colleagues to get in touch and share knowledge.

- Members can click on linked text within the Profile Completeness box to be taken directly to their personal information page or to their professional interest page.

Profile Completeness

This profile is 75% complete

A complete [profile](#) and [set of interests](#) helps us to contact you and provide evidence to inform your work. It can also help other colleagues to get in touch and share knowledge.

- Fields on the members personal information page and professional interests page contribute a percentage to the level of completeness

Field Name	Percentage contribution to Completeness Profile
OpenAthens persistent user ID	0%
OpenAthens username	0%
Profile Picture	2%
Title	0%
First name(s)	8%
Last name	8%
Address formally?	0%
Preferred name	5%
Phone number	2%
Email address	8%
Additional Emails	0%
LinkedIn	1%
Twitter	1%
Organisation	8%
Department	8%
Job title	8%
Job group	8%
Job role	8%
Room / Ward / Building	2%
Primary location	8%
Library and Knowledge Service	0%
Library and Knowledge Service membership number	5%
Professional Interests	10%
	100%

Fields marked yellow are mandatory

- The Profile Completeness can help library staff see the level of information that has been added to a member record.
 - A basic member profile added by library staff with only the mandatory field filled in will have a Profile Completeness of 72%. Library staff can then see at a glance that the record with a Profile Completeness of 72% does not have professional interests added.
 - A self-registered member profile will have a Profile Completeness of 56%. Library staff can then see a Profile Completeness of 56% shows the Job Group and Job Role are missing and need populating.

	Mandatory Fields added by Library Staff	Mandatory fields & Professional Interests added by Library Staff	Mandatory Fields when Members Self-registration
Level of Completeness	72%	82%	56%
Field Name			
OpenAthens persistent user ID			
OpenAthens username			
Profile Picture			
Title			
First name(s)	8%	8%	8%
Last name	8%	8%	8%
Address formally?			
Preferred name			
Phone number			
Email address	8%	8%	8%
Additional Emails			
LinkedIn			
Twitter			
Organisation	8%	8%	8%
Department	8%	8%	8%
Job title	8%	8%	8%
Job group	8%	8%	
Job role	8%	8%	
Room / Ward / Building			
Primary location	8%	8%	8%
Library and Knowledge Service			
Library and Knowledge Service membership number			
Professional Interests		10%	

- When a Members record achieves 100% completeness the Profile Completeness box disappears.

2.1 Editing a Member profile

2.1.1 Search for a member

- All search results for a member will lead to the Profile page
 - Simple search result
 - Advanced search result
 - My Member page
 - Assigned Evidence Search
- } Goes to Member Profile page

Home > Dr Walter Bray

 Dr Walter Bray +

Contact Information

- (no number stored)
- ✉ walter.bray@nhs.net
- 🏠 Royal Sussex County Hospital
Eastern Road
BRIGHTON
East Sussex
BN2 5BE
- 🌐 WalterBray
- 🐦 WalterBray

OpenAthens username
nhswalterbray103

Job title
Consultant

Department
Acute Medicine

Organisation
Brighton and Sussex University Hospitals NHS Trust

Profile Completeness

This profile is 78% complete

A complete [profile](#) and [set of interests](#) helps us to contact you and provide evidence to inform your work. It can also help other colleagues to get in touch and share knowledge.

Evidence Searches View All

What is the evidence that leg fat 'better than belly fat' for older women
Completed: 06/11/19

Skills Sessions

Dr Walter Bray has not attended any sessions yet.

Professional Interests

You do not currently have any professional interests registered on the system.

Journal Alerts

You are not currently signed up to receive tables of contents for any journals.

Settings

Your contact information can be seen by:
Library and Knowledge Service staff only.

Your professional interests can be seen by:
Library and Knowledge Service staff only.

You are not currently receiving personalised evidence updates.

You will see networking recommendations for staff in your organisation.

Profile page

2.1.2 Edit Member Personal Information

 Dr Walter Bray

Contact Information

- (no number stored)
- ✉ walter.bray@bsuh.nhs.uk
- 🏠 Royal Sussex County Hospital
Eastern Road
BRIGHTON
East Sussex
BN2 5BE

OpenAthens username
nhswalterbray103

Job title
Consultant

Department
Acute Medical Unit

Organisation
Brighton and Sussex University Hospitals NHS Trust

Edit

Click here

- On the Member profile page click on **Edit** on the personal information section to access edit Member page

- See section 2.2 Staff adding a new Member for further details on this page

2.1.2.1 Edit members login details

- Only staff with LKS Administrator permissions in a library service have permission to edit a member's login details

[Home](#) > [My Members](#) > [Mr Mulberry Hawk](#) > [Edit Member](#)

Mr Mulberry Hawk

User Information	
Login Details Joining Date: 08/05/2014 Last Login Date: 01/06/2022	
Username mulberryhawk001	OpenAthens persistent user ID c3f71004:01f29c1

- All other staff will be unable to access and edit a member's login details

[Home](#) > [My Members](#) > [Mr Mulberry Hawk](#) > [Edit Member](#)

Mr Mulberry Hawk

User Information	
Login Details Joining Date: 08/05/2014 Last Login Date: 01/06/2022	
Username mulberryhawk001	OpenAthens persistent user ID c3f71004:01f29c1

2.1.3 Edit Member Professional Interests

Professional Interests

Age Groups
Adults

Conditions and Lifestyle Factors
Cardiovascular Diseases

Professional Interests
Diffusion of Innovation, Patient Safety

Settings
Hospital Ward, Perioperative Setting

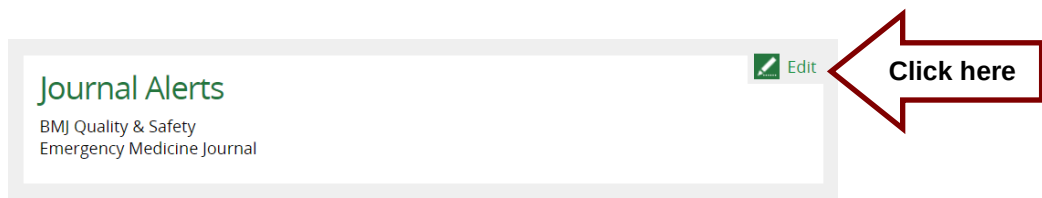
Staff Groups
Medic, Surgeon, Manager

 **Edit**



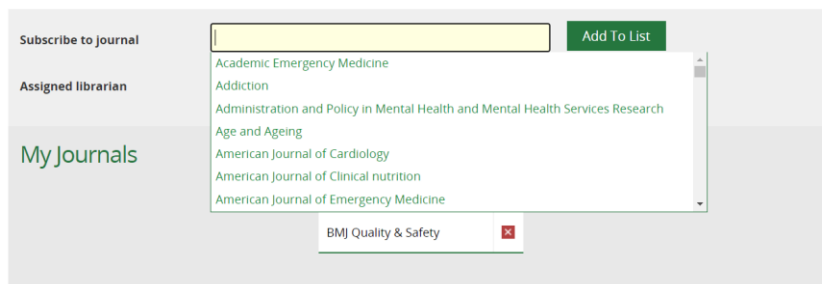
- On the Member profile page click on **Edit** on the Professional Interests section

2.1.4 Edit Member Journal Alerts

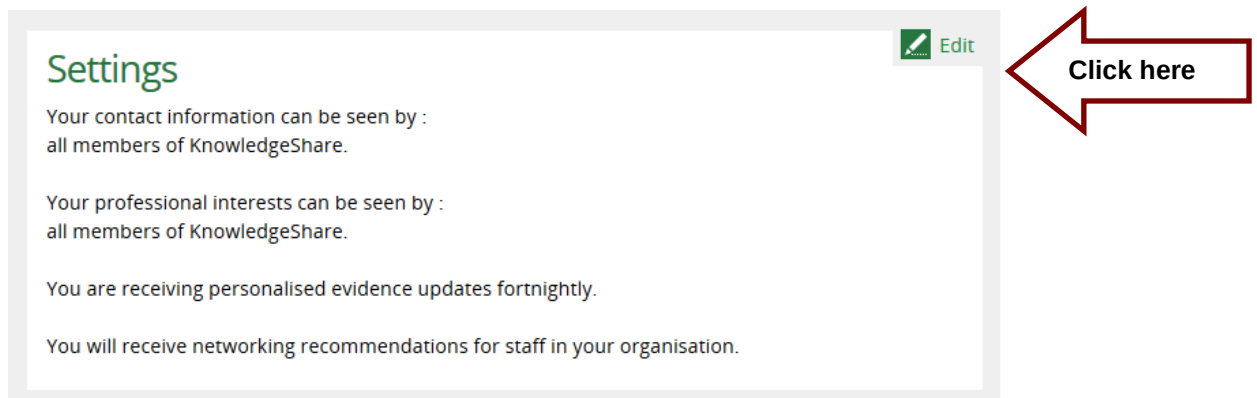


- On the Member profile page click on **Edit** on the Journal Alerts section to add or delete journals selected for table of contents (TOCs)
- Only those journals in the **Subscribe to journal** list are available as TOCs

Manage Journal Alerts for Mr Mulberry Hawk



2.1.5 Edit Member Settings



- On the Member profile page click on **Edit** on the Settings section

2.1.5.1 Communication Settings



Mr Mulberry Hawk - User Settings

Communication | Privacy | Connections

Personalised Updates

KnowledgeShare keeps you informed about new publications and events relating to your [professional interests](#) and/or [your journal alerts](#).

These tailored alerts can be viewed from your dashboard, but you can also elect to receive regular e-mail updates.

I would like to receive personalised update emails Every two weeks ▼

Assigned Librarian Elaine Watson

E-mails are sent out in the morning every day. You may receive e-mails less frequently depending on your e-mail preferences and whether resources match your interests.

Newsletters

Your library and knowledge service prepares regular newsletters on topics that they feel may be of interest to their members.

These are sent out on an *ad hoc* schedule by your library and knowledge service and will normally be targeted at particular interest groups, based on [professional interests](#) or where you work.

Send me news and bulletins from my Library and Knowledge Service ☒

2.1.5.1.1 Personalised Updates

Personalised Updates

KnowledgeShare keeps you informed about new publications and events relating to your [professional interests](#) and/or [your journal alerts](#).

These tailored alerts can be viewed from your dashboard, but you can also elect to receive regular e-mail updates.

I would like to receive personalised update emails Every two weeks ▼

Assigned Librarian Elaine Watson

E-mails are sent out in the morning every day. You may receive e-mails less frequently depending on your e-mail preferences and whether resources match your interests.

- **I would like to receive personalised update emails**
 - *Default Never*
 - Select one of the options from the pull-down list:
 - Never
 - Daily
 - Weekly
 - Every two weeks
 - Monthly
- The selection is synchronised with the other occurrences of this question on the:
 - Member Settings page on the Members' Professional Interests page

2.1.5.1.2 Newsletters

Newsletters

Your library and knowledge service prepares regular newsletters on topics that they feel may be of interest to their members.

These are sent out on an *ad hoc* schedule by your library and knowledge service and will normally be targeted at particular interest groups, based on [professional interests](#) or where you work.

Send me news and bulletins from my Library and Knowledge Service



- **Send me news and bulletins from my Library and Knowledge Service**
 - *Default: Yes. LKS Staff cannot edit this selection.*
 - Members deselecting this option allows them to stop receiving Newsletters emailed via KnowledgeShare
- The selection is synchronised with the other occurrences of this question on the:
 - Member Settings page
 - on the Members' Professional Interests page

2.1.5.1.3 System Alerts

System Alerts

Send me an e-mail when:

Networking and Groups



Someone comments on a thread I am participating in

You will receive 1 e-mail every 365 days with new recommended connections

- **Networking & Groups**

Someone comments on a thread I am participating in

- *Default setting is checked*
- Allows a Member to be emailed comments on a discussion thread they are participating in, once this function is developed

2.1.5.1.4 Disable All E-mails

If the Member is on sabbatical, parental leave or anything that means they are away from work for a number of months but planning to return, use the 'Pause all KnowledgeShare e-mails' function. This pauses the emails for a specified time period until the member returns. This overrides all the other email settings.

- **Pause all KnowledgeShare e-mails**
 - *The default value is unchecked*

- Checking the box will pause all emails from the system to the Member until the box is unchecked

Disable All E-mails

If you wish to pause all e-mail communication from KnowledgeShare for any reason, for example during sabbatical or maternity leave, then you can do so here. This over-rides all other e-mail settings.

Pause all KnowledgeShare e-mails

☐ you'll still receive e-mails regarding evidence searches you have requested, or skills sessions you have attended.

- Enter a date for emails to start resuming automatically
- For members on maternity leave if you don't have a return from leave date, select a date 12 months after the receiving the out of office email as their automatic restart date. This is based on statutory maternity leave in the UK being 52 weeks.

Disable All E-mails

If you wish to pause all e-mail communication from KnowledgeShare for any reason, for example during sabbatical or maternity leave, then you can do so here. This over-rides all other e-mail settings.

Pause all KnowledgeShare e-mails

☒ you'll still receive e-mails regarding evidence searches you have requested, or skills sessions you have attended.

(optional) Automatically restart on 06 / 07 / 2020

2.1.5.1.5 Evidence Search Updates

Evidence Search Updates

The following updates are based on evidence searches you have requested in the past. These alerts are not controlled via KnowledgeShare but are set up manually by your librarian. This section allows you to request that they be cancelled if no longer required.

What is the evidence for tuberculosis screening in at risk children in the community

X

- This lists any database alerts a Member has requested when they request an Evidence Search
- When an Evidence Search Update is cancelled three emails are sent:
 - To the Member
 - To the Library and Knowledge Service Administrator
 - To the Staff member cancelling the Evidence Search Update

2.1.5.2 Edit Member Privacy

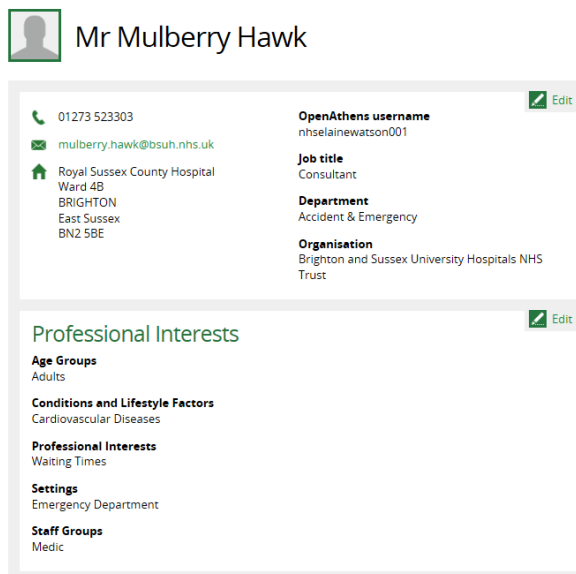
2.1.5.2.1 Privacy Settings

- **Who should be able to view your contact information?**
 - *Default: Librarians only. LKS Staff cannot edit this selection.*
 - Members may select one of the options from the pull-down list:
 - All KnowledgeShare members
 - Librarians and staff of your organisation
 - Librarians only
- The selection determines who will see the Member's contact information on their member profile record
 - Display for 'All KnowledgeShare members'

- Display for 'Librarians only'

- The selection is synchronised with the other occurrences of this question on the:
 - Member Settings page on the Add/Edit Member page
 - Member Professional Interests page
- **Who should be able to view your professional interests?**
 - *Default: Librarians only. LKS Staff cannot edit this selection*
 - Members may select one of the options from the pull-down list:
 - All KnowledgeShare members
 - Librarians and staff of your organisation
 - Librarians only

- The selection determines who will see the Member's professional interest categories on their member profile record
 - Display for 'All KnowledgeShare members'



Mr Mulberry Hawk

01273 523303
mulberry.hawk@bsuh.nhs.uk
Royal Sussex County Hospital
Ward 4B
BRIGHTON
East Sussex
BN2 5BE

OpenAthens username
nhselaineatson001

Job title
Consultant

Department
Accident & Emergency

Organisation
Brighton and Sussex University Hospitals NHS Trust

Professional Interests

Age Groups
Adults

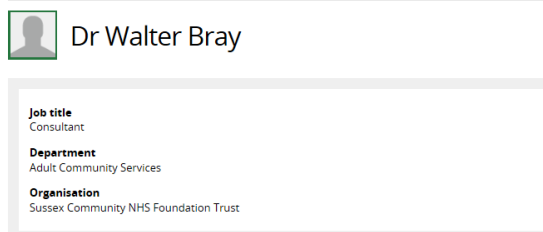
Conditions and Lifestyle Factors
Cardiovascular Diseases

Professional Interests
Waiting Times

Settings
Emergency Department

Staff Groups
Medic

- Display for 'Librarians only'



Dr Walter Bray

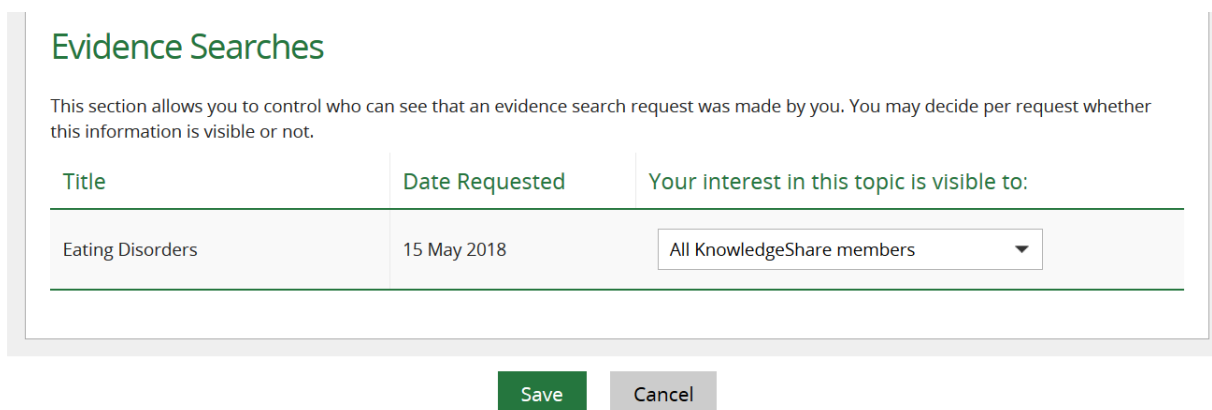
Job title
Consultant

Department
Adult Community Services

Organisation
Sussex Community NHS Foundation Trust

- The selection is synchronised with the other occurrences of this question on the:
 - Member Settings page on the Add/Edit Member page
 - Member Professional Interests page

2.1.5.2.2 Evidence Searches



Evidence Searches

This section allows you to control who can see that an evidence search request was made by you. You may decide per request whether this information is visible or not.

Title	Date Requested	Your interest in this topic is visible to:
Eating Disorders	15 May 2018	All KnowledgeShare members

Save **Cancel**

- **Your interest in this topic is visible to:**
 - All KnowledgeShare members
 - Librarians and staff of your organisation

- Librarians only
- The selection is synchronised with:
 - **Sharing your knowledge** on the Evidence Search request page

Request an Evidence Search

Evidence searches are carried out to inform patient care, service improvement, research activity and clinical teaching. Searches usually take around two weeks to complete, but searches related to the care of an individual patient will be completed as soon as required.

We do not carry out evidence searches for coursework purposes. Please contact your university for help, or book one of our [teaching sessions](#).

Request date 05 / 09 / 2018

Requesting member

We would like to let other members of KnowledgeShare* see that you have an interest in this topic. Please indicate who should see this information.

Sharing your knowledge

- **Sharing your knowledge** on the Assigned Evidence Search Request tab

Request number 12439

Request date 15 / 08 / 2018

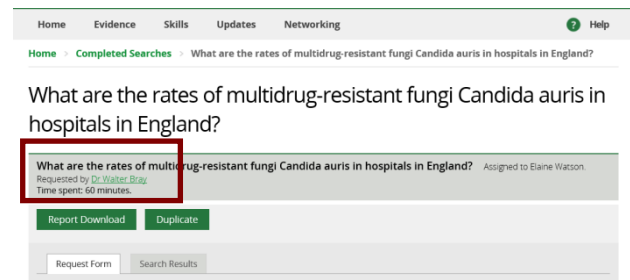
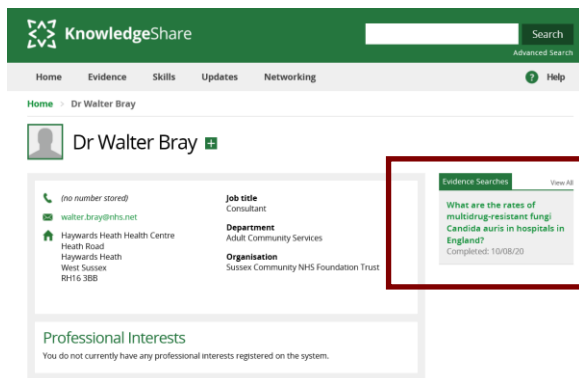
Requesting member Mr Gabriel Oak (Royal Sussex County Hospital)

We would like to let other members of KnowledgeShare* see that you have an interest in this topic. Please indicate who should see this information.

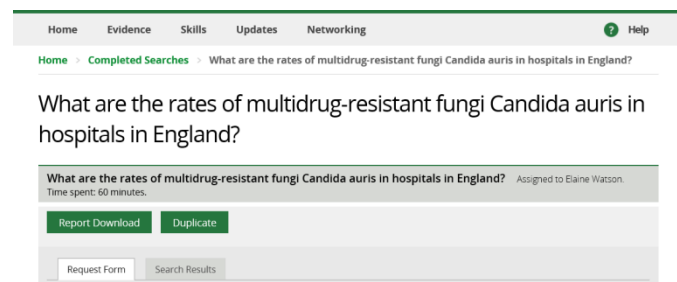
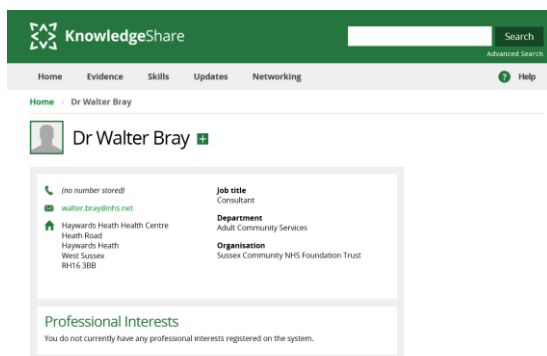
Sharing your knowledge All KnowledgeShare members

To facilitate collaboration, the 'Sharing your knowledge' question asks the Member who will see that they have requested an Evidence Search.

Depending on the option selected, the requester of an Evidence Search will be displayed or hidden on their Member profile page and the completed evidence search page.



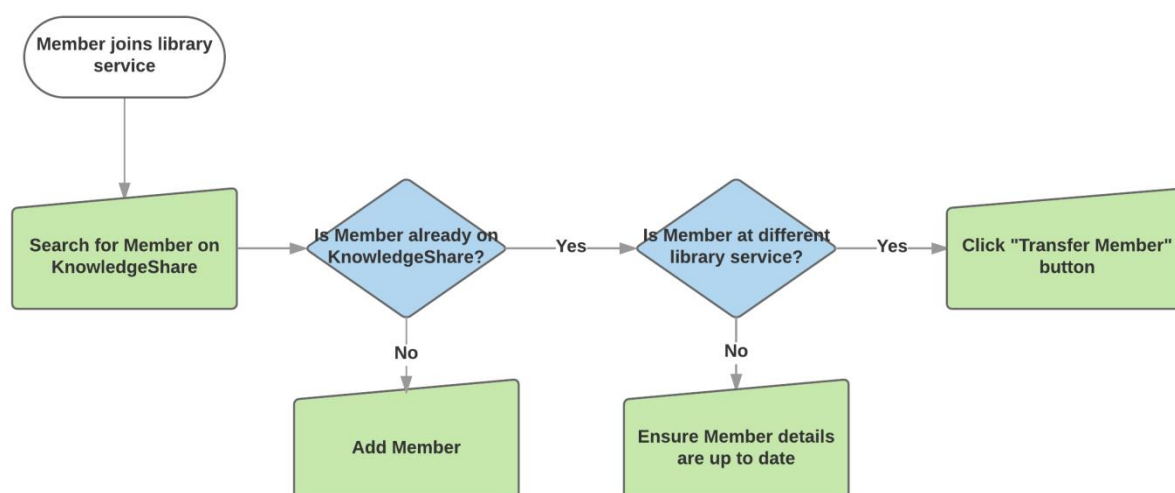
Requester's name not displayed on their profile page or on the completed search page



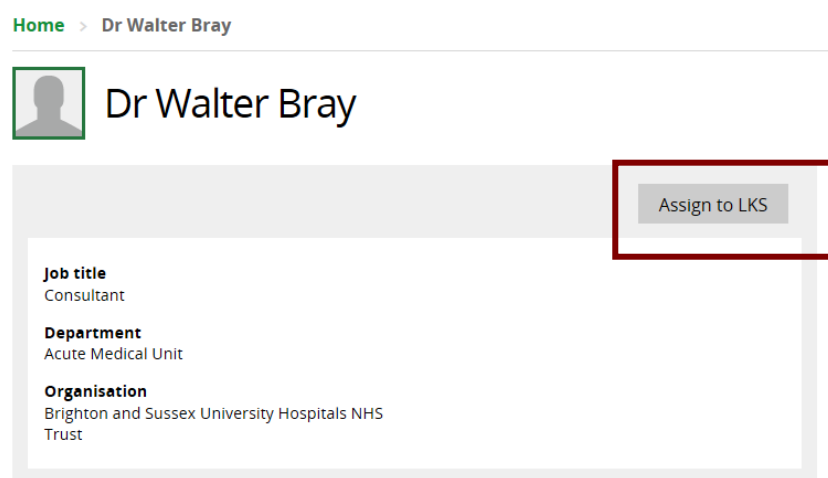
- When 'All KnowledgeShare Members' is selected:
 - The Evidence Search results report can be viewed by all librarians and members
 - The requester of the Evidence Search is displayed to all librarians and members
- When 'Librarians and staff of your organisation' is selected:
 - The Evidence Search results report can be viewed by all librarians and members
 - The requester of the Evidence Search is displayed to members or librarians at the same LKS as the requester (or a SysAdmin)
- When 'Librarians only' is selected:
 - The Evidence Search results report can be viewed by all librarians and members
 - The requester of the Evidence Search is displayed only to librarians at the same LKS as the requester (or a SysAdmin)

2.2 Assign a Member to a Library and Knowledge Service

Best practice before adding a new member is to search to see if they already have a record on KnowledgeShare



- If the member is on KnowledgeShare but not assigned to a library service they will have an **Assign to LKS** button on their record



2.2.1 Re-assign a Member

- On the Member profile page click on **Edit** on the Settings section
- To assign an unassigned member to your library service click **Assign to LKS**
- Click OK on the message **Are you sure you want to assign this user to your Library and Knowledge Service? User will be informed via email about this.**
- An email will go to the Member telling them they have been assigned to your Library and Knowledge Service from the Library and Knowledge Service Administrator

- An email will go to the Library and Knowledge Service Admin telling them a Member has been assigned to their Library and Knowledge Service
- Update the Member's record
 - When transferring a Member between services that share the organisation the Member has on their record, after clicking **Assign to LKS**, the Organisation, Department and Location fields retain their information
 - When transferring a Member between services that do not share the organisation the Member has on their record, after clicking **Assign to LKS**, the Organisation, Department and Location fields are empty and need updating.
- Click **Save**

2.3 Unassign a Member when they leave your service

Best practice when a member leaves your trust and library service is to unassign them on KnowledgeShare. This complies with the KnowledgeShare information governance and privacy policy.

KnowledgeShare information governance and privacy policy

“Deleting your information

We will keep your information for as long as you are making use of your library and knowledge services. **We will unassign you from your library and knowledge service when we know you have left or if you have not used any of our services for three years.** Once unassigned we will keep your information for a further two years (in case you return to using the services after a break). The system will only store as much information about you as is required, and will securely destroy any personal information about you when it is no longer of use..”

https://www.knowledgeshare.nhs.uk/index.php?PageID=help_privacy

- If a member has left your trust and library service, they can be unassigned from KnowledgeShare
- Search for a member
- On the Members profile page click on **Edit** on the **Personal Information** section



Dr Walter Bray

 (no number stored)	 Edit
 walter.bray@bsuh.nhs.uk	OpenAthens username nhswalterbray103
 Royal Sussex County Hospital Eastern Road BRIGHTON East Sussex BN2 5BE	Job title Consultant
	Department Acute Medical Unit
	Organisation Brighton and Sussex University Hospitals NHS Trust

Click here

- From the **Library and Knowledge Service** drop down list select **Member is no longer assigned to an LKS**

Library and Knowledge Service

Library and Knowledge Service

Brighton and Sussex

Member is no longer assigned to an LKS

Brighton and Sussex

- Click **OK** on the message **Removing Members name's link to this Library and Knowledge Service** will mean that they can no longer log in to KnowledgeShare. An email confirmation will be sent to *Members name*. Do you want to continue?
- An email will go to the member telling them they have been unassigned

System Level Template Name: UserUnassignedFromLKSAssignee
Subject Line: You have been unassigned from your library service on KnowledgeShare

Dear Dr Bray

You have been unassigned from Brighton and Sussex library service on KnowledgeShare by Elaine Watson.

Please contact the library if you have any queries about this.

Best regards,
KnowledgeShare Administration

----- Sent out by KnowledgeShare-----

- An email will go to the Member's Assigned Librarian telling them one of their members has been unassigned

System Level Template Name: UserUnassignedFromLKSAAdmin
Subject Line: INFORMATION: One of your Update Members have been unassigned from KnowledgeShare

Dear Alison,

Member Dr Walter, who you were the Assigned Librarian for, has been unassigned from Brighton and Sussex library service on KnowledgeShare by Elaine Watson.

ACTION: Please consider removing this member from your library management system and any associated paper records.

Best regards,
KnowledgeShare Administration

----- Sent out by KnowledgeShare-----

- When a member is automatically unassigned or manually unassigned an email alert will go to staff with LKS Administrator permissions in the member's LKS
- In accordance with GDPR, remove these members from your library management system and any associated paper records.

What happens to un-assigned Member records if they are not re-assigned?

“Once unassigned we will keep your information for a further two years (in case you return to using the services after a break). The system will only store as much information about you as is required and will securely destroy any personal information about you when it is no longer of use.”

See the KnowledgeShare information governance and privacy policy at:
https://www.knowledgeshare.nhs.uk/?PageID=help_privacy

2.3.1 Indicators that a Member has left your organisation

There isn't a leaving date field on a Member's record. Members will be automatically unassigned if they have had no activity in a three-year time period. They will be automatically deleted after five years of inactivity as it says in the KnowledgeShare information governance and privacy policy.

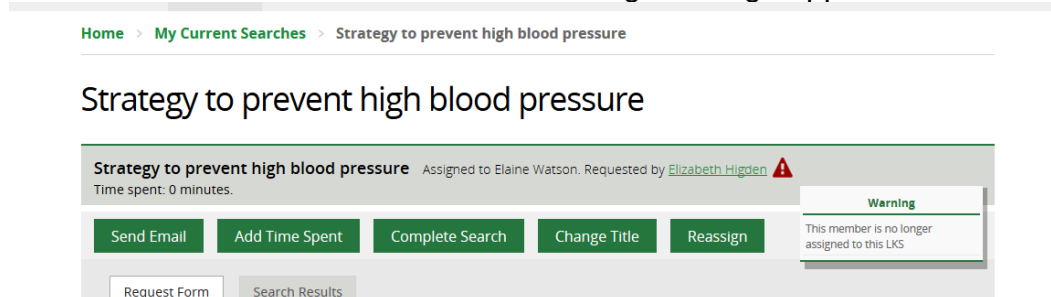
(https://www.knowledgeshare.nhs.uk/?PageID=help_privacy)

- Out-of-office messages
 - Assigned librarian will get out-of-office messages from their members they send current awareness updates to
 - Open all Out of Office messages and where email states:
 - the Member has left the organisation, in KnowledgeShare please unassign the Member from the Library Service (see section Unassign a Member when they leave your Service)
 - the Member is on sabbatical, maternity leave or anything that means they are away from work for a number of months but planning to return, please use the 'Pause all KnowledgeShare e-mails' function (see section 2.1.5.1.4 Disable All E-mails)
- KnowledgeShare System Admin mail server checks
 - A KnowledgeShare System Admin checks the KnowledgeShare mail server regularly and will let you know if any emails addresses bounce, have an invalid email addresses or member email boxes are full.
 - The email from the KnowledgeShare System Admin contains a list of actions that depend on the reason for the bounced email:
 - **Bounced (reason unknown):**
 - An email can bounce for a variety of reasons
 - The email may not be valid in a way that is not visible. Try emailing the member separately from KnowledgeShare and check whether the email address is valid
 - The member may have marked the emails as spam or blocked them. Email the member to check they are still happy to accept emails from KnowledgeShare or if they have blocked the current awareness.

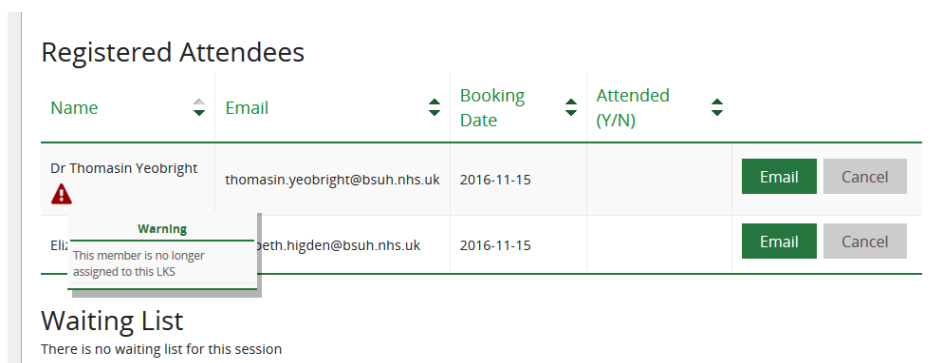
- Members may need to add your @knowledgeshare.nhs.uk email address to their Safe Sender List. To add emails to their Safe Senders List, in Outlook members need to:
 1. Select the Settings icon (gear icon)
 2. Select View all Outlook settings
 3. Select Mail
 4. Select Junk email
 5. Enter the sender email address
 6. Select Add > Save
 - Your @knowledgeshare.nhs.uk email address is displayed on your KnowledgeShare profile.
- **Invalid address:**
 - As the email is invalid check for alternative spellings or digits in the email.
 - Check whether the member has an alternative email address that could be used instead.
 - If an alternative email is not available, the members should be unassigned from your LKS. The invalid address may indicate the member has left your trust and the email has been deleted by your IT department.
 - **Mailbox full:**
 - As the mailbox is full for this email address, check whether there is an alternative email address.
 - If an alternative email is not available, pause emails for a month to allow time for the emails to be cleared. Use the Disable All functions under the Members Settings > Communications tab. See section 2.1.5.1.4 Disable All E-mails for details on this function.

2.3.2 Incomplete evidence searches or skill sessions bookings for an unassigned Member

- When a Member is unassigned from an LKS, and they have an incomplete assigned search:
 - the assigned librarian will be e-mailed when the Member leaves.
 - an icon appears on the assigned search page, when the Member leaves. If the cursor is held over the icon a warning message appears.

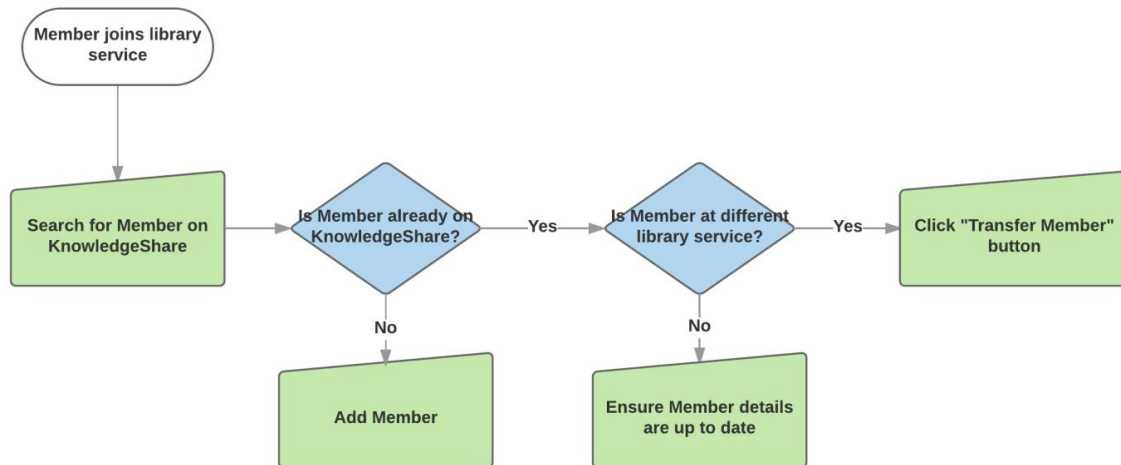


- When a Member is unassigned from an LKS, and they are booked on a skills session:
 - an email will be sent to the session leader when the Member leaves.
 - an icon appears on the session register members page, when the Member leaves. If the cursor is held over the icon a warning message appears.

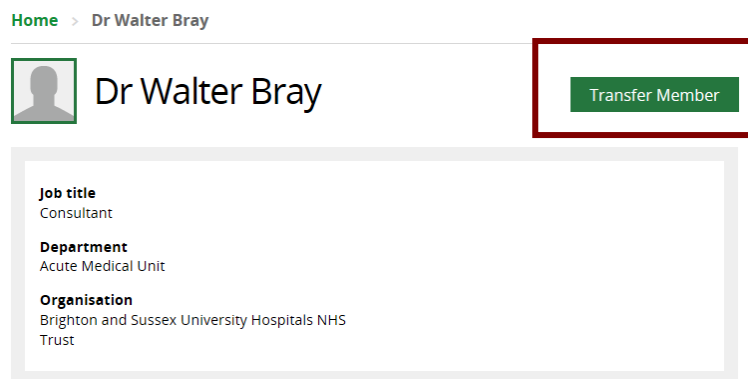


2.4 Transferring a Member from another Library and Knowledge Service

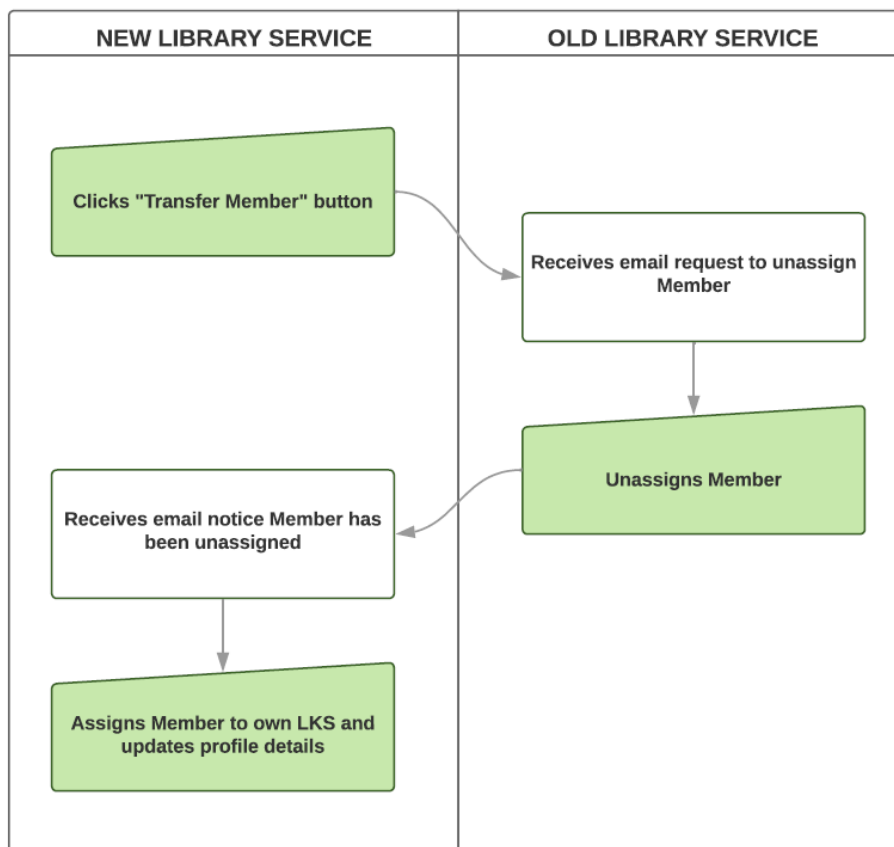
Best practice before adding a new member is to search to see if they already have a record on KnowledgeShare



- If the member is on KnowledgeShare but assigned to another library service they will have a **Transfer Member** button on their record



2.4.1 Transfer a Member



- If a Member has joined your library service but are already on KnowledgeShare and registered with another library service, you can request to transfer them.
- On the Member's profile page click on **Transfer Member**

[Home](#) > [Dr Walter Bray](#)



Dr Walter Bray

Transfer Member

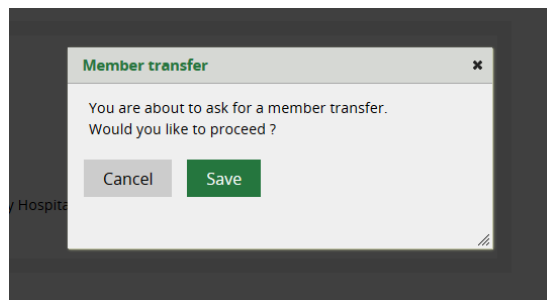
Click on Edit

Job title
Consultant

Department
Acute Medical Unit

Organisation
Brighton and Sussex University Hospitals NHS Trust

- Click SAVE on the message **You are about to ask for a member transfer. Would you like to proceed?**



- An email request will go to the Member's old library service requesting the Member is unassigned so they can be assigned to the new library service. The email is sent to the LKS Email address on the Manage LKS page.

System Level Template Name: TransferMemberRequest
Subject Line: KnowledgeShare member transfer request

Dear Brighton and Sussex Library and Knowledge Service,

Alison Mercier from Surrey and Sussex Library and Knowledge Services has requested that KnowledgeShare member Dr Walter Bray be unassigned from your Library and Knowledge Service so that they can be transferred to Surrey and Sussex .

ACTION:

- Search for Dr Walter Bray in KnowledgeShare
- In this member's record change their Library and Knowledge Service from Brighton and Sussex to *Member is no longer assigned to a LKS*

Once you have unassigned member Dr Walter Bray from your service, Knowledge Share at elaine.watson@bsuh.nhs.uk will be automatically emailed to confirm that they can now assign the member to their library service.

Many thanks for your help,
KnowledgeShare Admin.

----- Sent out by KnowledgeShare-----

- The new library service will now see on the Member's profile the greyed out button **A Transfer is in process** until an action is taken by the Member's old library service.

Home > Dr Walter Bray



Dr Walter Bray

A Transfer is in process

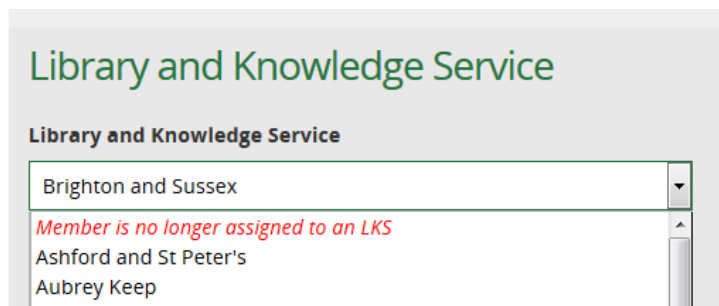
Job title
Consultant

Department
Acute Medical Unit

Organisation
Brighton and Sussex University Hospitals NHS Trust

- The old library service will have to unassigned the member as requested in the email by clicking on **Edit** on the **Personal Information** section and in the **Library and**

Knowledge Service drop down list select **Member is no longer assigned to an LKS**



- An email will go to the Staff member in the new library service who clicked Transfer Member informing them the current service has unassigned the Member

System Level Template Name: UserUnassignedAvailableForTransfer
Subject Line: KnowledgeShare member is now unassigned and available for transfer

Dear Alison Mercier,

KnowledgeShare member Dr Walter Bray has now been unassigned from library service, Brighton and Sussex by Elaine Watson. You may assign this user your library service.

ACTION:

- Search for Dr Walter Bray in KnowledgeShare
- Click the 'Assign to LKS' button at the top of this member's record
- Update this member's details for your Library and Knowledge Service

Many thanks for your help,
KnowledgeShare Administration

----- Sent out by KnowledgeShare-----

- When the requesting the Staff member who clicked Transfer Member receives the email that the member has been unassigned, they click on **Assign to LKS** on the Members profile page

[Home](#) > [Dr Walter Bray](#)



Dr Walter Bray

Assign to LKS

Job title

Consultant

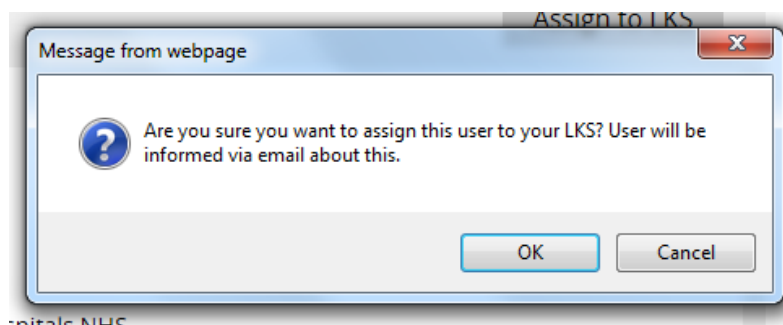
Department

Acute Medical Unit

Organisation

Brighton and Sussex University Hospitals NHS Trust

- Click OK on the message **Are you sure you want to assign this user to your Library and Knowledge Service?** User will be informed via email about this.



- An email will go to the member telling them they have been assigned to your Library and Knowledge Service from the staff member who has clicked on **Assign to LKS**

System Level Template Name: UserUnassignedAvailableForTransfer
 Subject Line: Welcome to your Library and Knowledge Service and KnowledgeShare

Dear Dr Bray,

Welcome to your Library and Knowledge Service and KnowledgeShare. You have been added to the KnowledgeShare system, which we use to provide and manage your access to library services provided by Surrey and Sussex.

Best regards,
 Knowledge

Alison Mercier
 Librarian | Alison.mercier@bsuh.nhs.uk
 Surrey and Sussex Library and Knowledge Services |
<http://www.surreyandsussexlibraryservices.nhs.uk>
 ----- Sent out by KnowledgeShare-----

2.4.2 Refuse Member Transfer

- On the Members profile page click on **Refuse Transfer** if you have a reason the member cannot be transferred such as,
 - You know the Member is still working at your trust
 - The Member still has an open search on KnowledgeShare
 - The Member is booked on to a forthcoming training session on KnowledgeShare

Home > Dr Walter Bray



Dr Walter Bray

Refuse Transfer

(no number stored)

elaine.watson@bsuh.nhs.uk

Royal Sussex County Hospital
 Eastern Road
 BRIGHTON
 East Sussex
 BN2 5BE

OpenAthens username
 nhswbray100

Job title
 Consultant

Department
 Acute Medical Unit

Organisation
 Brighton and Sussex University Hospitals NHS Trust

- Enter details of why the transfer is being refused in the field under: If you wish to cancel the transfer please give a reason why you do not wish to unassign this user?

- An email will go to the requesting LKS Email address on the Manage LKS page, giving details why the transfer has been refused and contact details of the Staff member who clicked Refuse Transfer.

Email Template Name: TransferMemberRequestRejected
 Subject Line: Knowledge member transfer request declined

Dear Brighton and Sussex Library and Knowledge Service,

Alison Mercier from Surrey and Sussex Library and Knowledge Services has declined your request to unassign Dr Walter Bray from their Library and Knowledge Service. The reason they have given is: 'We are still completing a literature search for this member'.

If you would like to contact Knowledge Share to discuss this, please contact them directly:

Phone: 01234 567891 Email: alison.mercier3@nhs.net

Many thanks for your help,
 KnowledgeShare Admin.

----- Sent out by KnowledgeShare-----

2.5 Merging two Member records

This function allows you to merge all the professional interests, skills sessions and evidence searches on two member records into one. Both records need to be assigned to the same library service for the function to work.

- Search for the member and open both records

Search Results

Search terms: walter bray Advanced Search

All: 3 Resources: 0 Users: 2 Evidence Searches: 1 Skills Sessions: 0 Groups: 0

Users

- Dr Walter Bray**
GP, General Practice, Sussex Community NHS Foundation Trust
- Dr Walter Bray**
GP, General Practice, Sussex Community NHS Foundation Trust

- On the Member profile page click on **Edit** on the personal information section to access edit Member page

Home > Dr Walter Bray

Dr Walter Bray +

(no number stored)

walter.bray@nhs.net

Brighton General Hospital
Elm Grove
Brighton
East Sussex
BN2 3EW

Username
nhswalterbray100

Job title
Consultant

Department
Adult Community Services

Organisation
Sussex Community NHS Foundation Trust

Edit

Click here

- Select the Member record with the most recent data, indicated by the Joining Date, for the record to be saved

Dr Walter Bray	Dr Walter Bray
User Information	User Information
Login Details	Login Details
Joining Date: 22/03/2016 Last Login Date: 18/02/2021	Joining Date: 22/04/2022 Last Login Date: Never

- At the bottom of the page click on **Merge with another user**

Privacy Settings

Who should be able to view your contact information?

Librarians only

Who should be able to view your professional interests?

Librarians only

Send me news and bulletins from my Library and Knowledge Service ☐

Send me an e-mail when:

A colleague invites me to join a community of practice ☐

A colleague with shared interests joins KnowledgeShare ☐

Save Merge with another user Cancel

- The Member you select is in the green **Settings to be saved** column. Search for the duplicate Member record in the red **Compare data** column and click **Select** when found

Home > User Merge Facility

User Merge Facility

Settings to be saved

Select user

User to be saved

Dr Walter Bray

Compare data

Select user

User to be deleted

Walter br

Dr Walter Bray (Brighton General Hospital)

Select

- Compare the data from the two records and copy any information that needs to be saved into the green **Settings to be saved** column
- Where a field has a red border, this indicates a difference between the two records. Select the most recent data for the **Settings to be saved** column

Home > User Merge Facility

User Merge Facility

Settings to be saved

User Information

Joining date: 22/04/2022
Last login date: Never

Login Details

Username

OpenAthens persistent user ID

Targeted ID

Compare data

User Information

Joining date: 22/03/2016
Last login date: 18/02/2021

Login Details

Username

OpenAthens persistent user ID

Targeted ID

- User Information
 - The joining date and Last login date will help to retain the most recent data in the **Settings to be saved** column

User Information

Joining date: 22/04/2022
Last login date: Never

User Information

Joining date: 22/03/2016
Last login date: 18/02/2021

- Login Details
 - Use the arrow icons between the columns to pull across the OpenAthens details and Targeted ID

Login Details

Username

OpenAthens persistent user ID

Targeted ID

Login Details

Username

OpenAthens persistent user ID

Targeted ID

2.5.1 Merging Professional Interests for two Member records

There are three options to consider when deciding how to merge the professional interests from two member records:

- Merge
 - This allows you to combine the categories from the **Settings to be saved** record and the **Compare data** record. You can then unselect categories before Saving

- **Replace**
This allows you to replace the categories from the **Settings to be saved** record with the categories from the **Compare data** record. You can then unselect categories before Saving
- **Additional set of interests**
This allows you to add the categories from the Compare data record as an additional set of interests for the Settings to be saved record

2.5.1.1 Merge Professional Interests

The merge function allows you to combine the categories from the **Settings to be saved** record and the **Compare data** record. You can then unselect categories before clicking **Save**

- Drag the Selected Categories box from the **Compare data** record to the Selected Categories box to the **Settings to be saved** record

Professional Interests

Please drag any sets of Professional Interests from the right to the left. If you drag and drop a set onto an existing set, you will be given the option to either merge the two sets or replace the current one. If you drag and drop onto an empty slot, a new set of Professional Interests will be created (up to a maximum of 3 sets)

Selected Categories

Age Groups

☒ Adults

Conditions and Lifestyle Factors

☒ Diabetes

Professional Interests

Settings

☒ General Practice

Staff Groups

☒ Medic

Drag here to create a new set of interests.

Professional Interests

Selected Categories

Age Groups

☒ Adults

Conditions and Lifestyle Factors

☒ Chronic Obstructive Pulmonary Disease

Settings

☒ General Practice

Staff Groups

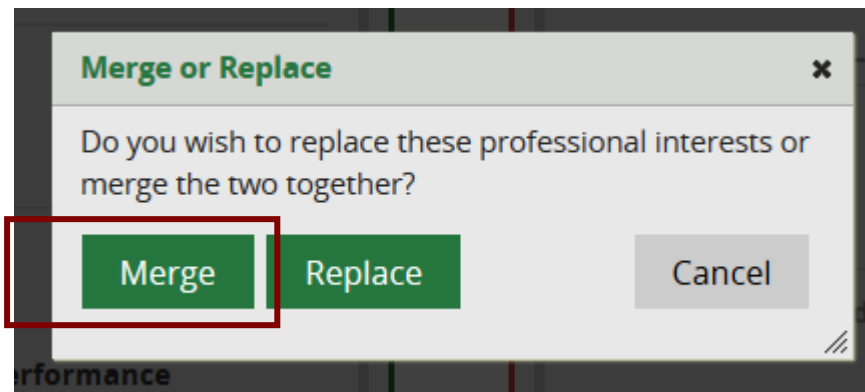
☒ Medic

Professional Interests

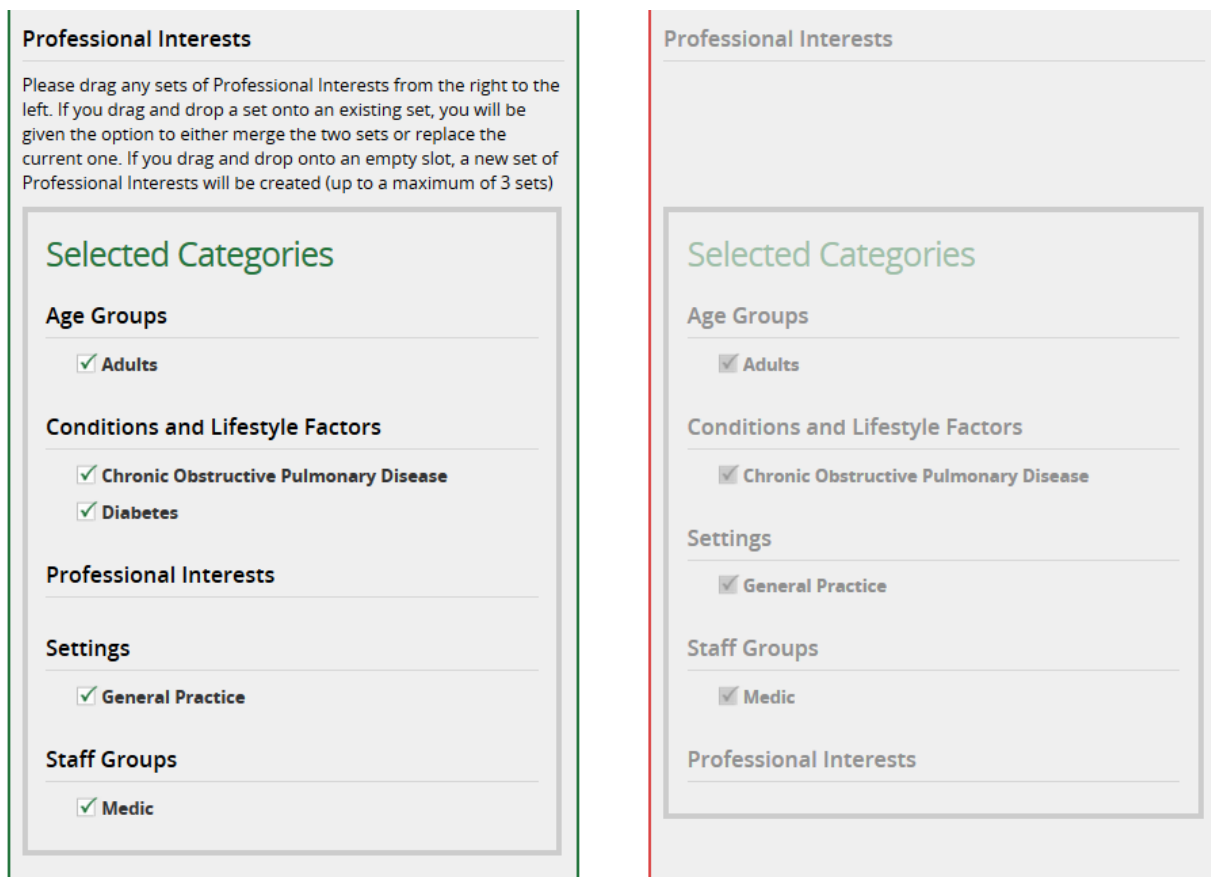
Drag and drop

Save **Cancel**

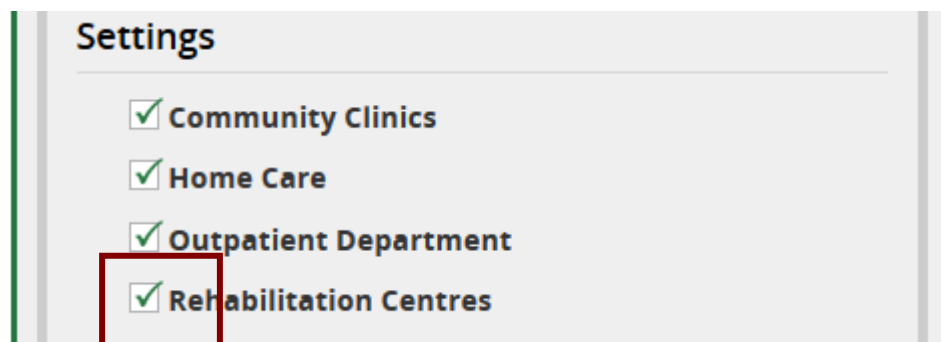
- In the Merge or Replace pop up message, click **Merge**



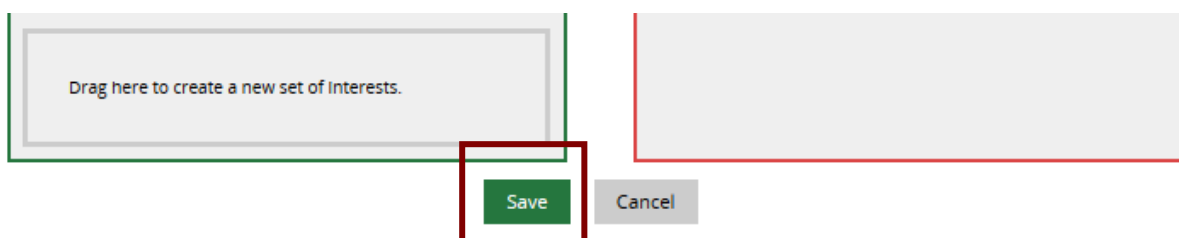
- The categories from both records will be merged together



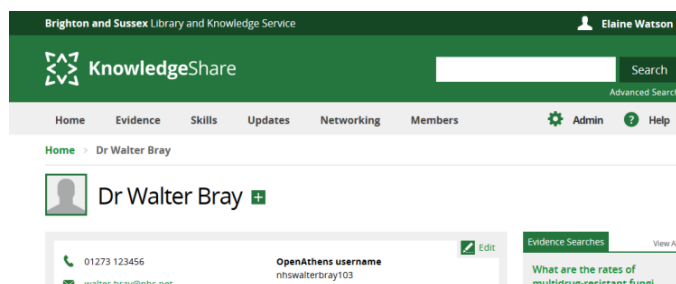
- If appropriate, unselect a category by unchecking the box on the left



- When all the relevant or most recent information is transferred from the red **Compare data** column to the green **Settings to be saved** column, click **Save**



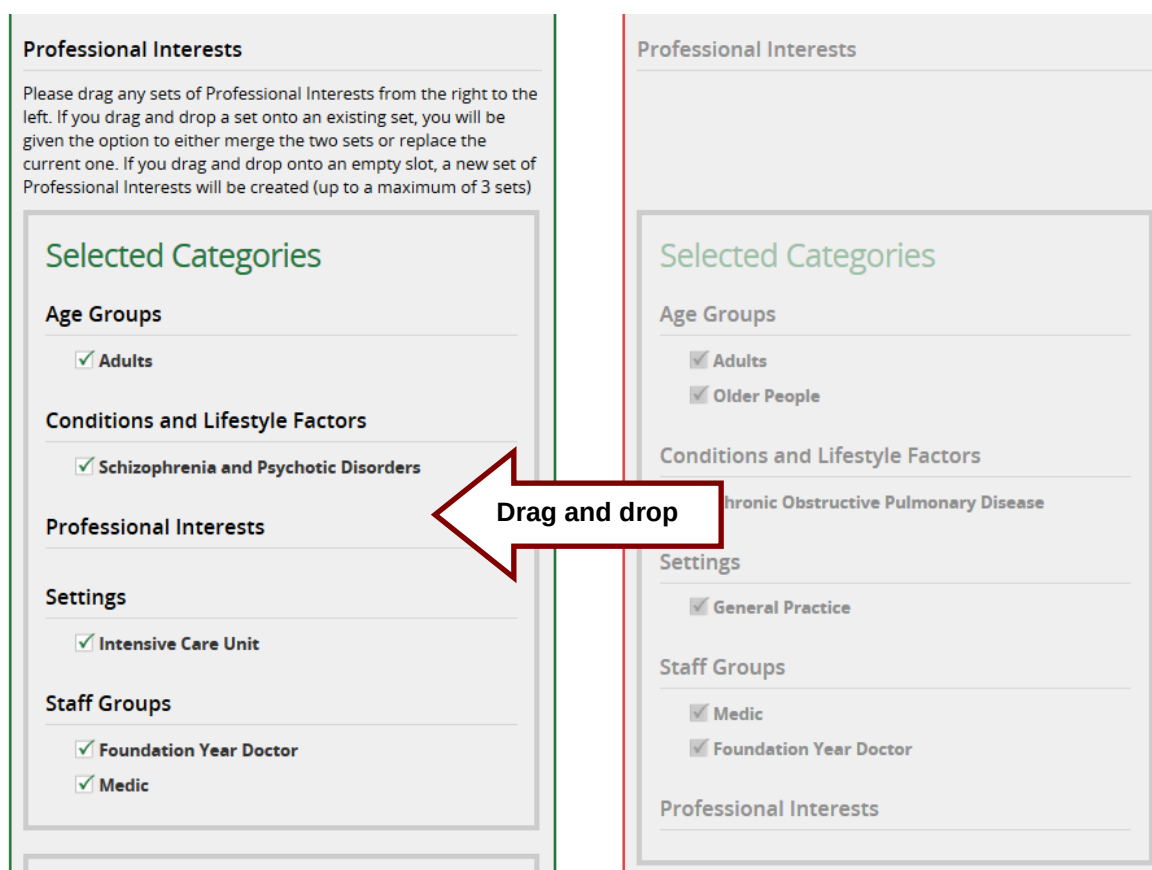
- Saving lands on Members profile page



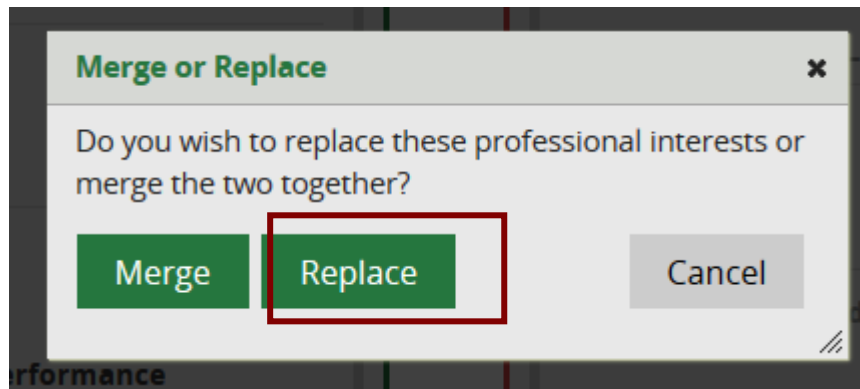
2.5.1.2 Replace Professional Interests

This allows you to replace the categories from the **Settings to be saved** record with the categories from the **Compare data** record. You can then unselect categories before clicking **Save**.

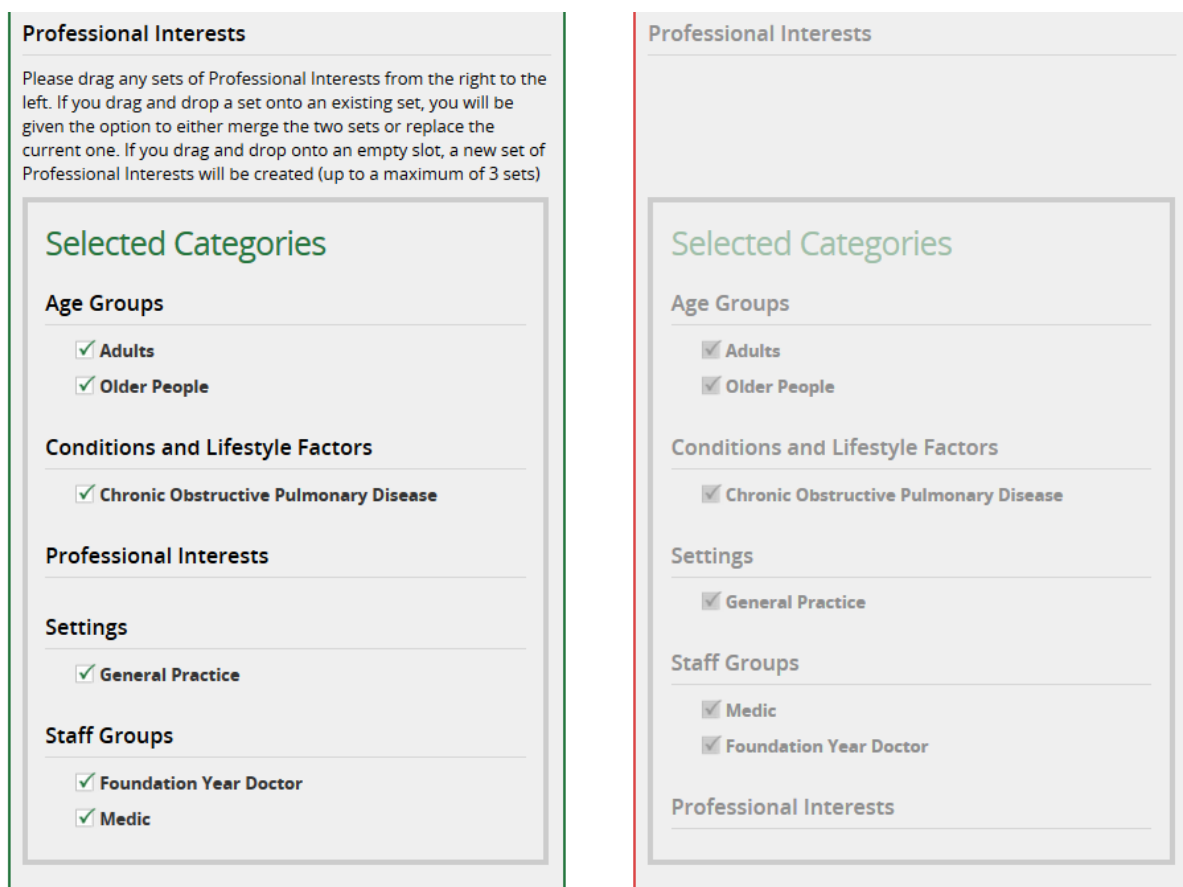
- Drag the Selected Categories box from the **Compare data** record to the Selected Categories box to the **Settings to be saved** record



- In the Merge or Replace pop up message, click **Replace**



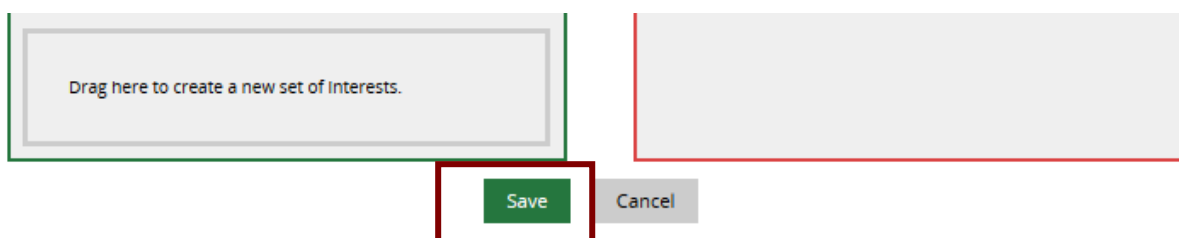
- The categories from the **Compare data** record will replace the categories from the **Settings to be saved** record



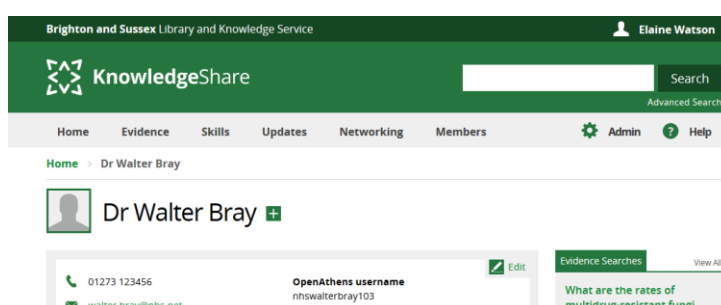
- If appropriate, unselect a category by unchecking the box on the left



- When all the relevant or most recent information is transferred from the red **Compare data** column to the green **Settings to be saved** column, click **Save**



- Saving lands on Members profile page



2.5.1.3 Creating an additional set of interests Professional Interests

This allows you to add the categories from the Compare data record as an additional set of interests for the Settings to be saved record

- Drag the Selected Categories box from the **Compare data** record to the Drag here to create a new set of interests box in the **Settings to be saved** record

Professional Interests

Please drag any sets of Professional Interests from the right to the left. If you drag and drop a set onto an existing set, you will be given the option to either merge the two sets or replace the current one. If you drag and drop onto an empty slot, a new set of Professional Interests will be created (up to a maximum of 3 sets)

Selected Categories

Age Groups

☒ Adults
 ☒ Older People

Conditions and Lifestyle Factors

☒ Chronic Obstructive Pulmonary Disease

Professional Interests

Settings

☒ General Practice

Staff Groups

☒ Foundation Year Doctor

Drag here to create a new set of interests.

Professional Interests

Selected Categories

Age Groups

☒ Children and Adolescents

Conditions and Lifestyle Factors

☒ Asthma

Settings

☒ General Practice

Staff Groups

☒ Medic

Professional Interests

Drag and drop

- An additional set of interests will be created for the Settings to be saved record

Professional Interests

Please drag any sets of Professional Interests from the right to the left. If you drag and drop a set onto an existing set, you will be given the option to either merge the two sets or replace the current one. If you drag and drop onto an empty slot, a new set of Professional Interests will be created (up to a maximum of 3 sets)

Selected Categories

Age Groups

☒ Adults
☒ Older People

Conditions and Lifestyle Factors

☒ Chronic Obstructive Pulmonary Disease

Professional Interests

Settings

☒ General Practice

Staff Groups

☒ Foundation Year Doctor

Selected Categories

Age Groups

☒ Children and Adolescents

Conditions and Lifestyle Factors

☒ Asthma

Professional Interests

Settings

☒ General Practice

Staff Groups

☒ Medic

Professional Interests

Selected Categories

Age Groups

☒ Children and Adolescents

Conditions and Lifestyle Factors

☒ Asthma

Settings

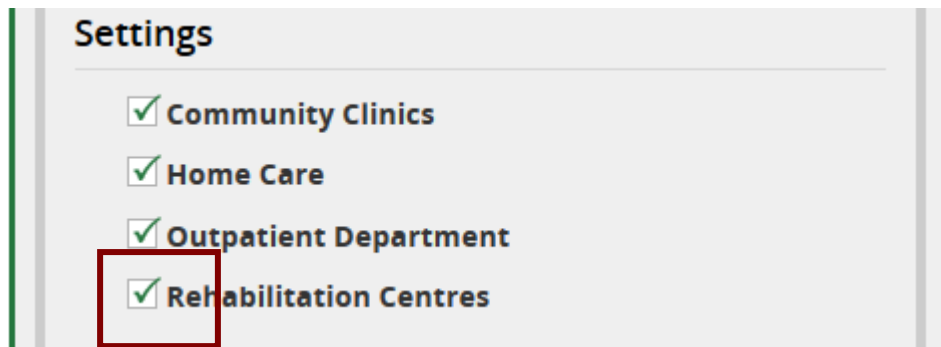
☒ General Practice

Staff Groups

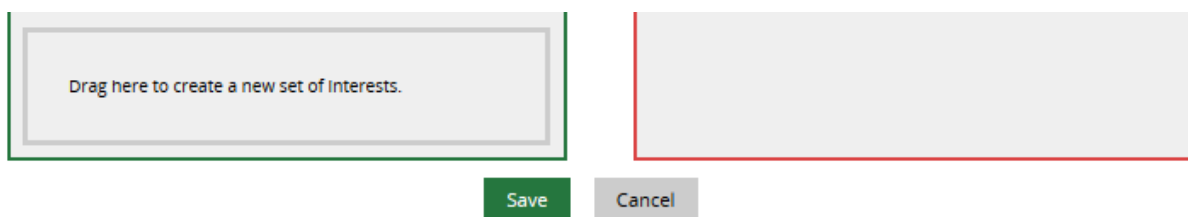
☒ Medic

Professional Interests

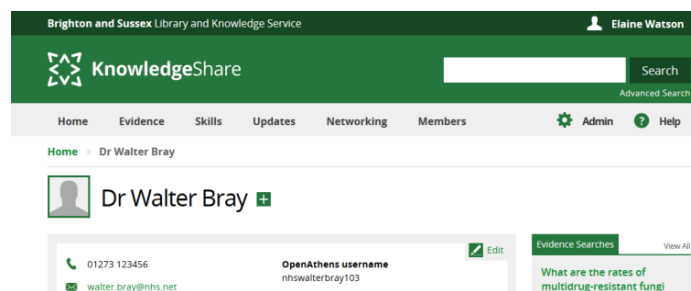
- If appropriate, unselect a category by unchecking the box on the left



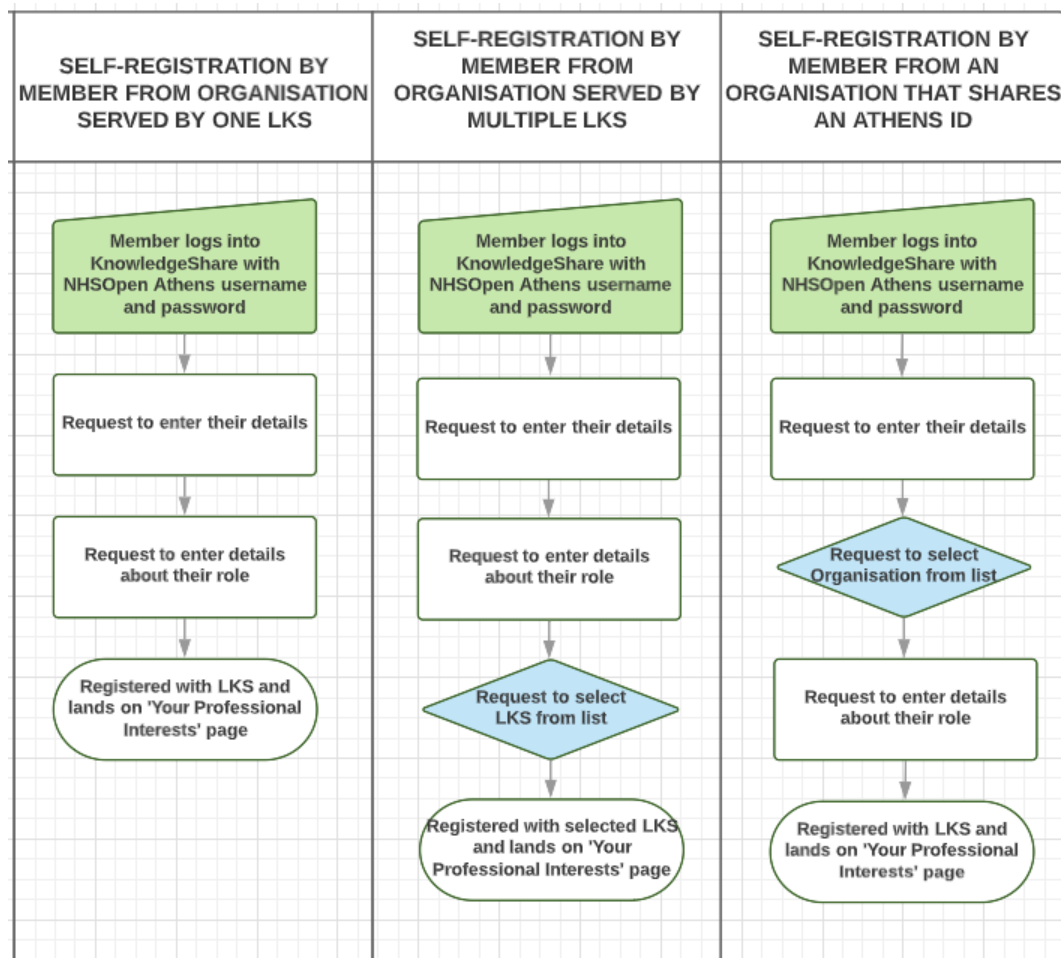
- When all the relevant or most recent information is transferred from the red **Compare data** column to the green **Settings to be saved** column, click **Save**



- Saving lands on Members profile page

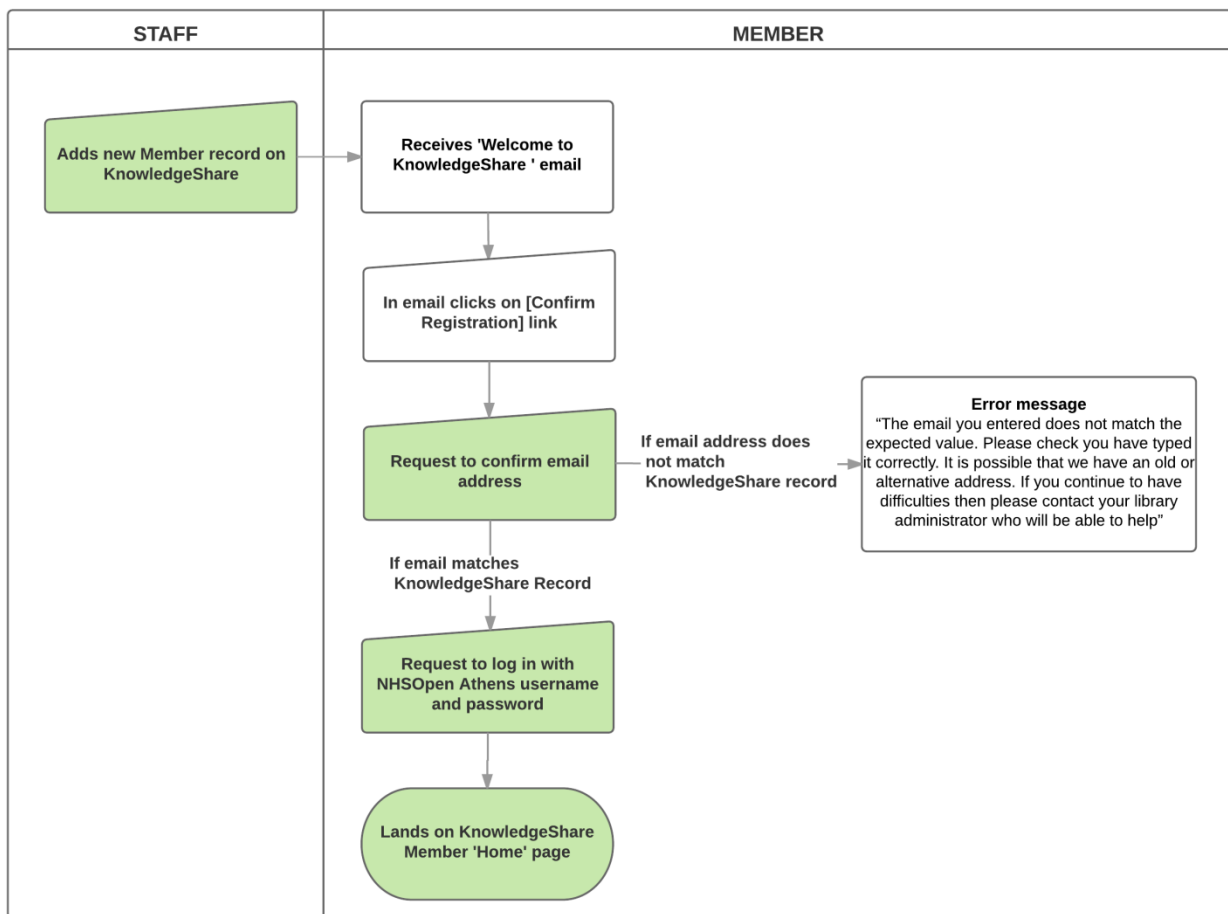


2.6 Member self-registration



2.6.1 Self-registration by a member via the Welcome to KnowledgeShare email

An email, with the subject heading **Welcome to KnowledgeShare**, is automatically sent to a new member when Save is clicked on the Add New Member page.



Who does the Welcome to KnowledgeShare email appear to come from?

The Welcome to KnowledgeShare email appears to come from the staff member who clicks Save on the Add a Member page. The idea being if the Member replies to the Welcome message this staff member will be best placed to retrieve or edit the Member's details.

- As part of General Data Protection Regulation (GDPR) compliance all members will receive Welcome emails when they are added to the system to ensure that they know they have been added to the system.
- This ensures that all members are told how we are processing their information, and that they have very easy access to their own data so that they can check what we hold about them and make changes, or request changes be made.
 - The email will appear to come from the member of staff who has added the new Member record to the system

System Level Email Template Name: NewMemberInvitation
Subject Line: Welcome to KnowledgeShare

Dear Dr Smith,

As a member of University Hospitals Sussex NHS Foundation Trust, your details have been added to the KnowledgeShare system, which we use to provide and

manage your access to library services provided by Sussex Health Knowledge and Libraries.

Please log into KnowledgeShare to check your details:

- Click: [\[confirmation link\]](#) *Please accept cookies to allow this process to work*
- Enter the email address this email was sent to
- Log in with your NHS OpenAthens username and password

You will then be able to directly access KnowledgeShare using your NHS OpenAthens login. If you don't have an NHS OpenAthens username and password you can self-register at: <https://openathens.nice.org.uk/>

When you log in you will be asked if you are happy to share your contact information with other KnowledgeShare members. Doing this helps in the sharing of knowledge across healthcare, and connecting staff together across geographical boundaries.

We are committed to safeguarding your information. The information you supply will be used to contact you about services or resources you have requested from the Library and Knowledge Service. For further information on how we keep your information secure, and your rights to access it, read the full KnowledgeShare [Privacy Policy](#).

Best regards,
Rachel

Rachel Playforth
Senior Knowledge Management Librarian | rachel.playforth@nhs.net

Sussex Health Knowledge and Libraries
| [@BrightonSx_LKS](#) | uhsussex.library@nhs.net
Informing • Educating • Influencing

----- Sent out by KnowledgeShare-----

- When the Member clicks on the [\[confirm registration\]](#) link in the email, they will be asked to enter their email address. This email must match the email on their KnowledgeShare record for the registration to be successful

This page is showing public data. To access protected content you must be logged in using OpenAthens. [Log in](#) [Sign up for OpenAthens](#)

KnowledgeShare [Search](#)

[Home](#) [Help](#)

This site uses cookies in order to remember who you are and to provide a richer user experience. Without cookies, every time you go to a new page it will be as if you are a brand new visitor, and this may limit the site's usefulness. A cookie has already been set for this purpose, but you can tell your browser to delete it and to block all cookies from this site (though parts of the site may not work correctly if you do so). By continuing to use this site you consent to our use of cookies. [Dismiss this message.](#)

[Home](#) > [Confirm email](#)

Welcome to KnowledgeShare

To complete the sign-up process, you will need to **confirm your email address**, to ensure that we link you to the correct member record.

Once your address is confirmed, you will be redirected to login via OpenAthens. Completing the login will link your Athens login to your KnowledgeShare account. If you are not registered with OpenAthens, then follow the link at the top-right of the page and return here once your OpenAthens sign-up is complete.

Confirm email address:

[Confirm address and proceed to OpenAthens login](#)

[About](#) | [Terms & Conditions](#) | [Privacy Policy](#) | [Accessibility](#) | [Credits](#) © Copyright 2013 - 2016, BSUH NHS Trust

Provided by [Brighton and Sussex University Hospitals NHS Trust](#) in consultation with [swiis](#) built by [MALDABA](#)

- The Member is then given the option to enter their NHS OpenAthens username and password or find their institution

Sign in with an OpenAthens account

Username

OR

Find your institution

Password

[Sign in](#)

[Problems signing in?](#)

By using this site you agree to us setting cookies. Please see our [privacy and cookie information](#).

Powered by OpenAthens

- On Member records where Staff have not added the OpenAthens username and OpenAthens PUID, the system will capture the Targeted ID after a successful registration
- When the Member clicks on the [\[confirmation link\]](#) link in the email and enters an email address that does not match the email on their KnowledgeShare record they will get the error message:
 - “The email you entered does not match the expected value. Please check you have typed it correctly. It is possible that we have an old or alternative address. If you continue to have difficulties, then please contact your library administrator who will be able to help”

Welcome to KnowledgeShare

To complete the sign-up process, you will need to **confirm your email address**, to ensure that we link you to the correct member record.

Once your address is confirmed, you will be redirected to login via OpenAthens. Completing the login will link your Athens login to your KnowledgeShare account. If you are not registered with OpenAthens, then follow the link at the top-right of the page and return here once your OpenAthens sign-up is complete.

Confirm email address:

j.smith@gmail.com

The email you entered does not match the expected value. Please check you have typed it correctly. It is possible that we have an old or alternative address. If you continue to have difficulties then please contact your library administrator who will be able to help.

Confirm address and proceed to OpenAthens login

2.6.2 Self-registration by a member without an existing record on Knowledge

2.6.2.1 Member from an organisation served by only one library service

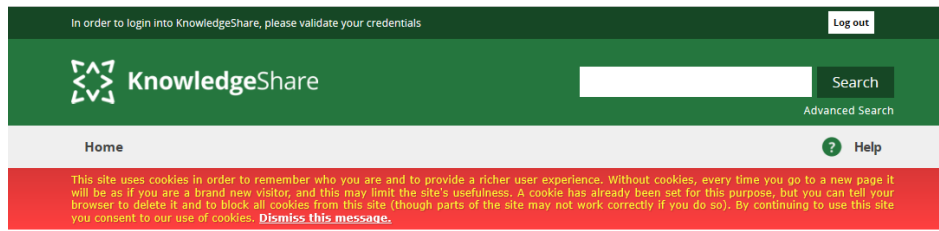
- When a member from an organisation served by only one library service self-registers, KnowledgeShare uses their Athens details to register them at that library service
- Member clicks on Log in link

The screenshot shows the KnowledgeShare website. At the top, a green header bar contains the KnowledgeShare logo, a search bar, and a 'Log in' link highlighted with a red box. Below the header, a navigation bar includes 'Home' and 'Help'. The main content area features a 'Log in' section with a red box highlighting the 'Log in' link and the text: 'If your institution uses the OpenAthens service, you may log in to KnowledgeShare using your username and password for your institution. If you don't have an account you can [sign up for OpenAthens](#).' Below this, a footer bar contains links for 'About', 'Terms & Conditions', 'Privacy Policy', 'Accessibility', and 'Credits', along with copyright information for 2013-2022, BSUH NHS Trust.

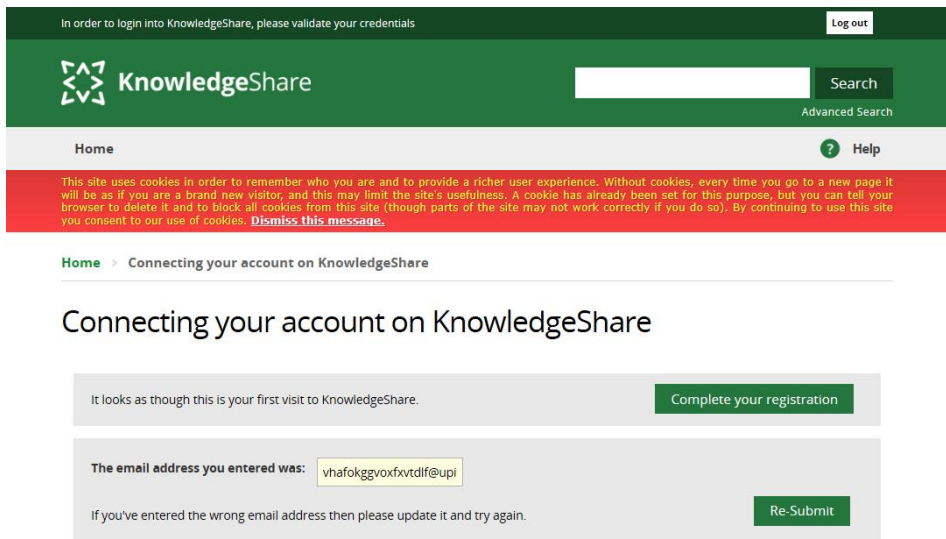
- The Member is then given the option to enter their NHS OpenAthens username and password or find their institution

The screenshot shows the login page of KnowledgeShare. It is divided into two main sections: 'Sign in with an OpenAthens account' and 'Find your institution'. The 'Sign in' section has fields for 'Username' (with a hint 'Email address or username') and 'Password', followed by a 'Sign in' button and a link for 'Problems signing in?'. The 'Find your institution' section has a 'Search' field with a hint 'Type the name of your institution' and a search button. At the bottom, there is a footer with a cookie consent message and the text 'Powered by OpenAthens'.

- The Member is then given the option to enter their email address



- If the email does not match a record the Member is then given the option to **Complete your registration** or to re-submit their email address



- If the Member selects **Complete your registration** they are asked to complete their details
 - Title (optional)
 - First Name(s)
 - *Mandatory field*
 - Last Name
 - *Mandatory field*
 - Primary Email Address
 - *Mandatory field*

Registration

Before continuing, please complete your registration by filling the following fields.

Information about what data we collect, why we collect it, how we use it and how you can access or update the data we hold is available in our [Privacy Policy](#).

Your Details

Please supply the following basic details, which are required in order to use the system. You will be able to provide additional contact details by editing your profile once registration is complete.

Title (optional)	
First name(s)	
Last name	
Primary email address	jlaempkx@upived.c
OpenAthens login	nhskstest999

- The Member is asked to complete details about their role
 - Job Title
 - *Mandatory field*
 - Department
 - *Mandatory field*
 - The Member can only pick departments from the list
 - Primary Location
 - *Mandatory field*
 - The Member can only pick locations from the list

Your Organisation

Organisation	Brighton and Sussex University Hospitals NHS Trust
Job title	
Department	
Primary location	

- The Member then clicks **Register**

Your LKS

Your organisation is served by **Brighton and Sussex** Library and Knowledge Service

[Register](#)

- The member is then taken to their Privacy Notice page

Privacy Notice

✓ Your changes have been saved.

We are committed to safeguarding your information. The information you supply will be used to contact you about services or resources you have requested from the Library and Knowledge Service. For further information on how your information is used, how we keep it secure, and your rights to access it, read our [Privacy Policy](#).

KnowledgeShare helps to share knowledge across the NHS by connecting staff with one another. We would like to share your information with other NHS staff and students for this purpose.

If you agree please select the appropriate option:

Who should be able to view your contact information?

Librarians only ▼

We would also like to contact you occasionally by email.

Please tick if you are happy to be contacted regarding any of the following:

Send me news and bulletins from my Library and Knowledge Service ☒

Save Skip

- The Member has the option to change their sharing and communication settings, or to skip the page and keep the default settings
 - If the Member clicks **Skip** they are then taken to their Professional Interests page

Your Professional Interests

We can use your professional interests to provide you with targeted evidence updates from high-impact health care publications. You can also choose to let other KnowledgeShare members find you based on your professional interests, in order to facilitate collaboration.

Enter your interests here or use the categories and evidence levels below. Be as specific as you like and [contact us](#) for advice on getting the best results.

Your interests

I would like to receive personalised update emails:

KnowledgeShare is designed to facilitate collaboration and the sharing of knowledge within the NHS.

I am happy for my professional interest to be seen by:

Librarians only ▼

How did you find out about current awareness?

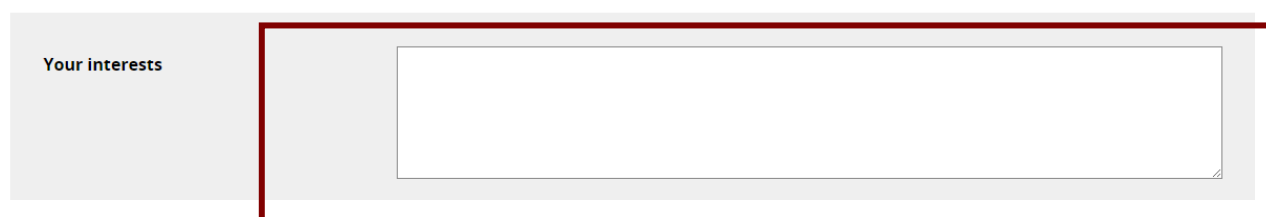
Receive additional bulletins or news from my library and knowledge service?

☒

Save Changes Cancel

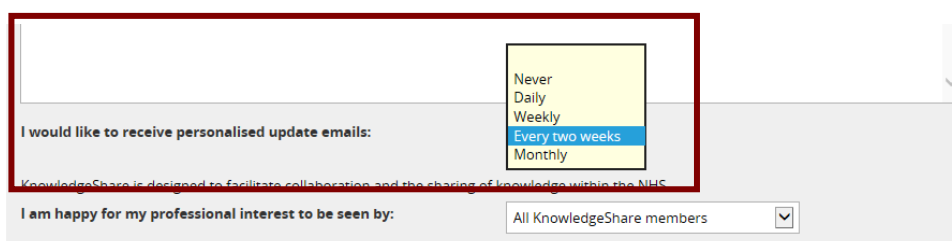
- The new Member now has the opportunity to enter:
 - topics of interests

Enter your interests here or use the categories and evidence levels below. Be as specific as you like and [contact us](#) for advice on getting the best results.



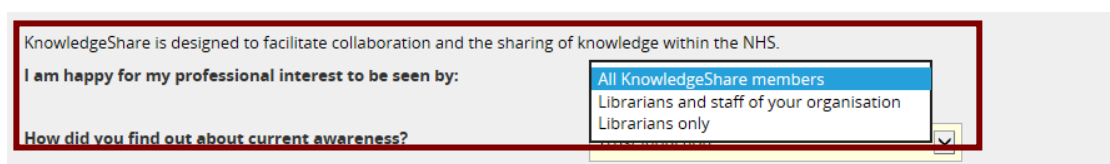
The screenshot shows a form section titled "Your interests". It contains a large, empty rectangular text input box with a light gray border and a small cursor icon at the bottom right corner.

- how often they would like to receive their update emails from the pull-down list:
 - Never
 - Daily
 - Weekly
 - Every two weeks
 - Monthly



The screenshot shows a form section with a pull-down menu open. The menu lists five options: "Never", "Daily", "Weekly", "Every two weeks" (which is highlighted in blue), and "Monthly". Below the menu, there is a text label "I would like to receive personalised update emails:" and a small text line "KnowledgeShare is designed to facilitate collaboration and the sharing of knowledge within the NHS". At the bottom, there is another label "I am happy for my professional interest to be seen by:" followed by a dropdown menu showing "All KnowledgeShare members".

- who will see their professional interest select on their member profile record from the pull-down list:
 - All KnowledgeShare members
 - Librarians and staff of your organisation
 - Librarians only



The screenshot shows a form section with a pull-down menu open. The menu lists three options: "All KnowledgeShare members" (highlighted in blue), "Librarians and staff of your organisation", and "Librarians only". Above the menu, there is a text label "I am happy for my professional interest to be seen by:". Below the menu, there is a text label "How did you find out about current awareness?".

- how they found out about the KnowledgeShare current awareness service from the pull-down list:
 - Colleague or educational supervisor
 - Commissioning Zone
 - Library current awareness
 - Library enquiry desk
 - Library publication (leaflet, display etc)
 - Library staff at meeting/event
 - Library teaching session
 - Library website
 - Trust induction
 - Trust publication
 - Used the service before

Your interests

I would like to receive personalised update emails:

KnowledgeShare is designed to facilitate collaboration between colleagues in the NHS.

I am happy for my professional interest to be seen by:

How did you find out about current awareness?

- Colleague or Educational Supervisor
- Commissioning Zone
- Library current awareness
- Library enquiry desk
- Library publication (leaflet, display etc.)
- Library staff at meeting/ event
- Library teaching session
- Library website
- Trust induction
- Trust publication
- Used the service before

- If they want to receive additional bulletins or news from the library service:

Receive additional bulletins or news from my library and knowledge service ☒

Save Changes

- The member must click **Save Changes**

2.6.2.2 Member from an organisation served by multiple library services

- When a member from an organisation served by multiple library services self-registers, KnowledgeShare uses their Athens details to list these library services so the member can select one.
- Member clicks on Log in link

This page is showing public data. To access protected content you must be logged in using OpenAthens.

Log in

KnowledgeShare

Search

Advanced Search

Home ? Help

Home > Log in

Log in

Log in

If your institution uses the OpenAthens service, you may log in to KnowledgeShare using your username and password for your institution. If you don't have an account you can [sign up for OpenAthens](#).

For services other than OpenAthens, log in to KnowledgeShare using your username and password for your institution.

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Provided by In consultation with Built by

- The Member is then given the option to enter their NHS OpenAthens username and password or find their institution

- The Member is asked to complete their details
 - Title (optional)
 - *Mandatory field*
 - First Name(s)
 - *Mandatory field*
 - Last Name
 - *Mandatory field*
 - Primary Email Address
 - *Mandatory field*

Registration

Before continuing, please complete your registration by filling the following fields.

Information about what data we collect, why we collect it, how we use it and how you can access or update the data we hold is available in our [Privacy Policy](#).

- The Member is asked to complete details about their role
 - Job Title
 - *Mandatory field*
 - Department
 - *Mandatory field*
 - The Member can only pick departments from the list
 - Primary Location
 - *Mandatory field*
 - The Member can only pick locations from the list

Your Organisation

Organisation

Job title

Department

Primary location

- The Member is asked to select their preferred Library Service from a list of those libraries which service this organisation
 - Please select your preferred Library & Knowledge Service
 - Mandatory field**
 - The libraries are listed alphabetically

Your LKS

Your organisation is served by multiple Library and Knowledge Services.

Please select your preferred Library & Knowledge Service

Brighton and Sussex
 East Sussex
 Surrey and Sussex

- The Member then clicks **Register**

Register

- The member is then taken to their Privacy Notice page

Privacy Notice

✓ Your changes have been saved.

We are committed to safeguarding your information. The information you supply will be used to contact you about services or resources you have requested from the Library and Knowledge Service. For further information on how your information is used, how we keep it secure, and your rights to access it, read our [Privacy Policy](#).

KnowledgeShare helps to share knowledge across the NHS by connecting staff with one another. We would like to share your information with other NHS staff and students for this purpose.

If you agree please select the appropriate option:

Who should be able to view your contact information?

We would also like to contact you occasionally by email.

Please tick if you are happy to be contacted regarding any of the following:

Send me news and bulletins from my Library and Knowledge Service ☒

Save

Skip

- The Member has the option to change their sharing and communication settings, or to skip the page and keep the default settings

- If the Member clicks **Skip** they are then taken to their Professional Interests page

Your Professional Interests

We can use your professional interests to provide you with targeted evidence updates from high-impact health care publications. You can also choose to let other KnowledgeShare members find you based on your professional interests, in order to facilitate collaboration.

Enter your interests here or use the categories and evidence levels below. Be as specific as you like and [contact us](#) for advice on getting the best results.

Your interests

I would like to receive personalised update emails:

KnowledgeShare is designed to facilitate collaboration and the sharing of knowledge within the NHS.

I am happy for my professional interest to be seen by:

Librarians only

How did you find out about current awareness?

Receive additional bulletins or news from my library and knowledge service?

☒

Save Changes

Cancel

- The new Member now has the opportunity to enter:
 - topics of interests

Enter your interests here or use the categories and evidence levels below. Be as specific as you like and [contact us](#) for advice on getting the best results.

Your interests

- how often they would like to receive their update emails from the pull-down list:
 - Never
 - Daily
 - Weekly
 - Every two weeks
 - Monthly

I would like to receive personalised update emails:

KnowledgeShare is designed to facilitate collaboration and the sharing of knowledge within the NHS.

I am happy for my professional interest to be seen by:

- who will see their professional interest select on their member profile record from the pull-down list:
 - All KnowledgeShare members
 - Librarians and staff of your organisation
 - Librarians only

KnowledgeShare is designed to facilitate collaboration and the sharing of knowledge within the NHS.

I am happy for my professional interest to be seen by:

How did you find out about current awareness?

- how they had found out about the KnowledgeShare current awareness service from the pull-down list:
 - Colleague or educational supervisor
 - Commissioning Zone
 - Library current awareness
 - Library enquiry desk
 - Library publication (leaflet, display etc)
 - Library staff at meeting/event
 - Library teaching session
 - Library website
 - Trust induction
 - Trust publication
 - Used the service before

Your interests

I would like to receive personalised update emails:

KnowledgeShare is designed to facilitate collaboration and the sharing of knowledge within the NHS.

I am happy for my professional interest to be seen by:

How did you find out about current awareness?

- If they want to receive additional bulletins or news from the library service:

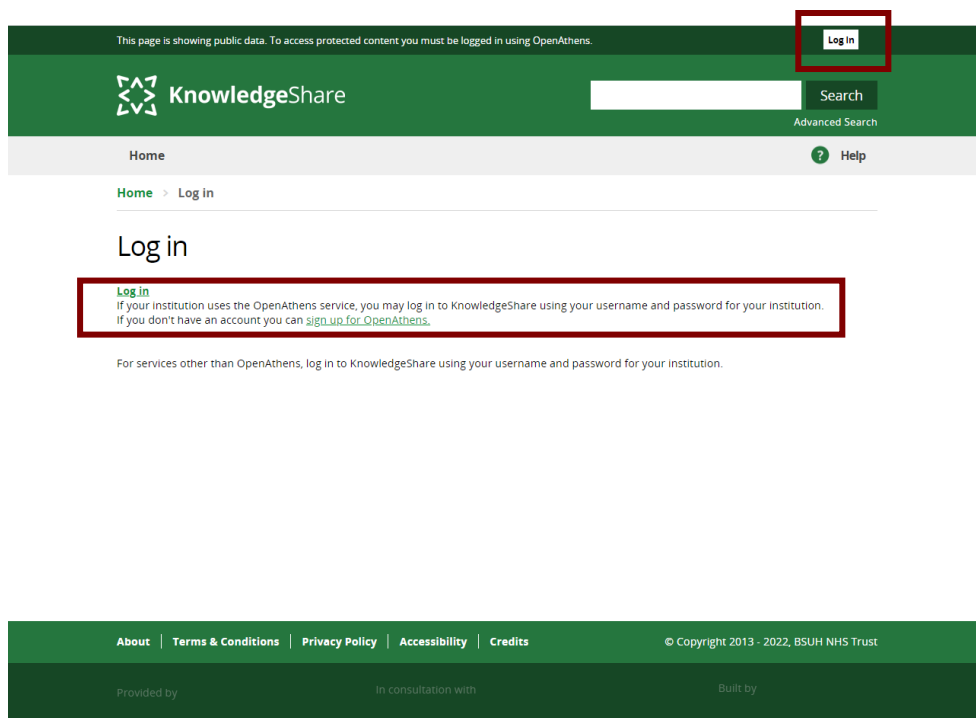
Receive additional bulletins or news from my library and knowledge service

Save Changes

- The member must click **Save Changes**

2.6.2.3 Member from an organisation that shares an AthensID with other organisations

- Organisations such as GPs, CCGs, Public Health providers and Social care providers in a region often share an AthensID.
- When a member from an organisation that shares an AthensID with other organisations self-registers, KnowledgeShare uses their Athens details to list the organisations in KnowledgeShare that share this ID, so the member can select the one they work for.
- Member clicks on Log in link



This page is showing public data. To access protected content you must be logged in using OpenAthens.

KnowledgeShare

[Log in](#)

[Search](#)

[Advanced Search](#)

[Home](#)

[Help](#)

[Home](#) > [Log in](#)

Log in

[Log in](#)
If your institution uses the OpenAthens service, you may log in to KnowledgeShare using your username and password for your institution.
If you don't have an account you can [sign up for OpenAthens](#).

For services other than OpenAthens, log in to KnowledgeShare using your username and password for your institution.

[About](#) | [Terms & Conditions](#) | [Privacy Policy](#) | [Accessibility](#) | [Credits](#)

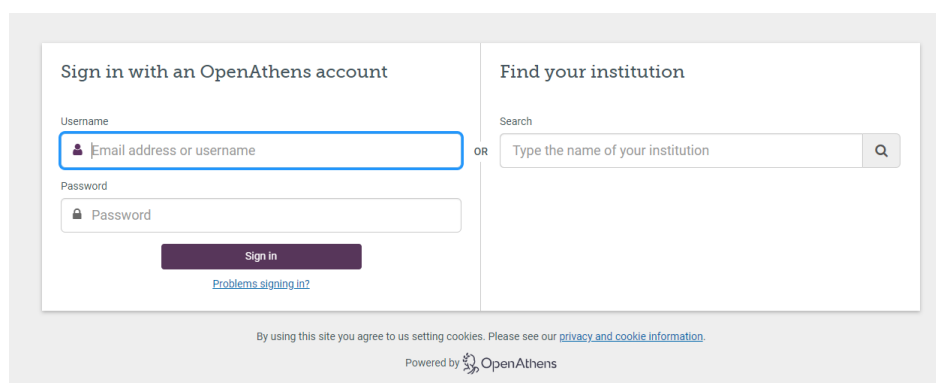
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Provided by

In consultation with

Built by

- The Member is then given the option to enter their NHS OpenAthens username and password or find their institution



Sign in with an OpenAthens account

Username

OR

Search

Password

[Problems signing in?](#)

By using this site you agree to us setting cookies. Please see our [privacy and cookie information](#).

Powered by OpenAthens

- The Member is asked to complete their details
 - Title (optional)
 - *Mandatory field*
 - First Name(s)
 - *Mandatory field*
 - Last Name
 - *Mandatory field*
 - Primary Email Address
 - *Mandatory field*

Registration

Before continuing, please complete your registration by filling the following fields.

Information about what data we collect, why we collect it, how we use it and how you can access or update the data we hold is available in our [Privacy Policy](#).

Your Details

Please supply the following basic details, which are required in order to use the system. You will be able to provide additional contact details by editing your profile once registration is complete.

Title (optional)

First name(s)

Last name

Primary email address

OpenAthens login

- The Member is asked to select their organisation from a list
 - Organisation
 - *Mandatory field*
 - “There are several organisations on KnowledgeShare that match the organisation reported by OpenAthens. Please select the correct organisation from the list. If your organisation is not listed, please contact your library administrator who will be able to advise”

Your Organisation

There are several organisations on KnowledgeShare that match the organisation reported by OpenAthens. Please select the correct organisation from the list. If your organisation is not listed, please contact your library administrator who will be able to advise.

Organisation

- Brighton and Hove City Council Public Health
- West Sussex County Council
- Brighton and Hove Food Partnership
- East Sussex County Council
- Pavilions Partnership
- Health Policy Support Unit (HPSU)
- PenZee Redies

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- When the Member has selected an organisation they are then asked to complete details about their role
 - Job Title
 - *Mandatory field*
 - Department
 - *Mandatory field*

- The Member can only pick departments from the list
- Primary Location
 - *Mandatory field*
 - The Member can only pick locations from the list

- The Member then clicks **Register**

- The member is then taken to their Privacy Notice page

Privacy Notice

- The Member has the option to change their sharing and communication settings, or to skip the page and keep the default settings
 - If the Member clicks **Skip** they are then taken to their Professional Interests page

Your Professional Interests

We can use your professional interests to provide you with targeted evidence updates from high-impact health care publications. You can also choose to let other KnowledgeShare members find you based on your professional interests, in order to facilitate collaboration.

Enter your interests here or use the categories and evidence levels below. Be as specific as you like and [contact us](#) for advice on getting the best results.

The screenshot shows a form titled 'Your interests'. It contains several input fields and a checkbox. At the bottom are 'Save Changes' and 'Cancel' buttons.

- Your interests:** A large text area for entering professional interests.
- I would like to receive personalised update emails:** A dropdown menu.
- KnowledgeShare is designed to facilitate collaboration and the sharing of knowledge within the NHS.** A line of text.
- I am happy for my professional interest to be seen by:** A dropdown menu with 'Librarians only' selected.
- How did you find out about current awareness?:** A dropdown menu.
- Receive additional bulletins or news from my library and knowledge service?:** A checkbox that is checked.
- Buttons:** 'Save Changes' (green) and 'Cancel' (white).

- The new Member now has the opportunity to enter:
 - topics of interests

Enter your interests here or use the categories and evidence levels below. Be as specific as you like and [contact us](#) for advice on getting the best results.

This image is a close-up of the 'Your interests' section of the form, showing a large, empty text area for entering professional interests. The text area is highlighted with a red border.

- how often they would like to receive their update emails from the pull-down list:
 - Never
 - Daily
 - Weekly
 - Every two weeks
 - Monthly

This image shows a close-up of the 'I would like to receive personalised update emails:' dropdown menu. The menu is open, showing the following options: Never, Daily, Weekly, Every two weeks (highlighted in blue), and Monthly. The dropdown is highlighted with a red border.

- who will see their professional interest select on their member profile record from the pull-down list:
 - All KnowledgeShare members
 - Librarians and staff of your organisation
 - Librarians only

KnowledgeShare is designed to facilitate collaboration and the sharing of knowledge within the NHS.

I am happy for my professional interest to be seen by:

- All KnowledgeShare members
- Librarians and staff of your organisation
- Librarians only

How did you find out about current awareness?

- how they had found out about the KnowledgeShare current awareness service from the pull-down list:
 - Colleague or educational supervisor
 - Commissioning Zone
 - Library current awareness
 - Library enquiry desk
 - Library publication (leaflet, display etc)
 - Library staff at meeting/event
 - Library teaching session
 - Library website
 - Trust induction
 - Trust publication
 - Used the service before

Your interests

I would like to receive personalised update emails:

KnowledgeShare is designed to facilitate collaboration and the sharing of knowledge within the NHS.

I am happy for my professional interest to be seen by:

How did you find out about current awareness?

- Colleague or Educational Supervisor
- Commissioning Zone
- Library current awareness
- Library enquiry desk
- Library publication (leaflet, display etc.)
- Library staff at meeting/ event
- Library teaching session
- Library website
- Trust induction
- Trust publication
- Used the service before

- If they want to receive additional bulletins or news from the library service:

Receive additional bulletins or news from my library and knowledge service ☒

Save Changes

- The member must click **Save Changes**

OpenAthens scope error

Occasionally a member sees the following error when logging in for the first time.

Error!

 The OpenAthens scope that this Athens account is registered with is not known to KnowledgeShare. Please contact your system administrator for advice.

Due to the above error the system is unable to respond to your request. Please go back and try again. If the problem persists please contact your [system administrator](#).

This is usually an issue with the OpenAthens permissions for their account and can be fixed by the Athens admin at their LKS.

- In Athens admin, go to Dashboard > Accounts > Modify account > Permissions.
- Tick the box to enable resource permissions.

2.7 Member Administration

2.7.1 Advanced Search for Members

The advanced search allows you to add additional filters when searching for Members, Resources and Evidence Searches



How do we see our total number of Members?

Click on Advanced search

- Select the User tab
- Member type = Member
- Library and Knowledge Service = *Name of your Library Service on KnowledgeShare*

Scroll down page and click **Search**

Staff with LKS Administrator Permissions can also export a .csv file of all current registered members.

2.7.1.1 Example Advanced Member Searches

2.7.1.1.1 Which Members don't receive current awareness update emails?

Click on Advanced search

- Select the User tab
- Member type = Member
- Library and Knowledge Service = *Name of your Library Service on KnowledgeShare*

- Receive current awareness = No
- Scroll down page and click **Search**

2.7.1.1.2 Which Member does this email address belong to?

Click on Advanced search

- Select the User tab
- Email = *email address*

Scroll down page and click **Search**

N.B. Will only search for first email address on a Member record

2.7.1.1.3 How many Members did we add last month?

Click on Advanced search

- Select the User tab
- Member type = Member
- Created between = *DD/MM/YYYY – DD/MM/YYYY*
- Library and Knowledge Service = *Name of your Library Service on KnowledgeShare*

Scroll down page and click **Search**

2.7.2 Delete a Member manually

To conform to the KnowledgeShare terms of use you should not delete a member when they leave your organisation. Please un-assign them instead.

Deleting members should only happen when:

- A record has been created in error. Where a duplicate member record has been created use the Merge function instead of deleting the record (see 2.5 Merging two Member records)
- The member specifically asks to have record completely deleted. This should be rare and the consequences should be explained to the member.
- The member has passed away.
- Only Library and Knowledge Service Administrators have permission to delete a Member
 - Search for a member
 - On the Member profile page click on **Edit** on the Personal Information section



Dr Walter Bray

(no number stored)	Edit
walter.bray@bsuh.nhs.uk	OpenAthens username nhswalterbray103
Royal Sussex County Hospital Eastern Road BRIGHTON East Sussex BN2 5BE	Job title Consultant
	Department Acute Medical Unit
	Organisation Brighton and Sussex University Hospitals NHS Trust

Click here

- Click **Delete** at the bottom of the page

Save

Merge with another user

Cancel

Delete

Click here

- When a Member record is deleted all the personal information is removed and made anonymous. The rest of the information is retained but hidden so it can be included in statistics

2.8 LKS Administrator Member Administration

One or more staff in your LKS can have LKS Administrator permissions.

The key Member-related permissions which LKS Administrators have that other staff do not are:

- May delete own LKS Members
- Export a list of own LKS Members
- Edit a Member's OpenAthens details

LKS Administrators also receive the following email notifications:

- Weekly email report of members who have self-registered in the previous week
 - Email subject: Weekly report of self-registered members on KnowledgeShare
- Weekly email report of members who have been manually or automatically unassigned
 - Email subject: Manually and automatically unassigned members on KnowledgeShare
- Email alert when a member logs in to KnowledgeShare and requests an Evidence Searches
 - Email subject when deadline is greater than 7 days: New KnowledgeShare Evidence Search Request by a Member
 - Email subject when deadline is less than 7 days: New KnowledgeShare Evidence Search Request by a Member: Short Deadline
- Email alert when a member adds information to their Professional Interests page or is transferred from another LKS and does not have an assigned librarian
 - Email subject: Member is missing an assigned librarian on KnowledgeShare

Who is the Named LKS administrator?

The Named LKS administrator is the member of staff listed as the Administrator on the Admin>Manage LKS page for your service

Home > LKS List > Brighton and Sussex > Edit

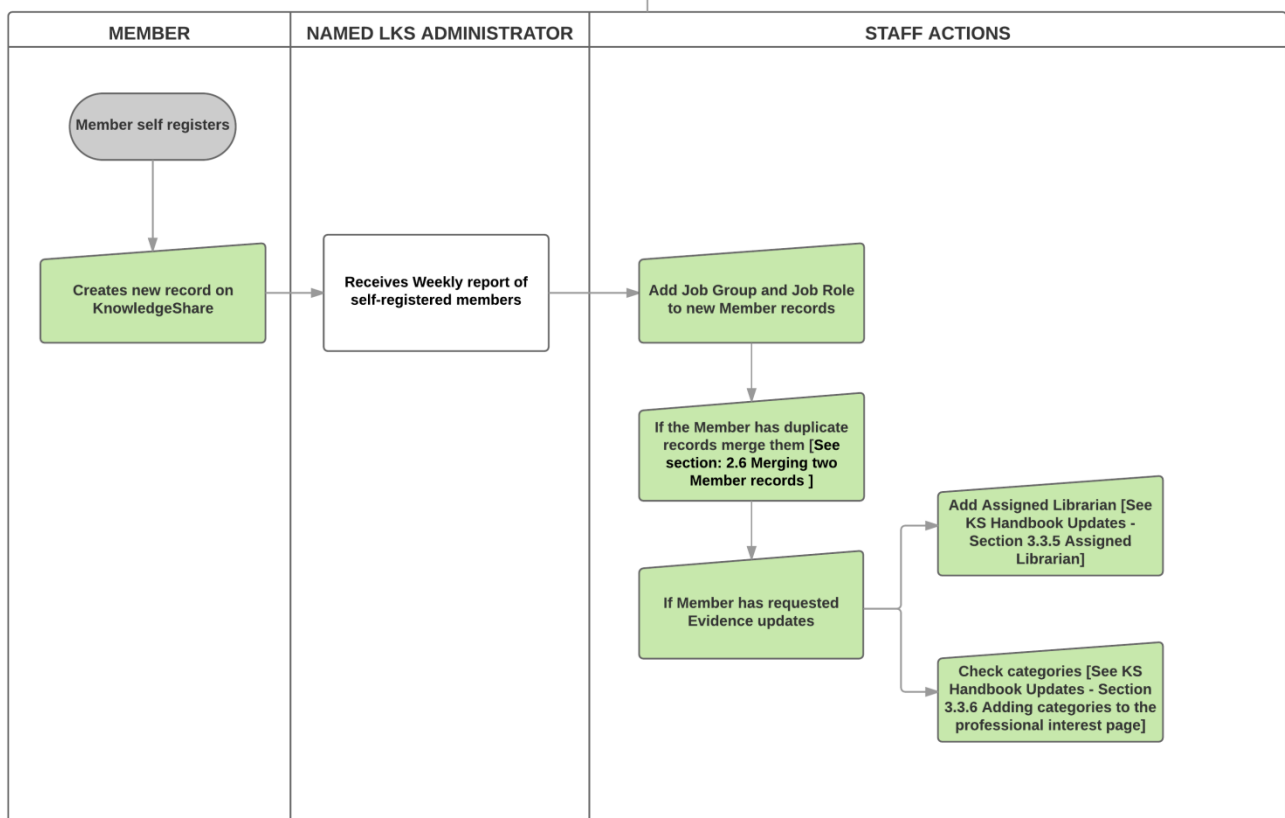
Edit

LKS name Brighton and Sussex	LKS subtitle Library and Knowledge Service
Region Kent, Surrey and Sussex	Administrator Ben Skinner
LKS website www.bsuh.nhs.uk/library	Staff email library.services@bsuh.nhs.uk

The Named LKS Administrator has the same permissions as any staff in the LKS Administrators permission group. They are the main default contact and some system emails will appear to come from them.

2.8.1 Weekly report of self-registered members

The report lists members who have self-registered in the previous week. It also includes possible duplicate users



- The report is sent to all staff with LKS Administrator permissions and is sent weekly on a Sunday night.

System Level Template Name: WeeklySelfRegisteredMembers
Subject Line: Weekly report of self-registered members

Dear Ben Skinner

Here is a list of new members who have self-registered in the last week along with any possible duplicate users.

- ACTION: Add a Job group and Job role to the records of the members below.
- ACTION: For duplicates, merge member records.
- CHECK: If member has added professional interests, check the categories and add an assigned librarian.
- CHECK: If member has added a search, change the generic title.

Newly registered:
[Charels Jones](#) (ID: 12305)

Newly registered:
[Dr Jayne Smith](#) (ID: 12306)
Possible duplicates:
[Jane Smith](#) (ID: 12300)

Regards,
KnowledgeShare Admin.

----- Sent out by KnowledgeShare-----

2.8.1.1 Actions on receiving the Weekly report of self-registered members

- Search for the members who have been listed as self-registered on the report
- Open the Member record
- The Member self-registration process does not including filling in the Job Group and Job Role fields so these fields need to be populated.
 - Click Edit next to the User Information selection
 - Appropriately populate the Job Group and Job Role fields

Organisation and Role

Organisation Sussex Community NHS Foundation Trust	Job title Consultant
Department Oncology	Job group
	Job role

- If the report has indicated the Member has possible duplicate records on the system investigate these.

- See section: 2.4.3 Merging two Member records, for instructions on how to merge member records.
- Usually it's appropriate to select the most recent record to keep.
- If the member has requested evidence updates then:
 - Add an Assigned Librarian [See KS Handbook Updates]
 - Check categories capture requested professional interests [See KS Handbook Updates]

2.8.2 Manually and automatically unassigned members on KnowledgeShare

The report lists members who have been manual or automatically unassigned in the previous week.

- When a member is automatically unassigned or manually unassigned an email will go to LKS Administrators of the member's LKS

System Level Template Name: InactivatedMembersReport
Subject Line: Automatically unassigned members on KnowledgeShare

Dear Ben Skinner

Here is a list of recently automatically and manually unassigned members from your LKS. Members have been automatically unassigned due to inactivity (see the [KnowledgeShare Privacy Policy](#)).

UserID	First Name	Surname	Job Title	Department	Organisation	LKS Membership Number
42912	Jane	Banks	Social Worker	Social Work	Brighton and Sussex University Hospitals NHS Trust	

- ACTION: Please consider removing these members from your library management system and any associated paper records.

Best wishes,

KnowledgeShare Administration

----- Sent out by KnowledgeShare-----

- Each member is shown on a separate line with KnowledgeShare User ID, Name, Job Title, Department, Trust, Primary Email Address, Library and Knowledge Service membership number. This is in a format that can easily be copied and pasted into Excel.
- In accordance with GDPR remove these members from your library management system and any associated paper records.

2.8.3 Manage your Welcome email template

An email with the subject heading **Welcome to KnowledgeShare** is automatically sent to a new member when Save is clicked on the Add New Member page.

What is an email template?

When KnowledgeShare system sends out emails to members, the body of the email is based on a template. The different types of email have different templates.

There are two levels of invitation email template

- **System Level Email Template:** This template can only be edited by the System Administrator
- **LKS Level Email Template:** This overrides any System Level version of this template. The template can be added and edited by LKS Administrators in a library service

2.8.3.1 System Level Email Template

- The template for the invitation email at System Level

Dear {{RecipientSalutation}},

As a member of {{OrganisationName}}, your details have been added to the the KnowledgeShare system, which we use to provide and manage your access to library services provided by {{LKSName}}.

Please log into KnowledgeShare and check your details:

1. Click: [\[confirmation link\]](#) *Please accept cookies to allow this process to work*
2. Enter the email address this email was sent to
3. Log in with your NHS OpenAthens username and password

You will then be able directly access KnowledgeShare using your NHS OpenAthens login. If you don't have an NHS OpenAthens username and password you can self-register at: <https://openathens.nice.org.uk/>

When you log in you will be asked if you are happy to share your contact information with other KnowledgeShare members. Doing this helps in the sharing of knowledge across healthcare, and connecting staff together across geographical boundaries.

We are committed to safeguarding your information. The information you supply will be used to contact you about services or resources you have requested from the Library and Knowledge Service. For further information on how we keep your information secure, and your rights to access it, read the full KnowledgeShare [Privacy Policy](#).

Best regards,

{{SenderFirstName}}

{{SenderName}}
{{SenderJobTitle}} | [{{SenderEmail}}](#)
{{SenderLKSName}} | [{{SenderLKSWebsite}}](#)

- The template creates the following text

System Level Email Template Name: NewMemberInvitation
Subject Line: Welcome to KnowledgeShare

Dear Dr Smith,

As a member of Brighton and Sussex University Hospitals NHS Trust, I have just added you to the KnowledgeShare system, which is what we use to provide and manage your access to library services provided by Brighton and Sussex Library and Knowledge Service.

Please log into KnowledgeShare and check your details:

1. Click: [\[confirmation link\]](#) *Please accept cookies to allow this process to work*
2. Enter the email address this email was sent to
3. Log in with your NHS OpenAthens username and password

You will then be able directly access KnowledgeShare using your NHS OpenAthens login. If you don't have an NHS OpenAthens username and password you can self-register at: <https://openathens.nice.org.uk/>

When you log in you will be asked if you are happy to share your contact information with other KnowledgeShare members. Doing this helps in the sharing of knowledge across healthcare, and connecting staff together across geographical boundaries.

We are committed to safeguarding your information. The information you supply will be used to contact you about services or resources you have requested from the Library and Knowledge Service. For further information on how we keep your information secure, and your rights to access it, read the full KnowledgeShare [Privacy Policy](#).

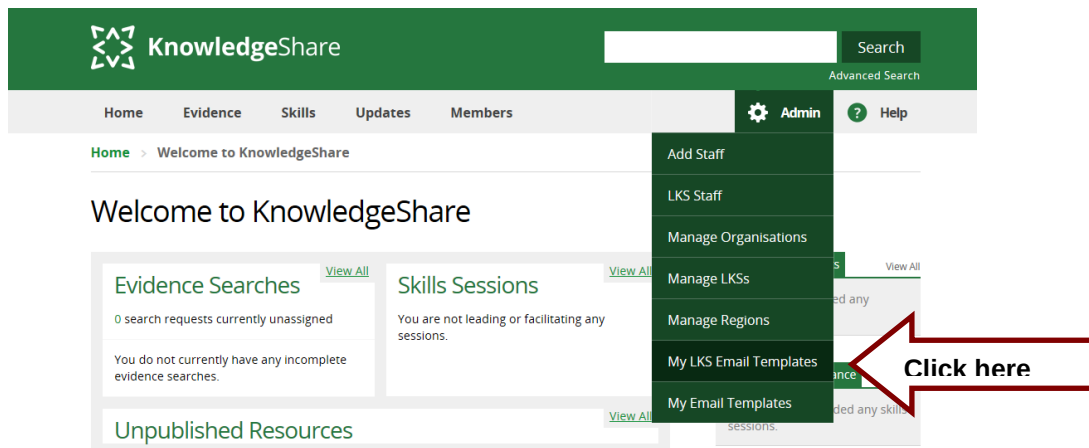
Best regards,

Elaine Watson
Knowledge Management Librarian | elaine.watson@bsuh.nhs.uk
Brighton and Sussex Library and Knowledge Service |
<https://www.bsuh.nhs.uk/library/>

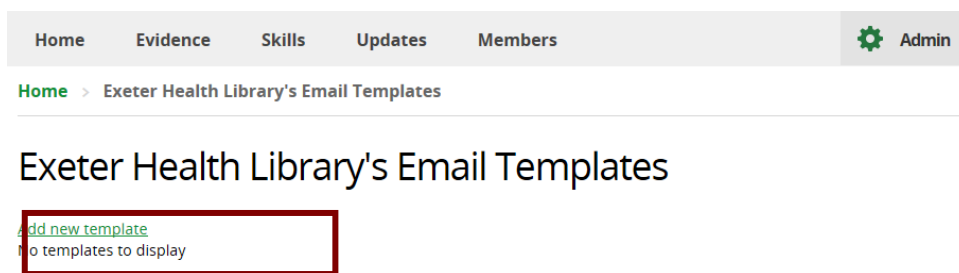
----- Sent out by KnowledgeShare-----

2.8.3.2 Add LKS Level Email Template

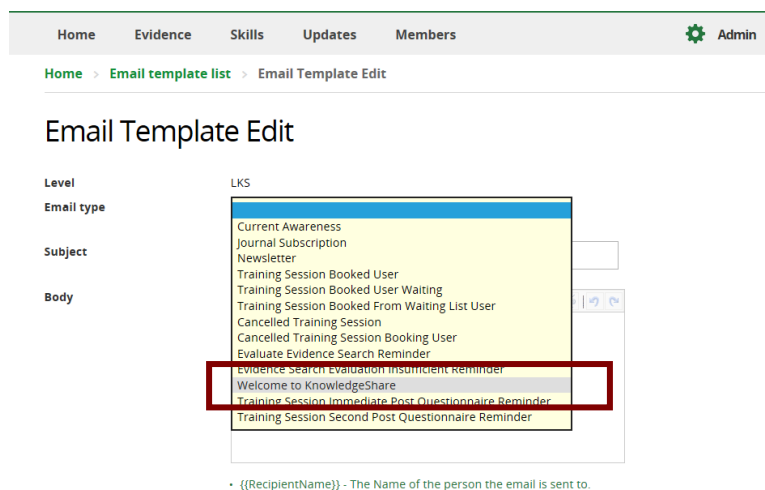
- Hold the cursor over **Admin** and click **My LKS Email Templates**



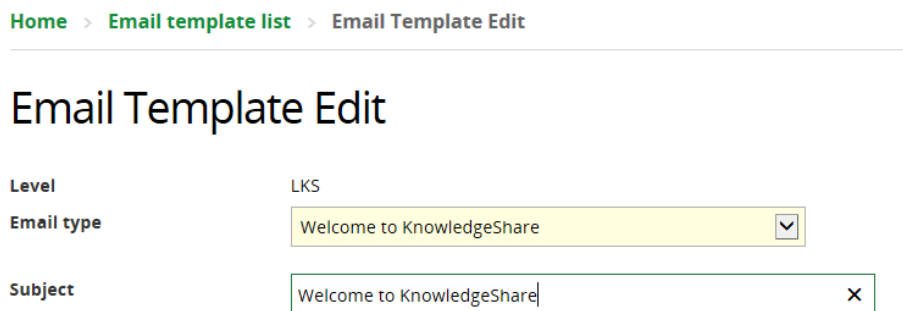
- Click **Add new template**



- From Email Type drop down list select **Welcome to KnowledgeShare**



- In the Subject add **Welcome to KnowledgeShare**



- Paste in the Body of the email the appropriate text

- Keep code {{RecipientSalutation}} to ensure Members are addressed formally or informally as they have specified
- Keep code {{OrganisationName}} to ensure the organisation the member works for is automatically added
- Embed a link to the code {{ConfirmationLink}} in the text [confirmation link] using the link icon. This saves time for staff by adding the Member's NHS OpenAthens details to their KnowledgeShare record.

The screenshot shows the 'Email Template Edit' page. The 'Level' is set to 'LKS'. The 'Email type' is 'Welcome to KnowledgeShare'. The 'Subject' is 'Welcome to KnowledgeShare'. The 'Body' field contains a rich text editor with a toolbar. A red box highlights the 'Insert/Edit Link' icon in the toolbar. An 'Insert/Edit Link' dialog box is open, showing the Link URL as {{ConfirmationLink}}, Target as 'Open Link in a New Window', and Title as empty. The dialog box has 'Update' and 'Cancel' buttons.

LKS Level Email Template Name: NewMemberInvitation
Subject Line: Welcome to KnowledgeShare

Dear {{RecipientSalutation}},

As a member of {{OrganisationName}}, I have just added you to KnowledgeShare. We use this system to provide and manage your access to library and knowledge services, such as evidence updates, provided by {{LKSName}}.

Please log into KnowledgeShare and check your details:

- Click: [\[confirmation link\]](#) Please accept cookies to allow this process to work
- Enter the email address this email was sent to
- Log in with your NHS OpenAthens username and password

You will then be able directly access KnowledgeShare using your NHS OpenAthens login. If you don't have an NHS OpenAthens username and password you can self-register at: <https://openathens.nice.org.uk/>

When you log in you will be asked if you are happy to share your contact information with other KnowledgeShare members. Doing this helps in the sharing of knowledge across healthcare, and connecting staff together across geographical boundaries.

We are committed to safeguarding your information. The information you supply will be used to contact you about services or resources you have requested from the Library and Knowledge Service. For further information on how we keep your

information secure, and your rights to access it, read the full KnowledgeShare [Privacy Policy](#).

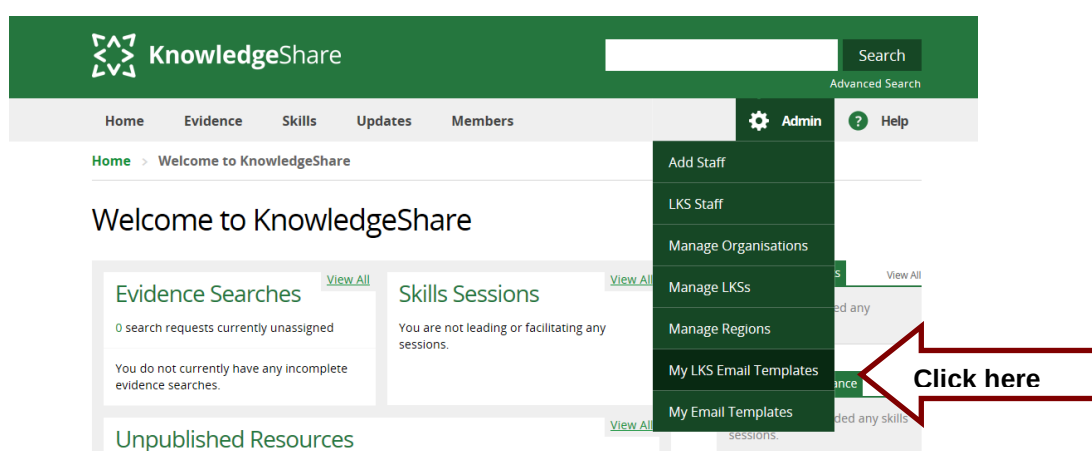
Yours sincerely,
{{SenderFirstName}}

{{SenderName}}
{{SenderJobTitle}} | [{{SenderEmail}}](#)
{{SenderLKSName}} | [{{SenderLKSWebsite}}](#)

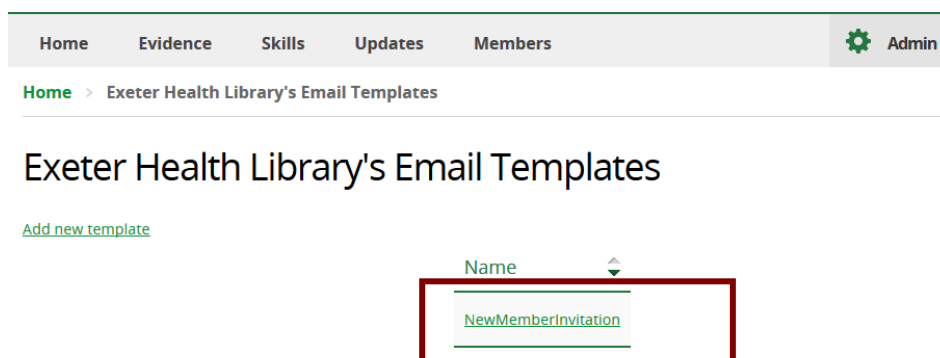
- Scroll down the page and click **Save**

2.8.3.3 Edit LKS Level Email Template

- Hold the cursor over **Admin** and click **My LKS Email Templates**



- Click **NewMemberInvitation**



- Edit template as appropriate remembering to:
 - Keep code {{RecipientSalutation}} to ensure Members are addressed formally or informally as they have specified
 - Keep code {{OrganisationName}} to ensure the organisation the member works for is automatically added
 - Embed a link to the code {{ConfirmationLink}} in the text [confirm registration] using the link icon. This saves time for staff by adding the Members NHS OpenAthens details to their KnowledgeShare record.
- Scroll down the page and click **Save**

2.8.4 Annual GDPR email

An email is automatically sent to members on the anniversary of the date they were added to KnowledgeShare, to ensure that they know what data the system holds about them. The email appears to come from the LKS Named Administrator.

System Level Email Template Name: GDPRAnnualReminder
Subject Line: Your information on the KnowledgeShare system from {{LKSName}}

Dear {{RecipientSalutation}},

As a member of {{RecipientLKSName}} we hold information about you on our KnowledgeShare system. We use this system to provide and manage your access to library and knowledge services, for example regular evidence updates.

We are writing to all members once a year to ensure that we are holding correct information about you.

Please check that the information below is correct.

- If it is correct you don't need to do anything more.
- If you would like to let us know about a change or correction you can:
 - Email us at {{LKSEmailAddress}} or
 - {{LandingPage}}, confirm the address that this email was sent to, and then enter your NHS OpenAthens username and password*.

The contact information we currently hold about you

Your OpenAthens username: {{RecipientOpenAthensUsername}}
Your name: {{RecipientFullName}}
Your phone number: {{RecipientPhoneNumbers}}
Your email address(es): {{RecipientEmailAddresses}}
Your LinkedIn handle: {{RecipientLinkedIn}}
Your Twitter handle: {{RecipientTwitter}}
Your organisation: {{RecipientOrganisation}}
Your department: {{RecipientDepartment}}
Your job title: {{RecipientJobTitle}}
Your work address: {{RecipientAddress}}

Your professional interests

{{ProfessionalInterests}}

We are committed to safeguarding your information. The information you supply will be used to contact you about services or resources you have requested from the Library and Knowledge Service. For further information on how we keep your information secure, and your rights to access it, read the full KnowledgeShare {{PrivacyPolicy}}.

Yours sincerely,

{{SenderFirstName}}

{{SenderName}}
{{SenderJobTitle}} | [{{SenderEmail}}](#)
{{SenderLKSName}} | {{SenderLKSWebsite}}

* If you don't have an NHS OpenAthens username and password you can self-register at: <https://openathens.nice.org.uk/>

2.9 Information Governance and Privacy Policy

2.9.1 Privacy Policy

The KnowledgeShare Privacy Policy explains:

- what information is collected and why it is collected
 - how KnowledgeShare uses that information
 - the information choices that are offered, including how to access and update information
- The full KnowledgeShare Privacy Policy can be found at:
https://www.knowledgeshare.nhs.uk/index.php?PageID=help_privacy
 - If different LKS teams use different processes then it will invalidate the privacy policy and the agreed information governance arrangements.

2.9.2 Consent and legitimate use of data

Following the introduction of the GDPR it is important to understand the difference between use of data based on consent versus legitimate use. Legitimate use relates to processing data and communicating with members in relation to services that they have specifically requested, such as if they have joined the library, requested an evidence search, booked on to teaching, or signed up to personalised evidence updates. We do not need opt-in consent to process data in these cases although we should ensure that members know how we are processing their data.

Opt-in consent must be given when processing data for additional purposes other than those already requested. This includes sharing member's contact information with other staff for the purposes of facilitating collaboration. Members are given the opportunity to consent to data sharing when they log in to KnowledgeShare, and library staff should not complete or edit these options on behalf of members.

2.9.2.1 Privacy notice on the Current Awareness Updates form

- Ensure you incorporate the Privacy Notice into your paper forms. Electronic forms may include slightly less information provided there is a link to the Privacy Policy on KnowledgeShare www.knowledgeshare.nhs.uk/index.php?PageID=help_privacy (also see the [example on our website](#)).

2.9.2.2 Consent questions for the Evidence Search form

- Ensure your print or online form for requesting an evidence search contains the 'sharing' questions:

We would like to let others know that you requested this search in order to facilitate collaboration. Please indicate who should see this information:

Any NHS staff and students ☐

Staff and students at my organisation ☐

Library and Knowledge Service staff only ☐

- Ensure you include on the form the following text:

Your data will be held on our library management systems, including KnowledgeShare. The privacy policy can be found at:
www.knowledgeshare.nhs.uk/index.php?PageID=help_privacy

2.9.3 Access to data

The privacy policy states “If you are eligible for an NHS OpenAthens password then you will be able to log into KnowledgeShare in order to update the information we hold about you. You can also request this information at any time from your LKS using the email address on their page on KnowledgeShare or directly from us.

As mentioned above you can log in to KnowledgeShare to update your privacy or communication settings or ask your LKS to make changes on your behalf.”

We must ensure that all members are told how we are processing their information, and that they have very easy access to their own data so that they can check what we hold about them and make changes, or request changes be made. Provided the member is eligible for NHS Open Athens they will be able to log in. All members will also receive Welcome emails when they are added to the system to ensure that they know they have been added

All members will also receive an annual email letting them know what contact information we hold about them and giving them the opportunity to amend this.

2.9.3.1 How the library service should ensure member access to data

- Ensure that members will be provided, on request, with the information that you hold about them on KnowledgeShare
- Ensure that your current awareness update emails contain a link to log in to KnowledgeShare and/or the following line below your signature: “ Please email me back if you would like to change your communication preferences or stop receiving these emails”

2.9.3.2 How the KnowledgeShare ensures member access to data

- Automatically send to members added to KnowledgeShare a Welcome email to ensure that they know they have been added and what data the system holds about them*
- Automatically send to members on the anniversary of the date they were added to KnowledgeShare, an email to ensure that they know what data the system holds about them

* Members can be added to KnowledgeShare without them having filled in a registration form (e.g. where they have booked on a teaching session or requested a search) because all of the data usage that is based on consent will default to “no” and they will receive an email confirming how their data is being processed.

2.9.4 Manually and automatically unassigned members

2.9.4.1 Manually unassigned member

The privacy policy states “We will unassign you from your library and knowledge service when we know you have left or if you have not used any of our services for three years. Once unassigned we will keep your information for a further two years (in case you return to using the services after a break).”

A member’s record is manually unassigned when:

- A member is identified as having left your LKS. This may be either via your usual Library Management System processes or by using the KnowledgeShare “out of office” messages where people tell you they have left the Trust.
- If possible, please try to align your process for removing (or marking as expired) members from your library management system with a process for unassigning them from your LKS on KnowledgeShare.
- When a member is automatically unassigned or manually unassigned a weekly email will go out to the LKS Administrator(s) of their last library service

System Level Template Name: InactivatedMembersReport
Subject Line: Automatically unassigned members on KnowledgeShare

Dear Ben Skinner

Here is a list of recently automatically and manually unassigned members from your LKS. Members have been automatically unassigned due to inactivity (see the [KnowledgeShare Privacy Policy](#)).

UserID	First Name	Surname	Job Title	Department	Organisation	LKS Membership Number
42912	Jane	Banks	Social Worker	Social Work	Brighton and Sussex University Hospitals NHS Trust	

- ACTION: Please consider removing these members from your library management system and any associated paper records.

Best wishes,

KnowledgeShare Administration

----- Sent out by KnowledgeShare-----

- Members who have been unassigned from an LKS for **two** years will be fully deleted from the system automatically.

2.9.4.2 Automatic unassigning of a member record to comply with GDPR

The privacy policy states “We will unassign you from your library and knowledge service when we know you have left or if you have not used any of our services for three years. Once unassigned we will keep your information for a further two years (in case you return to using the services after a break).”

A member’s record is automatically unassigned if:

- A member is assigned to an LKS but is inactive for three years. They are then automatically un-assigned. They remain unassigned from any LKS for two years and are then deleted.
- When a member is automatically unassigned or manually unassigned a weekly email will go out to the LKS Administrator(s) of their last library service

System Level Template Name: InactivatedMembersReport
Subject Line: Automatically unassigned members on KnowledgeShare

Dear Ben Skinner

Here is a list of recently automatically and manually unassigned members from your LKS. Members have been automatically unassigned due to inactivity (see the [KnowledgeShare Privacy Policy](#)).

UserID	First Name	Surname	Job Title	Department	Organisation	LKS Membership Number
42912	Jane	Banks	Social Worker	Social Work	Brighton and Sussex University Hospitals NHS Trust	

- ACTION: Please consider removing these members from your library management system and any associated paper records.

Best wishes,

KnowledgeShare Administration

----- Sent out by KnowledgeShare-----

- Each member is shown on a separate line with KnowledgeShare User ID, Name, Job Title, Department, Trust, Primary Email Address, Library and Knowledge Service membership number. This is in a format that can easily be copied and pasted into Excel.
- Members who have been unassigned from an LKS for **two** years will be fully deleted from the system automatically.

2.9.4.3 Definition of inactivity in KnowledgeShare

Inactivity is defined in KnowledgeShare as:

Most recent Skills session booking is over 3 years old (OR is NULL)

AND

Most recent Evidence Search request is over 3 years old (OR is NULL)

AND

Most recent Member login is over 3 years old (OR is NULL)

AND

Most recent Current Awareness sent date is over 3 years old (OR is NULL)

Unless:

Member creation date is under 3 years old

OR

Reassign to an LKS date is under 3 years old

2.9.4.4 Automatic deletion of a member record to comply with GDPR

The privacy policy states “The system will only store as much information about you as is required, and will securely destroy any personal information about you when it is no longer of use.”.

A member’s record is automatically deleted if:

- A librarian manually unassigns a member from their LKS. The member remains unassigned from any LKS for two years and is then deleted.
- A member is assigned to an LKS but is inactive for three years. They are automatically un-assigned. They remain unassigned from any LKS for two years and are then deleted.

2.10 Member access to KnowledgeShare services

2.10.1 Access via KnowledgeShare URL

Members can log in to KnowledgeShare with their NHS OpenAthens username and password via the URL: <https://www.knowledgeshare.nhs.uk>

2.10.2 Access via My Resources list in OpenAthens URL

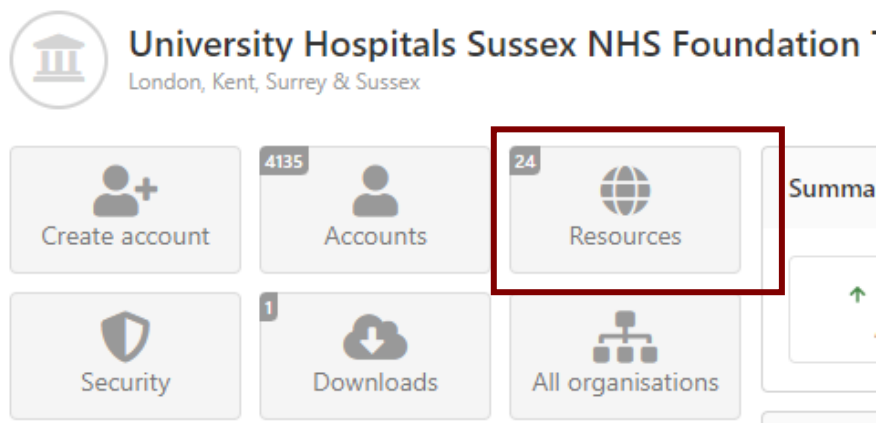
There is a Federated Resource Access setting that needs to be either Permissive or Restrictive. The default setting is permissive. For the permissive setting you don't have to add KnowledgeShare to the My Resource list in NHS OpenAthens, for Members to be able to log in to KnowledgeShare.

If you set it to restrictive then it is essential that KnowledgeShare is added to the list of available resources on OpenAthens.

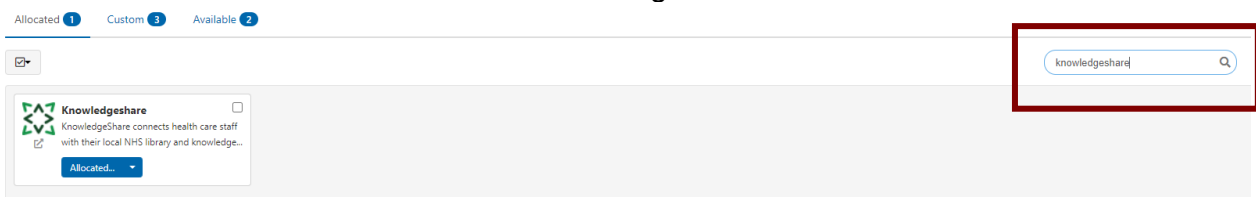
Members can log into KnowledgeShare directly without KnowledgeShare being added to the My Resources list. By adding KnowledgeShare to the resources list, it is then displayed and available for Members to select from this list.

2.10.2.1 Adding KnowledgeShare to the My Resources list in OpenAthens

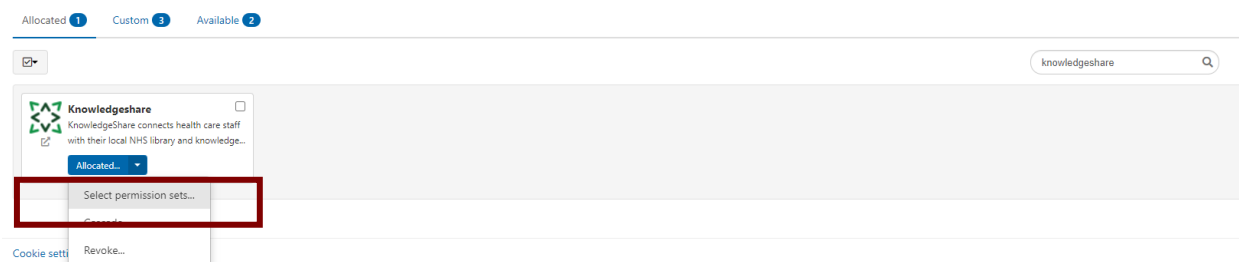
- Log into Athens Admin <https://admin.openathens.net/>
- Click on Resources



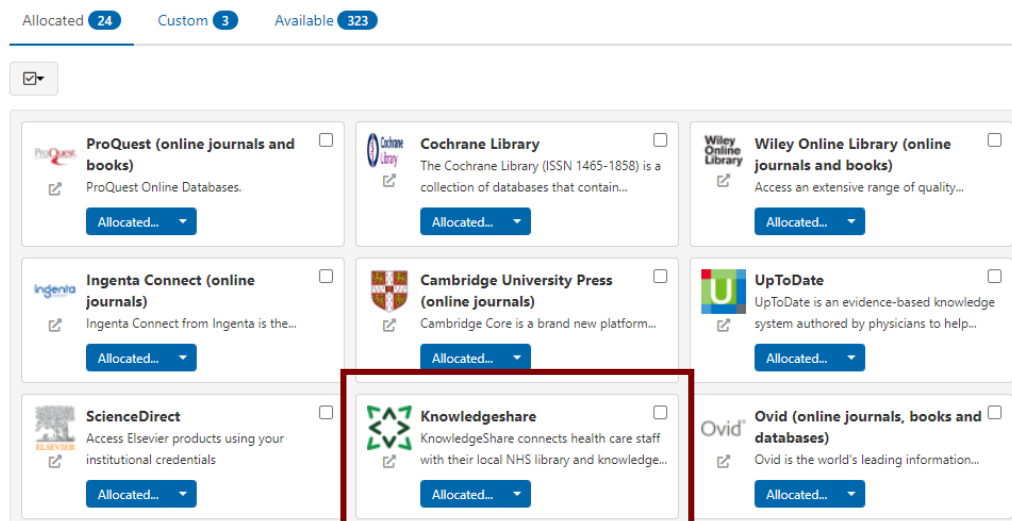
- Click on the All tab and search for KnowledgeShare



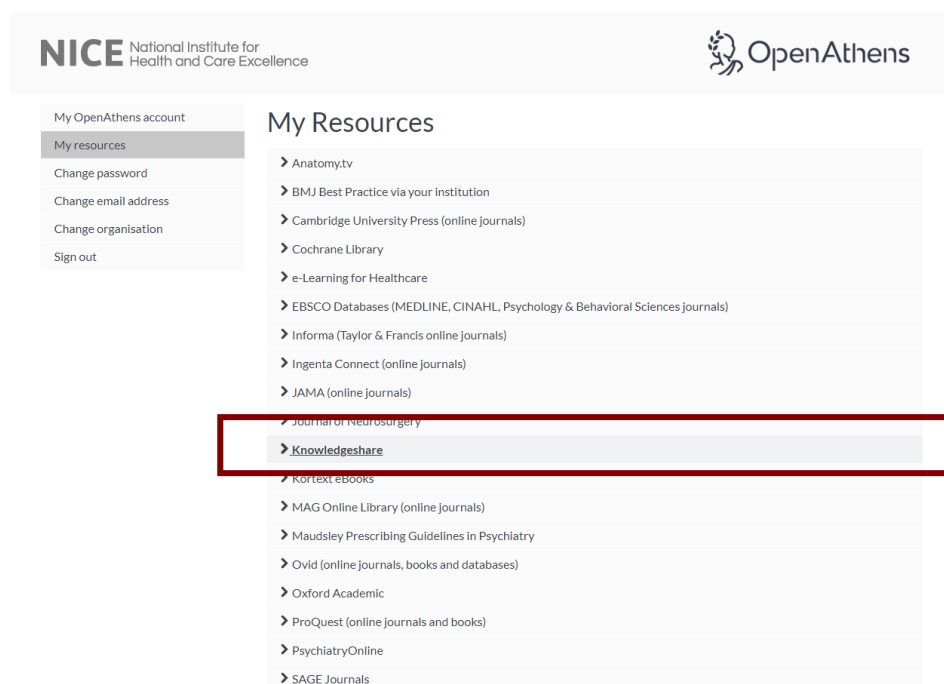
- On the Allocate menu click on Select permission sets



- KnowledgeShare now appears in allocated resources



- KnowledgeShare is now available on the NHS OpenAthens My Resources list for Members to select



2.10.3 Access for Members without an NHS OpenAthens username and password

- A Member can still enjoy the services you provide through KnowledgeShare even if they don't have an NHS OpenAthens username and password.
 - They can receive update emails
 - They can be emailed evidence search reports
 - They can be booked on skills sessions by library staff