

## Tutorial for PCPACK5 Single User

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### Introduction

This tutorial will lead you through most of the basic operations in PCPACK5.

If you want to see this tutorial being performed by an experienced user of PCPACK (who also provides an audio commentary) then this is available as a set of **videos** that can be downloaded from the website.

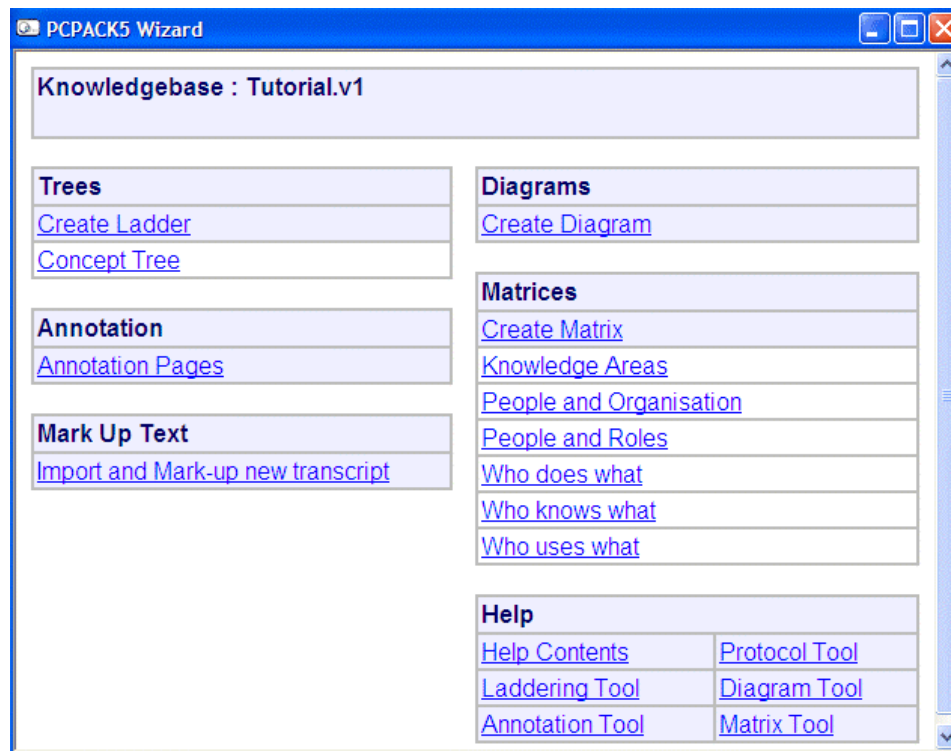
The tutorial is broken down into the following sections:

- Section 1.** Getting Started
- Section 2.** Concept Tree and Concept Map
- Section 3.** Marking-Up
- Section 4.** Concept Tree, Matrix and New Tree
- Section 5.** Annotation Pages
- Section 6.** Concept Map
- Section 7.** Process Maps
- Section 8.** Process Tree and Process Maps
- Section 9.** Annotation Pages for Tasks
- Section 10.** Attributes and Values
- Section 11.** Creating a Website

## Section 1. Getting Started

In this section you will open PCPACK, create a new knowledgebase and open the new knowledgebase.

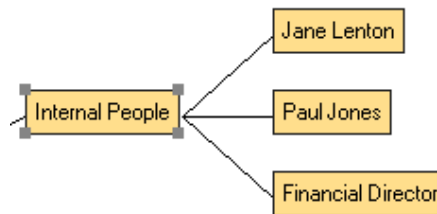
1. Open the “PCPACK5” folder on the desktop.
2. To run PCPACK5, double-click on “PCPACK5”.
3. Using the **Knowledgebase** menu (in the top-left), select “**New**”.
4. Select the “**GTO**” ontology and click **Create**.
5. Enter a name for the knowledge base (e.g. “Tutorial”)
6. Click **Save**.
7. A folder will be displayed in the Admin Tool with the name of your knowledge base. Double-click on the folder to open it.
8. Inside the folder will be a book icon that represents v1 (i.e. version 1) of your knowledge base. Double-click on the book icon to open the knowledge base.
9. The **Wizard** (see image below) – which is also called the ‘Tool Launcher’ - should open allowing you to access most of the main commands. (If the Wizard does not open, click the wizard’s hat icon in the bottom-left).



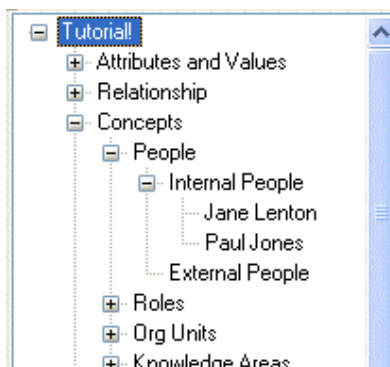
## Section 2. Concept Tree and Concept Map

In this section you will add some concepts into the knowledgebase using a concept tree and a concept map, and then create some relationships between them.

1. Using the Wizard, click on “**Concept Tree**”.
2. You will see a tree that contains the basic classes of concepts in GTO. You will use this tree to add some concepts into the knowledgebase.
3. Right-click on the “Internal People” node and select “**Ladder down**”.
4. A new dialog box will open. Type “Jane Lenton” and click **Add**. You will see that a new (Jane Lenton) node is added to the tree.
5. Now type “Paul Jones” and click **Add**.
6. Now type “Financial Director” and click **Add**.
7. Click **Done**. This part of the tree should now look like this:

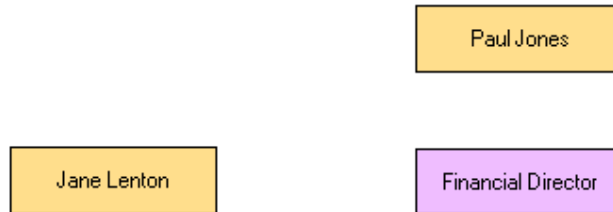


8. “Financial Director” is obviously not a person so we need to re-classify it. To do this, drag the “Financial Director” node and drop it on top of the “**Internal Roles**” node.
9. The concept tree is used to display and edit the “is a” relationships between concepts. You will now create some other relationships using a **concept map**. To do this, return to the Wizard by either closing the ladder (tree) tool or clicking on “Wizard” in the (minimised) bar at the bottom of your screen.
10. Using the Wizard, click “**Create Diagram**”.
11. Call the new diagram “Jane Lenton Map”.
12. Make sure that the Template is set to “**Concept Map**”. (If it is not, use the little arrow button the change it). Click **Ok**.
13. Nodes can be added to a diagram that represent concepts already in the knowledgebase. The easiest way to do this is to drag and drop them from the browser tree shown in the right-hand pane. To do this, expand the “Concepts” branch, then the “People” branch, then the “Internal People” branch.



14. Drag “Jane Lenton” from the browser onto the blank, white diagram area in the left-hand pane.

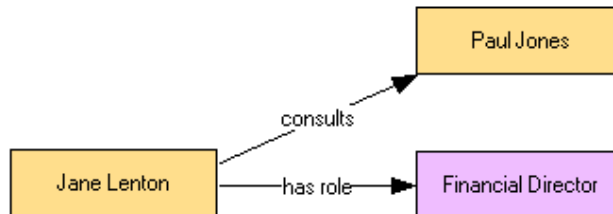
15. Use this method to add “Paul Jones” to the diagram.
16. Expand the Roles branch, and drag “Finance Director” onto the diagram
17. Re-arrange the nodes by dragging them, so you get something like this:



18. You will now create relationships between the nodes by adding links (arrows) between pairs of them. To do this, click the blue horizontal arrow in the tool bar (at the top of the screen).



19. The cursor is now in “link” mode. To create a link, click in the centre of “Jane Lenton” then click in the centre of “Finance Director”.
20. To add another relationship, click in the centre of “Jane Lenton” then click in the centre of “Paul Jones”. This time you will be asked which relation to choose. Select “**consults**” and click OK.
21. Now come out of “link” mode by doing a right mouse click (or by pressing the “esc” key on your keyboard).

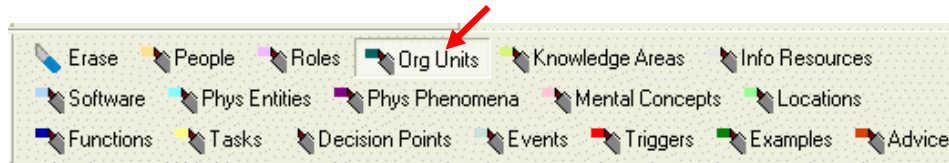


22. You will return to this diagram later, but you can shut it down for now by clicking the red box in the top-right corner of the Diagram Tool.

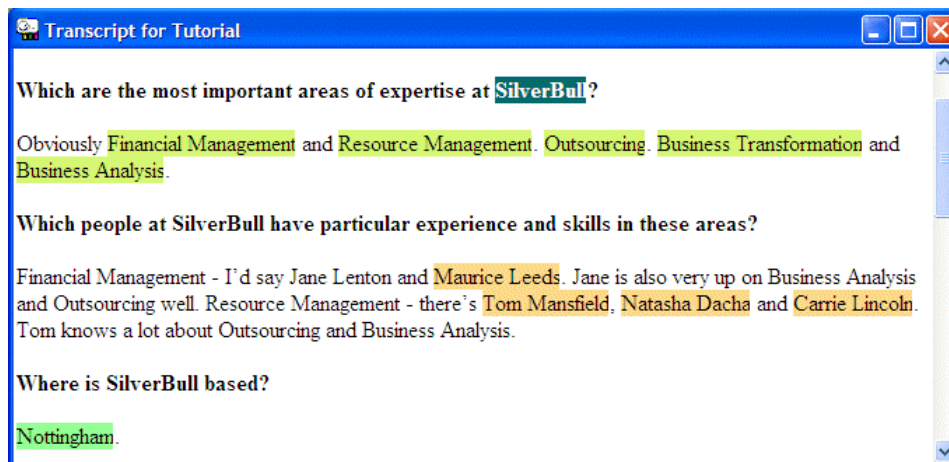
## Section 3. Marking-up

In this section you will add some more concepts into the knowledgebase by marking-up (highlighting) words and phrases in an imported document.

1. Using the Wizard, click on “**Import and Mark-up new transcript**”. (If you cannot see the Wizard, click “Wizard” on the bottom bar of your screen).
2. A new dialogue box (headed “Import Protocol”) will appear. (If it does not, use the Protocol menu in the top-left and select “Import”).
3. Use the browser to select the “**Transcript for Tutorial**” file that is located in the PCPACK5 folder on the desktop. Then click **Open**.
4. A smaller dialogue box (headed “Import Protocol”) will appear. Click **OK**.
5. After a few seconds the document will be imported.
6. Click on the “**Org Units**” marker pen (that is located in the bank of marker pens at the upper section of the screen).



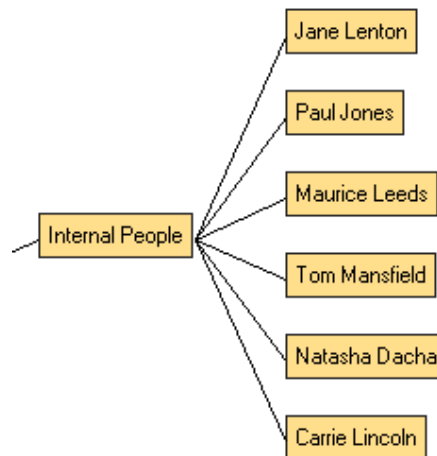
7. Use your cursor (that represents the Org Units marker-pen) to highlight the word “**SilverBull**” in the first line of the transcript.
8. Click on the “**People**” marker pen.
9. Highlight the names of people in the first few rows, e.g. Maurice Leeds and Tom Mansfield.
10. Click on the “**Knowledge Areas**” marker pen.
11. Highlight the areas of knowledge in the first few rows, i.e. Financial Management, Resource Management, Outsourcing, Business Transformation and Business Analysis.
12. Click on the “**Locations**” marker pen and highlight “Nottingham”.



## Section 4. Concept Tree, Matrix and New Tree

In this section, you will return to the concept tree to view the concepts that were marked-up in the previous section, and then use a matrix to create some relationships between them. You will then create a new tree.

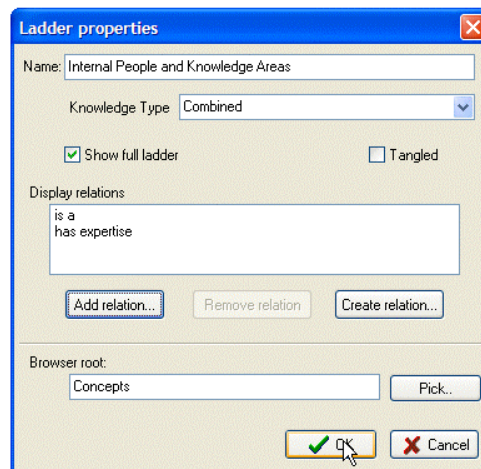
1. Close the Protocol Tool (e.g. by clicking the red box in the top-right).
2. Return to the Wizard and click on **“Concept Tree”**.
3. You will see the concepts that you marked-up are now shown on the tree. If you made any mistakes, you can delete or rename the incorrect nodes. To do this, right-click on the incorrect node and select either **“Delete”** or **“Rename”**.
4. Using your cursor, draw a box around the people you marked-up in the previous section. This has the effect of selecting multiple nodes.
5. Now drag one of the selected nodes (e.g. “Maurice Leeds”) and drop it on top of the “Internal People” node. This will move all of the selected nodes.



6. You will now associate the people with their areas of knowledge using a matrix. To do this, return to the Wizard.
7. In the Matrices section, click **“Who knows what”**.
8. A matrix will open. Simply click in the cells to say which person has expertise in which area of knowledge (e.g. Jane Lenton knows about Outsourcing). If you wish to see the transcript at the same time, then simply click “Text for Tutorial” in the Wizard and arrange the matrix window and protocol (i.e. marking-up) window so you can see them both.

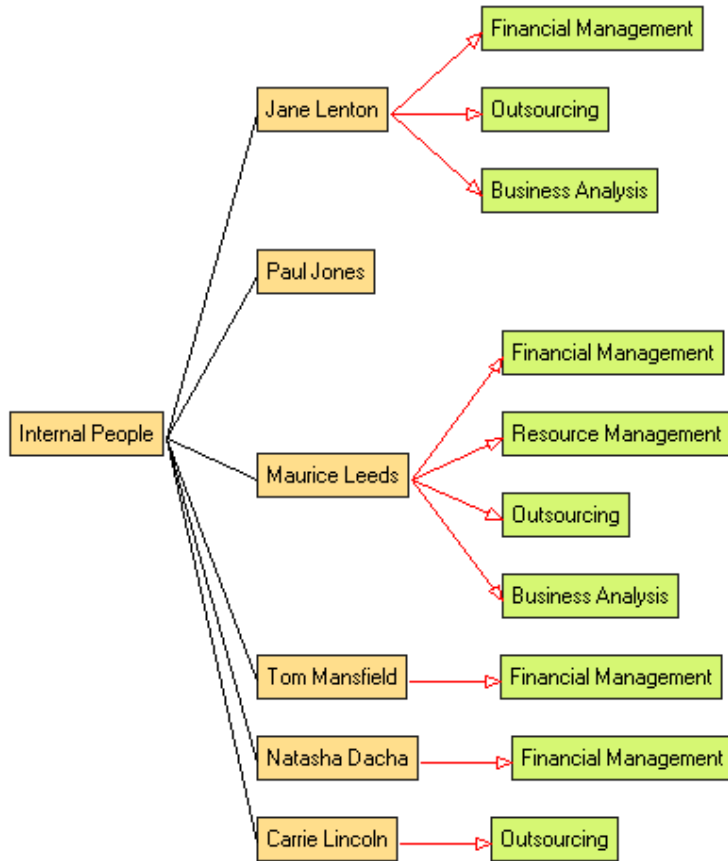
		People	Internal People	Jane Lenton	Paul Jones	Maurice Leeds	Tom Mansfield	Natasha Dacha	Carrie Lincoln
Knowledge Areas	Knowledge Areas								
	Financial Management			<input type="checkbox"/>		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
	Resource Management					<input type="checkbox"/>			
	Outsourcing			<input type="checkbox"/>		<input type="checkbox"/>			<input type="checkbox"/>
	Business Transformation								
	Business Analysis			<input type="checkbox"/>		<input type="checkbox"/>			

9. You will now create a new tree (or “ladder” as PCPACK calls it). First, close the Matrix Tool (e.g. by clicking the red box in the top-right).
10. Return to the Wizard and click on **“Concept Tree”**.
11. Right-click on the “Internal People” node and select **“Root of new ladder”**.
12. A dialog box (headed “Create New Ladder”) will appear. Click at the end of where it says “Internal People” and type in “and Knowledge Areas”. Click **OK**.
13. A new tree will be shown. At the moment, this just shows part of the Concept Tree (using the ‘is a’ relations). You will now alter the properties (template) of the tree so that it shows a second relation.
14. Using the **Laddering** menu (in the top-left), select **Properties**.
15. A dialog box will appear (headed “Ladder properties”). Click the **“Add relation”** button.
16. Select **“has expertise”** from the menu, and click **OK** to add the relation.



17. Click **OK** on the Ladder Properties dialog box.
18. The new tree will appear showing the internal people and their areas of expertise (that were entered into the knowledge base using the matrix).

19. To distinguish between the 'is a' and the 'has expertise' links, you will change the style of the latter. To do this, right-click on the link (line) between "Jane Lenton" and "Financial Management" and select "**Relation type style**".
20. A dialog box (headed "Relation Style: has expertise") will appear. Click on "**Arrow head**".
21. Click on "**Line Colour**".
22. A new dialog box (headed "Color") will appear. Click the **red** colour and do **OK**.
23. Click OK. The 'has expertise' links on the tree will have changed colour and have an arrow head.





## Section 5. Annotation Pages

In this section, you will view some annotation pages and edit an annotation page.

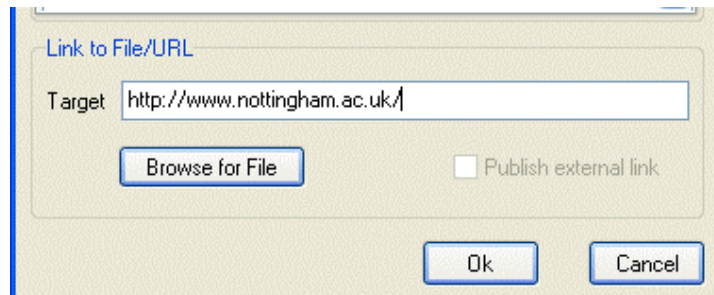
1. Right-click on the “Jane Lenton” node and select “**Annotation**” (or press the “ctrl” key and double-click on “Jane Lenton”).
2. A page of information will appear showing what has been entered into the knowledge base about Jane Lenton. The other concepts that have been related to Jane Lenton are shown as hyperlinks. Try clicking on one of these to see another annotation page.
3. Return to the “Jane Lenton” annotation page and click in the white section on the second row. Try typing some text into this “Description” field.
4. You will now cut and paste some text into the “Description” field. If you are reading this tutorial on a PC, then select the text below and then do a ‘copy’ command:

Jane Lenton has been a member of the Finance Group for 6 years, with primary responsibility for outsourcing. She was previously Director of the Einstein Business Unit at the University of Nottingham and still maintains strong links with this unit.

5. Now right-click in the Description field and select “**Paste unformatted**”.
6. You will now create a hyperlink to a website. Highlight “University of Nottingham” in the text you just pasted into the page, then click the small link symbol at the top menu bar.



7. A dialog box (headed “Select an item to link to”) will appear. Type “http://www.nottingham.ac.uk/” (or copy and paste it from here) into the box next to the word “Target”.



8. Click **Ok**. The hyperlink will appear on the annotation page.
9. You will now insert an image into the annotation page. Click at the end of the paragraph of text you pasted into the Description field, then press the enter (return) key on your keyboard. Now click the ‘insert image’ symbol at the top menu bar.



10. Click the Browse button and find an image file (e.g. a jpg, gif or bmp file). If you wish you can use one of the images in the tutorial folder in you PCPACK installation (C:\Program Files\Epistemics\PCPACK5\Tutorials\Pictures)

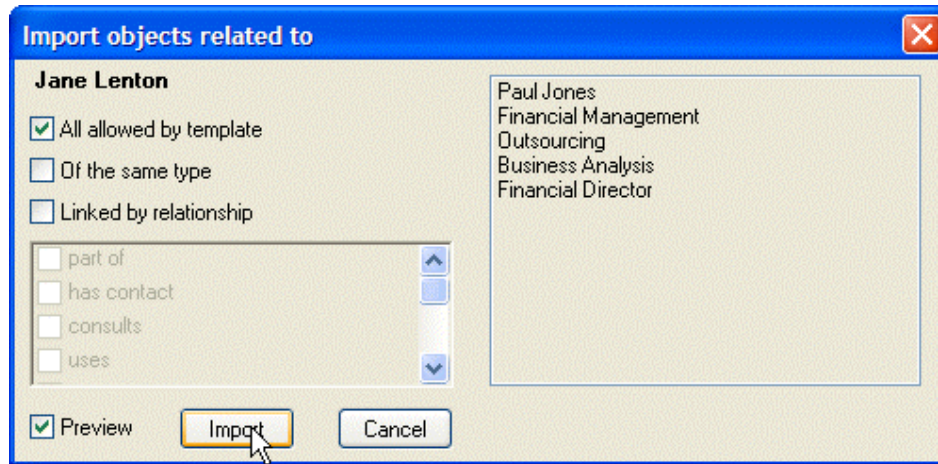
11. When you have found the image you want using the browser, click on it and click **Open**. Then click **Ok** when the next dialog appears. The image should appear in the annotation (where it can be re-sized or moved if you wish).

Person	Jane Lenton
- Description	<p>Jane Lenton has been a member of the Finance Group for 6 years, with primary responsibility for outsourcing. She was previously Director of the Einstein Business Unit at the <a href="#">University of Nottingham</a> and still maintains strong links with this unit.</p> 
- Type	▶ <a href="#">Internal People</a>
- Sub-Types	
- Has Role(s)	▶ <a href="#">Financial Director</a>
Works for	

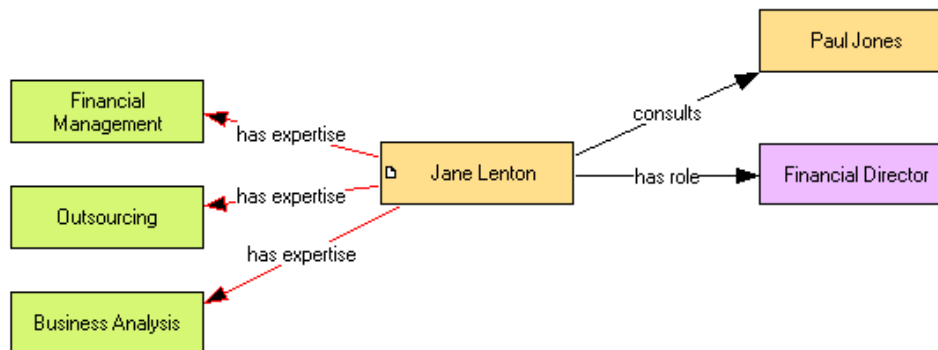
## Section 6. Concept Map

In this section, you will edit the concept map you created earlier.

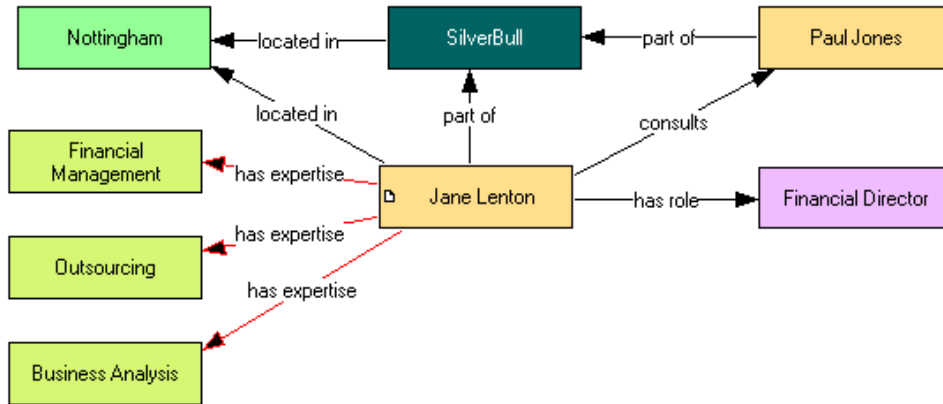
1. First, shut the annotation tool.
2. Right-click on the “Jane Lenton” node and select “Import related objects”.
3. A dialog box (headed ‘Import objects related to’) will appear. Make sure the “**All allowed by template**” and “**Preview**” boxes are checked.



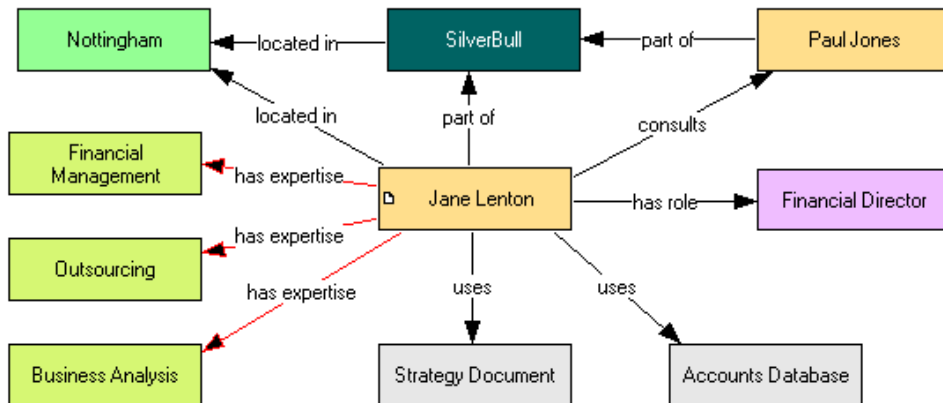
4. Click **Import**. The Knowledge Areas that you associated with Jane Lenton using the matrix have now been added to the diagram. Re-arrange them so the diagram looks neat.



5. You will now add some more information to the concept map. Using the browser on the right, expand the Concepts branch, then the Org Units and Locations branches.
6. Drag “**SilverBull**” and “**Nottingham**” from the browser onto the diagram.
7. Make a link between **Jane Lenton** and **SilverBull**.
8. Make a link between **Paul Jones** and **SilverBull**.
9. Make a link between **SilverBull** and **Nottingham**.



10. You will now add two new concepts to the knowledge base using the concept map. First, **right-click** on the white background area of the diagram somewhere underneath the “Jane Lenton” node.
11. Using the “**New Node**” menu item, select “**Info Resources**”.
12. A new dialog (headed “New Node: Info Resources”) will appear. Type the name “**Strategy Document**” into this, and click **Ok**.
13. Repeat the previous 3 steps to add another Info Resource called “**Accounts Database**”.
14. Now link “Jane Lenton” to the two new concepts using the “uses” relationship (using the same method you used in steps 18 to 21 of Section 2).



## Section 7. Process Maps

In this section, you will create some new concepts by marking-up a document and then you will use them to create a number of process maps.

1. Return to the Wizard and click on the “**Transcript for Tutorial**” (in the “Mark Up Text” section).
2. In the section headed “Extract 2”, use the “**Tasks**” marker pen to mark-up the following: “conducting an RCM study”, “facilitate the RCM meetings”, “carry out a criticality analysis”, “produce the RCM report”, “populate the Risk Tables” and “obtain the Defect Reports”.
3. Use the “**Roles**” marker pen to mark-up “RCM Facilitator”.
4. Use the “**Software**” marker pen to mark-up “RCM Toolkit”.
5. Use the “**Info Resources**” marker pen to mark-up the following: “RCM report”, “Criticality Analysis Report”, “Risk Tables” and “Defect Reports”.
6. Use the “**Triggers**” marker pen to mark-up “request comes in for an RCM Study”.

**Extract 2** (for use in Section 7 of the tutorial)

**What are the main tasks involved in conducting an RCM study?**

The main task is to facilitate the RCM meetings. This is done by the RCM Facilitator who uses the RCM Toolkit, which RCM meetings you carry out a criticality analysis which is used to produce the RCM report.

**What other information is used to produce the RCM report?**

As well as the Criticality Analysis Report, you use Risk Tables and Defect Reports.

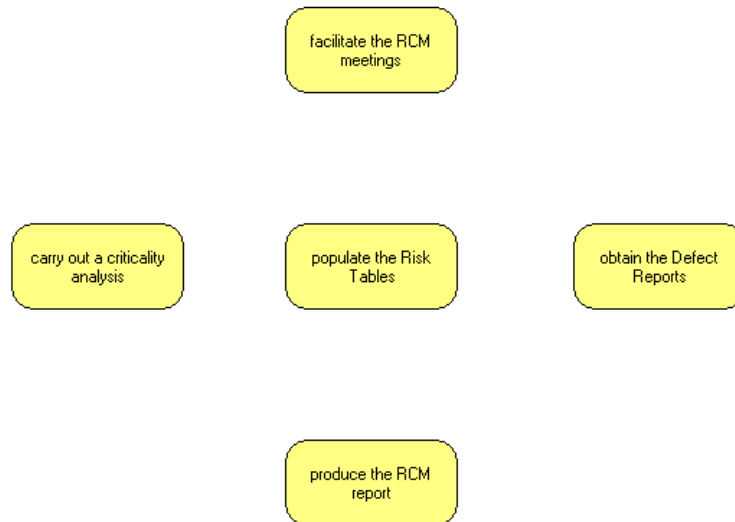
**And where do these come from?**

You populate the Risk Tables after the criticality analysis. And you obtain the Defect Reports from the Accounts Data

**And what makes this all happen - what triggers it?**

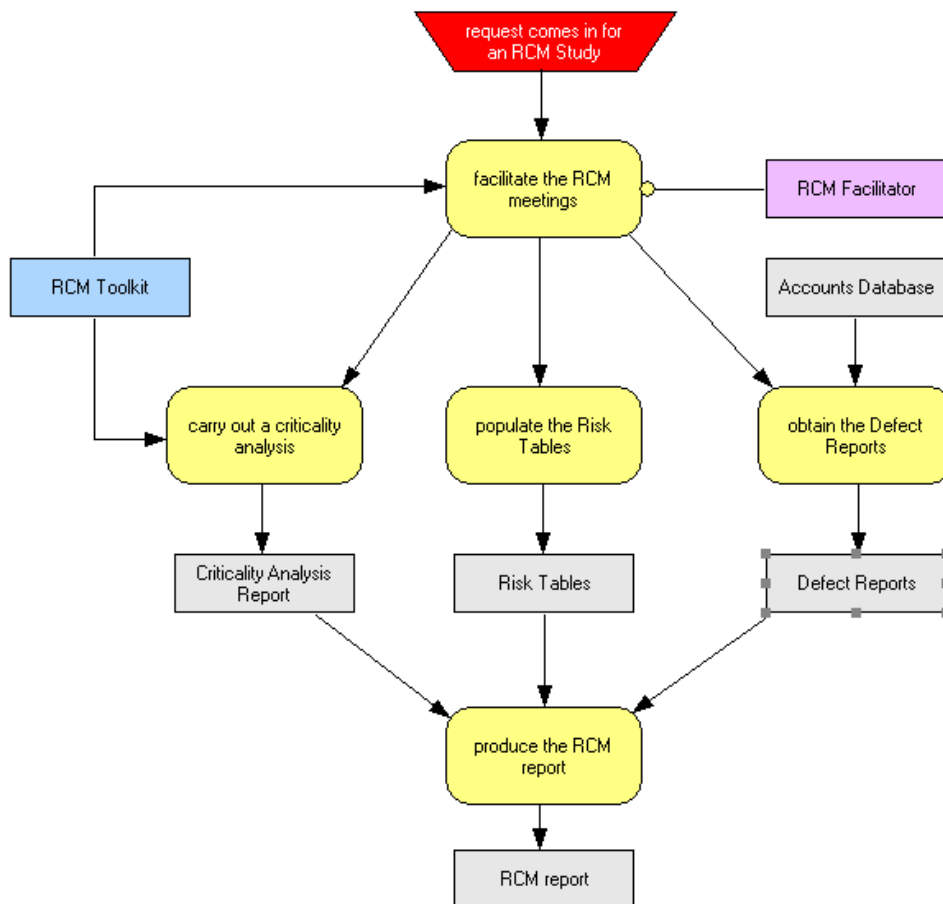
When a request comes in for an RCM Study.

7. Close the Protocol Tool and return to the Wizard.
8. Click **Create Diagram**.
9. Using the arrow-head next to the second box, select the “**Process Map**” template.
10. Use the first box to enter the name “How to do an RCM Study”.
11. Expand the **Concepts** branch in the right-hand browser, and then expand the **Tasks** branch.
12. Drag “conducting an RCM study” from the browser onto the diagram.
13. Right-click on the “conducting an RCM study” node and select “**Rename**”.
14. Change the name to “conduct an RCM study”.
15. You will now do a lower-level diagram that describes how to conduct an RCM study. To do this, **double-click** on the “conduct an RCM study” node.
16. A blank diagram (headed “conduct an RCM study”) will appear. Using the browser, drag the other tasks onto the diagram.
17. Arrange the nodes so they look something like this:



18. Using the browser, drag the following onto the diagram: “RCM Facilitator”, “RCM Toolkit”, “RCM report”, “Criticality Analysis Report”, “Risk Tables” and “Defect Reports”.

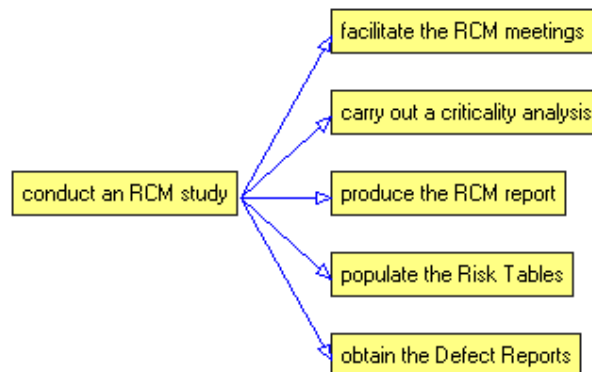
19. Arrange the nodes and make the links as shown below:



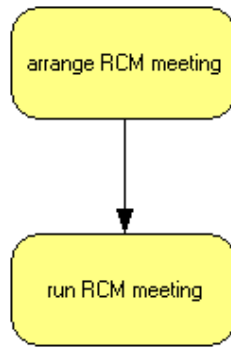
## Section 8. Process Tree and Process Maps

In this section, you will create a new tree (ladder) called a process tree. You will edit the process tree and see how it interacts with the process maps.

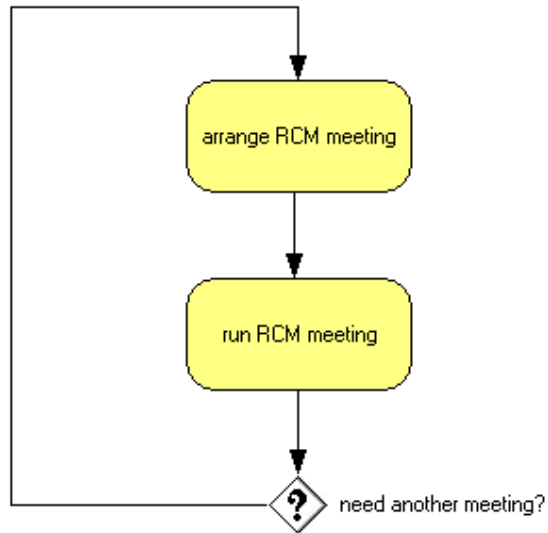
1. Return to Wizard and click on the “**Create Ladder**”.
2. A new dialog box (headed “New ladder”) will appear. In the top box, enter the name “Process Tree”.
3. In the “Display relations” section, click on “**is a**”.
4. Click “**Remove relation**”. The “is a” will disappear.
5. Click “**Add relation**”.
6. Select “**has part**” and click **OK**.
7. Click **OK**.
8. You now need to define a root node for the tree. To do this, expand the “Tasks” branch in the browser (on the right) and drag “**conduct an RCM study**” onto the blank tree area on the left.
9. Click **Yes** when asked if you want to add this as the root. The tree should appear as shown below:



10. You will now add some more tasks using this tree. To do this, right-click on “facilitate the RCM meetings” and select “**ladder down**”.
11. Type “arrange RCM meeting” and click **Add**.
12. Type “run RCM meeting” and click **Add**.
13. Click **Done**.
14. Return to the process map. **Double-click** on “facilitate the RCM meetings”.
15. A new diagram (headed “facilitate the RCM meetings”) will appear showing the two new tasks that you added to the process tree.
16. Arrange the nodes and link them as shown below:

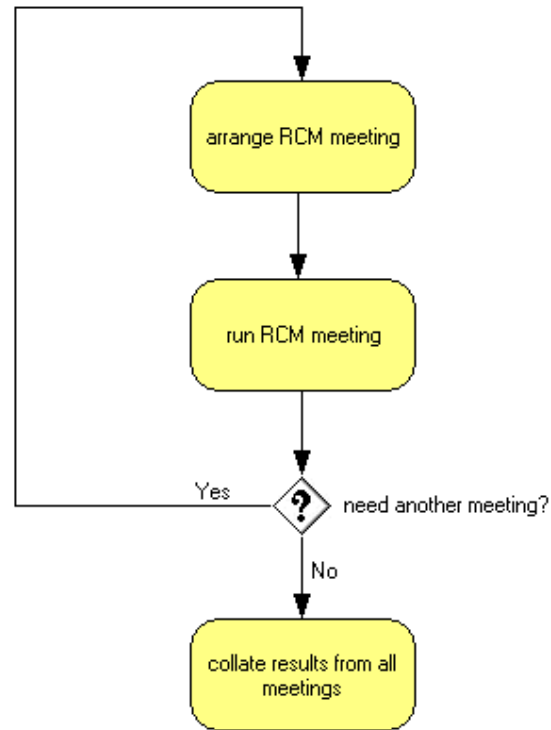


15. You will now add a decision point to the process map. To do this, **right-click** on the white background area of the diagram somewhere underneath the “run RCM meeting” node.
16. Using the “**New Node**” menu item, select “**Decision Points**”.
17. A new dialog (headed “New Node: Decision Points”) will appear. Type the name “**need another meeting?**” into this, and click **Ok**.
18. A diamond-shaped node will add to the diagram. Connect the new node to the other two nodes as shown below. (To do the link line that has corners in it, simply click where you want the corners as you make the link).



19. You will now add a label on the link line that has corners in it. To do this, **right-click** on any segment of the line, and select “**Label**”.
20. A new dialog box will appear. Type “**Yes**” and click **Ok**.
17. You will now add another task to the diagram. To do this, **right-click** on the white background area of the diagram somewhere underneath the “**need another meeting?**” node.
18. Select “**Tasks**” from the menu.
21. Type the name “**collate results from all meetings**”, and click **Ok**.
22. Add a link and label it as shown below.





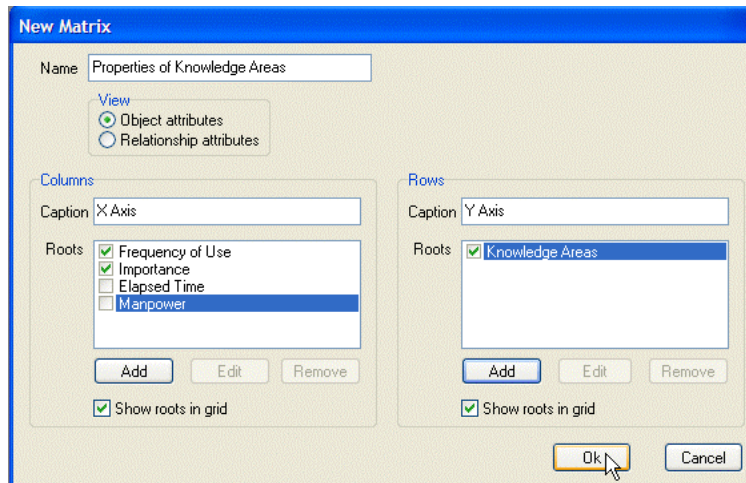
23. You will now view the Process Tree again to see how it has changed. To do this, click "Laddering" in the minimised bar at the bottom of the screen, or click Process Map in the Wizard.
24. You will see that the new task, "collate results from all meetings", has added to the tree.



## Section 10. Attributes and Values

In this section, you will represent the properties of some concepts in the knowledge base using attributes and values. To do this you will use a combination of an attribute matrix, the 'Object Attributes' dialog box, and an annotation page.

1. Return to the Wizard and click **Create Matrix**.
2. Call it "Properties of Knowledge Areas"
3. In the area headed "Columns" and "Roots", un-tick "Elapsed Time" and "Manpower".
4. In the area headed "Rows" click **Add**. (NB, this the Add button on the right-hand side, not the one on the left-hand side).
5. Using the browser, click on **"Knowledge Areas"** and click **Ok**.



6. Click **Ok**.
7. A matrix will appear. Click in some of the cells to show the properties of the Knowledge Areas, e.g. Outsourcing is done 'Monthly', and is '3-Important'.

		Frequency of Use						Importance					
		Frequency of Use	Daily	Weekly	Monthly	Quarterly	Half-yearly	Yearly	Importance	1 - Not important	2 - Low importance	3 - Important	4 - Very important
Knowledge Areas	Knowledge Areas												
	Financial Management		■										■
	Resource Management		■										■
	Outsourcing				■							■	
	Business Transformation			■							■		
	Business Analysis						■				■		

8. You will now add a new attribute. To do this, right-click on "Knowledge Areas" and select **"Attributes"**.
9. A new dialog box (headed "Object Attributes") will appear. Click "Add Attribute".

10. A new row will appear. Type “**Risk of Loss**” (in the first column, headed “Attribute Name”).
11. In the final column (headed “Type”), right-click and select “**Categorical**”.
12. In the second column (headed “Value”), type “**Low risk of loss**”.

Attribute Name	Value	Inherited from	Type
Description	[Double click to edit]		URL
Frequency of Use			Categorical
Glossary			Text
Importance			Categorical
Validation	[Double click to edit]		URL
Risk of Loss	Low risk of loss		Categorical

Categorical
  Ordinal
  Real
  Text
  URL

Add Attribute Remove Attribute Inherit Value Ok Cancel

13. Click **Ok**. The new attribute (Risk of Loss) and new value of it (“Low risk of loss”) have been added to the matrix.
14. You will now add a new value, using an annotation page. To do this, you will edit the template that lies behind the annotation page. First, right-click on “Knowledge Areas” and select “**Annotation Template**”.
15. The annotation template for “Knowledge Areas” will appear. On the 11<sup>th</sup> line, re-write the text that says “Examples” so it says “Risk of Loss”.
16. In the cell to the right of the one you just edited (that says [Examples-applicable to,b]), type “[Attribute-Risk of Loss]”.

<b>Known by</b>	[A-has expense,b]
<b>Frequency of Use</b>	[Attribute-Frequency of Use]
<b>Importance</b>	[Attribute-Importance]
<b>Risk of Loss</b>	[Attribute-Risk of Loss]
<b>Advice</b>	[Advice applicable to,b]

17. Close the annotation tool and return to the matrix. Right-click on “**Outsourcing**” and select “**Annotation**”.
18. In the “Risk of Loss” field, where it says, “Low risk of loss”, re-write it to say “**High risk of loss**”.
19. In the Glossary field, type “Contracting work to a third party”.

- <b>involves</b>	
- <b>Known by</b>	<ul style="list-style-type: none"> <li>▶ <a href="#">Carrie Lincoln</a></li> <li>▶ <a href="#">Jane Lenton</a></li> <li>▶ <a href="#">Maurice Leeds</a></li> </ul>
- <b>Frequency of Use</b>	Monthly
- <b>Importance</b>	3 - Important
- <b>Risk of Loss</b>	High risk of loss
- <b>Advice</b>	
- <b>Glossary Entry</b>	Contracting work to a third party
<i>Validation Information</i>	<i>Validated by</i>

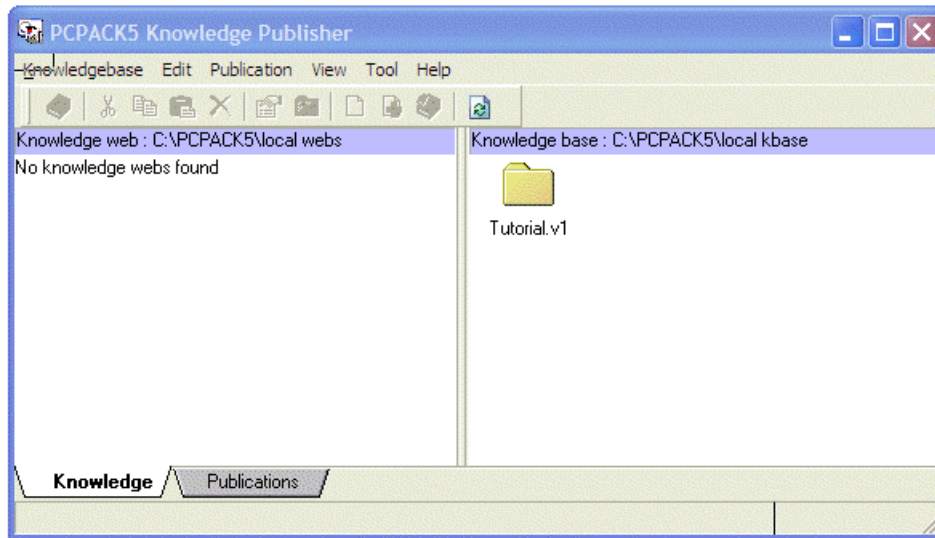
20. Close the annotation tool and return to the matrix. You will see that the new value, "High risk of loss", has been added (at the right-hand side).

		Frequency of Use						Importance				Risk of Loss		
		Frequency of Use						Importance				Risk of Loss		
		Daily	Weekly	Monthly	Quarterly	Half-yearly	Yearly	Importance	1 - Not Important	2 - Low Importance	3 - Important	4 - Very Important	Risk of Loss	Low risk of loss
Knowledge Areas	Knowledge Areas	[Progress bar]						[Progress bar]				[Progress bar]		
	Financial Management	■									■		■	
	Resource Management	■									■		■	
	<b>Outsourcing</b>			■						■				■
	Business Transformation		■						■				■	
	Business Analysis					■			■				■	

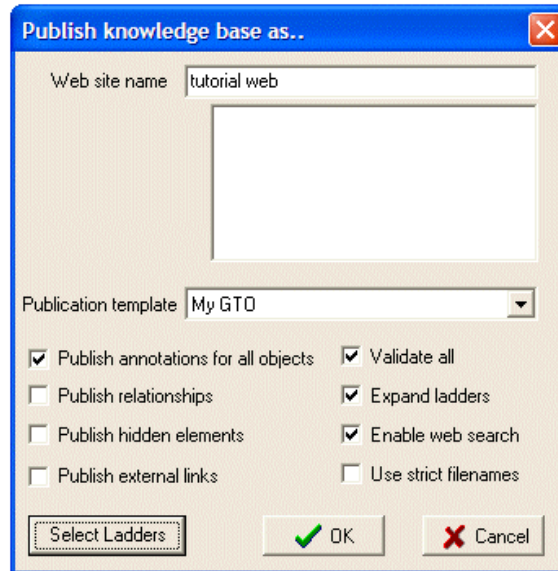
## Section 11. Creating a Website

In this section, you will use the Publisher Tool to create a website from your knowledgebase. You will view the website and see some navigation features.

1. Close the Matrix Tool and Wizard Tool.
2. Return to the Admin Tool that shows the open book symbol.
3. You will now close the knowledge base. To do this right-click on the open book and select **Close**.
4. You will now publish the knowledge base as a website. If you are using the multi-user (networked) version of PCPACK, then you will need to prepare the knowledge base for publishing. To do this, right-click on the book symbol and select **“Prepare for publication”**.
5. To open the Publisher tool, use the **Tool** menu to select **Publisher**.
6. The Publisher Tool will open.



7. Drag the “Tutorial.v1” folder from the right-hand (Knowledge base) pane to the left-hand (Knowledge web) pane.
8. A new dialog box will open. Use it to name the website “Tutorial Web”.
9. In the “Publication template” section, select “My GTO”
10. Check the boxes shown below:



11. Click "Select Ladders", select "Concept Tree" and click OK.
12. Click OK to start the publishing, and click "Yes" in the confirmation box.
13. A few seconds are required for the Publisher tool to convert the PCPACK knowledge base into the website. When the publishing has completed, a message will be displayed that says: "The knowledge base was published successfully". Click OK.
14. To view the website, right click on the Tutorial Web icon and select "Preview web".