

ICD Quick Start Instructions

A short guide to getting started with the Interactive Conceptual Diagram (ICD) application
(for more detail, see the complete ICD User Guide)

1. Go to the CADDIS home page (www.epa.gov/caddis), and click on **ICD application** in the Quick Finder to go to the ICD section of the site. To open the application, click on the **Go to ICD application** link in the Related Links box.
2. If you are not yet a registered ICD user, click **Register** on the View mode toolbar (see Figure 1) or go directly to the EPA Portal (portal.epa.gov). Remember—you only need to register once!
If you do not register, you will be considered a public user: you will be able to view EPA-constructed diagrams (in View mode), but you will not be able to view any other diagrams or access the ICD's diagram editing & collaborating capabilities (in Edit mode).
 - a. If you have an EPA LAN account, log in to the portal using your LAN id and password. You need to request access to the CADDIS community, so click Community Access >> Request Access to Communities, check CADDIS in the list, and click Save Groups. You will receive an email when access to the CADDIS community is granted.
 - b. If you do not have an EPA LAN account, click the Request Access to EPA Portal link on the EPA Portal Log in screen. Complete the Self-Registration form, using Kate Schofield as the EPA Contact Name, schofield.kate@epa.gov as the EPA Contact's Email Address, and (703) 347-8533 as the EPA Contact's Phone Number. Under Select the Community or Application for which you are requesting access, choose CADDIS, then accept the EPA Privacy & Security Notice and click Submit. You will receive an email when access to the CADDIS community is granted.
3. Once you have registered, click **Log In** on the View mode toolbar and log in using your username and password. Once you've logged in, you're ready to get started!
4. To view diagrams (*see Figure 1 for a brief description of all options on the View mode toolbar*):
 - a. Click the **View tab** to enter View mode.
 - b. Click **Open Diagram**, select the diagram you wish to open, and click Open.
Public users will only be able to view the three EPA-constructed diagrams currently in the application; registered users will be able to view these diagrams, any diagrams which they create or on which they are designated collaborators, and any diagrams that other creators allow all registered users to view.
 - c. Some shapes in the diagram initially may be hidden: a black triangle under a shape indicates that there are additional shapes (i.e., child shapes) associated with that shape (i.e., the parent shape). To show all shapes in a diagram, click **Show All**; to show the child shapes under a specific parent, click the **black triangle** under that parent.
 - d. To search for citations supporting linkages among shapes, **click any shape** (it will highlight blue).
Shapes linked to the shape you selected by at least one paper currently in the ICD literature database will highlight purple. If a child shape is linked to the shape you selected but hidden, its parent shape will be outlined in orange; simply click on the black triangle under that orange-outlined parent to view any purple-highlighted child shapes.
 - e. **Click any purple-highlighted shape** (it will highlight blue).

Note that the shapes shaded purple change—now, shapes linked to the second shape you selected will be highlighted purple.






- f. If you want to add any additional shapes to your query, **click any additional purple shapes**.
- g. To deselect any shape you've selected, click it again (it will return to its original color).
- h. To view references supporting linkages among the shapes you've selected, click the **References panel icon**  (top right of View mode toolbar).
The shapes you selected will be listed in the Selected Shapes sub-panel (top); references supporting linkages among those shapes will be listed, by shape-pair combination, in the Selected Linkages sub-panel (middle).
- i. If you wish to save any references listed in the Selected Linkages sub-panel, select those references by **clicking the associated checkboxes**, then click **Save** at the bottom of the Selected Linkages sub-panel.
- j. If you wish to download references from the Saved References sub-panel, select those references by **clicking the associated checkboxes**, then click **Download** at the bottom of the Saved References sub-panel.
- k. Click **Deselect All** to clear your search (deselect all shapes) and begin again.
Any references you saved into the Saved References sub-panel will remain there when you Deselect All; they are deleted only when you remove them from the sub-panel or exit your ICD session.



Figure 1. View mode toolbar in the ICD application.

- **Inset icon** : Pan around the open diagram by zooming in and dragging the blue window around the Inset (you also can use the Esc key to show/hide the Inset)
- **Open Diagram**: Open a diagram
- **Legend**: View a legend of the shapes used in the EPA-constructed diagrams
- **Collapse/Expand**: Vertically collapse a diagram and remove any unoccupied white space/Vertically expand a diagram and include any unoccupied white space (typically used when child shapes are hidden)
- **Hide All/Show All**: Hide all child shapes (shapes designated as sub-categories of another shape)/Show all child shapes (view all shapes in diagram)
- **Deselect All**: Reset the shape selection process by deselecting all currently selected shapes
- **View as Image**: View an image of the diagram as it currently appears on the screen
- **Log In/Log Out**: Log in to the ICD application / Log out of the ICD application
- **Register**: Register in the ICD application (only need to do this once; after that, can just log in)
- **Help icon** : Access the ICD User Guide for more detailed help with using the ICDs
- **Search icon** : Conduct a text-based keyword search of references (rather than a diagram-based search)
- **References Panel icon** : View/Hide the References panel, which shows you selected shapes and supporting references for linkages among those shapes

5. To create or edit diagrams (see Figure 3 for a brief description of all options on the Edit mode toolbar):
 - a. Click the **Edit tab** to enter Edit mode.
Remember that the Edit tab will be visible only if you are a registered user logged in to the ICD application.
 - b. If a diagram is not already open, the **Home: Diagram Settings screen** (Figure 2) will open automatically; if this screen is not open, click **Home** to bring it up.

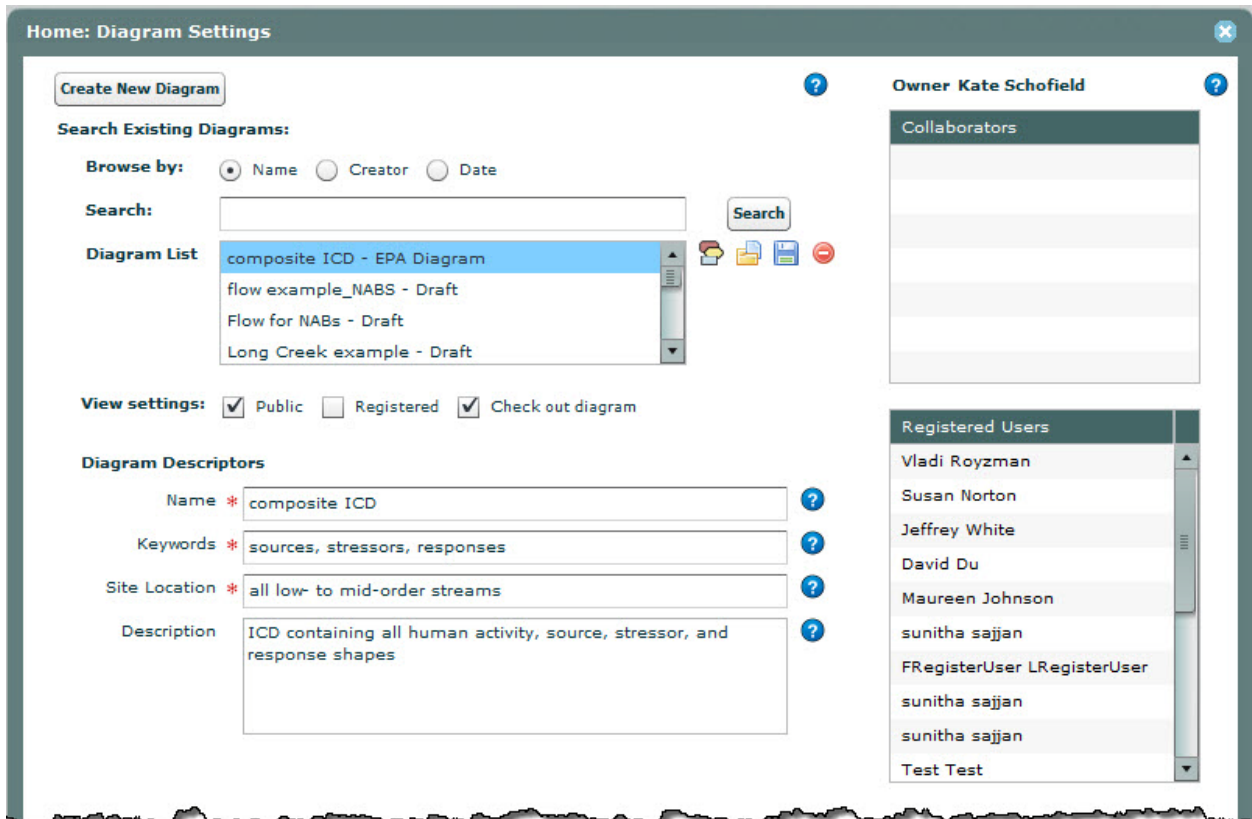








Figure 2. Home: Diagram Settings screen, in Edit mode of the ICD application.

- i. To **create a new diagram** (i.e., starting from a blank canvas), click **Create New Diagram** and fill in the required fields.
- ii. To **open an existing diagram**, browse or search the existing diagrams and **select the diagram you wish to open** (i.e., so that it appears in the **Diagram List window**), then click the **Open Diagram icon**  .
As in View mode, registered users will be able to view EPA-constructed diagrams, any diagrams which they create or on which they are designated collaborators, and any diagrams other creators allow all registered users to view; these will be the options they see displayed in the Diagram List window.
- iii. To **designate collaborators** (i.e., registered users who can make changes to your diagram), select the diagram in the **Diagram List window**, select a user from the **Registered Users window**, and either double-click on or drag-and-drop that user to add them to the **Collaborators window**. Click the **Recategorize Diagram icon**  to save these changes before proceeding.




You can only designate collaborators for diagrams you created, and you will only see the Recategorize Diagram icon for diagrams you created or on which you are designated as a collaborator.

- iv. To **change diagram view settings**, select the diagram in the Diagram List window, check the appropriate boxes next to **View Settings** (registered users will only be able to select the Registered and Check out diagram options), then click the **Recategorize Diagram icon**  .
You will only see the Recategorize Diagram icon for diagrams you created or on which you are designated as a collaborator.
If you check Registered, all registered users will be able to view and comment on your diagram.
If you check Check out diagram, you will be able to save changes to the existing diagram, using the same diagram name—the Save button on the Edit mode toolbar will be enabled. If you designate collaborators on your diagram, remember to select Check out diagram each time you're editing the diagram, to ensure that collaborators are not making simultaneous changes to a diagram; when you are done editing, be sure to check the diagram back in by unchecking the Check out diagram box and clicking the Recategorize Diagram icon.
 - v. To **change diagram descriptors**, select the diagram in the Diagram List window, edit the text fields under Diagram Descriptors, then click the **Recategorize Diagram icon**  .
You will only see the Recategorize Diagram icon for diagrams you created or on which you are designated as a collaborator.
 - vi. To **view all previous versions of a given diagram**, select the diagram in the Diagram List window and click the **Diagram History icon**  .
You will only see the Diagram History icon for diagrams you created or on which you are designated as a collaborator.
 - vii. To **delete a diagram**, select the diagram in the Diagram List window and click the **Delete Diagram icon**  .
You will only see the Delete Diagram icon for diagrams you created or are designated as a collaborator.
- c. Once you have created a new or opened an existing diagram, you are ready to start building or editing your diagram.
- i. To **create your own diagram from an existing one** (e.g., the EPA-constructed ones), use **Save As** to save it as a new diagram.
All information attached to the diagram transfers to your new diagram, including linked references.
 - ii. To **add a shape to the diagram**, click on **any shape icon** on the toolbar, then click anywhere on the diagram canvas to place that shape. Fill in shape information in the **Shape Attributes** screen: its label (the text which appears in the shape), any direction for that label (increasing, decreasing, or change in), and any parent designation (the shape that your new shape is a sub-category or child of, if any).
*The ability to establish parent-child relationships was created for large, complicated diagrams (e.g., the composite EPA diagram) that users may occasionally want to view in less detailed form. This functionality will be evolving in future versions of the ICD, so **we generally recommend that you do not create any parent-child relationships in your own diagrams.***

- iii. To **add an arrow or line**, click on the **arrow or line icon** on the toolbar. Click once on the canvas at the point you wish to start the arrow or line to begin drawing; click a second time at the point you wish to end the arrow or line to stop drawing.
- iv. To **delete a shape or line**, mouse over the shape or line so that the highlighting dots appear, then press the **Delete** key.
- v. To **link supporting references to your diagram**, click on **Add Linkage**, select the shapes you want to create a linkage between, then click **Save Linkage**.
You can select more than two shapes, but you will have to specify if you want to link the first shape you selected to all subsequent shapes (all primary shape pairs), or create links between all shape-pair combinations of the selected shapes (all linkage pairs).
- vi. Fill in the required information on the **Save New Linkage** screen. You can search citations already entered in the ICD literature database using the Find Citation field, as well as add new citations individually (click **Enter new citation**) or by uploading references from your reference manager software (click **Upload new citation(s)**). To select a citation, either **double-click it in the Existing Citation window**, or **drag-and-drop it into the Selected Citations window**. Click **Save** to save the linkage.
- vii. To **save changes you've made to the diagram**, either click **Save** (if you are the diagram creator or a designated collaborator) or **Save As** (to save the diagram as a new diagram, with you as the creator).
If you are the creator or a collaborator and Save is disabled (i.e., shaded out on the toolbar), make sure that you have checked the Check out diagram box under View Settings and clicked the Recategorize Diagram icon (see above).



Figure 3. Edit mode toolbar in the ICD application.

- **Inset icon** : Pan around the open diagram by zooming in and dragging the blue window around the Inset (you also can use the Esc key to show/hide the Inset)
- **Home**: Open the Home: Diagram Settings screen, from which you can create a new diagram, search for and open an existing diagram, and designate collaborators or modify other diagram settings for diagrams you create
- **Save**: Save any changes made to the open diagram
- **Save As**: Save the open diagram as a new diagram
- **Close**: Close the open diagram
- **Shape, Arrow and Line icons**: Add a shape, arrow or line to the open diagram
- **Hide/Show**: Hide/Show all arrows and lines
- **Tiers**: Designate tiers (horizontal layers) of the diagram as collapsible or non-collapsible
- **Select/End**: Select multiple shapes (e.g., to move or delete them)/End the Select function
- **Copy/End**: Copy a shape and all its attributes, for pasting into the open diagram/End the Copy function
- **Align/End**: Select and vertically align multiple shapes/End the Align function
- **Add Linkage/Save Linkage**: Link a supporting reference to pair-wise linkages between shapes
- **Comment icon** : Submit a comment on the open diagram
- **Help icon** : Access the ICD User Guide