

**CARE
OPINION** AUST
BE HEARD.

**MEMBER USER GUIDE
ADMINISTRATOR ROLE**

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INTRODUCTION








The following information has been provided to aid in undertaking the basic functions as a member of a Care Opinion subscription. The guideline provides information regarding:

-  Creating and saving searches
-  Setting up alerts for yourself and other members in your subscription
-  Generating and saving reports, visualisations and digests
-  Submitting responses from yourself, or on behalf of another responder in your subscription
-  Adding, removing and freezing members to your subscription
-  Managing your subscription






KEY MEMBER ROLES

As an administrator you will have control over managing your subscription. There are three different roles available when you [set up a new member](#), with varying features available to each:




ADMINISTRATOR

-  View stories
-  Generate and save reports, digests and visualisations (for themselves and others)
-  Manage email alerts (for themselves and others)
-  Respond to stories (for themselves and on behalf of others)
-  Publish blog posts
-  Add/remove members
-  Change member roles and details

RESPONDER

-  View stories
-  Generate and save reports, digests and visualisations
-  Manage email alerts
-  Respond to stories
-  Publish blog posts

SUBSCRIBER

-  View stories
-  Generate reports, digests and visualisations
-  Manage email alerts

LOGGING ON TO CARE OPINION

All of the functionality outlined in this document requires you to be logged in and an active member of a subscription.

1. Head to <https://www.careopinion.org.au> and click on 'Log in' in the top right corner of the page
2. Enter your user name or email address, followed by your password, then click 'Log in' below - you can request that your details are remembered on that computer for future logins

Select Language | Size: A A A Contrast: C C C C Log in

CARE OPINION AUST
BE HEARD.

An independent site about your experiences of care and support services, good or bad.
We pass your stories to the right people to make a difference.

Home Tell your story About us

Search for stories about... Search »
eg Brisbane, elderly care, dementia, 2250

Log in to Care Opinion

Your user name or email address

Your password

Remember me on this computer

Log in

Forgotten your password?

Select Language | Size: A A A Contrast: C C C C Welcome Anthony
Your stories Log out

CARE OPINION AUST
BE HEARD.

An independent site about your experiences of care and support services, good or bad.
We pass your stories to the right people to make a difference.

LOGGED IN

FORGOT YOUR PASSWORD?

If you have forgotten your password, you can click the link at the bottom of the 'Log in' page to request we send you a password reset link. Enter the email address you use for your subscription and click 'Go'. Check your emails, as the password reset link we send you expires in 4 hours.

Forgotten your password?



i **Help:** We will send you an email with a special link to reset your password. The link expires after four hours, so you should use it as soon as it arrives.

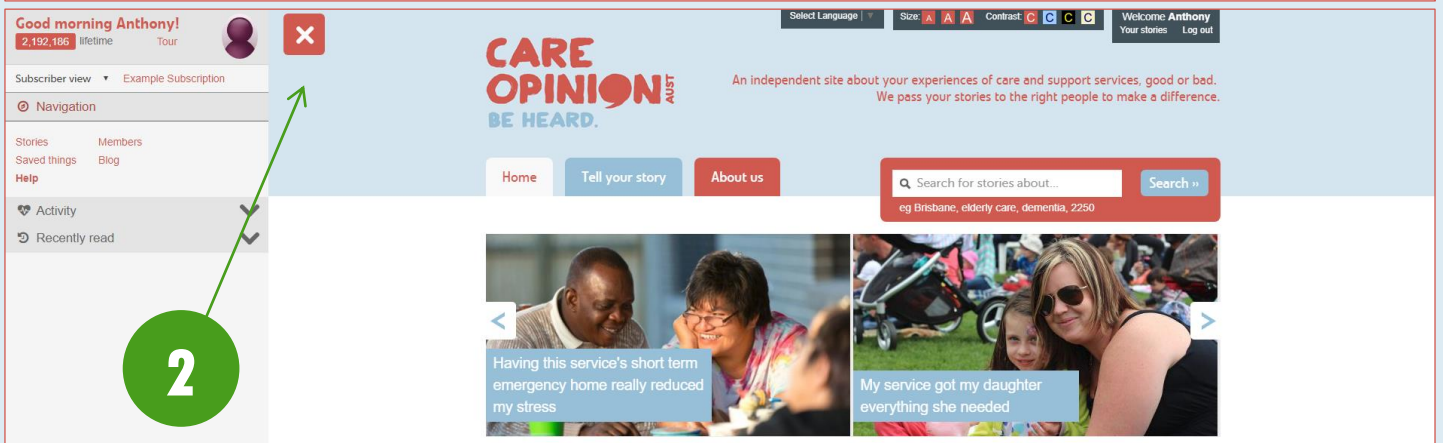
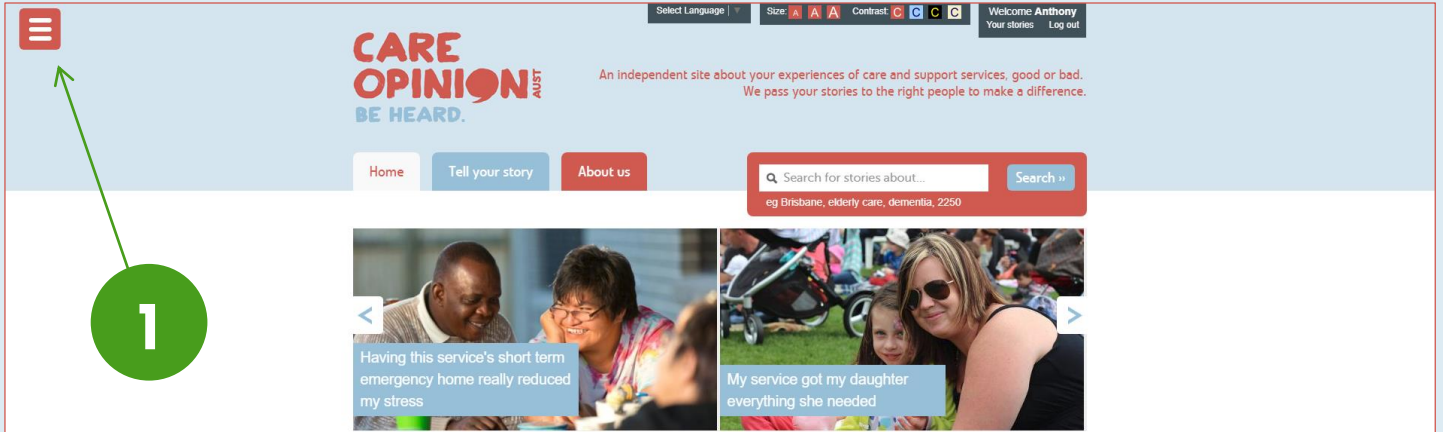
Please enter your email address

Go

NAVIGATING THE WEBSITE

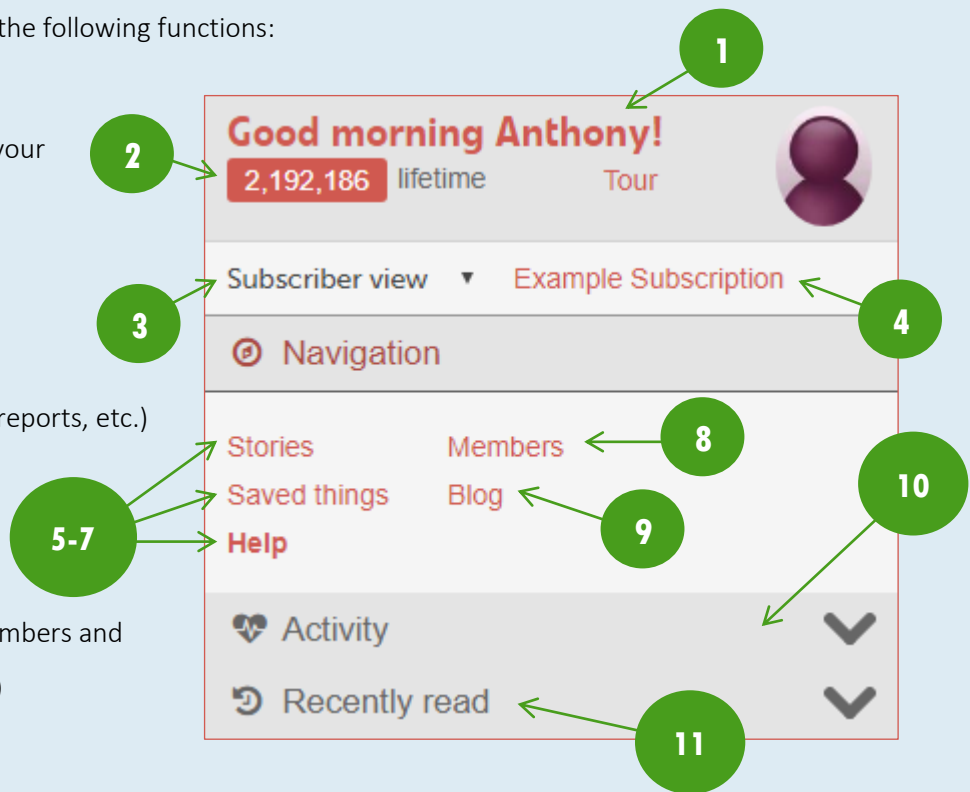
Once logged in you will have access to the navigation drawer. This houses all of the key links to managing both your own profile in the subscription, as well as the subscription as a whole (for administrators).

1. The navigation drawer can be accessed by clicking the  icon in the top left corner of any page
2. It can be closed by clicking the  icon at any time.



From the navigation drawer you can access the following functions:

1. Your profile
2. Total public views on stories about your subscription
3. Your view (public or subscriber)
4. Your subscription information
5. Stories about your subscription
6. Your saved things (searches, alerts, reports, etc.)
7. Help pages
8. Your subscription's member list
9. Your subscription's blog posts
10. Subscription activity (number of members and responsiveness to stories published)
11. Your recently read stories



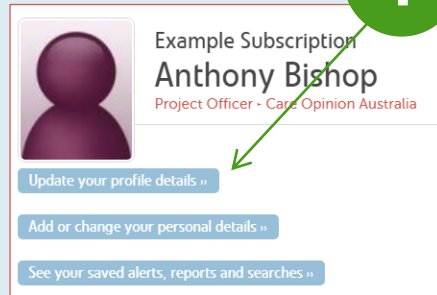
YOUR PROFILE

Your profile can be accessed by clicking your name in the [navigation drawer](#) (shown above) or by clicking your name at the top right of the page – ‘Welcome [YourName]’.

UPDATING YOUR PROFILE DETAILS

These are the details that appear for you in your subscription, such as your name and job role.

1. Click ‘Update your profile details’ on your [profile page](#)
2. Make any changes to your details in the various fields – any changes will be highlighted in green
3. Click ‘Update’ to save the changes, or ‘Cancel’ to leave the page without saving

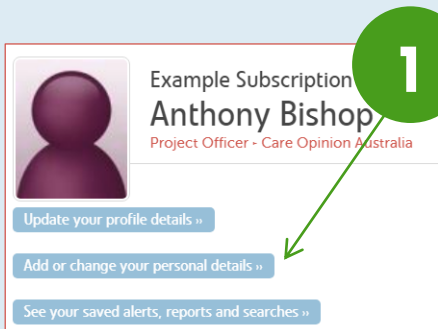


This screenshot shows the 'Update Anthony's details in Example Subscription' form. It contains several input fields: Role (Administrator), First name (Anthony), Last name (Bishop), Email (anthony.bishop@patientopinion.org.au), Job (Project Officer), Department (if any), Organisation (Care Opinion Australia), and Phone (not shown on public pages). There is also a text area for 'What I do, in plain language (short and sweet!)'. At the bottom, there are 'Update' and 'Cancel' buttons. A green circle with the number '2' and an arrow points to the profile picture area, and another green circle with the number '3' and an arrow points to the 'Update' button.

UPDATING YOUR PERSONAL DETAILS

These are the details that are independent of your membership in your subscription, such as your password and time zone – meaning these details can be changed whether you are member of a subscription or not. Please note that changing your email address in this section will not affect the email that Care Opinion sends your story alerts to – that can be updated under ‘Update your profile details’.

1. Click ‘Add or change your personal details’ on your [profile page](#)
2. Select any of the various personal settings options to amend and follow the instructions on those pages.



This screenshot shows the 'More about you' page. It features a 'Personal settings' sidebar on the right with options like 'More about you', 'Add/change your picture', 'Change your email address', 'Change your password', 'Change your timezone', and 'Log out everywhere'. The main content area has a 'Your privacy' section with a list of bullet points: 'We will never share your details in any way which could identify you.', 'We will share information about the overall mix of people using Care Opinion in our reports', 'We will only share percentages, never individual information', 'We will only include percentages if there are more than 10 stories in a report', and 'We will never show your details alongside any story you share with us'. Below this is a form with questions like 'How do you identify your gender?', 'In what year were you born?', 'Are your day-to-day activities limited because of a health problem or disability which has lasted, or is expected to last, at least 12 months?', and 'How do you identify your ethnic group?'. A green circle with the number '2' and an arrow points to the 'Your privacy' section.

ADDING A PICTURE TO YOUR PROFILE

For those that will be responding to stories, it is suggested that you upload a photo of yourself to help add a human face to your responses. This will help the story author and the wider community connect with your responses, rather than seeing you as a 'faceless' organisation. We suggest that the photo be warm, but professional.

1. Click 'Update your profile details' on your [profile page](#)
2. Click 'Choose a new picture'
3. Select your photo from the pop-up file selection screen and ensure that the photo you want to upload has a filename that is all lower case, is an appropriate file type (.png, .jpg, etc.), and that the file size does not exceed 1MB – photos can be easily resized in a program such as 'Paint' to ensure that they do not exceed this size
4. Use the tool to position or centre your photo as necessary to fit the required frame ratio – a preview is available on the right.
5. Once you are happy with the preview, click 'Use this picture' – you can update or remove your photo at any time by coming back to 'Update your profile details'

The image illustrates the process of updating a profile picture through five numbered steps:

- Step 1:** The user is on their profile page for 'Example Subscription Anthony Bishop, Project Officer - Care Opinion Australia'. The 'Update your profile details' button is highlighted with a green circle and arrow.
- Step 2:** The 'Choose a new picture' button is highlighted with a green circle and arrow.
- Step 3:** A file explorer window is open to 'This PC > Desktop > Photo Upload'. Two files are listed: 'anthonybishop' (33 KB PNG image) and 'suepalmer' (148 KB PNG image). The 'anthonybishop' file is selected, and the 'Open' button is highlighted with a green circle and arrow.
- Step 4:** The photo upload tool is shown with two preview images of a man. The 'Use this picture' button is highlighted with a green circle and arrow.
- Step 5:** The profile page is updated with the new photo of the man. The 'View alerts' button is highlighted with a green circle and arrow.

PUBLIC STORY VIEWS

You can check the total number of public views stories about your subscription have received from the [navigation drawer](#). There are a number of timeframes you can constrain this to, from public views in the last day to the entire lifetime of the platform. You can do this by clicking the number of views to open a drop-down menu of all options, and selecting the desired timeframe.

The image shows two side-by-side screenshots of a user profile interface. The left screenshot shows the user 'Good afternoon Anthony!' with a lifetime view count of 2,192,624. A dropdown menu is open, showing options for 'Last day', 'Last week', 'Last four weeks', 'Last six months', 'Last year', and 'Lifetime'. A green arrow points from the 'Last six months' option to the right screenshot. The right screenshot shows the same user profile but with the view count updated to 2,211 for the 'last day' timeframe. The dropdown menu is now closed, and the 'Subscriber view' is selected. Below the view count, there are navigation options for 'Stories', 'Members', 'Saved things', and 'Blog', along with a 'Help' link. At the bottom, there are icons for 'Activity' and 'Recently read'.

SUBSCRIBER VIEW OR PUBLIC VIEW?

While you are logged in to the system, the site will appear differently to that of a public user. You will have access to all of the membership functions that being come with a subscription to Care Opinion. However, things such as the pool of stories you can see by doing a search changes from all stories on the platform, to only those that are about your organisation.

Occasionally, you may want to see what the public sees – all stories being visible in a search, or what a story looks like without all of the extra subscriber only information that you are privy to. To do so, simply click on 'Subscriber view' in the [navigation drawer](#) and select 'Public view' from the drop down menu. To change back, simply do click on 'Public view' and reselect 'Subscriber view' again.

It should be noted that if you wish to share your own story on the platform while you are a member of a subscription, that this will need to be done in 'Public view' as the system no longer considers you a member of the public while 'Subscriber view' is active.

The image shows a screenshot of a user profile interface for 'Good afternoon Anthony!' with a lifetime view count of 2,192,861. A dropdown menu is open, showing options for 'Subscriber view' and 'Public view'. The 'Subscriber view' option is highlighted in blue. Below the view count, there are navigation options for 'Stories', 'Members', 'Saved things', and 'Blog', along with a 'Help' link. At the bottom, there are icons for 'Activity' and 'Recently read'.

YOUR SUBSCRIPTION INFORMATION

By clicking your organisation name in the [navigation drawer](#), you can access the information for your subscription. This will allow you to edit your role in the subscription, show you the features that you can access at your subscription level, generate an API key so you can access the raw data, as well as access links to go to manage your members or update your organisation's public service pages.

To access your subscription information page, click the link in the [navigation drawer](#). From here you can:

1. Edit your role
2. View your available features
3. Generate an API key
4. Customise your service pages
5. Email Care Opinion – this inbox is monitored daily, however we recommend that you contact our personal emails should you require assistance, as these inboxes are monitored at more regular intervals

Good morning Anthony!
2,192,186 lifetime Tour

Subscriber view ▾ Example Subscription

Navigation

Stories Members
Saved things Blog
Help

Activity ▾
Recently read ▾

My subscription

Example Subscription ▸ Subscription is active

1

My profile in this subscription
These are your own details in this subscription. Add or update your information by clicking on it. If you change your mind, press "Esc" before you finish editing.

Email

Job:
✎ Project Officer

What I do, in plain language (short and sweet!):
✎ Click to edit

Department (if any):
✎ Click to edit

Organisation:
✎ Care Opinion Australia

Phone (not shown on public pages):
✎ Click to edit

Role (click to change):
✎ Administrator

2

Your subscription level

Current level
Full, until 18 December 2018

Features available at this level

- [Alerting](#)
- [API \(basic\)](#)
- [API \(enhanced\)](#)
- [Blogging](#)
- [Custom service pages](#)
- [Digests](#)
- [Member freezing](#)
- [Reporting on demand](#)
- [Reporting on schedule](#)
- [Responding](#)
- [Responding for another](#)
- [Responding with images](#)
- [Smart alerting](#)
- [Story tagging](#)
- [Subscriber-only resources](#)
- [Support and advice](#)
- [Visualisations](#)

Features not available at this level

[More information](#)

3

4

▶ **API access**

▶ **Custom service pages**

▶ **Custom service pages**

Which stories are in the scope of this subscription?
This subscription includes:

- All stories

This subscription ends on 18 December 2018

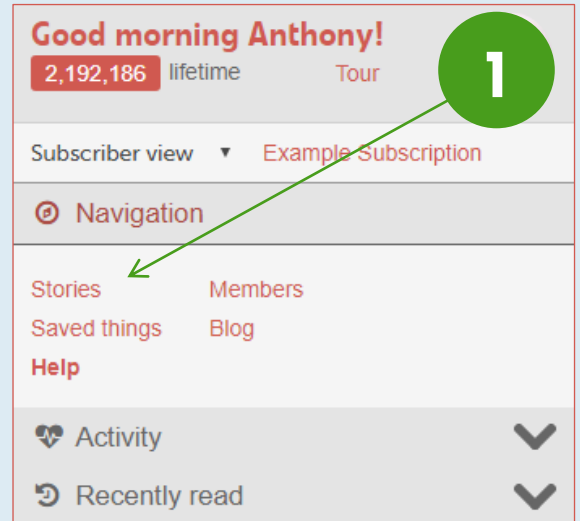
5

[Email Care Opinion »](#)

STORIES ABOUT YOUR SUBSCRIPTION

Your subscription will be scoped to include all stories about your organisation. This allows you to quickly access the stories that are relevant to you for response. To access your stories:

1. Click on 'Stories' in the [navigation drawer](#) – this will automatically bring you to a page with a tab showing all stories about your organisation to date
2. Click 'Unread' to see all stories that have not yet been read by anyone in the subscription
3. Click 'Without response' to see all stories from the last 3 years that have not received a response from a member of our subscription
4. Click 'Change promised' to see all stories that have received a response from your anyone in your subscription indicating a change is planned, but that has not then had a follow-up response indicating the change has now been made.
5. Click the link attached to 'responses or changes from your subscription or others' to see a full list of stories about you were anyone from any subscription may have responded or made a change (this is helpful where there is more than one service attached to a story, and therefore another organisation may have responded)
6. Click the link attached to 'recently read stories' to see recent stories that you yourself have read (while logged in)
7. Click 'Search within your stories' to filter the stories shown here by various tags or keywords



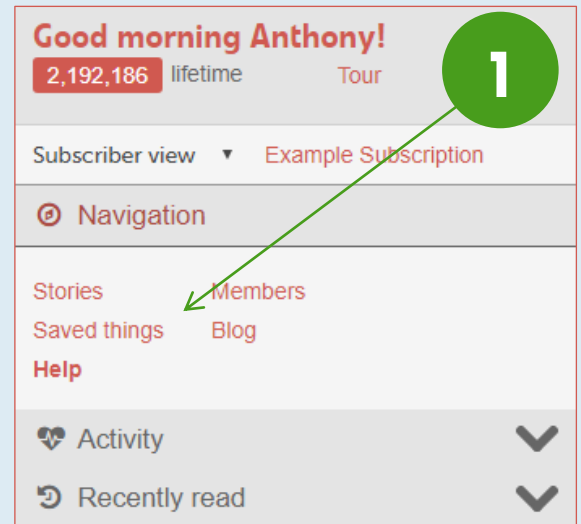
Key information for each story is shown such as the title (A), the progress (B), the moderation level (C) and the number of total public views (D).

The screenshot shows the 'Good afternoon Anthony!' page. It features a header with the user's name and a sub-header 'Stories and responses from Example Subscription'. Below this, there are instructions on how to select a story to read or view responses. A 'Manage stories' section includes tabs for 'All stories', 'Unread', 'Without response', and 'Change promised'. A search bar is located on the right side. The main content area displays a list of stories, with the first story being 'Kununoppin Hospital'. This story card includes a title (A), a 'NEW STORY' indicator with a progress bar (B), a 'MODERATION CRITICALITY' of 0 (C), and an 'ACTIVITY READ BY' of 4 (D). Green circles with numbers 2 through 7 and arrows point to various elements on the page: 2 points to the 'Manage stories' section, 3 points to the 'Without response' tab, 4 points to the search bar, 5 points to the 'Responses or changes from your subscription or others' link, 6 points to the 'Recently read stories' link, and 7 points to the 'Search within your stories' button.

YOUR SAVED THINGS

This holds all of the searches, reports, alerts, visualisations and digests you have saved for later use for your user. To access your saved things:

1. Click on 'Saved things' in the [navigation drawer](#) – this will automatically bring you to a page with a tab showing your alerts (which trigger your email notifications of relevant stories)
2. Click 'Reports' to access all saved reports to be generated at any time, as well as details of when they will be automatically generated and emailed to you on schedule (if your subscription has access to this feature)
3. Click 'Searches' to access all saved searches – this is helpful for accessing searches you run on a regular basis that have multiple filters
4. Click 'Visualisations' to access all saved visualisations – these include links to share the visualisations publicly – all visualisations are fully interactive
5. Click 'Digests' to see all saved digests – these are mini overview reports that can be emailed to you weekly



Your saved searches, alerts and reports

Here are the things you've saved in your **Example Subscription** subscription.

[Return to your profile page](#)

Your saved things

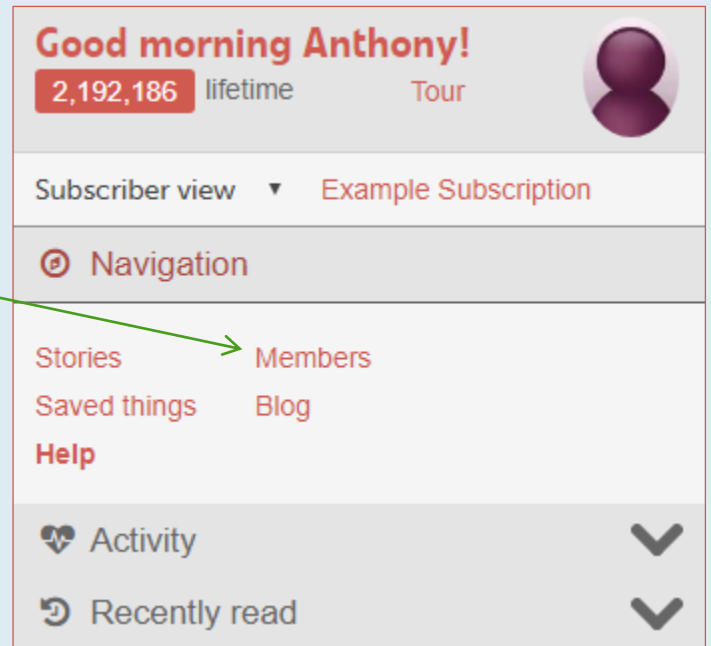
The screenshot shows the 'Your saved things' page. At the top, there are five tabs: 'Alerts' (highlighted in red), 'Reports', 'Searches', 'Visualisations', and 'Digests'. Below the tabs, there is a section for 'alerts' with the text: 'Here are your alerts in this subscription. You can turn each alert on and off or delete it if you no longer need it. (Help with alerts)'. There are two alert cards. The first card is titled 'If I respond, alert me' and has two items: 'when my response is published' and 'when my response is found helpful by the story author'. The second card is titled 'Alert: All stories tagged with ED - emergency department' and has four items: 'when a story is published', 'when a response is published', 'when a story has no response from anyone in my subscription after 1 week', and 'when a change is planned but not yet made by this organisation after 4 weeks'. Both cards have a 'Create a new alert' button and a 'Turn all my alerts on' button. There are five green circles with numbers 1 through 5, each with an arrow pointing to a specific element: 1 points to the 'Saved things' menu item in the navigation drawer, 2 points to the 'Your saved things' header, 3 points to the 'Alerts' tab, 4 points to the 'Visualisations' tab, and 5 points to the 'when my response is found helpful by the story author' alert item.

HELP PAGES

You can access further guides to using the site from our Help pages – available by clicking ‘Help’ in the [navigation drawer](#).

MEMBER LIST

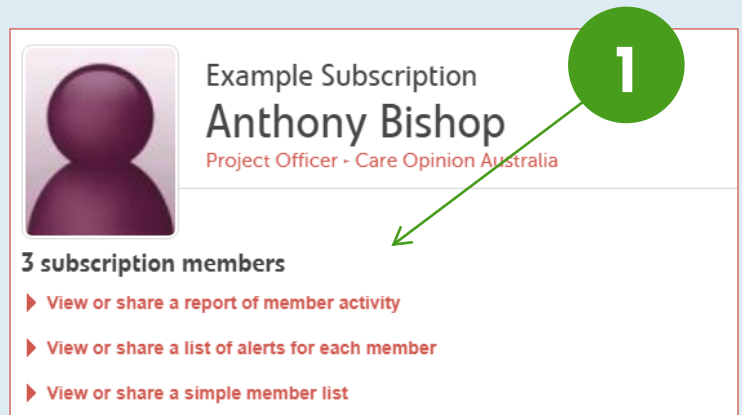
Each subscription has access to a page listing all its members. You can view details for each member or pull reports on all members collating things such as how many stories they have read and how many stories they have responded to. As an administrator you will also have the ability to add new members from this page. To access the member listing page, click ‘Members’ in the [navigation drawer](#).



GENERATING A MEMBER REPORT

There are three member reports available – member activity, alert listing, and simple member list. To generate these:

1. Select which report you want to generate
2. Select which file format of the report – options include PDF, Microsoft Excel, and Microsoft Word (both current and old file versions)
3. Select date from which to include data (*member activity report only*)
4. Click ‘Generate’



ADDING MEMBERS

On your member page, you will see the number of members set up in your subscription, as well as your member capacity. As long as you are under your member capacity, you can add members to your subscription. To add members to your subscription:

1. Click 'Add a new member'
2. Enter the member's details
3. Click 'Add an alert for all stories in the subscription' *if this is appropriate for the member you are adding* – this is not required as you can always add an alert later
4. Click 'Add'

Example Subscription
Anthony Bishop
Project Officer - Care Opinion Australia

3 subscription members

- ▶ [View or share a report of member activity](#)
- ▶ [View or share a list of alerts for each member](#)
- ▶ [View or share a simple member list](#)

You can add more members (your subscription capacity is **10** members).
You can decide which members can respond to stories, and you can always change your mind later.
[Freeze members or view those already frozen](#)

[Add a new member](#)

This information is required

First name

Last name

Email of the new member

Role of the new member

Add an alert for all stories in the subscription

[Add](#)

This information is optional

Job title

Department

Organisation

Phone

What this person does, in plain language

BULK MEMBER UPLOAD

The member adding function on the member list page is useful if you are only adding a few people to your subscription, but can be extremely time consuming if you are adding many members at once. For this situation we have the bulk member upload facility. To access this facility:

1. Click 'Help' in the [navigation drawer](#)
2. Click 'Upload new members' under 'More information'
3. Follow the instructions on this page

Good morning Anthony!
2,192,186 lifetime Tour

Subscriber view ▾ Example Subscription

Navigation

Stories Members
Saved things Blog
Help

Navigating the site

We hope you'll find *Care Opinion* easy to use.

But we know that sometimes it may not be as easy as it could be, so we've created some help pages which will explain how to do some key tasks.

You may also find these pages useful if you want to go further and get more from Care Opinion.

If you'd like us to add more help pages here, just let us know.

And of course, if you need immediate help and are a member of a full subscription, you can always [contact us](#) for friendly assistance.

2

More information

- [Change password](#)
- [Looking at a story](#)
- [Help with searching](#)
- [Help with alerting](#)
- [Help with responding](#)
- [Showing you've made a change](#)
- [Help with reporting](#)
- [Help with scheduled reports](#)
- [Roles in subscriptions](#)
- [Upload new members](#)
- [Help with blogging](#)
- [Customising service pages](#)

[Back to Help and resources for subscribers](#)

Search our help pages for

Search

3

Uploading new subscription members

You can add new members to your subscription one at a time, or if you prefer you can add a whole list of members in one go.

To add a list of new members, you'll need to prepare and upload an Excel file containing the required information.

Follow these steps:

1: Prepare your Excel file of new members

You should create the list of members on the first worksheet (only) of your Excel file.

The first row of the sheet must contain the column headings. Each row below that must contain a member to be added.

If you accidentally list a member twice, only the first will be added. If you list a member already in the subscription, they will be ignored.

Required columns

More information

- [Change password](#)
- [Looking at a story](#)
- [Help with searching](#)
- [Help with alerting](#)
- [Help with responding](#)
- [Showing you've made a change](#)
- [Help with reporting](#)
- [Help with scheduled reports](#)
- [Roles in subscriptions](#)
- [Help with blogging](#)
- [Customising service pages](#)

[Back to Navigating the site](#)

Search our help pages for

Search

A template is available for download from this page to allow you to easily structure your upload in the format required by the platform. If you have any issues with the bulk upload, please don't hesitate to contact us.

ADDING A PICTURE TO ANOTHER USER'S PROFILE

As an administrator, you have the capacity to upload a photo for the members of your subscription on their behalf. You can do this [from the 'Members' page](#).

1. Click 'Edit' for the user you want to upload a photo for
2. Click 'Choose a new picture'
3. Select your photo from the pop-up file selection screen – ensure that the photo has a filename that is all lower case, is an appropriate file type (.png, .jpg, etc.), and that the file size does not exceed 1MB
4. Use the tool to position or centre your photo as necessary to fit the required frame ratio – a preview is available on the right.
5. Once you are happy with the preview, click 'Use this picture'
6. You can remove (or change) the photo at any time by returning to this page and selecting the appropriate option

The image illustrates the process of uploading a profile picture for a user in a system. It is divided into several sections:

- Active members:** A table listing users. The 'Edit' button for Sue Palmer is highlighted with a green circle labeled '1'.
- Profile page (Step 2):** The profile for Sue Palmer is shown. The 'Choose a new picture' button is highlighted with a green circle labeled '2'.
- File Selection (Step 3):** A file explorer window titled 'Photo Upload' is shown. It displays a list of files on the desktop, including 'anthonybishop' and 'suepalmer'. The 'suepalmer' file is selected, and a green circle labeled '3' points to it.
- Photo Cropping (Step 4):** A tool for cropping the selected photo is shown. The photo is being positioned within a frame. A green circle labeled '4' points to the cropping tool.
- Final Profile (Step 5):** The profile page for Sue Palmer is shown again, but now with the new photo. The 'Use this picture' button is highlighted with a green circle labeled '5'.
- Profile Management (Step 6):** The profile page for Sue Palmer is shown with the new photo. The 'Remove profile picture' button is highlighted with a green circle labeled '6'.

FILTERING MEMBERS

The member listing can display up to 15 members at a time, before you will need to move to the next page of members. For situations where you have a number of pages of members, you can filter them by typing keywords such as first or last names and job titles, as well as their role on Care Opinion (Subscriber, Responder and Administrator), and the clicking 'Filter'.

Filter members
You can narrow down the list of members to just the ones you're interested in.

We'll look for your search term in first and last name, job title, department, and organisation.

Active members

	Anthony Bishop	Project Officer	Administrator	🔔 0	Edit
	Craig Hislop	IT Manager	Subscriber	🔔 0	Edit Remove
	Sue Palmer	Client Liaison Officer	Subscriber	🔔 1	Edit Remove

FREEZING MEMBERS

If your subscription has reached its capacity, or if you have a member who will be taking a long leave of absence, you can 'freeze' this member to remove them from the active member list. Whilst a member is frozen, they no longer count towards your member total, and will not receive email alerts from Care Opinion. Members can be unfrozen at any time, as long as your subscription has the capacity to add them back as an active member. To freeze/unfreeze a member:

1. Click 'Freeze members or view those already frozen' [on the Members page](#)
2. Select the members you want to freeze/unfreeze
3. Click the >/< button to move them between lists – clicking the >>/<< button will move all members in that list to the other – you can also double-click a member to move them immediately
4. Click 'Save changes'

Your active member total will update as you move members between 'active' and 'frozen' (A), and you can return to your member listing page by clicking 'Back to members' (B).

Example Subscription
Anthony Bishop
Project Officer - Care Opinion Australia

3 subscription members

- ▶ [View or share a report of member activity](#)
- ▶ [View or share a list of alerts for each member](#)
- ▶ [View or share a simple member list](#)

You can add more members (your subscription capacity is **10** members).

You can decide which members can respond to stories, and you can always change your mind later.

[Freeze members or view those already frozen](#)

1

[Back to members](#)

B



Example Subscription
Anthony Bishop
Project Officer - Care Opinion Australia

Set the active members for Example Subscription with immediate effect

This subscription allows up to 10 active members at any time. If there are more members than this, some will be "frozen".

You can see which members are active or frozen below.

You can freeze or unfreeze members up to the subscription capacity. When you save your changes, we will email the affected members to let them know.

Active members: 3 (Limit: 10)

A

2

3

Active

Anthony Bishop (Administrator)
Craig Hislop (Subscriber)
Sue Palmer (Responder)

Frozen

--

>>

>

<

<<

Click to select a user. You can select multiple users, and you can clear your selection by pressing "Esc".

Use the arrows to move members between the lists, or double-click a member to move them immediately.

When you are ready, click "Save changes".

4

BLOGGING

As a subscription, you can publish blogs to the Care Opinion platform. This can be performed by members with the Responder or Administrator roles. Blogs could be about anything from how you have found the Care Opinion journey so far, to public information blogs such as [this](#). To access your subscription's blogs:

1. Click 'Blog' in the [navigation drawer](#)
2. Select 'All our posts' to view blogs from anyone in your subscription
3. Select 'Just my posts' to view blogs written by you
4. Click the post title to open the blog post

Good morning Anthony!
2,192,186 lifetime Tour

Subscriber view ▾ Example Subscription

Navigation

Stories Members
Saved things Blog

Help

Activity ▾
Recently read ▾

Example Subscription
Anthony Bishop
Project Officer > Care Opinion Australia

Good afternoon Anthony!
Blog posts from Example Subscription, and responses
Here are your subscription's changes, questions and updates. If you're an admin, you can approve blog posts for publication. [Learn more...](#)

Create a new post »

Manage your blog posts

All our posts Just my posts Unpublished posts Responses to moderate

All blog posts from Example Subscription (Create a widget)

	STATUS	ACTIVITY	ACTIONS
	NOT YET PUBLISHED	READ BY RESPONSES	EDIT PREVIEW
Example Post 3	NOT YET PUBLISHED	3 0	EDIT PREVIEW
Example Blog Post 2	NOT YET PUBLISHED	0 0	EDIT PREVIEW

CREATING AND SAVING A BLOG POST

1. Click 'Create a new post' on the [blog page](#)
2. Add a title to your post
3. Indicate whether your post is an update, change, or question (which you answer in your blog post)
4. Indicate how you would like your title to be written as the author of the blog post – [name, role, organisation], [role, organisation] or simply [organisation]
5. Add the body of text for your post
6. Add tags (*optional*) – your blog post will appear under stories with the same tag
7. Add services (*optional*) – your blog post will appear under stories that are about these services
8. Click 'Save'

The screenshot shows a user interface for creating a blog post. At the top, a header area displays the user's profile: 'Example Subscription', 'Anthony Bishop', and 'Project Officer - Care Opinion Australia'. A green circle with the number '1' points to the user's name. Below the header, a message reads 'Good afternoon Anthony!' followed by a link to 'Blog posts from Example Subscription, and responses'. A blue button labeled 'Create a new post >>' is highlighted with a green circle '1' and an arrow pointing to it.

The main content area is divided into several sections. On the left, a red box highlights the text 'add a title to your blog post' with a green circle '2' and an arrow. Below this, a dropdown menu is set to 'Update' with a green circle '3' and an arrow. To the right of the dropdown, a text field contains 'Anthony Bishop, Project Officer, Care Opinion Australia' with a green circle '4' and an arrow. A red button labeled 'Close without saving' is highlighted with a green circle '8' and an arrow. Below this, a red button labeled 'Manage your blog' is highlighted with a green circle 'B' and an arrow.

The central section is titled 'Text of your blog post' and contains a rich text editor with a toolbar and a large text area. A green circle '5' has an arrow pointing to the text area.

At the bottom, there are two sections: 'Tag your post' and 'Which services is your post about?'. The 'Tag your post' section has a text input field with 'Add a new tag' and a plus sign, highlighted with a green circle '6' and an arrow. The 'Which services is your post about?' section has a text input field with 'Add a service' and a plus sign, highlighted with a green circle '7' and an arrow.

On the right side, there are three green circles with letters: 'C' at the top, '8' in the middle, and 'B' at the bottom. Arrows point from these circles to specific elements in the interface.

You can click 'Close without saving' (A) or 'Manage your blog' (B) to return to the main blogs page. Further information about content can be accessed by clicking 'guidance with writing a post?' (C).

DECIDING WHAT WILL HAPPEN TO YOUR BLOG POST

You will be given a number of options once you have saved your blog post.

- (A) Click 'View' to preview your post
- (B) Decide if you will allow responses to your post (by clicking 'Allow' / 'Don't allow') and for how long (by clicking '30 days' / '60 days' / 'ever')
- (C) Decide if you will show this post under related stories (based on tags and tagged services) by clicking 'Don't show this post' / 'Show this post'
- (D) Click 'Publish' to make your post public immediately, and click 'Publish' in the pop-up prompt
- (E) Click 'Publish and alert members' to make public and send an email alert to all members of your subscription, and click 'Publish' in the pop-up prompt
- (F) Click 'Delete' to remove post
- (G) Access further 'help with tagging and linking your blog post'

Would you like any **guidance with writing a post?**

This post is not yet published

Your post is all saved

Save

A **View »**

B **Allow responses for 30 days**

This post is not linked to any services

C **Don't show this post** under related stories on publication

G **Help with tagging and linking your blog post** ←

D1 **Publish** **Publish and alert members** **E1**

F **Delete**

Manage your blog

Publish? ×

Publish this blog post?

D2 **E2**

Publish **Cancel**

MANAGING AND APPROVING BLOG POSTS

If you did not publish the blog post at the time of writing it, you will have to ability to make changes to it publish it when it is ready.

1. Select the 'Unpublished posts' tab on the [blog page](#)
2. Click 'Edit'
3. Make changes to the post, *if necessary*
4. Click 'Save'
5. Click 'Publish' or 'Publish and alert members'
6. Click 'Publish' from the pop-up prompt



Good afternoon Anthony!

Blog posts from Example Subscription, and responses

Here are your subscription's changes, questions and updates. If you're an admin, you can approve blog posts for publication. [Learn more...](#)

[Create a new post »](#)

Manage your blog posts

All our posts

Just my posts

Unpublished posts

Responses to moderate

All blog posts from Example Subscription ([Create a widget](#))



Example Post 3

STATUS
NOT YET
PUBLISHED

ACTIVITY
READ BY
3
RESPONSES
0

ACTIONS
EDIT
PREVIEW

3



Example Post 3

Posted by Anthony Bishop, 24 October 2018

Update

Anthony Bishop, Project Officer, Care Opinion Australia

Would you like any [guidance with writing a post?](#)

This post is **not yet published**

Your post is all saved

Save

4

[View »](#)

Allow responses for 30 days

This post is not linked to any services

[Don't show this post](#) under related stories on publication

[Help with tagging and linking your blog post](#)

Publish

Publish and alert members

Delete

[Manage your blog](#)

5

Text of your blog post

B *I* U [List icons] [Link icon] [Image icon] [Quote icon] [Code icon] [Fullscreen icon]

Type something

MODERATE BLOG POST RESPONSES

If you have opted to allow responses on your blog post, you will have the ability to moderate responses that you receive. This allows you to choose whether to publish or reject the response. To moderate a response:

1. Select the 'Responses to moderate' tab on the [blog page](#)
2. Click 'Moderate response(s)' under 'Actions' – the number of responses will be listed; in this case there is one
3. On the response click 'Publish' or 'Reject' – this action can be undone by clicking 'Undo' after your decision has been made

Good afternoon Anthony!
Blog posts from Example Subscription, and responses
Here are your subscription's changes, questions and updates. If you're an admin, you can approve blog posts for publication. [Learn more...](#)

[Create a new post »](#)

Manage your blog posts

All our posts | Just my posts | Unpublished posts | **Responses to moderate**

All blog posts from **Example Subscription** ([Create a widget](#))

	STATUS		ACTIVITY		ACTIONS
Example Post 3	PUBLISHED 05/11/2018	OPEN FOR 29	READ BY 3	RESPONSES 0	MODERATE 1 RESPONSE

All blogs > [Example Subscription](#)

Example Post 3
Update from Example Subscription
Posted by Anthony Bishop, Project Officer, Care Opinion Australia, on 5 Nov 2018

Test

Was this post helpful? [Yes](#) | [No](#)

One response to this post

Response from Craig Hislop, IT Manager, Patient Opinion Australia on 24 Oct 2018 at 16:18

This response is waiting for you to **PUBLISH** or **REJECT** it.

Test

One response requires moderation ▶

This blog post is **published**

3 views by public users

[Edit »](#)

[Manage your blog](#)

About this blog

This blog post is written by [Example Subscription](#), which also moderates any responses to the post.

[More posts by Anthony](#)

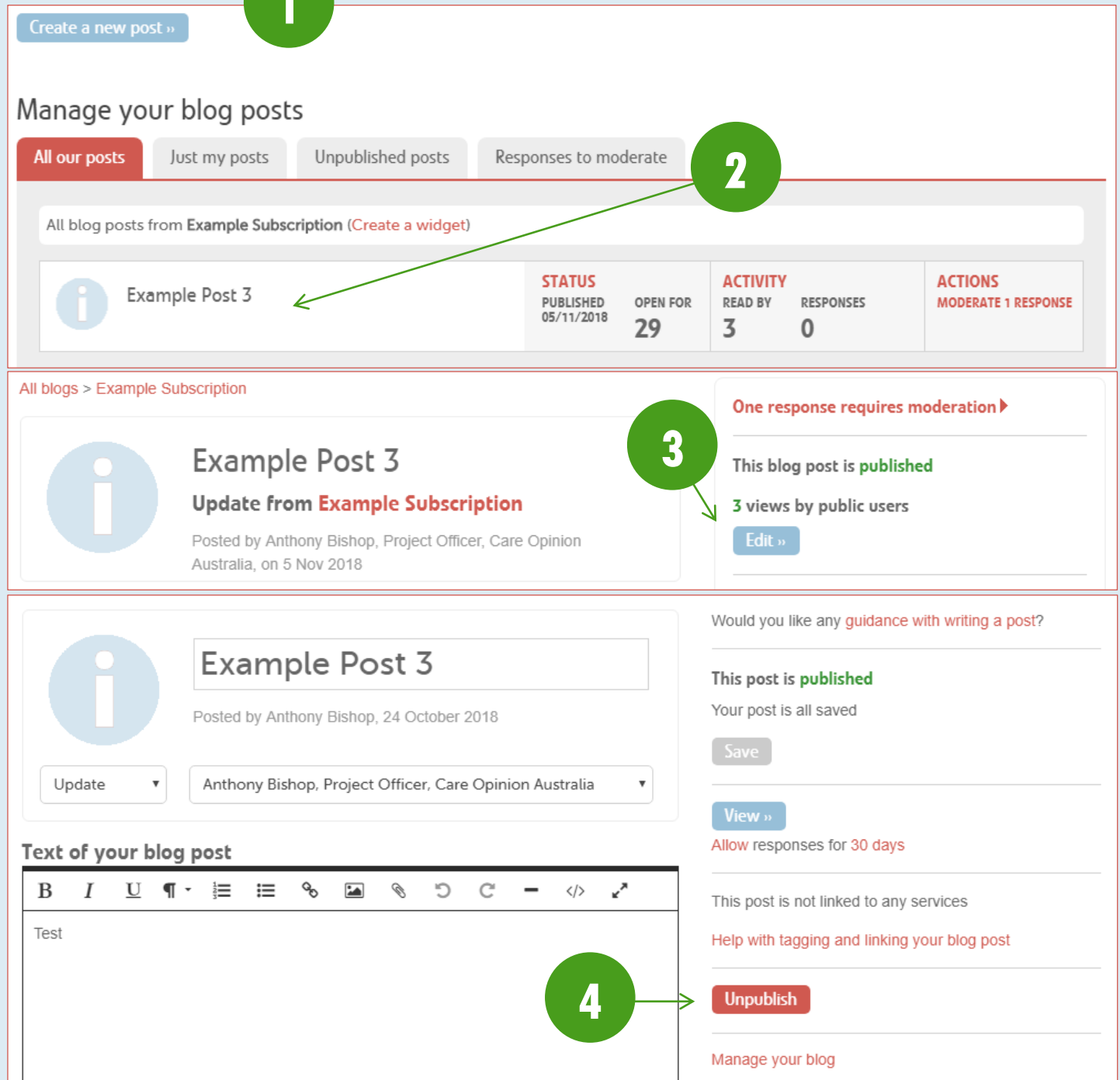
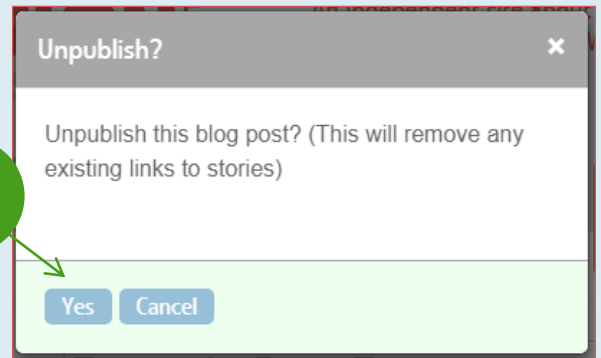
29 days left to respond to this post

Recent blog posts

UNPUBLISHING A BLOG POST


You can unpublish your blog posts at any time. To do this:

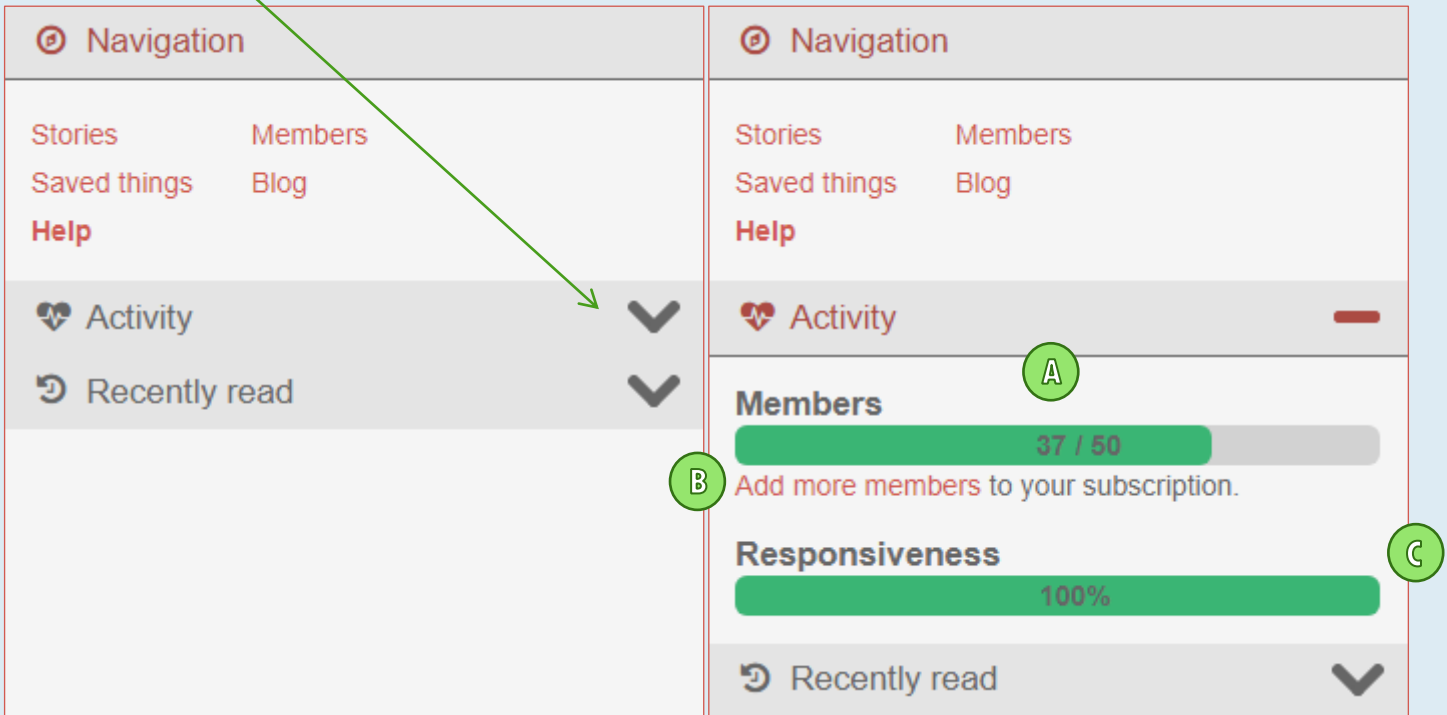
1. [Navigate to the blog page](#)
2. Click the post you wish to unpublish
3. Click 'Edit'
4. Click 'Unpublish'
5. Click 'Yes'



The screenshot shows the "Manage your blog posts" interface. At the top left, there is a button "Create a new post »" with a green circle "1" next to it. Below this, there are tabs for "All our posts", "Just my posts", "Unpublished posts", and "Responses to moderate". A green circle "2" is next to the "All our posts" tab. Below the tabs, there is a search bar and a table of blog posts. The table has columns for "STATUS", "ACTIVITY", and "ACTIONS". The first row shows "Example Post 3" with a status of "PUBLISHED 05/11/2018", "OPEN FOR 29", "ACTIVITY READ BY 3", "RESPONSES 0", and "ACTIONS MODERATE 1 RESPONSE". A green circle "3" is next to the "Example Post 3" entry in the table, with an arrow pointing to the "Example Post 3" text. Below the table, there is a detailed view of "Example Post 3". The post title is "Example Post 3" and the subtitle is "Update from Example Subscription". The author is "Anthony Bishop, Project Officer, Care Opinion Australia, on 5 Nov 2018". A green circle "3" is next to the "Example Post 3" title, with an arrow pointing to the "Example Post 3" text. To the right of the post details, there is a section titled "One response requires moderation ▶" and "This blog post is published". Below this, there is a button "Edit »". A green circle "3" is next to the "Edit »" button, with an arrow pointing to the "Edit »" button. Below the post details, there is a section titled "Text of your blog post" with a rich text editor. The editor has a toolbar with icons for bold, italic, underline, list, link, image, and other formatting options. The text area contains the word "Test". A green circle "4" is next to the "Unpublish" button in the right-hand sidebar, with an arrow pointing to the "Unpublish" button. The sidebar also contains a "Save" button, a "View »" button, and a "Manage your blog" link.

SUBSCRIPTION ACTIVITY


From the [navigation drawer](#), you can see a quick overview of the details in your subscription. To expand the activity section, click the  icon.



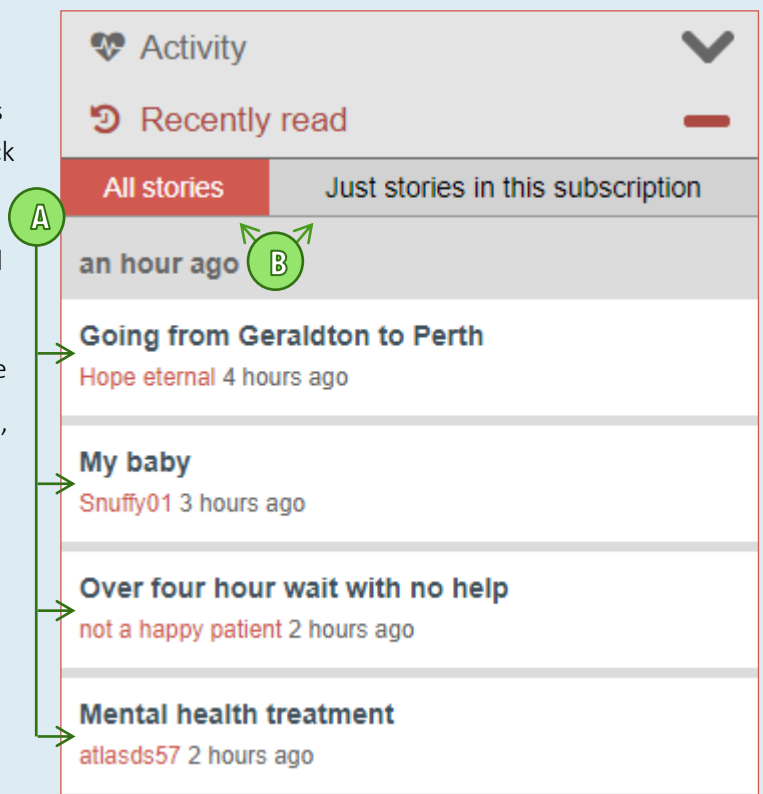
It includes the following information:

- (A) Number of active members out of your subscription's total capacity
- (B) A link to add more members
- (C) Your responsiveness – percentage of total stories about your subscription that has received a response from any member of your subscription

RECENTLY READ STORIES

From the [navigation drawer](#), you can see a list of stories that you have recently read. To expand the section, click the  icon. It includes the following information:

- (A) List of stories in order of how long ago you read them
- (B) Ability to swap between recent stories you have read that are about your subscription's services, or any service on the platform



SEARCHING STORIES

Searches are the basis for all alerting, and generating reports and visualisations on the platform - to set a story alert, you will define what stories you want to receive notification of by creating a story search; to pull a report, you will define the data set of stories by creating a story search. You may run reports on the same search on a regular basis, perhaps as a monthly or quarterly report, and as such you can save your search (especially those with lots of filters, or where you may have lots of different searches you need to run) to make it more efficient to run later.

1. Type a search term (the name of a service, medical condition, emotion tag, etc.) into the search bar and click 'Search' – the search bar is accessible from almost every page of the website and will match what you write as you type with terms and services already in the system; select them from the drop down for better search matching
2. Refine your search further by adding one or more filters – options available include both story and response parameters and a full list is below

The screenshot displays the Care Opinion website interface. At the top, there is a navigation bar with 'Home', 'Tell your story', and 'About us' buttons. A search bar is located in the top right, containing the text 'support' and a 'Search »' button. Below the search bar, a dropdown menu shows 'support' as a suggestion. To the left of the search bar, a green circle with the number '1' points to the search input field. Below the search bar, a 'Refine your search' sidebar is visible, containing various filters and options. A green circle with the number '2' points to the 'Refine your search' sidebar. The main content area shows '2,332 stories have been told' and a list of stories with filters like 'Latest stories', 'Latest responses', and 'Latest changes'. The stories listed include 'My wife', 'Care at Eastern Health-Lilydale', 'Care at Glenarm Nursing Home', and 'Eye operation'. Each story entry includes a title, a 'NEW STORY' or 'STORY HAS A RESPONSE' indicator, and a 'Shared' or 'Response' timestamp. The 'About' field for each story is also visible.

SAVING SEARCHES

1. Once the appropriate search terms and filters have been added, click 'Save my search as...'
2. Click the 'Search' tab
3. Enter a name for your search and click 'Save' – saved searches are added to and can be accessed through your 'Saved things' and a link to this is located in the [navigation drawer](#) and below the 'Save' button
4. You can click 'Back to search results' if you would like to alter your search

This screenshot shows the search filter sidebar on the left and search results on the right. The filter sidebar includes options like 'Read by me', 'Published on or after', 'Published on or before', 'non picture stories', and 'via Patient Opinion'. A red button labeled 'Save my search as... »' is highlighted with a green circle containing the number 1. The search results on the right show three items: 'Eye operation' (STORY HAS A RESPONSE), 'Comp... midwife' (STORY READ), and 'Geraldton Regional Hospital Emergency Department' (STORY READ). A green arrow points from the 'Save my search as...' button to the first result.

This screenshot shows the 'Save my search' form. On the left is a 'Refine your search' sidebar with 'Your current search' and 'Filtered by your subscription' sections. A green circle with the number 2 points to the 'Add a search term' input field. The main form has tabs for 'Alert', 'Report', 'Search', 'Visualisation', and 'Digest'. The 'Search' tab is active. Below the tabs, there is a 'Saved search' section with a 'Create a saved search' instruction. A text input field contains 'Search: All stories tagged with support' and a 'Save' button. A green circle with the number 3 points to the 'Save' button. Below the input field, there is a note: 'You'll find all your saved searches listed on your [saved things](#) page.' A green circle with the number 4 points to a 'Back to search results' button at the bottom of the form.

ALERTS

You can save any search as an alert, and this will define what stories you receive email notification of. This allows you to control story alerts by relevance to the person that is receiving them. This means that you could set an alert up of all stories in your subscription, or be very specific, for example, by setting up an alert for only stories tagged with 'ED – emergency department'. To save an alert for yourself:

1. [Create a search](#) with the relevant filters
2. Click 'Save my search as...'
3. Click the 'Alert' tab
4. Enter a name for your alert and click 'Save for me' – saved alerts are added to and can be accessed through your 'Saved things' and a link to this is located in the [navigation drawer](#) and below the 'Save for me' button

The screenshot shows a search results page for the tag 'support'. The left sidebar contains a 'Refine your search' section with a 'Save my search as...' button highlighted by a green circle and arrow labeled '2'. The main content area shows 2,303 stories. The first story is titled '"Request for an appointment following doctor's referral"' and is marked as a 'NEW STORY'. The second story is '"Positive physio experience"' and is marked as 'STORY READ'. The third story is '"Visiting Club Kinross."' and is marked as a 'NEW STORY'. The fourth story is '"Returning to my local health service"' and is marked as 'STORY READ'. The fifth story is '"My wife"' and is marked as a 'NEW STORY'. A green circle labeled '1' is positioned over the top of the search results area.

The screenshot shows a search interface with a sidebar on the left and a main content area on the right. The sidebar has a 'Refine your search' section with 'Your current search' (support (any)), 'Filtered by your subscription', and 'Stories tagged with'. Below this is an 'Add a search term' field and 'Story search options' and 'Response search options' sections. At the bottom of the sidebar is a 'Need a little help?' section with links for 'Help with searching', 'Creating an alert', and 'Creating and sharing reports'. The main content area has a 'Save my search as...' button (marked with a green circle '3') and a 'Back to search results' button. The 'Alert' tab is selected, showing an 'Email alert' section. It prompts the user to create an email alert and provides a text input field with the text 'Alert: All stories tagged with support' and a 'Save for me' button. Below this is a 'Help with alerts' section and a note: 'As an administrator, you can also save this alert for one or more members of your subscription'. This section includes a 'Who is this alert for?' text input field and a 'Save for member' button (marked with a green circle '4').

SAVING AN ALERT FOR ANOTHER MEMBER

As an administrator, you can also save an alert for other members of your subscription. To do this:

1. [Create a search](#) with the relevant filters
2. Click 'Save my search as...'
3. Click the 'Alert' tab
4. Enter a name for the alert
5. Type the name of the member (they must be an active member of your subscription) into the 'Who is this alert for' bar
6. Select their name from the drop down box (this will only appear if they are an active member)
7. Click 'Save for member' – in this case, because I have selected Sue Palmer, it says 'Save for Sue'

1 Refine your search More tags related to: support

▼ Your current search ADD/REMOVE

Filtered by your subscription

Stories tagged with

▶ support (any) −

Add a search term +

▶ Story search options

▶ Response search options

Save my search as... »

2,303 stories have been told

Latest stories | Latest responses | Latest changes

"Request for an appointment following doctor's referral" NEW STORY
 Shared less than an hour ago

About: Fiona Stanley Hospital

"Positive physio experience" STORY READ
 Read less than an hour ago

About: Sir Charles Gairdner Hospital

3 Refine your search ADD/REMOVE

▼ Your current search

Filtered by your subscription

Stories tagged with

▶ support (any) −

Add a search term +

▶ Story search options

▶ Response search options

Save my search as... »

Save my search

Alert | Report | Search | Visualisation | Digest

Email alert
 Create an **email alert** if you would like us to send you an email whenever we publish new stories like the ones in your search

Enter a name for your alert Save for me

You'll find all your saved alerts listed on your **saved things** page.

Help with alerts

As an administrator, you can also save this alert for one or more members of your subscription

Who is this alert for? Save for member

Sue Palmer

4

5 Refine your search ADD/REMOVE

▼ Your current search

Filtered by your subscription

Stories tagged with

▶ support (any) −

Add a search term +

▶ Story search options

▶ Response search options

Save my search as... »

Save my search

Alert | Report | Search | Visualisation | Digest

Email alert
 Create an **email alert** if you would like us to send you an email whenever we publish new stories like the ones in your search

Enter a name for your alert Save for me

You'll find all your saved alerts listed on your **saved things** page.

Help with alerts

As an administrator, you can also save this alert for one or more members of your subscription

Who is this alert for? Save for Sue

6

7

The member will now be able to find this alert in their saved things. You can also access their alerts from the Member page.

EDITING ALERTS AND SETTING TRIGGERS

When you save an alert, it will automatically be set up with default triggers. These can be updated to suit your needs for that alert, to ensure that the email alerts you receive are only what is relevant. To edit your alerts:

1. [Navigate to the 'Alerts' tab on your 'Saved things' page](#)
2. Go to the alert that you want to edit
3. To remove a trigger, click the --- icon next to it
4. To add a trigger, click 'Available triggers' to expand the list and click the --- icon next to it
5. To cycle through a trigger's options, click the pink text (only triggers with pink text have options)
6. To view a list of stories currently captured by this alert, click 'view the original search'
7. To edit the search filters for the alert, click 'edit alert'
8. To deactivate/reactivate the alert entirely, toggle the switch – green is active, grey is inactive

The screenshot shows the 'My saved things' Alerts tab. At the top, there are tabs for Alerts, Reports, Searches, Visualisations, and Digests. Below the tabs, there is a header: 'Here are your alerts in this subscription. You can turn each on or off or delete it if you no longer need it. (Help with alerts)'. The main content area shows a list of alerts. The first alert is 'If I respond, alert me' with two triggers: 'when my response is published' and 'when my response is found helpful by the story author'. Below this is a section for 'Available triggers' with a 'Create a new alert' button. The second alert is 'Alert: All stories tagged with support' with four triggers: 'when a story is published', 'when a response is published', 'when a story has no response from anyone in my subscription after 1 week', and 'when a change is planned but not yet made by this organisation after 4 weeks'. Below this is another 'Available triggers' section with four triggers: 'when a response is marked helpful by anyone', 'when a response is marked unhelpful by anyone', 'when a story remains unread by me after 1 day', and 'when a story has no change planned or made by me after 1 day'. On the right side of the second alert, there is a toggle switch and a minus sign. At the bottom right, there is a 'Turn all my alerts off' link.

1 My saved things

Alerts Reports Searches Visualisations Digests

Here are your alerts in this subscription. You can turn each on or off or delete it if you no longer need it. (Help with alerts)

A If I respond, alert me

B - when my response is published
- when my response is found helpful by the story author

▶ Available triggers

Create a new alert » Turn all my alerts off C

3 Alert: All stories tagged with support (edit alert or view the original search)

- when a story is published
- when a response is published
- when a story has no response from anyone in my subscription after 1 week
- when a change is planned but not yet made by this organisation after 4 weeks

▶ Available triggers

4 Available triggers

+ when a response is marked helpful by anyone
+ when a response is marked unhelpful by anyone
+ when a story remains unread by me after 1 day
+ when a story has no change planned or made by me after 1 day

5 6 7 8

If you are a person with responding rights, such as a 'Responder' or an 'Administrator' you will also have an alert with triggers for when you post a response (A) – this alert is automatically added to your saved things, and can be deactivated by removing all active triggers (B).

To deactivate all of your alerts (if you have multiple), click 'Turn all my alerts off' (C). This does not include your response alert.

EDITING ALERTS FOR OTHERS

As an administrator, you have the capacity to edit the alerts of the other members within your subscription. This includes being able to edit the search filters that determine the pool of stories that they will be alerted to, but [not the alert triggers shown above](#). Alert triggers can only be edited by that user, from their [‘Saved things’ page](#). To edit the user’s alert:

1. [Navigate to the ‘Members’ page](#)
2. Click ‘Edit’ on the user you wish to edit the alert for
3. Click ‘View alerts’
4. To edit the search filters for the alert, click ‘edit alert’
5. To view a list of stories currently captured by this alert, click ‘view the original search’
6. To deactivate/reactivate the alert entirely, toggle the switch – green is active, grey is inactive

Members
You can narrow down the list of members to just the ones you're interested in.

E.g. CEO Any Filter

We'll look for your search term in first and last name, job title, department, and organisation.

Active members

	Anthony Bishop	Project Officer	Administrator	🔔 1	Edit
	Craig Hislop	IT Manager	Subscriber	🔔 0	Edit Remove
	Sue Palmer	Client Liaison Officer	Responder	🔔 1	Edit Remove

Back to members

Example Subscription
Sue Palmer
Client Liaison Officer - Care Opinion Australia

Choose a new picture »

View alerts »

From **Anthony Bishop**:

Alert: All stories tagged with support (edit alert or view the original search)

REPORTS

Reporting can be generated from any pool of stories refined from a search. This will allow you to generate data-driven information relevant to you and your organisation. To generate a report:

1. [Create a search](#) with the relevant filters
2. Click 'Save my search as...'
3. Click the 'Report' tab
4. Select your desired report
5. Select any report-specific options available
6. Select your desired file type from the drop-down options
7. Click 'Generate' – generation of the report may take a short while, depending on the number of stories filtered by the search; when the system has generated the report, it will begin downloading

This screenshot shows the 'Refine your search' sidebar on the left and the main content area on the right. A green circle with the number '1' is placed over the search filter 'support (any)'. A second green circle with the number '2' is placed over the 'Save my search as...' button in the sidebar. The main content area displays '2,303 stories have been told' and lists two stories: 'Request for an appointment following doctor's referral' (marked as 'NEW STORY') and 'Positive physio experience' (marked as 'STORY READ').

This screenshot shows the 'Save my search' interface. The 'Report' tab is selected in the top navigation bar. A green circle with the number '3' is placed over the 'Report' tab. Below the navigation bar, there are four report options listed with document icons and right-pointing arrows: 'Services with ratings', 'Story authors in summary', 'Story and response listing', and 'Stories in summary'. The 'Report' section title is followed by the instruction: 'Create a report if you would like to print or share these stories with other people'.

Refine your search

▼ Your current search ADD/
REMOVE

Filtered by your subscription

Stories tagged with

▶ support (any) -

Add a search term +

▶ Story search options

▶ Response search options

Save my search as... »

Need a little help?

- Help with searching
- Creating an alert
- Creating and sharing reports

Tweet
Like 0
Share

✉ Email

Save my search

Alert
Report
Search
Visualisation
Digest

Report

Create a **report** if you would like to print or share these stories with other people

4

←

📄

Services with ratings >

Summary of the rating scores for a set of services

←

📄

Story authors in summary >

Summary of information provided by authors, such as role, age, gender, ethnicity and disability

←

📄

Story and response listing >

A list of the stories in your search, grouped by the service they are about

←

📄

Stories in summary >

A summary of the stories in your search, counting stories by time, place, person, service and criticality

←

📄

Services with story activity >

Summary of story counts, responsiveness and criticality for a set of services

←

📄

Story listing in a table >

Simple table of stories suitable for export to Excel. This report is too wide to be easily used in Word or PDF formats.

←

📄

Response quality >

How services are responding

←

📄

Responses and story progress >

A summary of responses and changes following the stories in your search

Refine your search

▼ Your current search ADD/
REMOVE

Filtered by your subscription

Stories tagged with

▶ support (any) -

Add a search term +

▶ Story search options

▶ Response search options

Save my search as... »

Need a little help?

Save my search

Alert
Report
Search
Visualisation
Digest

Report

Create a **report** if you would like to print or share these stories with other people

5

📄

Services with ratings ▾

Summary of the rating scores for a set of services

Include Friends and family test data

Include
Exclude

Choose a format for the report

Excel
▾

Generate

Generate

You can **save this report** if you think you might need it again, or you would like it sent out on a regular basis.

Enter a name for your report Save

SAVING A REPORT

You can save a report if you may need that report again. To do this:

1. [Create a search](#) with the relevant filters
2. Click 'Save my search as...'
3. Click the 'Report' tab
4. Select your desired report
5. Select any report-specific options available
6. Select your desired file type from the drop-down options
7. Enter a name for your report and click 'Save' – saved reports are added to and can be accessed through your ['Saved things'](#) and a link to this is located in the [navigation drawer](#) and below the 'Save' button

The image consists of two screenshots of a web application interface, illustrating the process of saving a report. The first screenshot shows a search results page with 2,303 stories. The second screenshot shows the 'Save my search' dialog with the 'Report' tab selected.

Step 1: The search results page shows a sidebar with 'Refine your search' and 'Your current search' filters. A green circle with the number '1' is placed over the search filters.

Step 2: A green circle with the number '2' is placed over the 'Save my search as...' button in the sidebar.

Step 3: A green circle with the number '3' is placed over the 'Report' tab in the 'Save my search' dialog.

Step 4: A green circle with the number '4' is placed over the 'Services with ratings' report in the 'Report' dialog.

Step 5: A green circle with the number '5' is placed over the 'Include' button in the 'Services with ratings' report.

Step 6: A green circle with the number '6' is placed over the 'Excel' dropdown menu in the 'Services with ratings' report.

Step 7: A green circle with the number '7' is placed over the 'Save' button in the 'Services with ratings' report.

SCHEDULING A SAVED REPORT

You can also request that a saved report generate on schedule – for example, on the 1st of each month you may wish to pull a report for all stories published about your subscription in the previous month. To schedule a saved reports generation:

1. [Create a search and save it as a report](#)
2. Click on the calendar icon
3. To update the frequency of the report, click on the day and date, then select the appropriate frequency option from the pop-up menu and click 'Update' to save
4. To update who the report should be sent to, click on 'you alone', then type the member(s) you would also like to receive the report, select them from the drop-down options, and click 'Update' to save
5. Your automatic report is now set – to return to the search, click 'Back to search results'

The screenshot shows the 'Report' generation interface. On the left, a sidebar titled 'Refine your search' contains a search filter for 'support (any)'. A green circle with the number '1' points to the 'Save my search as...' button. The main area is titled 'Report' and shows a report named 'Services with ratings' with a summary of rating scores. It includes options to 'Include' or 'Exclude' 'Friends and family test data' and a dropdown menu for 'Choose a format for the report' set to 'Excel'. A 'Generate' button is visible. Below this, a text box allows entering a name for the report, with 'Services with ratings: All stories tagged with support' entered. A green circle with the number '2' points to the 'Save' button. Below the 'Save' button, a list of saved reports is shown, with a green circle with the number '3A' pointing to the report name 'Services with ratings: All stories tagged with support'. A yellow box with a green circle containing '4A' highlights a message: 'You can use the links to change the recipients, format or schedule of your report. More help'. The report name in the list is followed by a calendar icon and a minus sign.

Update delivery schedule

Stories in summary: All stories tagged with support **3B**

How often should this report be sent?

Weekly

Monthly

Day 8 of every 1 month(s)

The Fourth Friday of every 1 month(s)

Yearly

Update

Update

Cancel

3C

Update who will receive this report

Stories in summary: All stories tagged with support

Who should receive this report?

Deliver to me

You will receive this report

Deliver to these subscription members

- This report will not be sent to anyone else

Add Sue Palmer| +

Sue Palmer

Cancel Update

4B

4C

4D

Services with ratings: All stories tagged with support

Email to you alone as [PDF](#) on the third Tuesday of every month (due 18/12/2018)

You can use the links to change the recipients, format or schedule of your report. [More help](#)

VISUALISATIONS

For a more visual representation of your data, you have access to visualisations. These are fully-interactive, data sets that allow you to focus on various aspects of the stories that are shared about your organisation. To generate a visualisation:

1. [Create a search](#) with the relevant filters
2. Click 'Save my search as...'
3. Click the 'Visualisation' tab
4. Select the visualisation you would like to generate and click 'Preview [visualisation type]'

Refine your search

More tags related to: **support**

1

Your current search ADD/REMOVE

Filtered by your subscription

Stories tagged with

▶ support (any) -

Add a search term +

▶ Story search options

▶ Response search options

Save my search as... »

2,303 stories have been told

Latest stories | Latest responses | Latest changes

"Request for an appointment following doctor's referral" **NEW STORY** Shared less than an hour ago

About: Fiona Stanley Hospital

"Positive physio experience" **STORY READ** Read less than an hour ago

Refine your search

Your current search ADD/REMOVE

Filtered by your subscription

Stories tagged with

▶ support (any) -

Add a search term +

▶ Story search options

▶ Response search options

Save my search as... »

3

Save my search

Alert | Report | Search | **Visualisation** | Digest

Visualisation

Create a **visualisation** of the stories in your search

You'll find all your saved visualisations listed on your **saved things** page.

4

Tag bubbles

This shows the most popular tags for your stories as bubbles. The bubbles are split according to how often the tag is used to say "what was good", or "what could be improved".

This visualisation provides a lot of information in a very easy to understand way.

Preview tag bubbles

Story swarm

This shows how your stories are spread over time, and allows you to see patterns in story progress or criticality. Up to 400 stories are included.

Preview story swarm

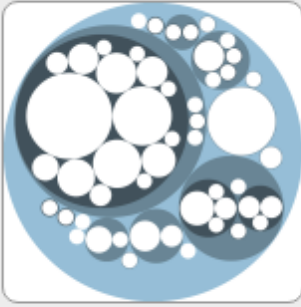
Need a little help?

- [Help with searching](#)
- [Creating an alert](#)
- [Creating and sharing reports](#)

Tweet Like 0 Share

Email

Lily pad

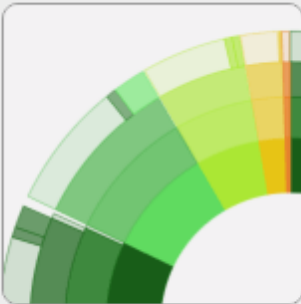


This shows how your stories are spread according to the services they relate to. Each circle represents an organisation or the services it provides. The more stories about a service, the larger the circle for that service.

Some stories are about multiple services, so you may see services outside your subscription scope on the lily pad.

[Preview lily pad](#)

Sunburst



This shows how stories progress from being told to being read, responded to and perhaps leading to change too. Stories are grouped by criticality

[Preview sunburst](#)

Tag word cloud



This shows the most popular tags for your stories as words, sized according to use. You can choose the tags people used to say "what was good", "what could be improved" or "how did you feel?"

What was good?

[Preview tag word cloud](#)

Story word cloud



This shows the most commonly used words in the text of your stories, based on the last 100 stories.

[Preview story word cloud](#)

[Back to search results](#)

4

SAVING AND SHARING VISUALISATIONS

You can save your visualisations for later use, as well as generate a short-URL for sharing with others. To do this:

1. [Create and save a search, and select the 'Visualisation' tab](#)
2. Select the visualisation you would like to generate and click 'Preview [visualisation type]'
3. Enter a name for the visualisation
4. Enter a description for the visualisation
5. Select how you would like to sign the visualisation (this is how it is displayed when you share it publicly) – you can sign with your [name, role, organisation], [role, organisation], or just [organisation]
6. Click 'Save and share'
7. Click the link to view the visualisation or copy it and share it with others

1 Save my search

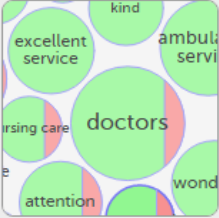
Alert Report Search **Visualisation** Digest

Visualisation

Create a **visualisation** of the stories in your search

You'll find all your saved visualisations listed on your **saved things** page.

Tag bubbles

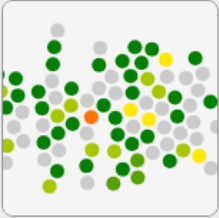


This shows the most popular tags for your stories as bubbles. The bubbles are split according to how often the tag is used to say "what was good", or "what could be improved".

This visualisation provides a lot of information in a very easy to understand way.

[Preview tag bubbles](#)

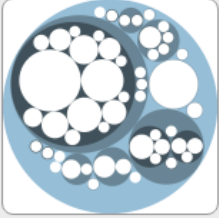
Story swarm



This shows how your stories are spread over time, and allows you to see patterns in story progress or criticality. Up to 400 stories are included.

[Preview story swarm](#)

Lily pad



This shows how your stories are spread according to the services they relate to. Each circle represents an organisation or the services it provides. The more stories about a service, the larger the circle for that service.

Some stories are about multiple services, so you may see services outside your subscription scope on the lily pad.

[Preview lily pad](#)

2

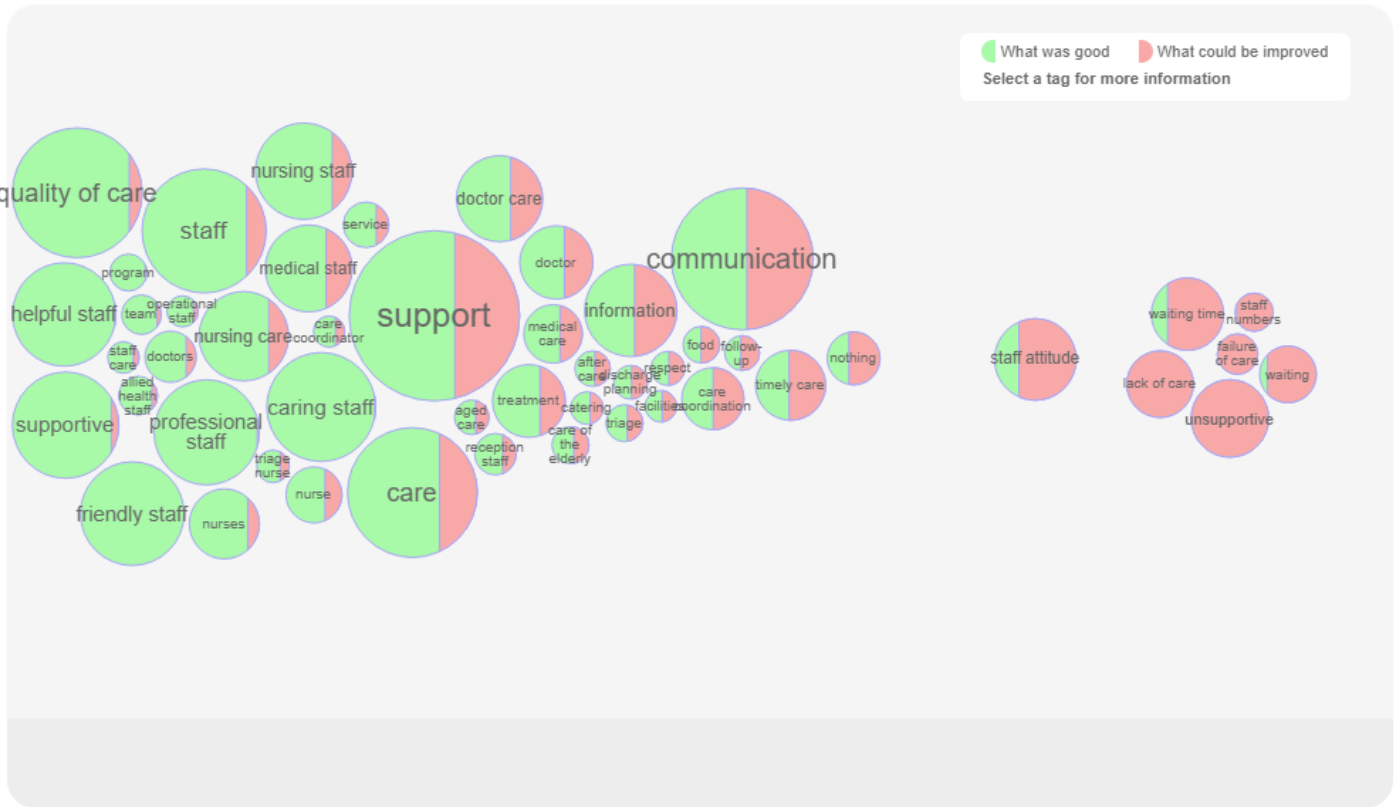
Need a little help?

- [Help with searching](#)
- [Creating an alert](#)
- [Creating and sharing reports](#)

[Tweet](#) [Like 0](#) [Share](#)

[Email](#)

Tag bubbles



Save and share

To share your tag bubbles with others, you save it with a name and a short description.

Once it is saved, we give you a simple link which you can share with *anyone* - no login to **Care Opinion** is needed.

You can see all of your saved visualisations on your **saved things** page.

Name

Enter a description for your tag bubbles visualisation

How would you like to sign your visualisation?

Save and share

3

4

5

6

7

✔ Your visualisation is now available here: <https://www.careopinion.org.au/vis/mp6nn>

DIGESTS

Digests are available if you would just like to see a brief overview of the activity in your subscription over the past 7 days. It summarises the number of stories, responses and changes published about your subscription over this time period – and you can set up the digest to be sent to you weekly, on any day of the week you would like. To create a digest:

1. [Create a search](#) with the relevant filters
2. Click 'Save my search as...'
3. Click the 'Digest' tab
4. Select the day you want to receive the digest from the drop-down options
5. Type a name for your digest and click 'Save for me'

The screenshot shows the 'Refine your search' interface. On the left, there is a sidebar with search filters. The main area displays search results for 'support' with 2,303 stories. Two story cards are visible: one titled 'Request for an appointment following doctor's referral' and another titled 'Positive physio experience'. A green circle with the number '1' is placed over the top of the sidebar. A green circle with the number '2' is placed over the 'Save my search as...' button at the bottom of the sidebar. A green circle with the number '3' is placed over the 'Digest' tab in the top navigation bar.

The screenshot shows the 'Save my search' configuration page. The 'Digest' tab is selected in the top navigation bar. The main content area is titled 'Digest' and contains the following fields: 'Choose a day to receive the digest' with a dropdown menu set to 'Monday', 'Enter a name for your digest' with the text 'Digest: All stories tagged with support', and a 'Save for me' button. A green circle with the number '4' is placed over the day dropdown menu. A green circle with the number '5' is placed over the 'Save for member' button at the bottom of the page.

SAVING A DIGEST FOR ANOTHER

As an administrator, you can also save an alert for other members of your subscription. To do this:

1. [Create a search](#) with the relevant filters
2. Click 'Save my search as...'
3. Click the 'Digest' tab
4. Select the day you want to receive the digest from the drop-down options
5. Type a name for the digest
6. Type the name of the member (they must be an active member of your subscription) into the 'Who is this digest for?' bar and select their name from the drop down box (this will only appear if they are an active member)
7. Click 'Save for member' – in this case, because I have selected Sue Palmer, it says 'Save for Sue'

1 Refine your search. More tags related to: support. 2,303 stories have been told. Latest stories, Latest responses, Latest changes. "Request for an appointment following doctor's referral" NEW STORY. Shared less than an hour ago. About: Fiona Stanley Hospital. "Positive physio experience" STORY READ. Read less than an hour ago. Save my search as... »

2 Save my search as... »

3 Save my search. Alert, Report, Search, Visualisation, Digest. Digest. Create a digest of the stories in your search. Choose a day to receive the digest: Monday. Enter a name for your digest: Digest: All stories tagged with support. Save for me. You'll find all your saved digests listed on your saved things page. As an administrator, you can also save this digest for one or more members of your subscription. Who is this digest for? Sue. Save for member. Sue Palmer.

4 Monday

5 Digest: All stories tagged with support

6 Sue

7 Save for Sue

RESPONDING

There are two methods available to respond to a story; you must be logged on to the system in order to respond.

RESPONSE METHOD 1: EMAIL ALERT

When a story is published that is relevant to you, you will receive an email alert ([subject to how you have set up your alerts](#)). Inside this email alert is a web-link to the story – the link also contains a single-use login token that means that the first time you click the link, it will also log you in. The respond via your email alert:

1. Click the story link in the email
2. After reading the story, scroll down to the response box – if the response box is not visible, ensure you are [logged in](#) and that you are in '[Subscriber View](#)'
3. Type your response into the response box
4. Indicate if you are planning to or have made a change
5. Choose how you will sign your response from the drop-down options - you can sign with your [name, role, organisation], [role, organisation], or just [organisation]
6. Provide your consent for your response to be published – you cannot submit the response without this
7. Click 'Send your response'

Anthony, Care Opinion has published a story relevant to you

1

[Care at Glenarm Nursing Home](#)

This is your **personal link**. It will log you in the first time you use it. After that it is safe to share with other people.

You can also [see who we've told about this story](#)

Why did I get this email?

We've sent this email in line with alerts you have set on Care Opinion. You can change or [pause](#) emails you receive from us at any time.

Just log into [Care Opinion](#), and then [change your alerts](#).

If you need help, check our [alerting help page](#)

This response is from Me



Your reply:

Show me some [guidance on responding](#) and some [responses people found helpful](#)

B *I*

Type something

Are you planning a change in response?

[\(More about changes\)](#)

- Not at the moment We're planning a change We've made a change

How would you like to sign your response?

Anthony Bishop, Project Officer, Care Opinion Aust

Your consent

- I consent to my response being published on Care Opinion and shared online to help learning and change.

7

Submit your response »

RESPONSE METHOD 2: YOUR STORIES PAGE

You can view a list of stories about your subscription from the [‘Stories’ page](#) – accessible from the [navigation drawer](#). To respond to a story this way:

1. Navigate to your [‘Stories’ page](#)
2. Click on the story you want to respond to
3. After reading the story, scroll down to the response box – if the response box is not visible, ensure you are [logged in](#) and that you are in [‘Subscriber View’](#)
4. Type your response into the response box
5. Indicate if you are planning to or have made a change
6. Choose how you will sign your response from the drop-down options - you can sign with your [name, role, organisation], [role, organisation], or just [organisation]
7. Provide your consent for your response to be published – you cannot submit the response without this
8. Click ‘Send your response’

1

Example Subscription
Anthony Bishop
Project Officer > Care Opinion Australia

Good afternoon Anthony!
Stories and responses from Example Subscription
Here are the latest stories in your subscription. Some may need further action.
Select a story to read it, or any service it is about to see other stories about that service.
Or see which stories have [responses or changes from your subscription or others](#)
Can't find a story that you read before? [Click here](#) to go through your [recently read stories](#)

2

Manage your stories [Search within your stories](#)
Latest stories, with responses and changes from Example Subscription

All stories **Unread** Without response Change promised

Stories not yet read by anyone in the **Example Subscription** subscription

	STORY READ	MODERATION CRITICALITY	ACTIVITY READ BY
"Positive physio experience"	 Read less than an hour ago	0	40

About:

This response is from Me



Your reply:

Show me some [guidance on responding](#) and some [responses people found helpful](#)

B *I*

Type something

Are you planning a change in response? [\(More about changes\)](#)

- Not at the moment We're planning a change We've made a change

How would you like to sign your response?

Anthony Bishop, Project Officer, Care Opinion Aust

Your consent

- I consent to my response being published on Care Opinion and shared online to help learning and change.

8

Submit your response »

RESPONDING ON BEHALF OF ANOTHER

As an administrator, you have the ability to submit a response on behalf of another responder/administrator in your subscription. This allows you to submit the response for them, whilst the response still being publicly displayed as being written by them. While you are logged in you and other members of your subscription will be able to see that the response was posted on behalf of someone else, however members of the public will not. To respond on behalf of another:

1. Navigate to the story you wish to respond to – you can follow [Method 1](#), or [Method 2](#) above
2. Select 'Someone else in my subscription' from the drop-down options
3. Type in the name of the person you want to respond on behalf of – this person must be an active member of your subscription and be set up as a 'Responder' or 'Administrator'
4. Select the person from the drop-down options
5. Type your response into the response box
6. Indicate if you are planning to or have made a change
7. Provide consent for the response to be published – you cannot submit the response without this
8. Click 'Send your response'

The screenshot shows a user interface for responding to a story. A large green circle with the number '1' is positioned at the top left. Below it, the text 'Responses to this story' and 'No responses yet' is visible. The main form area is titled 'Your reply:' and contains several fields. A green circle with the number '2' points to a dropdown menu labeled 'This response is from' which currently shows 'Someone else in my subscriptio'. A green circle with the number '3' points to a text input field labeled 'The response author is' which contains the text 'Sue|'. Below this field, a dropdown menu shows 'Sue Palmer'. A green circle with the number '4' points to the dropdown menu for the author name. At the bottom of the form, there is a rich text editor with a toolbar containing icons for bold (B), italic (I), link, image, undo, and redo. Below the toolbar is a text area with the placeholder 'Type something'. A red banner at the bottom of the page contains the number '48'.



Your reply:

Show me some **guidance on responding** and some **responses people found helpful**

B *I* 🔗 🖼️ ↺ ↻

Type something

6

Are you planning a change in response?

[\(More about changes\)](#)

- Not at the moment We're planning a change We've made a change

Your consent

- I consent to my response being published on Care Opinion and shared online to help learning and change.

8

Submit your response »

5

7

ADDITIONAL INFORMATION AND GUIDES

New features are added to the platform regularly – [check out our blog to see the latest updates](#). You can access the [‘Help’](#) pages from your [navigation drawer](#) for further subscriber guides.

If you should have any issues, please do not hesitate to contact us:



(07) 3354 4525



info@careopinion.org.au

For general subscriber enquiries, please contact our Client Liaison Officer, Sue Palmer:



sue.palmer@patientopinion.org.au

For platform IT issues, please contact our Project Officer, Anthony Bishop:



anthony.bishop@patientopinion.org.au