CARE OPINION AUST
BE HEARD.

MEMBER USER GUIDE
ADMINISTRATOR ROLE

CONTENTS

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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

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.

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.
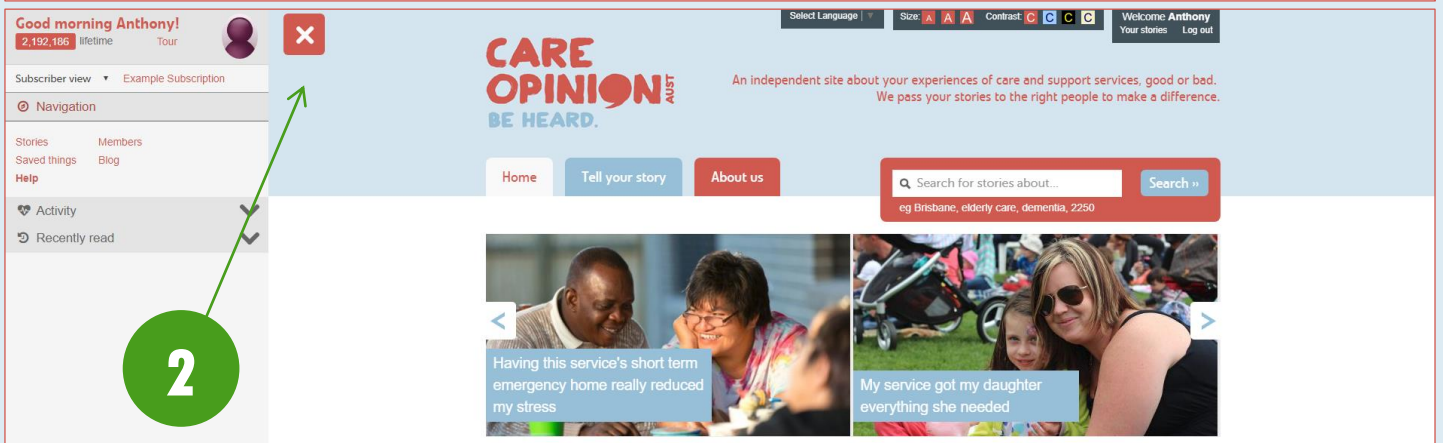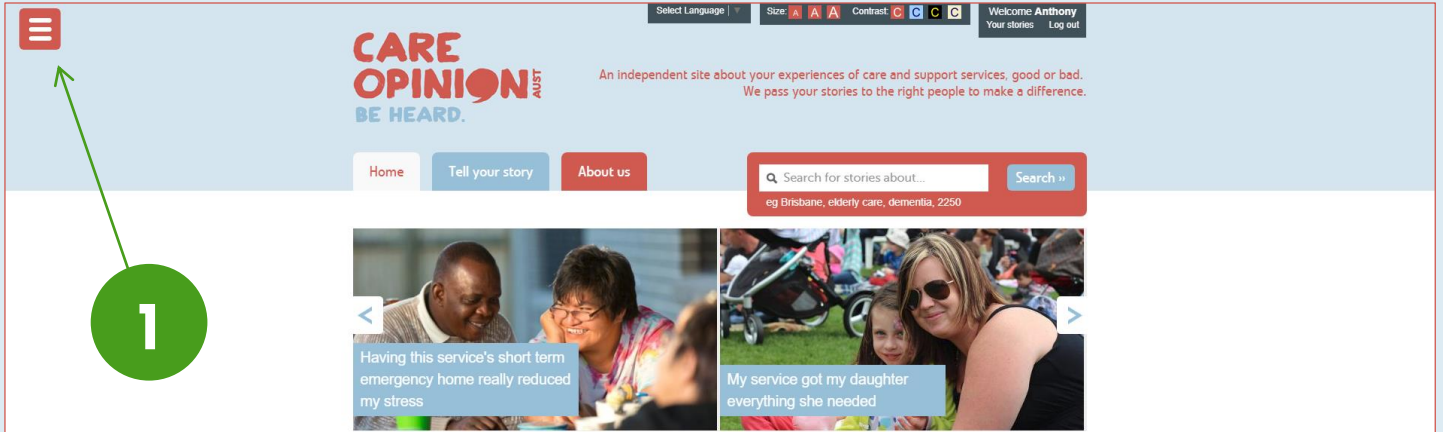
From the navigation drawer you can access the following functions:

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
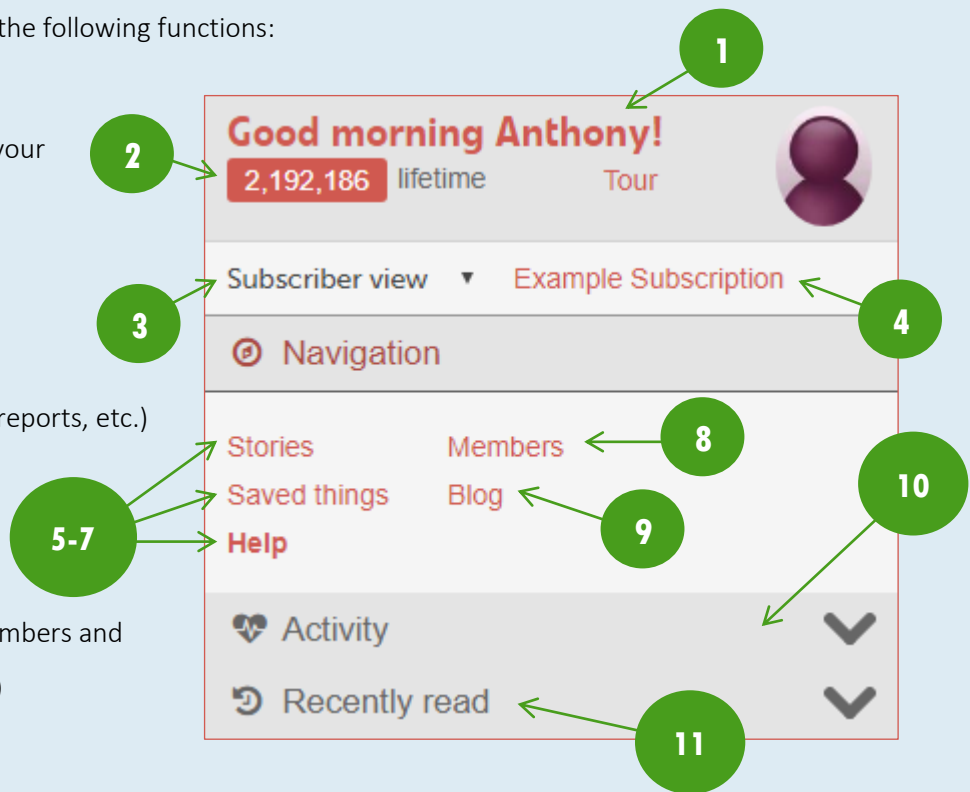
YOUR PROFILE

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

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.

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'

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.

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.

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

3

▸ **API access**

4

▸ **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

Email Care Opinion ››

5

👥 33rd/ 69

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

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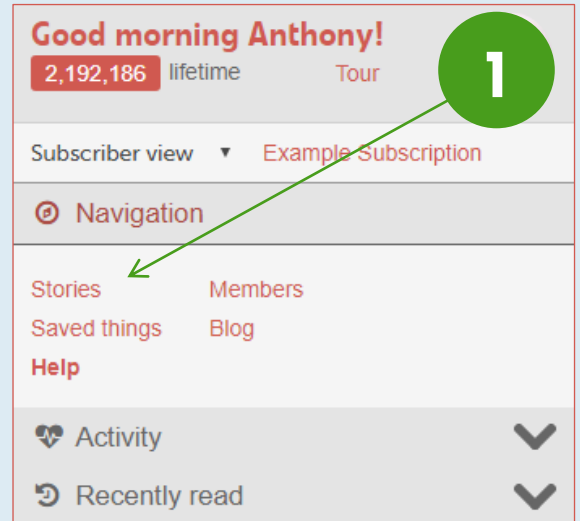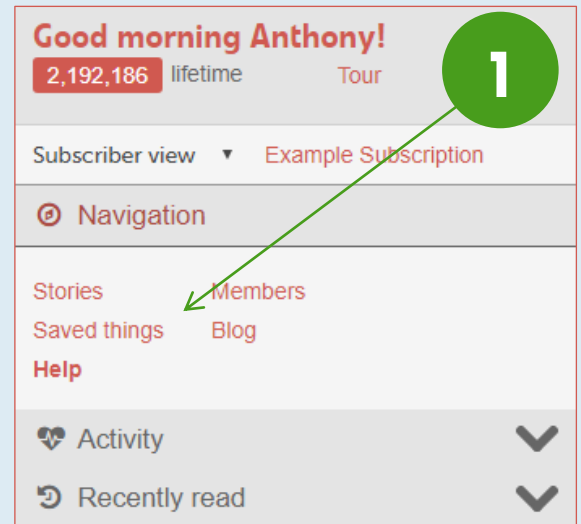
Key information for each story is shown such as the title (A), the progress (B), the moderation level (C) and the number of total public views (D).

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

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.
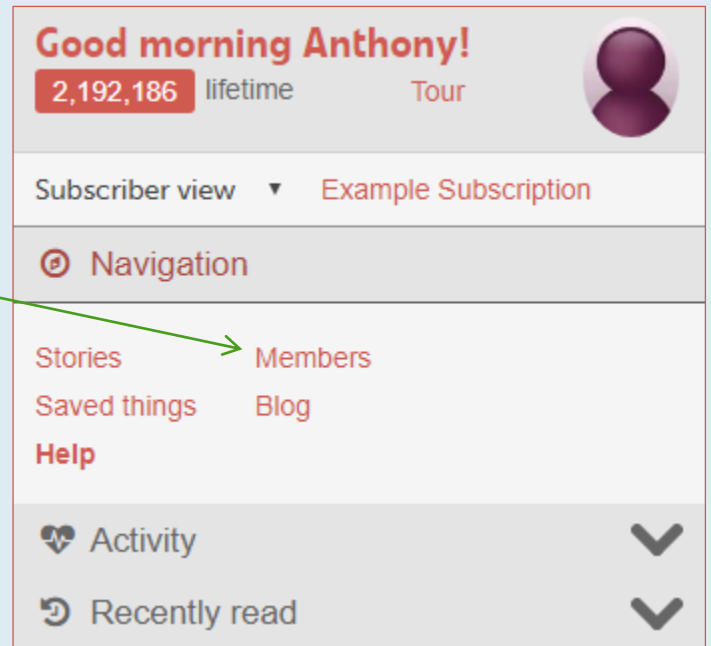
GENERATING A MEMBER REPORT

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'
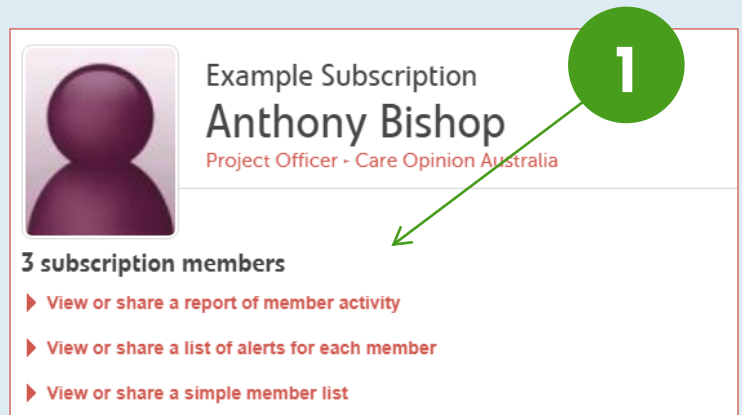
ADDING MEMBERS

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'

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

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

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'.

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).

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

Active

Anthony Bishop (Administrator)

Craig Hislop (Subscriber)

Sue Palmer (Responder)

2

3

>>

>

<

<<

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".

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

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'

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 »

Would you like any guidance with writing a post?

This post is **new**

Save

Close without saving

Manage your blog

add a title to your blog post

Posted by Anthony Bishop, 05 November 2018

Update ▼

Anthony Bishop, Project Officer, Care Opinion Australia ▼

Text of your blog post

B I U ¶ ▾ ≔ ≣ ⚭ 🖼 🖇 ↺ ↻ — </> ↗

Type something

Tag your post

Add a new tag +

Which services is your post about?

Add a service +

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

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

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

Publish?

Publish this blog post?

Publish   Cancel

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 |

Example Post 3

Posted by Anthony Bishop, 24 October 2018

Update ▼   Anthony Bishop, Project Officer, Care Opinion Australia ▼

Text of your blog post

B *I* U ¶ ▾ ☰ ☰ ⬞ ▤ ⬞ ↺ ↻ — ⟨/⟩ ⤢

Type something

Would you like any guidance with writing a post?

This post is not yet published

Your post is all saved

Save

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

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

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'
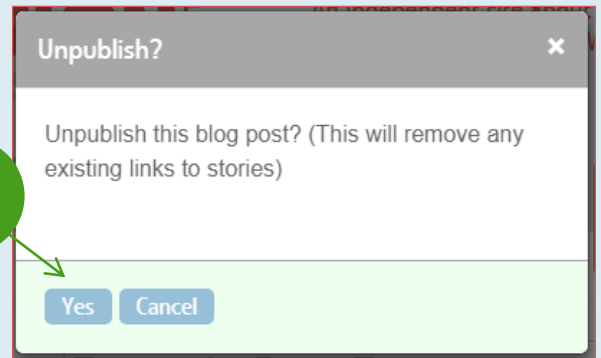
5

Unpublish? ✕

Unpublish this blog post? (This will remove any existing links to stories)

[Yes] [Cancel]

1

Create a new post ››

Manage your blog posts

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

2

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

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

One response requires moderation ▶

This blog post is **published**

3 views by public users

3

Edit ››

Example Post 3

Posted by Anthony Bishop, 24 October 2018

[Update ▼] [Anthony Bishop, Project Officer, Care Opinion Australia ▼]

Text of your blog post

B I U ¶ ▾ ≣ ≣ % 🖾 📎 ↺ ↻ — </> ⤢

Test

Would you like any guidance with writing a post?

This post is published

Your post is all saved

[Save]

[View ››]

Allow responses for 30 days

This post is not linked to any services

Help with tagging and linking your blog post

4

[Unpublish]

Manage your blog

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.
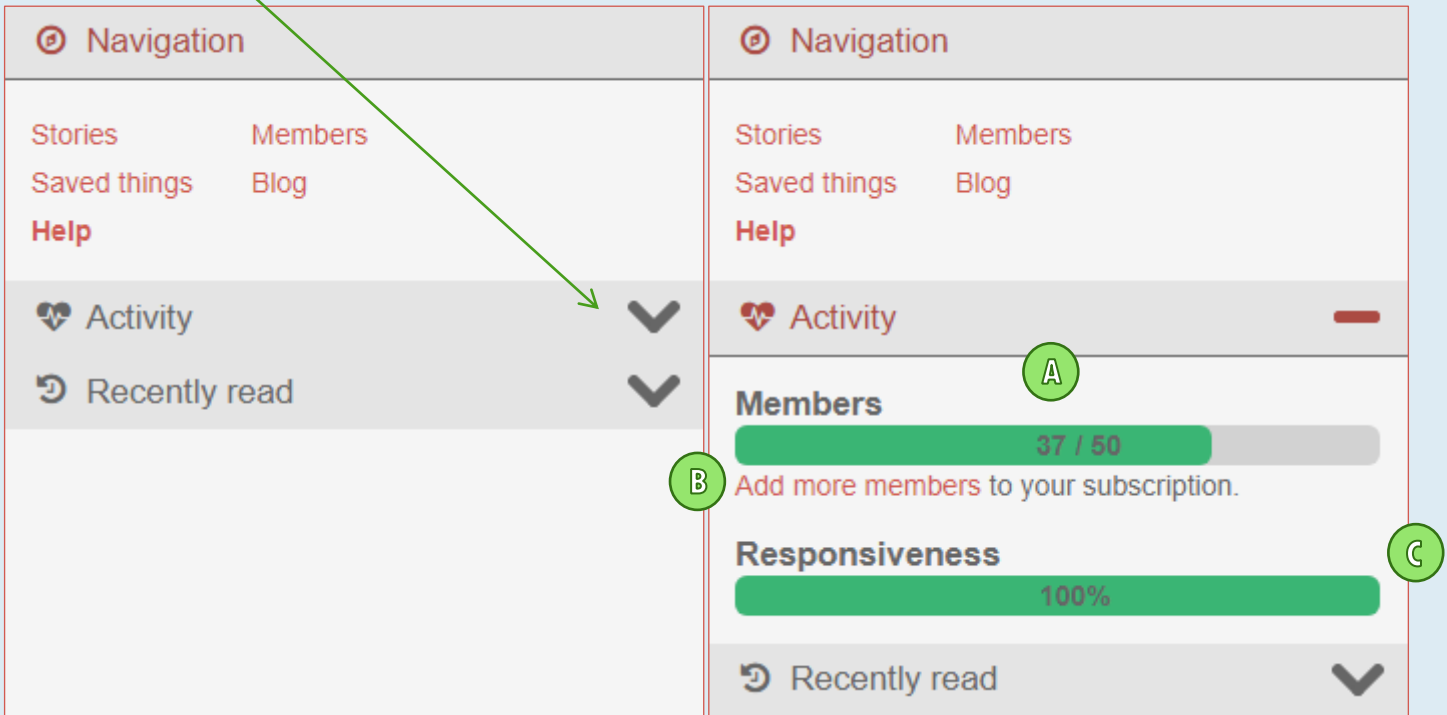
It includes the following information:

(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
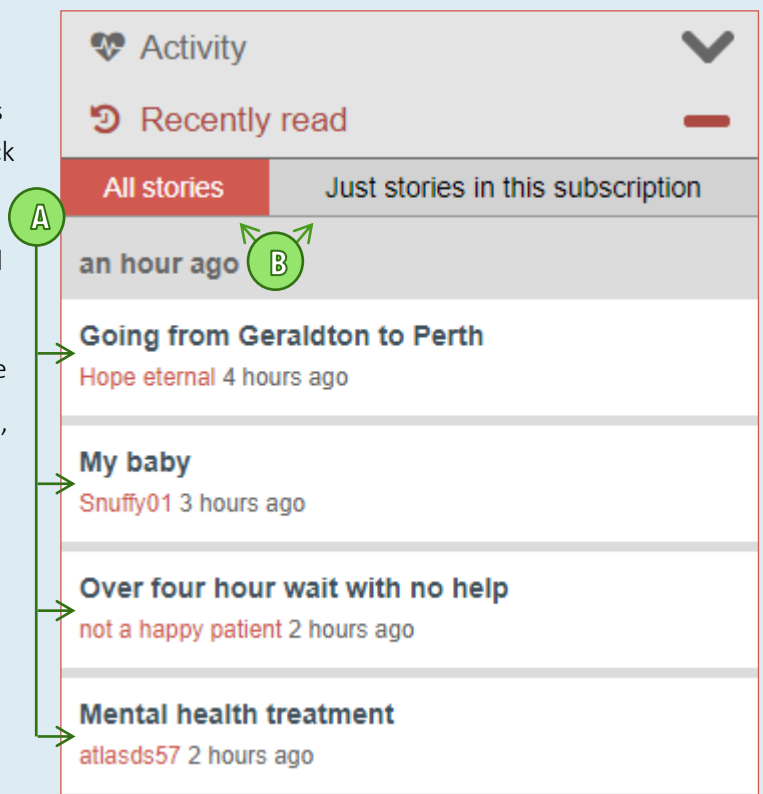
SEARCHING STORIES

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

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 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

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 accessed through your 'Saved things' and a link to this is located in the navigation drawer and below the 'Save for me' button

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'

x

1

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... »

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

2

"Positive physio experience"

STORY READ

Read less than an hour ago

About: Sir Charles Gairdner Hospital

3

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... »

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   Alert: All stories tagged with support   Save for me

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

Help with alerts

4

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

Who is this alert for?   Sue   Save for member

Sue Palmer

5

6

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... »

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   Alert: All stories tagged with support   Save for me

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

Help with alerts

7

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

Who is this alert for?   Sue Palmer   Save for Sue

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

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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

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

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

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

📄 **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

4

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

📄 **Services with ratings** ⌄
Summary of the rating scores for a set of services

Include Friends and family test data   [**Include** | Exclude]   **5**

Choose a format for the report   [Excel ▾]   **6**

[Generate]   **7**

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   [Services with ratings: All stories tagged with support]   [Save]

34

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 accessed through your 'Saved things' and a link to this is located in the navigation drawer and below the 'Save' button

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'

Update delivery schedule

Stories in summary: All stories tag[ged with] support

3B

How often should this report be sent?

▸ Weekly

▾ Monthly

Day [8] of every [1] month(s)

[Update]

The [Fourth ▾] [Friday ▾] of every [1] month(s)

[Update]

3C

▸ Yearly

Cancel

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

4B

• This report will not be sent to anyone else

Add [Sue Palmer|] ⊕

Sue Palmer

4C

Cancel [Update]

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]'

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]
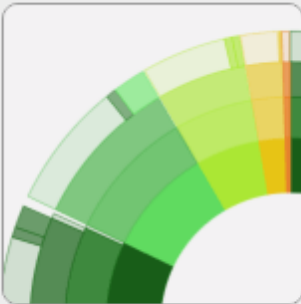
Story word cloud

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'
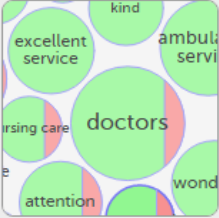7. Click the link to view the visualisation or copy it and share it with others

Tag bubbles

What was good | What could be improved
Select a tag for more information

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

Interactive tag bubbles about All stories tagged with support

How would you like to sign your visualisation?

Anthony Bishop, Project Officer, Care Opinion Australia ▼

Save and share

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

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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'

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'

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'

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.

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'

This response is from [Me ▾]

3

Your reply:

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

4

| B | I | % | 🖼 | ↺ | C |

Type something

5

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?

6

[Anthony Bishop, Project Officer, Care Opinion Aust ▾]

7

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'

Your reply:

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

5

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

7

Your consent

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

8   → Submit your response »

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