

**CARE
OPINION** AUST
BE HEARD.




**MEMBER USER GUIDE
SUBSCRIBER 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
-  Generating and saving reports, visualisations and digests

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.

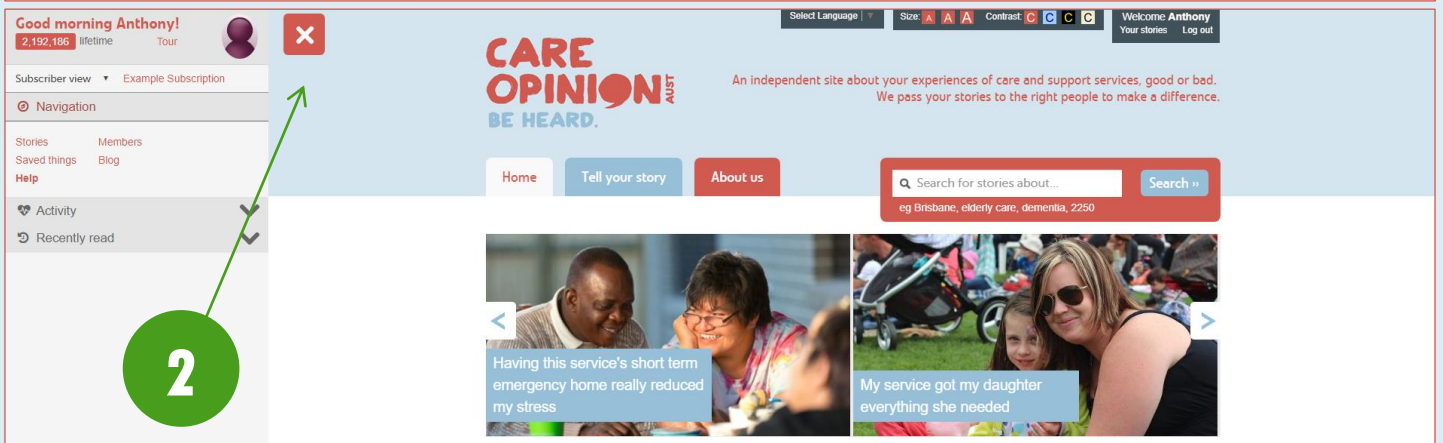
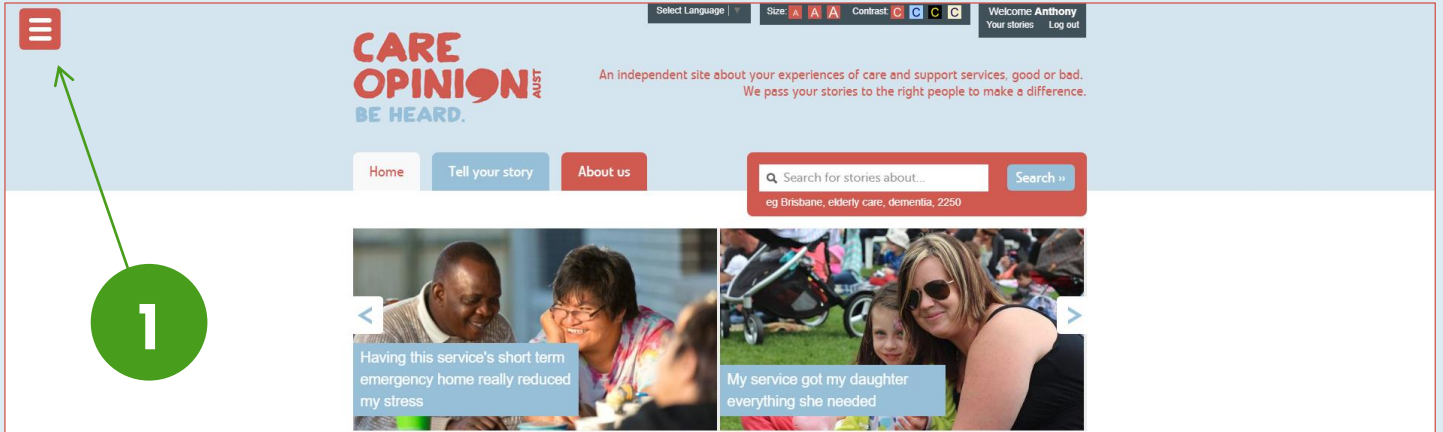
Please enter your email address

Go

NAVIGATING THE WEBSITE

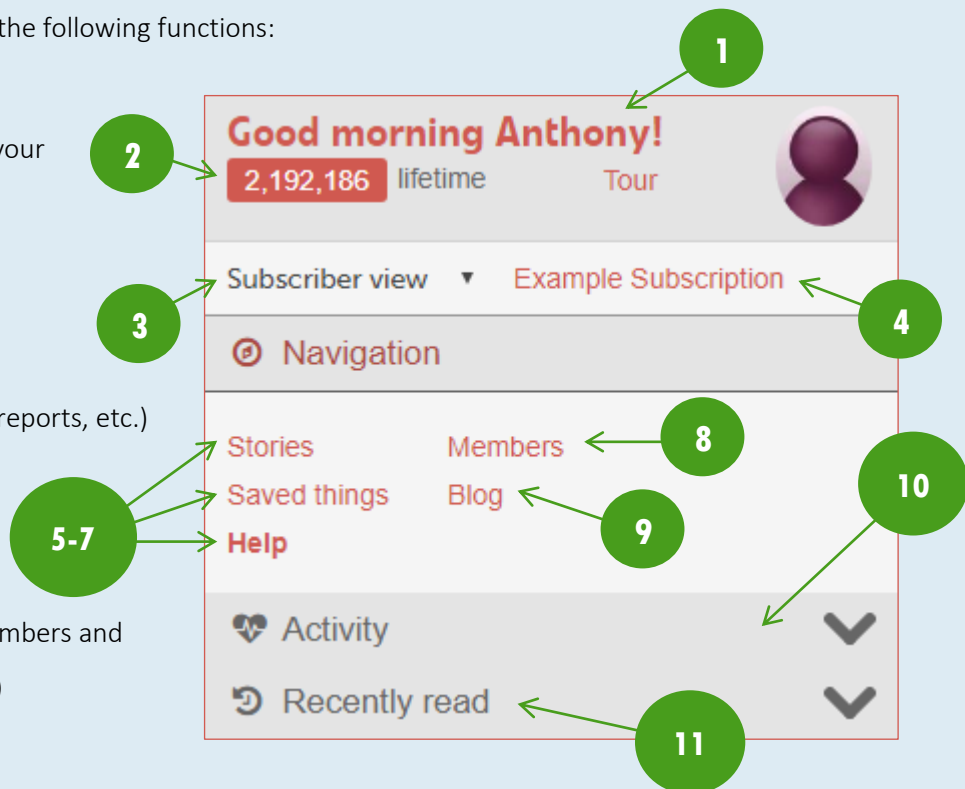
Once logged in you will have access to the navigation drawer. This houses all of the key links to managing your profile in the subscription.

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

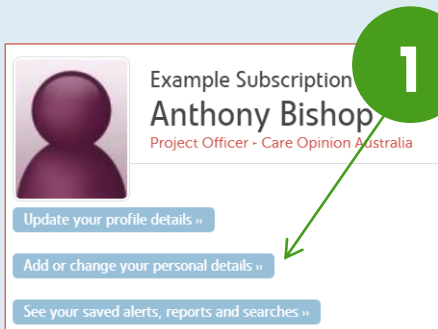


This screenshot shows the 'Update Anthony's details in Example Subscription' form. It contains several input fields: Role (Administrator), First name (Anthony), Last name (Bishop), Email (anthony.bishop@patientopinion.org.au), Job (Project Officer), Department (if any), Organisation (Care Opinion Australia), 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 at the top left of the form.

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 includes 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 'Personal settings' sidebar with a list of options: 'More about you', 'Add/change your picture', 'Change your email address', 'Change your password', 'Change your timezone', and 'Log out everywhere'. A green circle with the number '2' and an arrow points to the 'Personal settings' sidebar.

ADDING A PICTURE TO YOUR PROFILE

Particularly 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 shows a sequence of five screenshots illustrating the steps to update a profile picture:

- Step 1:** Profile page for Anthony Bishop, Project Officer - Care Opinion Australia. The 'Update your profile details' button is highlighted.
- Step 2:** Profile page with the 'Choose a new picture' button highlighted.
- Step 3:** A file selection dialog box showing a folder named 'Photo Upload' containing two files: 'anthonybishop.png' (33 KB) and 'suepalmer.png' (148 KB). The 'anthonybishop.png' file is selected.
- Step 4:** A photo upload tool showing a preview of the selected photo. The 'Use this picture' button is highlighted.
- Step 5:** Profile page with the new photo of Anthony Bishop uploaded.

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 displays two side-by-side screenshots of a user profile page for 'Good afternoon Anthony!'. The left screenshot shows the profile with 2,192,624 lifetime views. A dropdown menu is open, showing options: Last day, Last week, Last four weeks, Last six months, Last year, Lifetime, and Help. A green arrow points from 'Last six months' to the right screenshot. The right screenshot shows the profile with 2,211 last day views. A 'Subscriber view' dropdown menu is open, showing options: Subscriber view, Public view, and Subscriber view. Both screenshots show navigation links for Stories, Members, Saved things, and Blog, and a bottom section with Activity and Recently read options.

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.

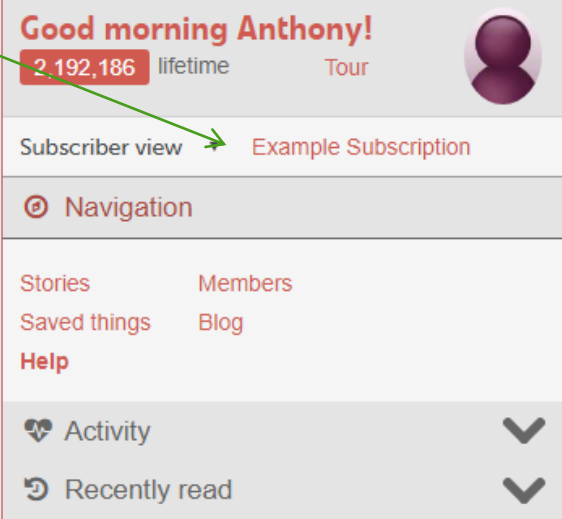
The image shows a screenshot of the user profile page for 'Good afternoon Anthony!' with 2,192,861 lifetime views. The 'Subscriber view' dropdown menu is open, showing options: Subscriber view, Public view, and Subscriber view. The 'Public view' option is highlighted in blue. The rest of the page content is visible below the dropdown.

YOUR SUBSCRIPTION INFORMATION

By clicking your organisation name in the [navigation drawer](#), you can access the information for your subscription. This will show you the features that you can access at your subscription level.

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

1. View your available features
2. Email Patient 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

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

33rd/69

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](#)



▶ 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

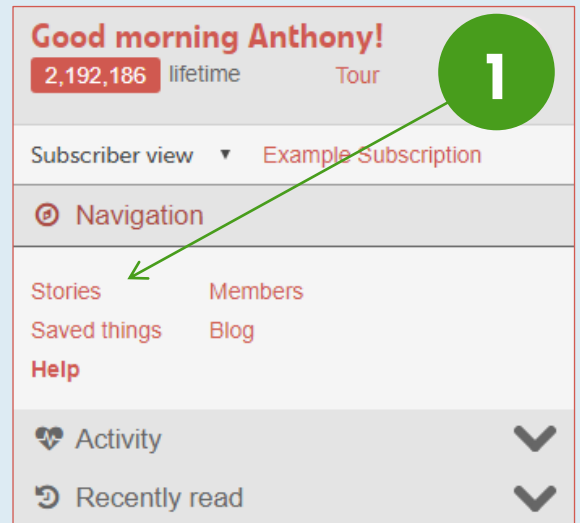
[Email Care Opinion »](#)



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

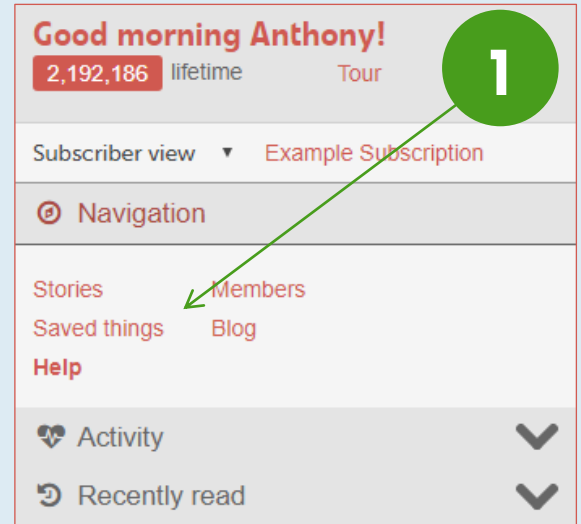


Key information for each story is shown such as the title (A), the progress (B), the moderation level (C) and the number of total public views (D).

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

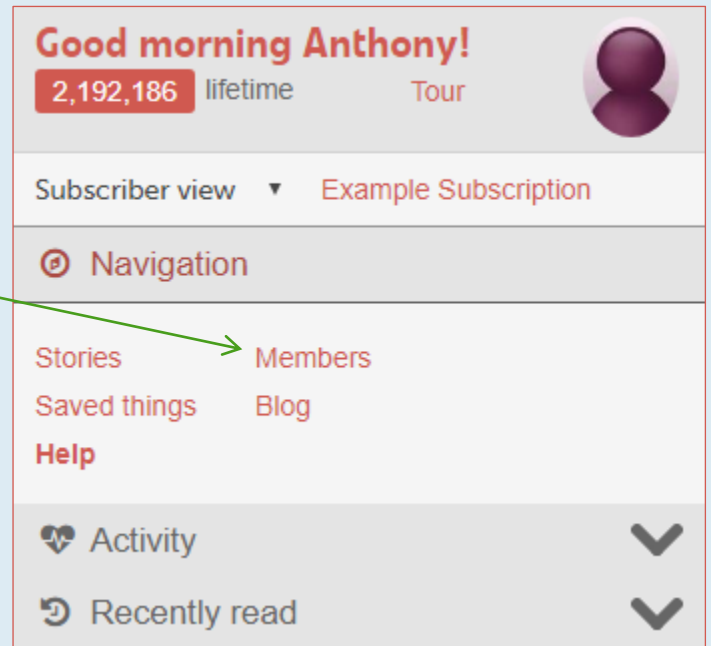
The screenshot shows the 'Your saved things' page. At the top, there are five tabs: 'Alerts', 'Reports', 'Searches', 'Visualisations', and 'Digests'. The 'Alerts' tab is selected. Below the tabs, there's a heading 'Here are your alerts in this subscription. You can turn each alert on and off or delete it if you no longer need it. (Help with alerts)'. The main content area shows a list of saved alerts. The first alert is titled 'If I respond, alert me' and has two triggers: 'when my response is published' and 'when my response is found helpful by the story author'. Below this are 'Available triggers' and a 'Create a new alert' button. The second alert is titled 'Alert: All stories tagged with ED - emergency department' and has 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 are 'Available triggers', a toggle switch, and a delete icon. Numbered callouts (2, 3, 4, 5) point to the 'Return to your profile page' link, the 'Alerts' tab, the first alert's triggers, and the second alert's triggers respectively.

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

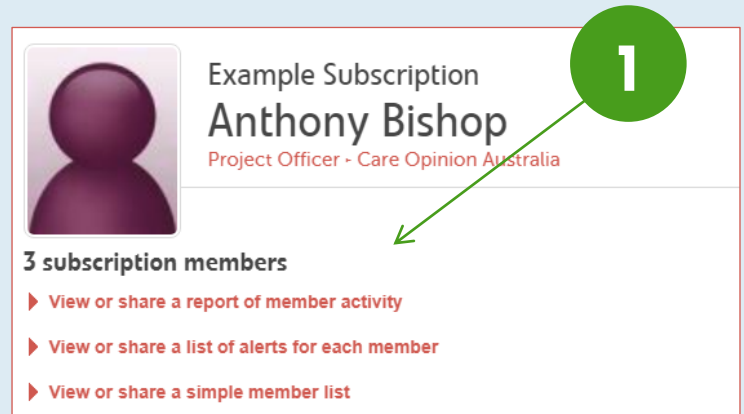
Each subscription has access to a page listing all its members. You can view details for each member or pull reports on all members collating things such as how many stories they have read and how many stories they have responded to. To access the member listing page, click ‘Members’ in the [navigation 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’









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.

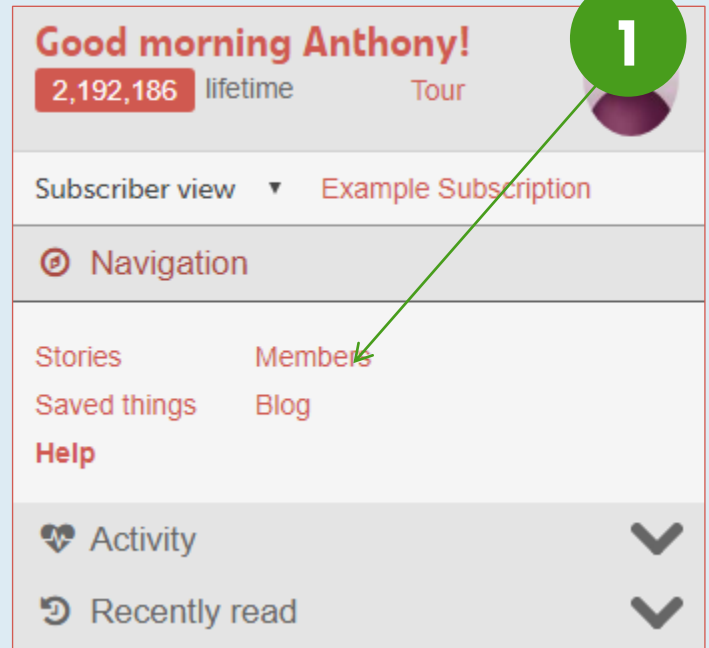
Active members

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

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 and view your subscription's blogs:

1. Click 'Blog' in the [navigation drawer](#)
2. Click the post title to open the blog post



Good morning Anthony!
2,192,186 lifetime Tour

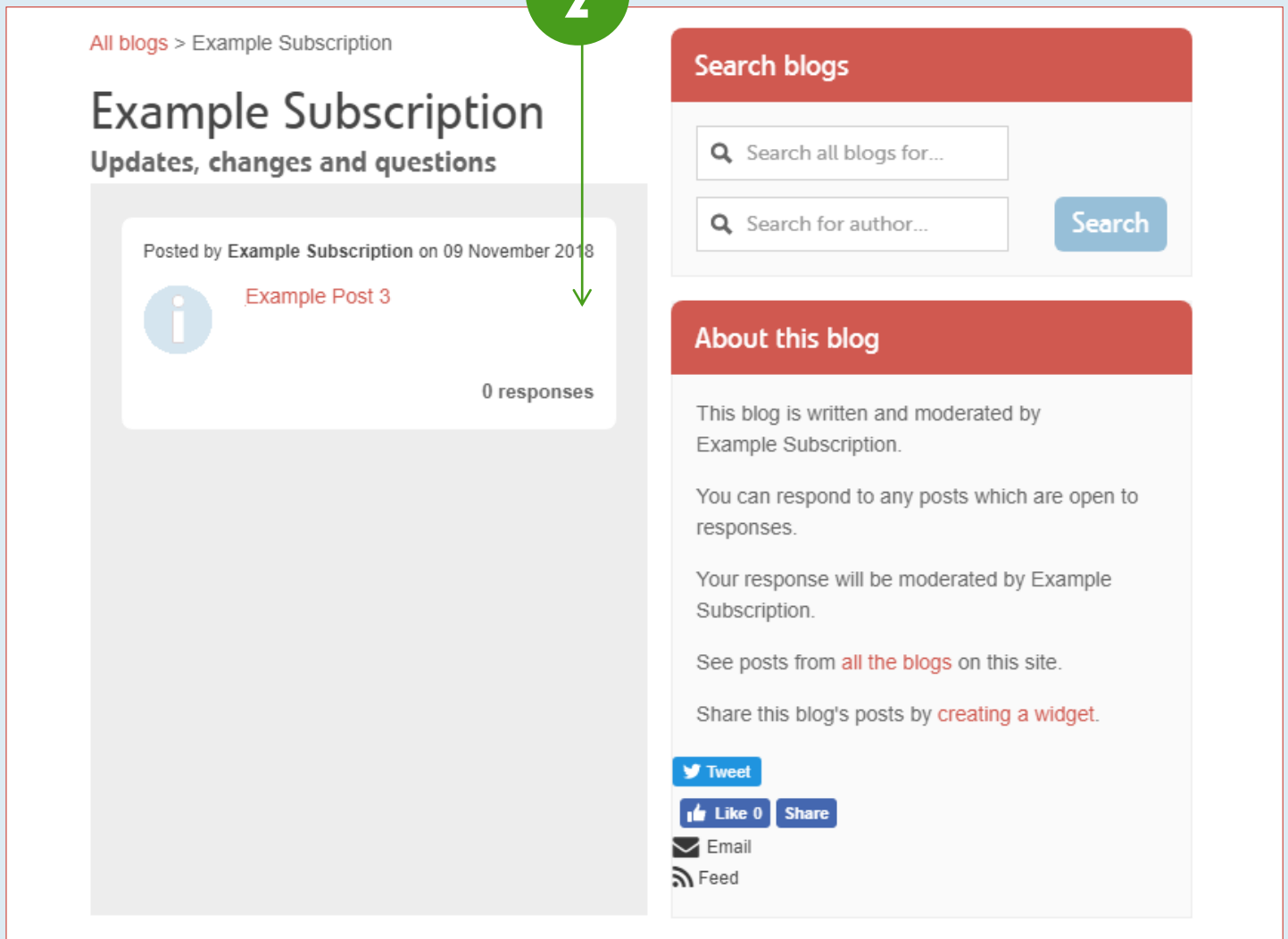
Subscriber view ▾ Example Subscription

🔗 Navigation

Stories Members
Saved things Blog

Help

📍 Activity ▾
🕒 Recently read ▾



All blogs > Example Subscription

Example Subscription

Updates, changes and questions

Posted by Example Subscription on 09 November 2018

Example Post 3

0 responses

Search blogs

🔍 Search all blogs for...
🔍 Search for author... **Search**

About this blog

This blog is written and moderated by Example Subscription.

You can respond to any posts which are open to responses.


Your response will be moderated by Example Subscription.

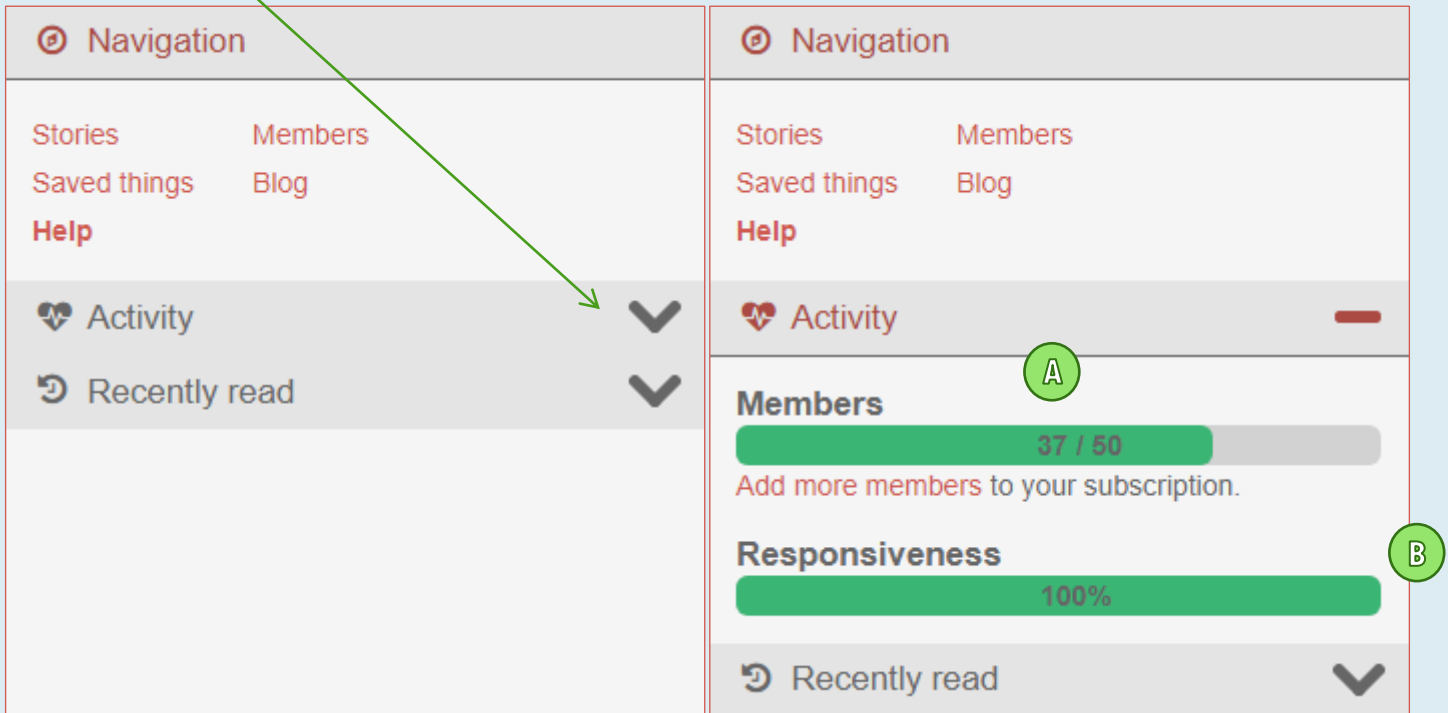
See posts from **all the blogs** on this site.

Share this blog's posts by **creating a widget**.

Tweet
Like 0 **Share**
📧 Email
📡 Feed

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.



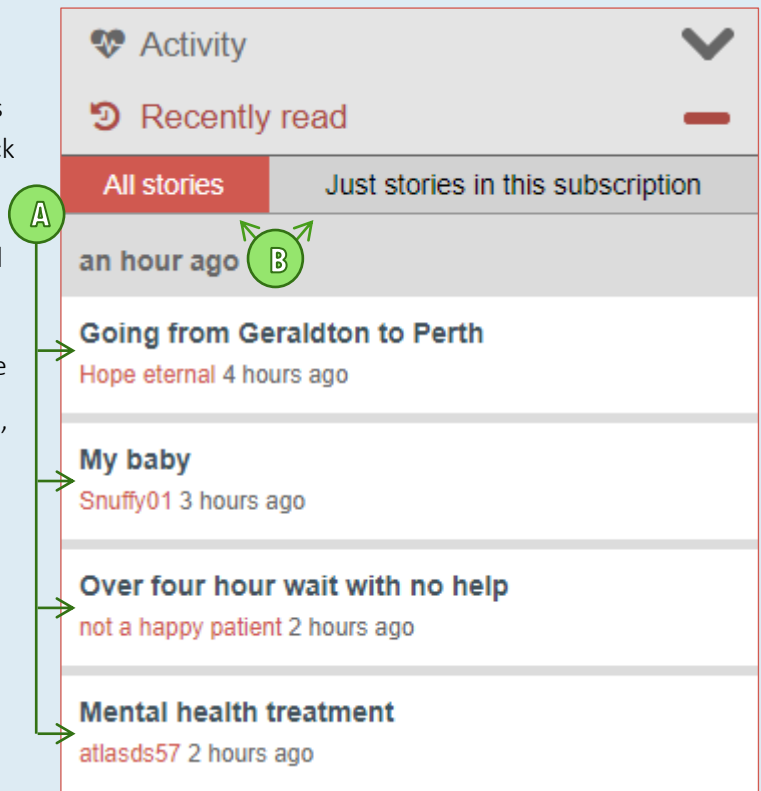
It includes the following information:

- (A) Number of active members out of your subscription's total capacity
- (B) 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. A green circle with the number '1' points to the search bar. Below the search bar, there is a 'Refine your search' sidebar. The sidebar has a section for 'Your current search' with 'support (any)' selected. Below this, there are several filter options, including 'All stories by anyone', 'Submitted on or after', 'Submitted on or before', 'Criticality equa', 'Aboriginal Health Care', 'the patient', and 'Read by me'. 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. The first story is titled '"My wife"' and is marked as a 'NEW STORY' shared 18 hours ago. The second story is titled '"Care at Eastern Health-Lilydale"' and is marked as 'STORY HAS A RESPONSE' less than an hour ago. The third story is titled '"Care at Glenarm Nursing Home"' and is marked as 'STORY HAS A RESPONSE' 21 hours ago. The fourth story is titled '"Eye operation"' and is also marked as 'STORY HAS A RESPONSE'.

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 at the bottom of the filters. 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 circle with the number '1' is placed over the 'Save my search as...' button, with an arrow pointing to it.

This screenshot shows the 'Save my search' form. On the left is a 'Refine your search' sidebar with 'Your current search' (support (any)) and 'Add a search term' field. A green circle with the number '2' is over the 'Add a search term' field. The main form has tabs for 'Alert', 'Report', 'Search', 'Visualisation', and 'Digest'. The 'Search' tab is active. Below the tabs is a 'Saved search' section with a text input field containing 'Search: All stories tagged with support' and a 'Save' button. A green circle with the number '3' is over the 'Save' button, with two arrows pointing to it. At the bottom of the form is a 'Back to search results' button. A green circle with the number '4' is over this button, with an arrow pointing to it.

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 with a left-hand navigation panel and a main content area. The navigation panel is titled 'Refine your search' and includes sections for 'Your current search', 'Filtered by your subscription', 'Stories tagged with', 'Story search options', and 'Response search options'. A blue button labeled 'Save my search as...' is located below the 'Response search options' section. A green circle with the number '1' is placed over the top of the navigation panel, and a green circle with the number '2' is placed over the 'Save my search as...' button, with a green arrow pointing from the '2' to the button. The main content area displays '2,303 stories have been told' and lists several stories under the 'Latest stories' tab. Each story card includes a title, a 'NEW STORY' or 'STORY READ' indicator, a share icon, and a timestamp. The stories listed are: 'Request for an appointment following doctor's referral' (Fiona Stanley Hospital), 'Positive physio experience' (Sir Charles Gairdner Hospital), 'Visiting Club Kinross.' (Amana Living Club Kinross (Day Centre)), 'Returning to my local health service' (Beechworth Health Service Acute Unit), and 'My wife' (Gilgai Home Care Packages).



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

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](#)



[Back to search results](#)

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 'Alerts' tab in the 'My saved things' section. It features a navigation bar with 'Alerts', 'Reports', 'Searches', 'Visualisations', and 'Digests'. Below the navigation bar, there is a header for alerts and a list of alerts. The first alert is 'If I respond, alert me' with triggers for 'when my response is published' and 'when my response is found helpful by the story author'. The second alert is 'Alert: All stories tagged with support' with triggers for '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 the second alert, there is an 'Available triggers' section with four options: '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'. A 'Turn all my alerts off' button is located at the top right of the alert list. Numbered callouts 1-8 and letters A-C point to various UI elements: 1 points to the 'Alerts' tab; 2 points to the 'If I respond, alert me' alert; 3 points to the 'Create a new alert' button; 4 points to the 'Available triggers' link; 5 points to the pink text 'anyone in my subscription'; 6 points to the 'view the original search' link; 7 points to the 'edit alert' link; 8 points to the toggle switch; A points to the 'If I respond, alert me' alert title; B points to the minus icon next to the first trigger; and C points to the 'Turn all my alerts off' button.

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.

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

The screenshot shows the 'Refine your search' sidebar on the left. A green circle with the number '1' is positioned over the search filters. A green circle with the number '2' is positioned over the 'Save my search as...' button. The main content area shows '2,303 stories have been told' and a list of 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 titled 'Positive physio experience' and is marked as 'STORY READ'.

The screenshot shows the 'Save my search' page. The 'Report' tab is selected and highlighted with a green circle containing the number '3'. Below the tabs, there is a section titled 'Report' with the instruction 'Create a report if you would like to print or share these stories with other people'. There are four report options listed: 'Services with ratings', 'Story authors in summary', 'Story and response listing', and 'Stories in summary'.

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

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

←

Choose a format for the report

←

←

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

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 steps to save a report. The first screenshot shows the search results page for the tag 'support', with 2,303 stories. A green circle with the number '1' points to the search filter sidebar. A green circle with the number '2' points to the 'Save my search as...' button at the bottom of the sidebar. The second screenshot shows the 'Save my search' dialog. A green circle with the number '3' points to the 'Report' tab. A green circle with the number '4' points to the 'Report' tab. A green circle with the number '5' points to the 'Include' button for 'Services with ratings'. A green circle with the number '6' points to the 'Excel' dropdown menu. A green circle with the number '7' points to the 'Save' button at the bottom right of the dialog.

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. 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 includes options to 'Include Friends and family test data' (set to 'Include') and to 'Choose a format for the report' (set to 'Excel'). A 'Generate' button is visible. Below this, a text box contains the name 'Services with ratings: All stories tagged with support' and a 'Save' button. A green circle with the number '2' points to the 'Save' button. Below the 'Save' button, the report title is displayed with a calendar icon and a minus sign. A green circle with the number '3A' points to the calendar icon. Below the report title, the text 'Email to you alone as PDF on the third Tuesday of every month (due 18/12/2018)' is shown. A yellow box contains the text: 'You can use the links to change the recipients, format or schedule of your report. [More help](#)'.

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) Update

The Fourth Friday of every 1 month(s) Update

Yearly

Cancel

3C

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

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

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](#)
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- [Creating and sharing reports](#)

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

[Email](#)

Alert Report Search **Visualisation** Digest

Visualisation

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

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2

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[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](#)

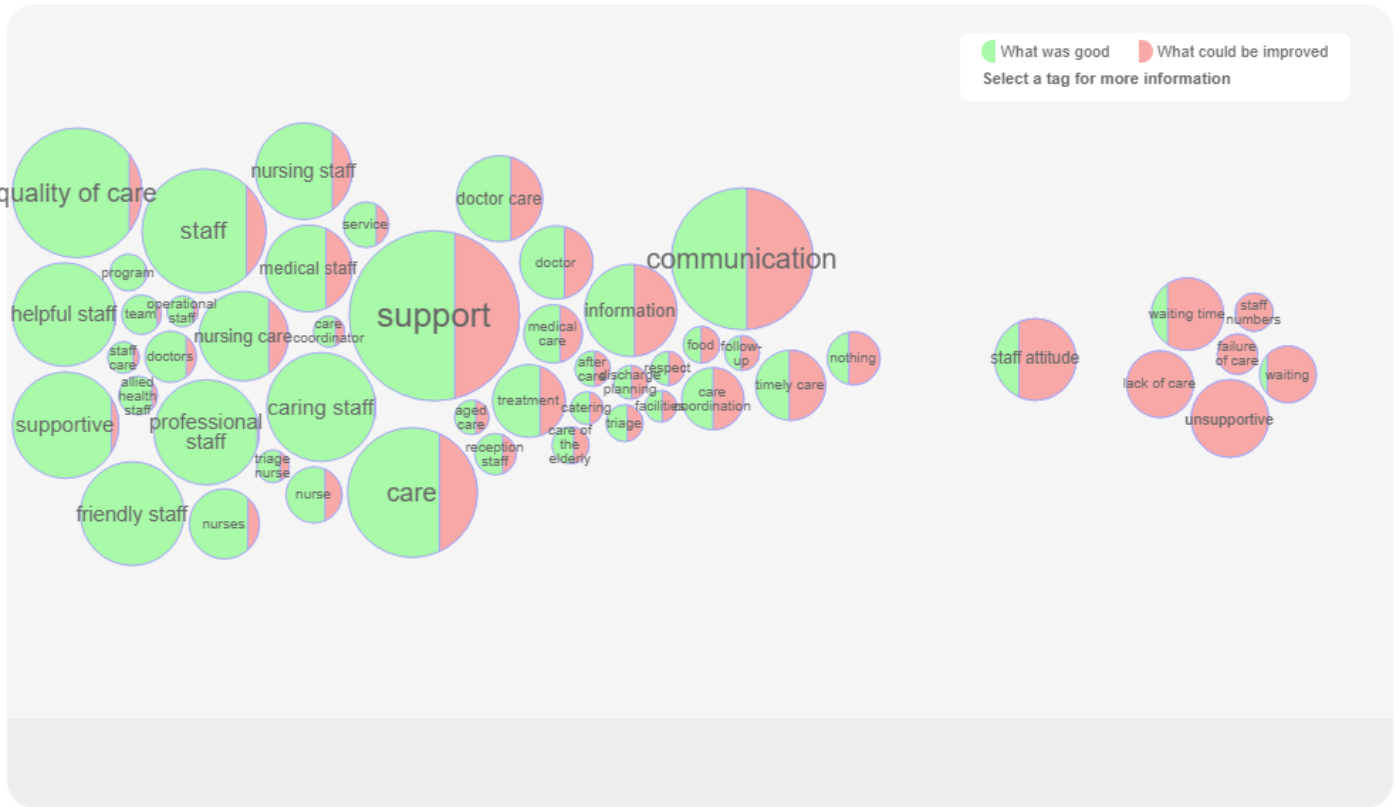
Lily pad

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](#)

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 image illustrates the process of creating a digest in two stages. The top screenshot shows a search results page with 2,303 stories. A green circle with the number 1 points to the search filters on the left. A green circle with the number 2 points to the 'Save my search as...' button at the bottom left. The bottom screenshot shows the 'Save my search' page with the 'Digest' tab selected. A green circle with the number 3 points to the 'Digest' tab. A green circle with the number 4 points to the 'Monday' dropdown menu. A green circle with the number 5 points to the 'Save for me' button.

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