

Orientation and Site Navigation Guide

for

Site Administrators



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Introduction

First of all, welcome to Care Opinion!

The following information has been provided to guide and support you in undertaking the basic functions as an 'Administrator' member of a Care Opinion subscription. The guideline provides information regarding:

- > Managing your profile
- > Managing your subscription
- > Navigating the platform

Key Member roles

There are three different roles available when you set up a new account, with varying features available to each:

Administrator	Responder	Member
ି View stories	ି View stories	ଦ View stories
 Generate and save reports, digests and visualizations (for themselves and others) 	○ Generate and save reports, digests and visualizations	Generate reports, digests and visualizations
Manage email alerts (for themselves and others)	ି Manage email alerts ଦି Respond to	∿ Manage email alerts
Respond to stories (for themselves and on behalf of others)	stories $^{\circ}$ Publish	
⁰ Publish blog posts	blog posts	
ଦ Add/remove members		
igodoldoldoldoldoldoldoldoldoldoldoldoldol		



Logging on to Care Opinion

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

- 1. Head to <u>www.careopinion.ca</u> and click on **'Log in'** in the top right corner of the page
- 2. Enter your username 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



Login to Care Opinion





Forgot your password?

If you have forgotten your password, you can click the link at the bottom of the 'Log in' page to request a password reset link. Enter the email address you use for your subscription and click 'Go'.

For	rgotten 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.
Ple	ase enter your email address
► G	٥

IMPORTANT: 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 the key links to managing your profile in the subscription. The navigation drawer can be accessed by clicking the \equiv icon in the top left corner of any page. It will close by clicking this





From the Navigation Drawer you can access the following functions:

- 1. Your profile
- 2. Your subscription information
- Your subscriptions and subscription view (public or subscriber)
- 4. Stories about your subscription
- Your saved things

 (searches, alerts, reports, etc.)
- 6. Your subscription's members list
- Tags added to stories by yourself/subscription members
- 8. Invitation links created within your subscription
- 9. View Bookmarked stories
- 10. Your subscription's **blog posts**
- 11. Help pages
- 12. Subscription activity

(number of members

and responsiveness to stories published)

13. Your recently read stories





Updating your 'profile' details

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

- Click 'Update your profile details' on your profile page
- Make any changes to your details in the various fields – any changes will be highlighted in green
- Click 'Update' to save the changes, or
 'Cancel' to leave the page without saving



Example Subscription Joslyne Smith Choose a new picture View alerts				
Update Joslyne's details ir	n Example Subscription			
Role	Administrator			
First name	Joslyne			
Last name	Smith			
Email	joslyne.smith@careopinion.org.au			
Job				
Department (if any)				
Organisation				
Phone (not shown on public pages)				
What I do, in plain language (short and sweet!)				
▶ Update				
► Cancel				
	3			



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'.

as personal and and follow	► Update	e your profile details	
J 2	Add or See you aring from all kinds of	change your personal details ur saved alerts, reports and searches Personal settings	
y way which could identify you out the overall mix of people us is, never individual information ges if there are more than 10 s ils alongside any story you shai	J. sing Care Opinion in tories in a report re with us	 More about you Consents Add/change your picture Email address Password Timezone Log out everywhere Back to profile 	
ful to us in showing the differe if you prefer not to.	nt kinds of people		
Not stated	~		
Not stated 🗸			
Not stated 🗸			
Not stated	~		
	end and follow se pages.	end and follow se pages.	end and follow se 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' organization. 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
- 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'



Your subscription information

To access your subscription information page, click on the subscription name in the Navigation Drawer:

Good afternoon Josly	ne!
Example Subscription (Admin	istrator)
Change subscription V	Subscriber view 🗸

From here you can:

- 1. Edit your role
- 2. View your available features
- 3. Manage your subscription members
- 4. Generate an API key
- 5. Customize your service pages
- 6. Email Care Opinion this inbox is monitored from Monday to Friday.

My profile in this subscription These are your own details in this subscription. Add or update your information by	22nd/ 86
clicking on it. If you change your mind, press 'Esc' before you finish editing.	
Email	Your subscription level
Job:	Convert level
Click to edit	Full, until 31 January 2022
What I do, in plain language (short and sweet!):	Features available at this level
🖉 Click to edit	Alerting
Department (if any):	API (basic)
Click to edit	API (enhanced)
Organisation:	Blogging
🧷 Click to edit	Campaign links
Phone (not shown on public pages):	Custom service pages
Click to edit	Digests
Parls (all all the share set)	Member freezing
Administrator	Reporting on demand
	Reporting on schedule
Manage members	Responding
Contraction of the second se	Responding for another
	Responding with images
Which stories are in the scope of this subscription?	Smart alerting
This subscription includes:	Story tagging
All stories	Subscriber-only resources
	Support and advice
API accoss	Visualisations
	Features not available at this lev
Custom service pages	

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 come with a subscription to Care Opinion.

For example, instead of seeing all stories published on Care Opinion (**Public view**):



You will only see...

• total number of stories about your organization (Subscriber View)



Stories about your subscription

Viewing and searching for stories within the scope of your subscription is a fundamental task on Care

O Navigation	o –	
<u>Stories</u>	>	
Saved things	>	
Members	>	
Tags	>	
Invitation links	>	
Bookmarked stories	>	
Blog	>	
Help	>	

Opinion.

A good place to start is your subscription stories page.

When you view this page in your own subscription, you will see five tabs, as follows:

Il stories Unread Without response	Change promised Assigned to	me	
Il stories in the Example Subscription subscription			
"Hypnobirthing Australia™ with WACHS Telehealth"	STORY READ	MODERATION CRITICALITY O	ACTIVITY Read by 15
About: Bunbury Hospital / Maternity and Busselton H Parenting Education	Health Campus / Maternity Unit, Childbirth	ı G	
"Frustrated with lack of assistance and follow-up"	STORY READ	MODERATION CRITICALITY 2	ACTIVITY READ BY 34
About: Warren Hospital / Radiology Department			
"Necrotic bone removal and stage one of knee reconstruction"	STORY HAS A RESPONSE	MODERATION CRITICALITY 5	ACTIVITY READ BY 38
About: Fiona Stanley Hospital / Operating Theatres,	Post Anaesthetic Care Unit		
"Speedy Covid Vaccination"	NEW STORY	MODERATION CRITICALITY O	ACTIVITY READ BY 1
About: St George Hospital COVID Vaccine Hub			
"Covid jab"	NEW STORY	MODERATION CRITICALITY O	ACTIVITY READ BY O
About: St George Hospital COVID Vaccine Hub			

All stories: this tab shows all the stories within the scope of your subscription, along with the story progress, the criticality score and the number of reads by public users.

Unread: stories within your subscription which haven't yet been read by any of your subscription members.

Without response: stories within your subscription which don't yet have any response from a member of your subscription.

Change promised: stories for which someone in your subscription has promised a 'change planned', but which doesn't yet have a 'change made'.

Assigned to me: stories that have been assigned to you by either yourself or another member in your subscription.

Note that on any of these tabs, you can filter down to just the stories you need by selecting "search within your stories" just above the tabs. This will allow you to enter a search term. You can also just click open the search area and select the search button to go to the search page and develop a search from there.

Your 'saved things'

This holds all of the searches, reports, alerts, visualizations and digests you have saved for later use for your user, and it is a duplication of the actions that you can 'Create in your subscription' from the advanced search page before they go into your 'saved things':



You can access your '<u>saved things</u>' via 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)

Ø Navigation	• •
Stories	>
Saved things	>
Members	>
Tags	>
Invitation links	>
Bookmarked stories	>
Blog	>
Help	>

You will also see the following tabs:

lerts	Reports Searches Visualisations Digests
ere 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)
f I resp	ond, alert me
0	when my response is published
0	when my response is found helpful by the story author
0	when my response is found unhelpful by the story author
Avail	able triggers
	no slotte caused for this subscription

Reports: access any/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).

Searches: this is helpful for accessing your saved searches you run on a regular basis that have multiple filters.

Visualisations: these include links to visualizations you have created and saved for public or internal sharing – all visualizations are fully interactive provided they are accessed via the saved link(s).

Digests: these are a 1-page overview reports that can be emailed to you on a weekly basis.

Members' list

On the <u>Members</u> page, you can see a list of all the current members of your subscription.

Ø Navigation	0	-
Stories		>
Saved things		>
<u>Members</u>		>
Tags	Members of this subscription	>
Invitation links		>
Bookmarked storie	25	>
Blog		>
Help		>

If you are a subscription administrator, you can also use this page to:

- add and remove members
- <u>run member reports</u>
- <u>freeze or unfreeze members</u>
- upload bulk members

You can filter the list by...

• Typing in their name/role/job title, hospital / department they work at in the 'Filter members' field:

Filter members You can narrow down the list of member	s to just the ones you're interested	in.
Smith	Any	✓ Filter
We'll look for your search term in first and last name	e, job title, department, and organisation.	

• Care Opinion member role:

Filter members You can narrow down the list of members to just the o	nes you're interested in.		
Smith	Any	~	▶ Filter
We'll look for your search term in first and last name, job title, der ar	Any Subscriber		
Active members	Administrator		

Adding a new member

To add a new member to your subscription list, click on the <u>Members</u> tab from your Navigation Drawer, and select the 'Add a new member' icon. The page will expand and display the required

This information is required	This information is optional
ïrst name	Job title
Last name	Department
mail of the new member	Organisation
Role of the new member	Phone
Subscriber	
Add an alert for all stories in the subscription	What this person doos, in plain language

fields to enter the details of the member you are adding.

IMPORTANT: Not all the fields are considered required, however, please ensure to at least enter the new member's: First Name, Last Name, Email address and Job title. It is preferred but not mandatory that a phone number is also provided. Other mandatory fields include:

- 1. **Role of the new member:** This will default to 'subscriber' unless specified otherwise. So be sure to select the appropriate member role for the member you are adding. Refer to page 4 of this document for an outline of the key member roles.
- Add an alert for all stories in this subscription: if the member you are adding would like to receive notifications on all stories for your organisation, make sure this is ticked. Otherwise, you can tailor their alerts after they are added by following this <u>Alerting</u> guide.

Once these fields are completed, simply click 'Add' and that member will receive a 'Welcome to Care Opinion' email, with information on setting up a password to activate their access.

Updating a single member's details

- 1. Select the member's name from the list.
- 2. Click on 'edit member details to display their profile.
- 3. Select the role you want them to have from the drop-down list.
- 4. Update any necessary information on that same page.
- 5. Click 'update' once all necessary changes have been made.

Act	tive members			
	Julie McGovern	Administrator	$\triangle 0$	Edit Remove
8	Patient Opinion	Administrator	Φ0	Edit Remove
ack to members Care C Care Care Care Care Care Care Care Car	Opinion Australia Ce Opinion Opinion Australia ion.org.au tails	 Back to members Back to members Care Opinio Care Opinio Care Opinio Update profile picture View alerts Update Care's detate Role 	n Australia Dpinion Australia on Australia Ails in Care Opinion Austra Administrator	
		Update Patier Role	nt's details in Care Op Administrat	inion Australia
care Opinion Austral	lia	First name	Care	
Care Opini • Care Opinion Austra	ion Australia	Last name	Opinion	
e profile picture		Email	info@carec	pinion.org.au
Care's details in C	are Opinion Australia	Job		
	Administrator	Department (if any)		
	Care Opinion Australia	Organisation		
	info@careopinion.org.au	Phone (not shown or	n public pages)	
r (rrany) n shown on public pages) n plain language (chort and	Care Opinion Australia	What I do, in plain la sweet!)	nguage (short and	
· point any uage (short and		► Update		
te				

Adding a profile picture to another member's profile

As an administrator, you also have the capacity to upload a photo for the members of your subscription on their behalf. You can do this from the Members page. Like the steps above:

- 1. Select the member's name from the list (*refer to 'step 1' figure above*)
- 2. Click on 'edit member details to display their profile (*refer to 'step 2' figure above*)
- 3. Click 'Update profile picture'
- 4. 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
- 5. Use the tool to position or centre your photo as necessary to fit the required frame ratio a preview is available on the right.
- Once you are happy with the preview, click 'Upload' you can remove (or change) the photo at any time by returning to this page and selecting the appropriate option.



Tags

Subscriber members have the ability to add 'Story tags' on published stories that fall under their subscription scope, along with the option to:

- 1. Polarize added tag/s as positive, neutral or negative.
- 2. Choose a visibility preference of private (to you), shared (with subscription members) or public.

Campaign links Bookmarked stories Blog Bookmarked stories Blog Activity Image: Contracting on the story Image: Contracting on t	
Birth Of OUr Daby Birth Of Our	
Blog > Help > © This story 30 © This story © • This story © • This story © • Criticality 0 - not critical • Posted by happyparents (as the patient). 3 weeks ago • Our baby was born a few weeks ago at Wonthaggi Hospital. We could not praise the maternity team at the hospital more. Wat's good? • Story tags • Materney • Needently read • Materney • This story hassn't had any extra tags added yet Initial	-
Help Activity Activity This story Activity This Activity	
 Activity This story The author is in Flinders Protect by happyparents (as the patient), Weeks ago Our bady was born a few weeks ago at Wonthaggi Hospital. We could not praise the maternity team at the hospital more. Story tags Story tags This story hasn't had any extra tags added yet 	
e This story The author is in Flinders Posted by happyparents (as the patient), Waveks ago Our bady was born a few weeks ago at Wonthaggi Hospital. We could not praise the maternity team at the hospital more. Story tags Story tags Recently read This story hasn't had any extra tags added yet	
 The author is in Flinders Published 23/02/2021 at 14 52. Critically 0 - not critical Story tags Story tags Recently read This story hasn't had any extra tags added yet 	
 Published 33/02/2021 at 14.52 Criticality 0 - not critical 2 0 wiews by public users S Story tags This story hasn't had any extra tags added yet 	
Criticality 0 - not critical 208 views by public users Story tags Recently read Chris story hasn't had any extra tags added yet	
 Story tags Recently read This story hasn't had any extra tags added yet 	proved?
 Story tags Recently read This story hasn't had any extra tags added yet 	
Image: Story tags Image: Story t	
This story hasn't had any extra tags added yet	
© Recently read ✓ This story hasn't had any extra tags added yet	
This story hasn't had any extra tags added yet	
This story hasn't had any extra tags added yet	
This story hasn't had any extra tags added yet	_
Ph Add a tag	
Ph Add a tra	
B. Adda too	
Ph Add a tag	
Ph Add a tag	
◆ Add a dag	
choose a tag	
neutral 🗸 🗸	
shared in my subscription	
Add	

Once story tag/s have been added, members can tag as many stories as they wish with the same tag. To view story tags in more detail, click on 'Tags' from your Navigation Drawer:

Ø Navigation	⊚ −
Stories	>
Saved things	>
Members	>
<u>Tags</u>	>
Invitation links	>
Bookmarked stories	>
Blog	>
Help	>

Invitation links

An invitation link is a special link that subscribers can create through their subscription for sharing externally, to invite more people to feedback about a service or issue. A link might look like this:

https://www.careopinion.ca/49/example-link

The part up to the last forward slash (/) is fixed, however, the digits before that (49) will also be different to this example, as it depends on the code associated with your subscription. The text after that is up to your choosing. But the invitation link also has two extra special powers you can use to specify:

- the **service** you want to be linked to stories told using this link.
- any tags you want to be automatically added to stories told using this link.

There are two ways that you can generate an invitation link for your service.

 Click on 'Invitation links' from the Navigation Drawer and select 'New invitation link' on the right-hand side

O Navigation	o –
Stories	>
Saved things	>
Members	>
Tags	>
Invitation links	>
Bookmarked stories	>
Blog	>
Help	>

🔺 Invitation link	;	
Create an invitation link if you want to inv after a story is shared. Learn more about invitation links	te feedback about a specific se	rvice, automatically tag new stories, or offer your own online survey
Search by link name, tag or service code	Q	+ New invitation link
▼ Link name ▼ Description		▼ Date created ▼ Created by

- 2. Search for the hospital or health service on Care Opinion's search bar.
 - a. Click on the service name from the 'Recommended pages within Care Opinion' to view the service page
 - b. Scroll down the service page and you will find the 'Create campaign (invitation) link' on the bottom right-hand side.

Roya Roya	val Perth X Q Il Perth Hospital 2250
Your current search Your current search	Recommended pages within Care Opinion
Filtered by your subscription Stories about Royal Perth Hospital (refine)	Royal Perth Hospital Royal Perth Hospital is Western Australia's longest-serving hospital and is renowned for contributing to innovation and excellence in medical research and patient care.
	Slideshow Kiosk mode
	 Solution Create a campaign link f Share Tweet Email

Both of the above actions will take the page to create a 'New invitation link' and fill in the blank fields. Here is an example:

Name The name will be used to create the URL for the invitation. Cl	nanging this after creation will mean the old link will stop working,	
You can customise an invitation link after creation. conference-2021 (between 3 and 60 characters, letters, numbers and dashes) Description	conference-2021 (between 3 and 60 characters,	letters, numbers and dashes)
The description will be shown to other members in your subs To invite consumers from the conference to tell their stories	cription to describe how it should be used.	
(max 400 characters)	+ Create	

Once you select 'create', the web browser will take you to the 'Invitation links' page, which can also be accessed via your Navigation Drawer (*Point 1 in previous page*).

From here, the page will display additional information in relation to the newly created link, such as the URLs under 'using your link', which can be copied or generated as a QR Code for sharing purposes:

有 con	ference-2021	☑ View stories	
🖹 Overvi	ew		
To invite con	nsumers from the conference to tell their stories.		
This link doesr	n't have any additional actions.		
You can add a	ctions to the link in the edit section below.		
🚀 Using y	your link		
You can use yo	our link to invite feedback via our "tell your story" page, a kiosk page, or a widget on y ese, find the link you need, or download a QR code, below.	our own site.	
 Tell your s 	story		
► Kiosk			
▶ Widget	▼ Tell your story		
🖉 Edit	Use this link or QR code to invite feedback via the "tell your story" page of	on Care Opinion.	
 Name 	https://www.careopinion.org.au/695/conference-2021		
 Descriptio 	n		
 Service to 	receive feedback		
► Tags			
 Your surve 	ey or consultation		
		× Delete invitation link	

For more detailed guidance on how to create, customize and share an invitation link, please click on the following resources:

- <u>https://www.careopinion.ca/info/invitation-links</u>
- https://www.careopinion.ca/resources/site?id=co-branding-and-promotional-materialguidelines.pdf

Bookmarked stories

Members now have the ability to bookmark any stories that they wish to refer back to. The bookmark icon can be found next to the title of a story. Simply click on the bookmark icon to bookmark. Here's what it will look like:



Once bookmarked, members can access and manage their list of marked stories through the 'Bookmarked stories' tab in their Navigation Drawer:



Blogging

Blogging is included in many of our subscription levels. This can be performed by members with 'Responder' or 'Administrator' roles.

You could use our blogging feature for all kinds of things:

- Update everyone on plans for your services
- Consult with patients, users and carers about changes you plan to make, and collect their responses
- Add a "change post" when you have made a service improvement
- Share good practice in getting the most from Care Opinion

To access this feature, log in to your subscription and follow the <u>blog</u> link.



You will see a 'Create a new post' tab, along with tabs on how to 'Manage your blog posts'.



There are more tips to <u>help with blogging</u> available on the Care Opinion website, just make sure you follow the links on the right-hand side of the page under 'More Information'.

Subscriber Help pages

This webpage includes a wealth of information to support subscriber members. It covers some of the topic within this document, plus more!

Ø Navigation	0 -
Stories	>
Saved things	>
Members	>
Tags	>
Invitation links	>
Bookmarked stories	>
Blog	>
Help	>

Each category includes sub-categories for that subject, which are individually linked to each 'help' page on that topic. Some will include detailed explanations and short clips on how to create/search/access certain features and functionalities, while others will contain information on guidance and support.

Promotion		Q responses
Co-Branding Promotional Materials Assisted Storytelling Tell your story widget Campaigns Blogging Invitation Links Sharing with staff Sharing with patients and carers	Implementation Guide Introduction & Overview Phase 1 Scoping the Project Phase 2 Foundational Preparation Phase 3 Soft Launch Phase 4 Review and Embed Phase 5 Review and Embed	Search and view stories Looking at a story Basic searching Story search options Search services within a service Sharing a story with your staff Sharing a response with your staff Response search options See recently read stories
	Help with alerting	
How to respond to stories Responding to stories Timely responding Edit your response within 30 minutes Responding well Showing you've made a change Adding an image to a response	Alerting Adding and changing alert triggers Creating an alert for specific services Alerting for unresponded stories Create a digest	⑦ Understanding your subscription
		Understanding your subscription See activity in your subscription Changing active subscription Change password Terms, levels and features
	Help with reporting	1 Training and Learning
Managing your subscription	Reporting See reports you have saved Help with scheduled reports Understanding report time periods Report examples Reporting for unresponded stories Creating a Visualisation Help with reports	Training and Learning How-To Videos (coming soon) Care Opinion Subscriber Community Online training Care Opinion How-To Videos Get help
Managing your subscription Access to data Subscription members Customising service pages		
Promoting Care Opinion		
Promoting Care Opinion	Story tags	
Understanding moderation	Story tags See tags you have added to stories Add a private/shared tag to a story	
Moderation Advanced moderation		

Notes for Follow Up