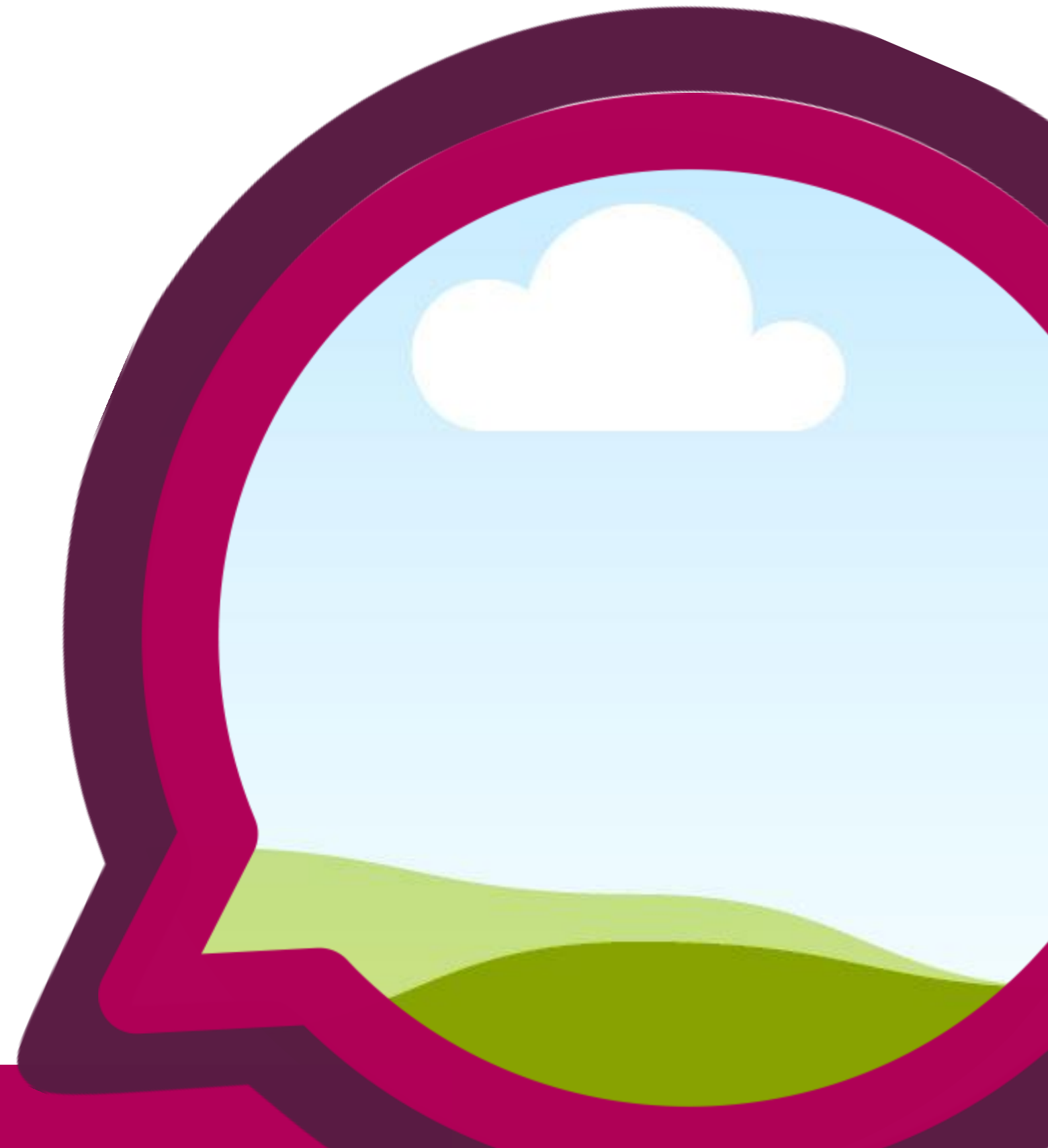


How to use Reports & Visualisations

 info@careopinion.org.uk

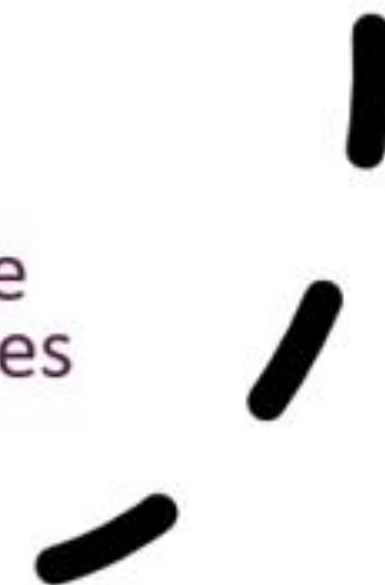
 www.careopinion.org.uk





Before we begin...

- Camera & mic
- Webinar recording
- Webinar follow up email
- The website examples and terms in this presentation are based on the UK version of Care Opinion, but the features work the same across all Care Opinion sites, including Canada and Australia.





Poll Question!



Agenda

→ **Introduction to why reports are useful**

→ **Report & Visualisations available on Care Opinion**

→ **Basic Searching on Care Opinion**

→ **Building a search & saving a search**

→ **Running & Scheduling reports & visualisations**



Why reporting?

- Show a snapshot of themes
- How they are being responded to
- Help you track progress over time
- Management reports
- Promotes transparency

[Help with reporting](#)



Care Opinion Reports available

Create a report to summarise, print or export these stories

If you save your report you can run it again, or have it delivered on a schedule. [\(learn more\)](#)



Responses and story progress >

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



Services with ratings >

Summary of the rating scores for a set of services



Services with response quality >

Indicators of quality of responding for a set of services



Services with story activity >

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



Stories in summary >

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



Story and response listing >

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



Story authors in summary >

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



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.

1. Story and response listing report – The simplest report lists a collection of stories and responses [VIEW EXAMPLE](#)

1. Story in Summary report – Instead of listing all the individual stories, you can view a set of summary charts and tags [VIEW EXAMPLE](#)

1. Response and story progress report – You can also view summary charts on story progress and responses [VIEW EXAMPLE](#)

1. Services with response quality report – indicators of quality of responding for a set of services. This includes identifying whether there is a response to a story, response time and whether the response was helpful (as rated by the story author) [VIEW EXAMPLE](#)

Reports continued

Create a report to summarise, print or export these stories

If you save your report you can run it again, or have it delivered on a schedule. [\(learn more\)](#)



Responses and story progress >

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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.

1. Services with story activity report – This report shows summaries of story counts, responsiveness and criticality for a set of services [VIEW EXAMPLE](#)

1. Story authors in summary report – Summary of authors age, gender, ethnicity & disability [VIEW EXAMPLE](#)

1. Services with Ratings report – Summary of the rating scores for a set of services including the Friends and Family Test question (England only) [VIEW EXAMPLE](#)

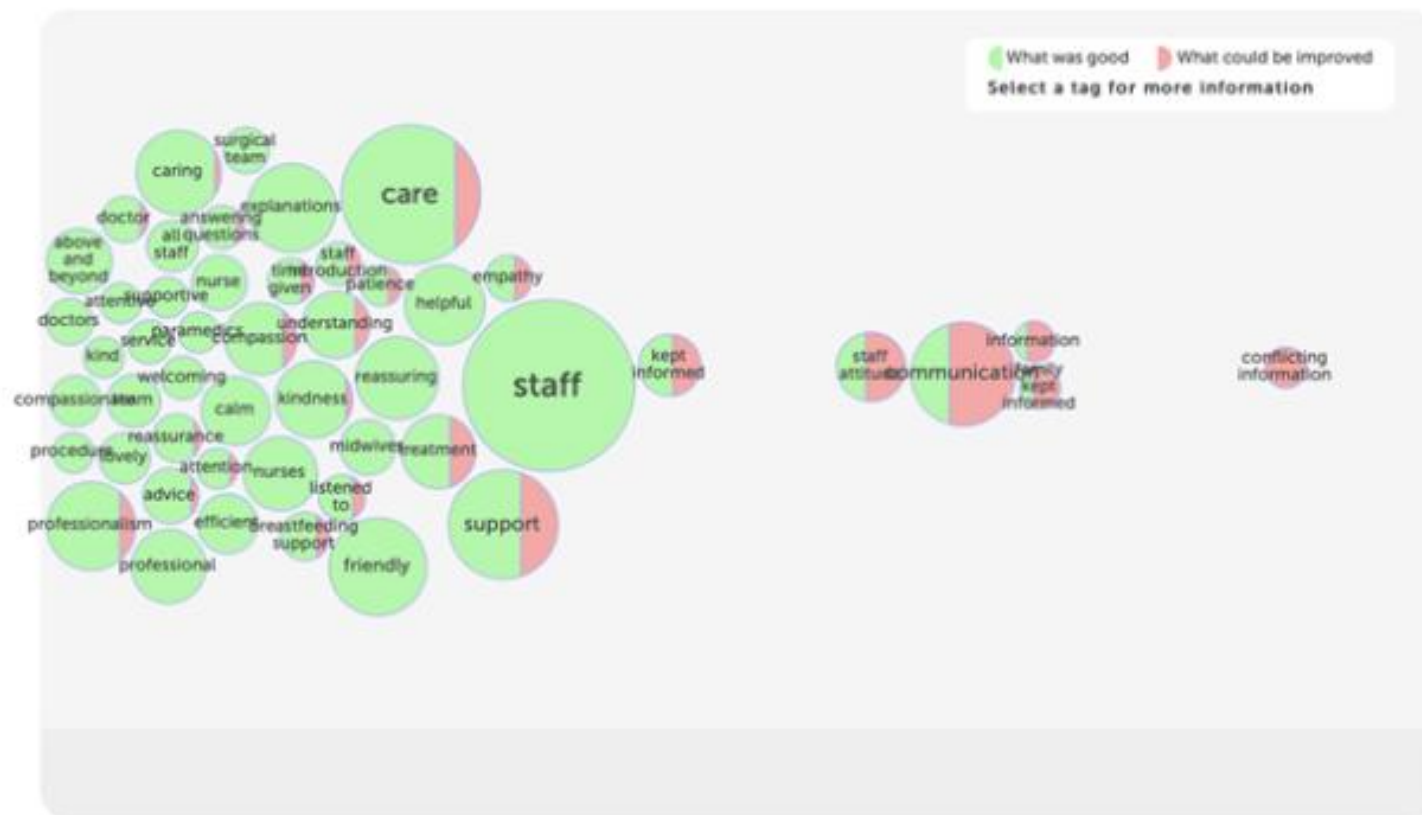
1. Story listing in a table report – The most comprehensive report which pulls all the information from the TYS workflow into Excel [VIEW EXAMPLE](#)

Visualisations available

Tag bubbles

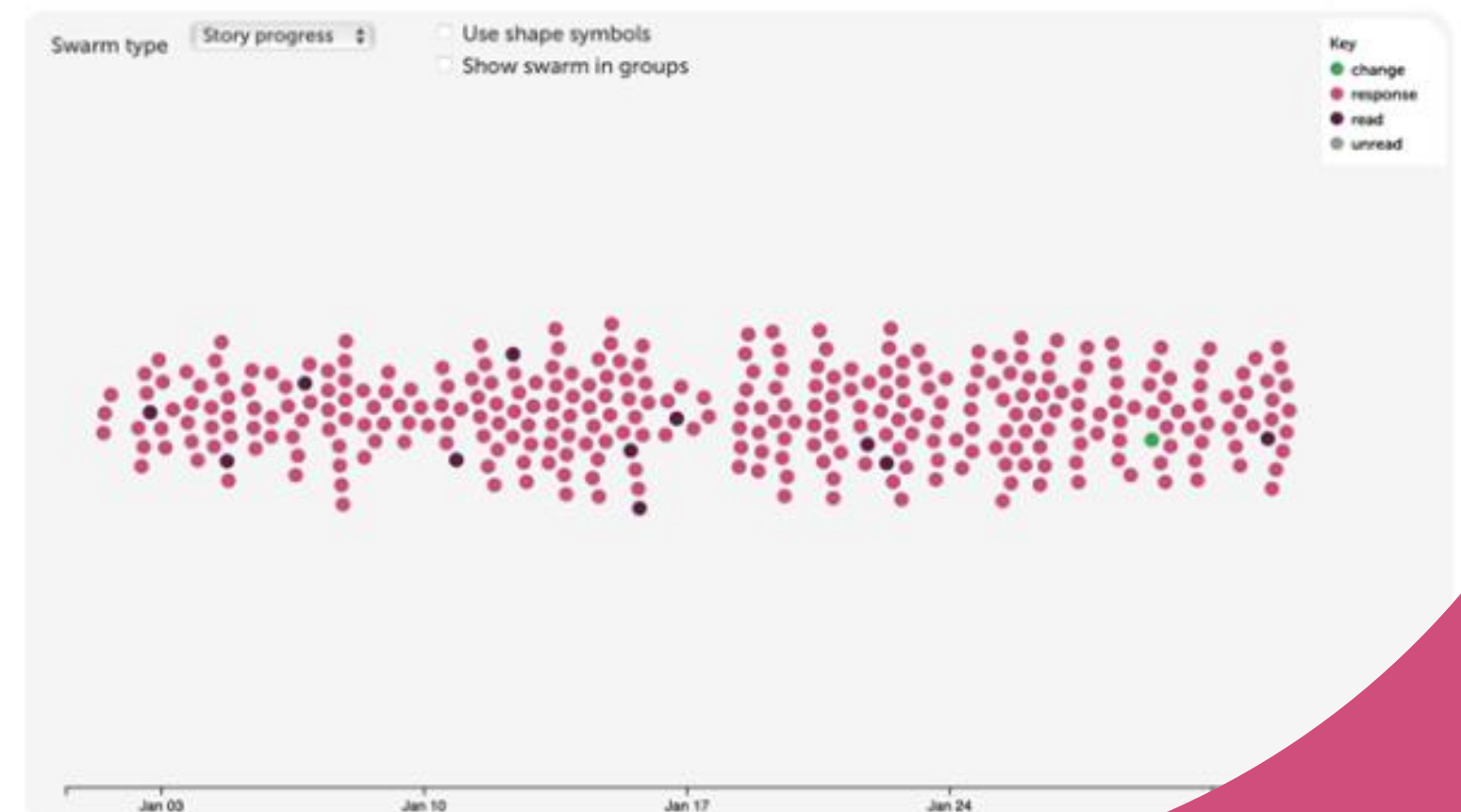
This shows the most popular tags for your stories as bubbles. The bubbles are split according to how often the tag is used to say "what was good", or "what could be improved".

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



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.



[Help with Visualisations](#)

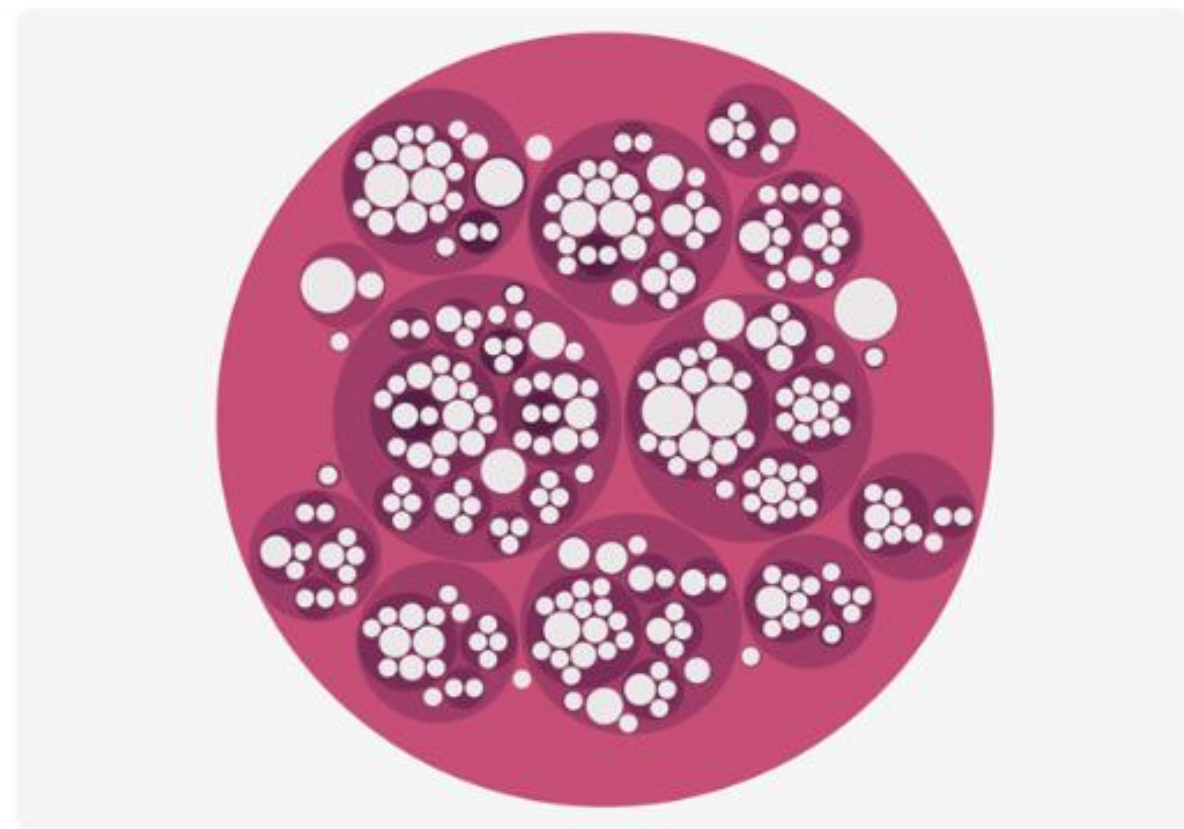
Visualisations available

Lily pad

This shows how your stories are spread according to the services they relate to.

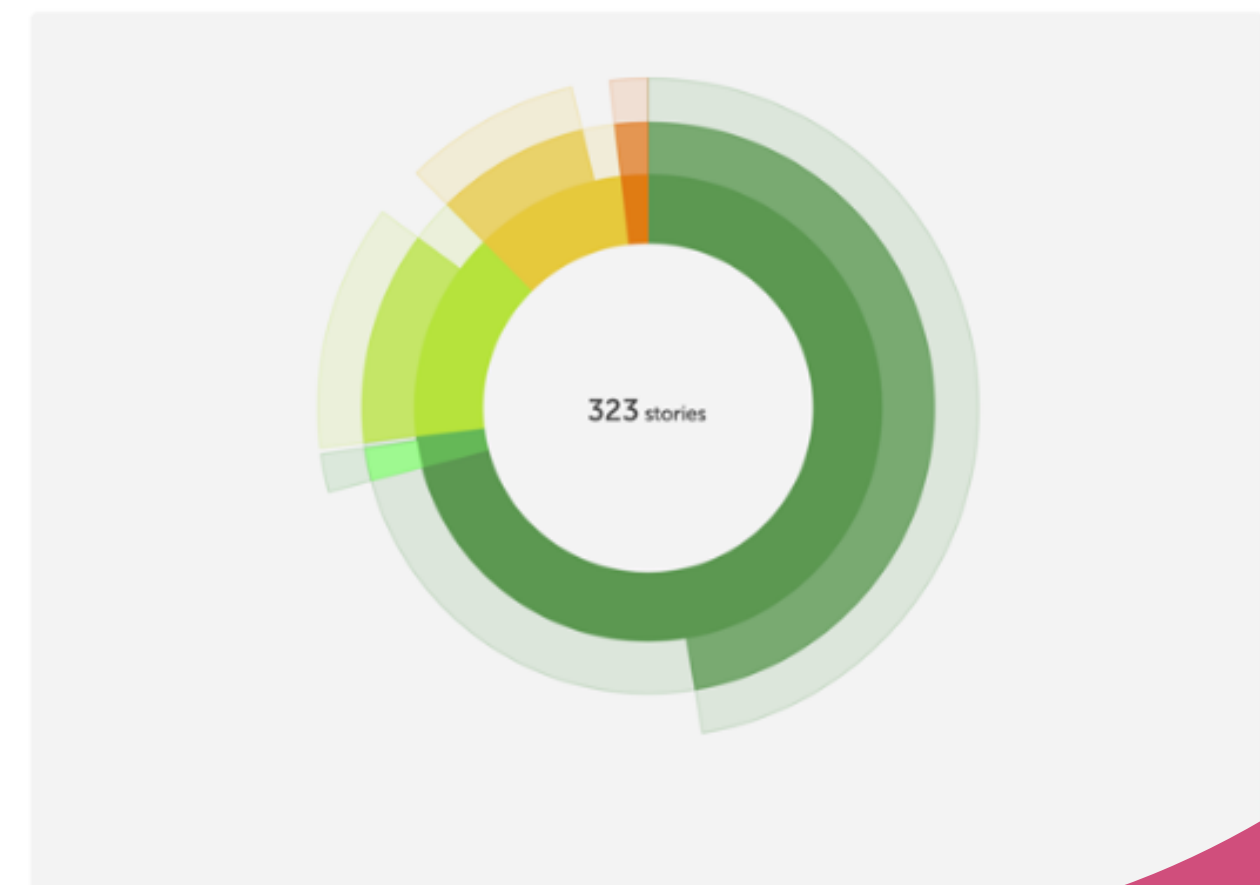
Each circle represents an organisation or the service it provides. The more stories about a service, the larger the circle for that service.

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



Sunburst

This shows how stories progress: each ring represents a step on the journey from being told to being read, responding to and perhaps leading to change too. Stories are grouped by criticality.



Visualisations available

Tag word cloud

This shows the most popular tags for your stories as words, sized according to use.

There are three variants of this visualisation: you can choose to display tags people used to say "*what was good?*", "*what could be improved?*" or "*how did you feel?*"



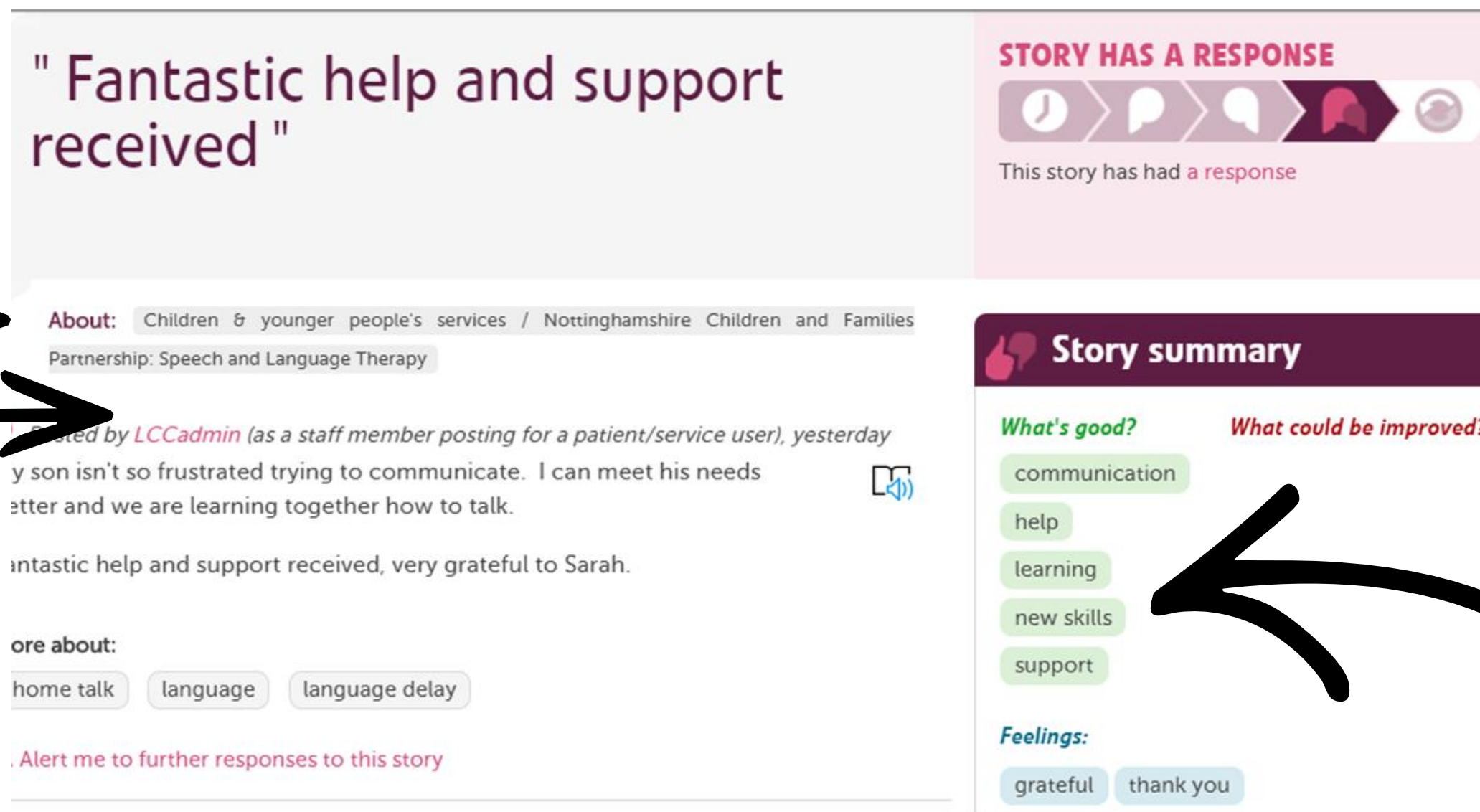
Story word cloud

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



Basic Searching

- More stories about the same **service**
- More stories by the same **author**
- More stories with the same **tag**



The screenshot shows a story titled "Fantastic help and support received". It includes an "About" section with categories like "Children & younger people's services" and "Partnership: Speech and Language Therapy". The story text mentions "LCCadmin" as the author. A "Story summary" sidebar on the right lists "What's good?" (communication, help, learning, new skills, support) and "Feelings" (grateful, thank you). Hand-drawn arrows point to the "About" section, the author name "LCCadmin", and the "Story summary" sidebar.

" Fantastic help and support received "

STORY HAS A RESPONSE

This story has had a response

About: Children & younger people's services / Nottinghamshire Children and Families Partnership: Speech and Language Therapy

Created by **LCCadmin** (as a staff member posting for a patient/service user), yesterday

My son isn't so frustrated trying to communicate. I can meet his needs better and we are learning together how to talk.

Fantastic help and support received, very grateful to Sarah.

More about:

home talk language language delay

Alert me to further responses to this story

Story summary

What's good?

- communication
- help
- learning
- new skills
- support

What could be improved?

Feelings:

- grateful
- thank you



Live site demo

Share your experiences of UK health and care services, *good* or *bad*.
We pass your stories to the right people to make a difference.

▶ **Search**



Search for stories about...

eg Leeds General Infirmary, heart surgery, dementia, S3 8EN

Always start any search from the Search box on the Homepage

Either press Enter, or type your organisation name

Click the pink (**refine**) button

Add a search term from any tag i.e. staff or nursing

Your search

▼ Your current search ADD/
REMOVE

Filtered by your subscription

Stories about

Nottinghamshire Healthcare
NHS Foundation Trust
(refine)

Add new search term +

▶ Story search options

[Help with searching within a service](#)

Your search

▼ Your current search ADD/
REMOVE

Filtered by your subscription

Stories about

Nottinghamshire Healthcare
NHS Foundation Trust
(refine) −

Add new search term +

► Story search options

► Response search options

▼ Create in your subscription

 Save search

 Create alert

 Create report

 Create visualisation

Change "Nottinghamshire Healthcare NHS Foundation Trust" in your search

Update your search by choosing service(s) below, instead of **Nottinghamshire Healthcare NHS Foundation Trust**

If you see the service(s) you want, use the Add button to add them to your search.
You can move to a service, and see the services it contains, by clicking it.

[Help with service selection](#)

- + NHS Nottingham and Nottinghamshire Integrated Care Board
- + Nottinghamshire Healthcare NHS Foundation Trust
 - + Addiction services (community)
 - + Adult mental health (inpatient)
 - + Adult Mental Health Community
 - + Adult Mental Health Crisis Services
 - + Adult Mental Health Deaf Services
 - + Ashfield Health Village
 - + Carer services
 - + Children, Young People and Families
 - + Clinical psychology
 - + Community Health
 - + Eating disorders
 - + Forensic mental health
 - + Intellectual Developmental Disabilities /Learning Disability Services - Community
 - + Intellectual Developmental Disabilities /Learning Disability Services - Day Services
 - + Intellectual Developmental Disabilities/ Learning Disability Services – Inpatient



Select the service(s) you would like to report on



Click the green  button, to add services to your search



Then click 



Build your search from the ‘Story Search Options’

▼ Story search options

Progress of story

All stories ▼ by anyone ▼ +

- All stories
- Unheard stories
- Stories without response
- Heard stories, without response**
- Stories with response
- Stories with response, but no change planned or
- Stories with change planned or made
- Stories with change made
- Withdrawn stories
- Rejected stories

Addiction services ▼ +

▼ Story search options

All stories ▼ by anyone ▼ +

Submitted on or after +

Dec ▼ 2019 ▼

Mo	Tu	We	Th	Fr	Sa	Su
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

Read by me ▼ +

Add in additional filters e.g. a date range or criticality etc...

Your search

▼ Your current search ADD/REMOVE

Filtered by your subscription

Stories about

Offender healthcare (refine) -

Add a search term +

▼ Story search options

All stories ▼ by anyone ▼ +

Submitted on or after +

Submitted on or before +

Criticality equal to ▼ 0 | ▼ +

Addiction services ▼ +

the patient ▼ +

Read by me ▼ +

Published on or after +

Published on or before +

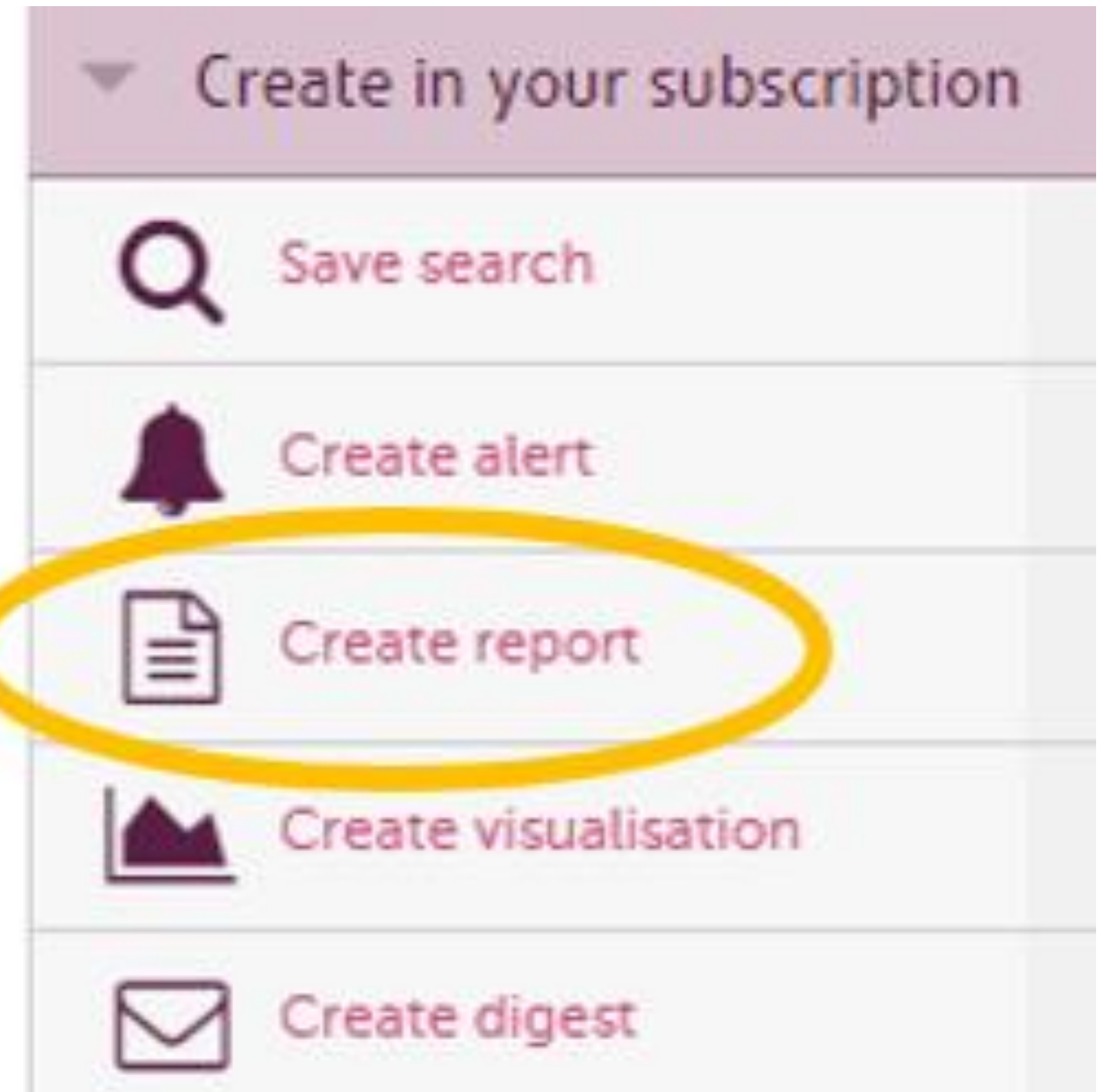
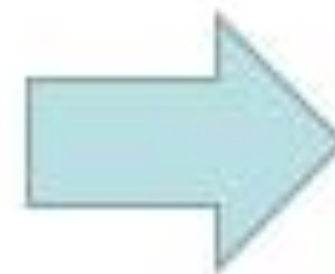
non picture stories ▼ +

via Care Opinion ▼ +

Now your ready to create your Report or Visualisation

You can also:

- **SAVE** your search
- Create an Alert
- Create a Digest



Have a go!

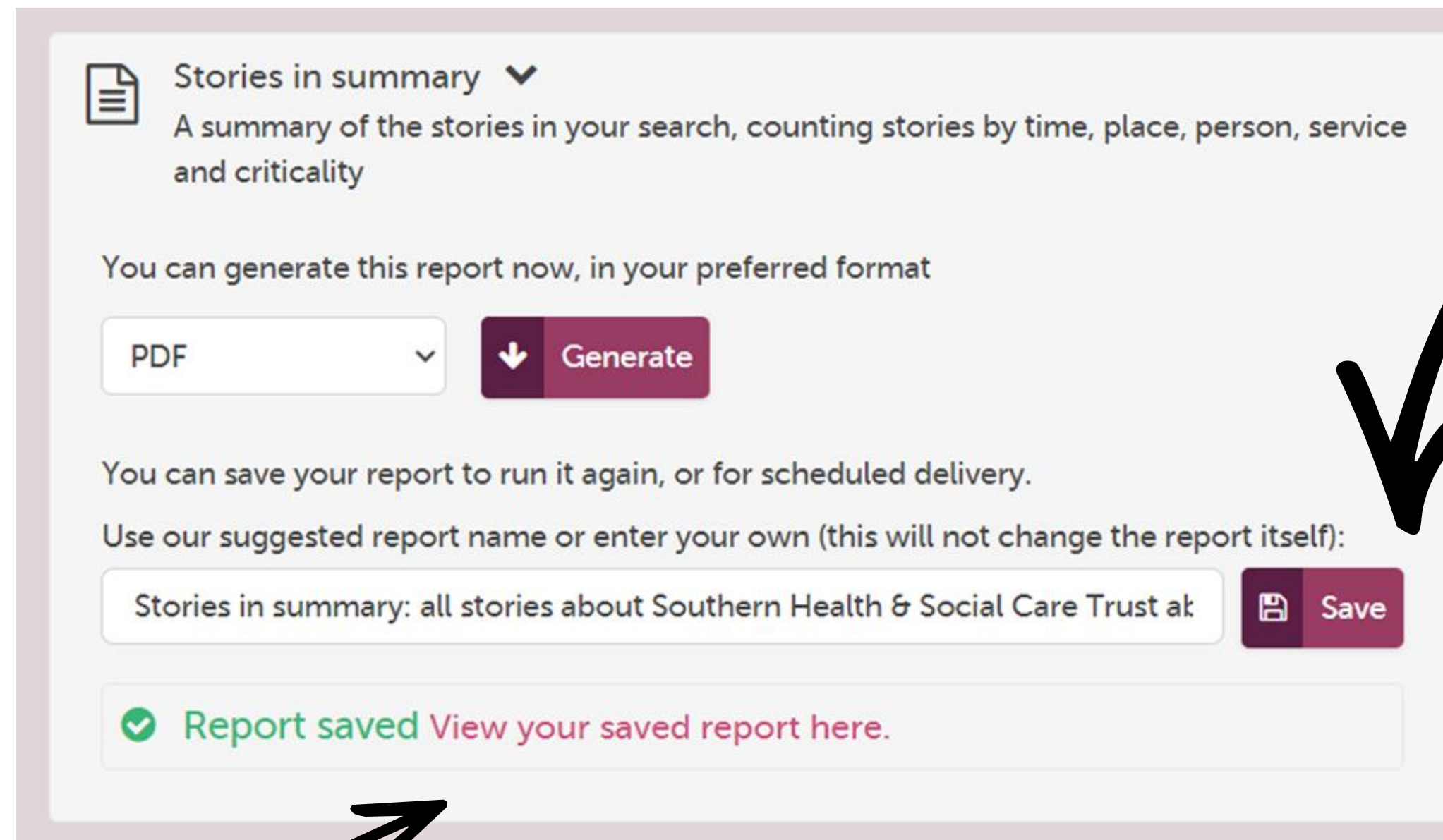
Try this example search:

- All stories in your subscription
- Published last month (Use published on or before and published on or after)
- Equal to criticality 0

The screenshot shows a search interface with a purple header. The main search bar is labeled "Your search". Below it, there's a section for "Your current search" with an "ADD/REMOVE" button. The search results are filtered by the user's subscription. The search criteria include "Stories about Offender healthcare (refine)" with a minus sign to remove it. There's a text input field for "Add a search term" with a plus sign to add more terms. Below the search criteria, there's a section for "Story search options" with various filters: "All stories" by "anyone", "Submitted on or after", "Submitted on or before", "Criticality equal to" (set to 0), "Addiction services", "the patient", "Read by me", "Published on or after", "Published on or before", "non picture stories", and "via Care Opinion". Each filter has a plus sign to add it. On the right side, there's a sidebar with a thumbs up icon, a section for "Offer" with text "We are health", and a section for "Lat" with a dropdown menu.

Save your report, rather than generate!

Use the template to generate a new report at any time, or add a schedule if you want new reports to be generated on a regular basis



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

You can generate this report now, in your preferred format

PDF ▼  **Generate**

You can save your report to run it again, or for scheduled delivery.

Use our suggested report name or enter your own (this will not change the report itself):

Stories in summary: all stories about Southern Health & Social Care Trust ak  **Save**

✓ **Report saved** [View your saved report here.](#)

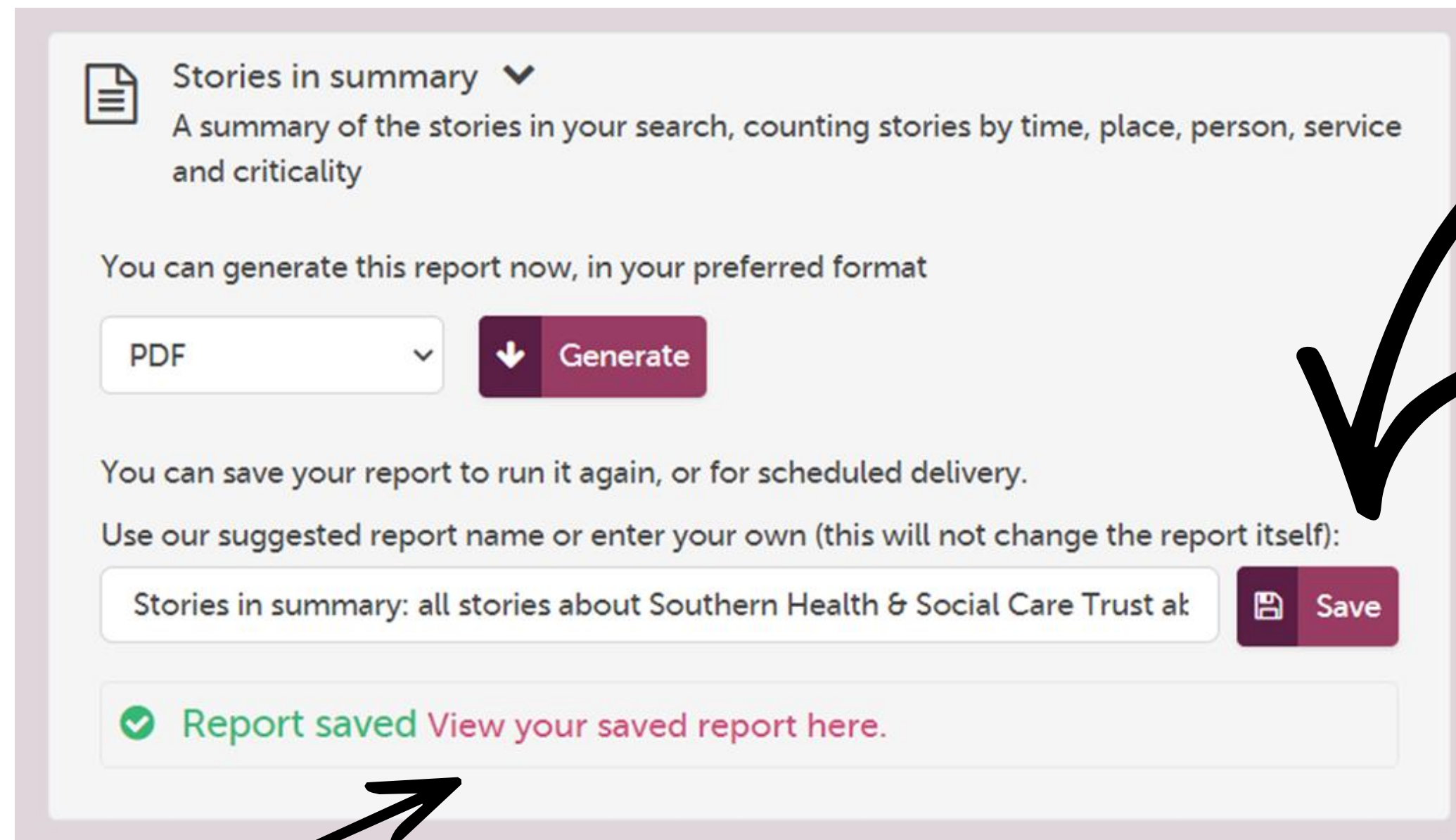
The image shows a screenshot of a web interface for generating and saving reports. It features a title 'Stories in summary' with a dropdown arrow, a description, and instructions on how to generate or save the report. There are buttons for 'Generate' and 'Save', and a confirmation message at the bottom. Two large black handwritten arrows are overlaid on the image: one points from the top right towards the 'Generate' button, and the other points from the bottom left towards the 'Report saved' message.

Check by viewing 'Saved things'

When ever you have set up an alert, digest, report or visualisation you can always double check these by accessing your 'saved things'

Remember!

You can always pause or delete anything you have set up & if you are an 'Administrator' you can set assets up for other members!



The screenshot shows a web interface for generating a report titled 'Stories in summary'. It includes a description, a format selection dropdown set to 'PDF', a 'Generate' button, a 'Save' button, and a confirmation message at the bottom. Two handwritten black arrows are present: one points from the top right towards the 'Generate' button, and another points from the bottom left towards the 'Report saved' message.

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

You can generate this report now, in your preferred format

PDF ▼ 

You can save your report to run it again, or for scheduled delivery.

Use our suggested report name or enter your own (this will not change the report itself):

Stories in summary: all stories about Southern Health & Social Care Trust ak 

✔ Report saved [View your saved report here.](#)

Scheduling a Report or Visualisation

Reports you create about stories and responses can be scheduled for regular delivery to you or other members of your subscription.

Examples of scheduled reports

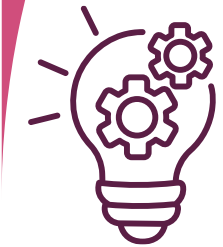
- a list of new stories and responses sent to you and your manager every other week
- a summary of stories sent to committee members every 3 months
- a list of stories which are critical but lack a response sent to you every Monday

[Help with Scheduling reports](#)

The screenshot shows a 'Schedule' configuration window. At the top right is a 'Pause the schedule' button. The main text states: 'Your template will generate a new report on the 2nd of every 3rd month. It is next due 01/04/2023 and will use stories published between 01/01/2023 and 31/03/2023'. Below this is a section titled 'Update schedule' with a dropdown arrow. The first step, '1. The schedule should be', has a dropdown menu set to 'Monthly by date'. Below this, it shows 'Day 2 every 3 month(s)' and 'Starting from 03/03/2023' with a calendar icon. The second step, '2. When the schedule is run, the following data will be used:', has three radio button options: 'Use data from the last complete 3 months' (which is selected), 'Use data from the latest 2 Days' (with a dropdown set to '2'), and 'Use data from all time'. At the bottom right of this section is an 'Update' button with a right arrow. At the bottom left is a 'Remove schedule' link with a right arrow. Below the main configuration area are two expandable sections: 'Recipients' and 'Delete', each with a right arrow.

Scheduling a Report or Visualisation

Important reminder:
No need to add a date range when scheduling reports!
The site is very clever



Monthly schedule

Choose "monthly" to see the options for a monthly schedule.

In the example below, the schedule is "the fifth of every month".

The schedule should be ☐ Weekly ☒ Monthly ☐ Yearly

☒ Specify by date

☐ Specify by week day

Day every month(s)

Starting from 

[Close](#)  [Update](#)

If you prefer the monthly schedule to be set according to a fixed weekday, choose "specify by weekday", and then set the weekday in the month you want.

For example, here the schedule is "the third Friday of the month".

[Different types of schedules - Help page](#)

Bite Size Video

Running & scheduling reports and visualisations

Reports and visualisations are one of our most loved features by subscribers!

Learn how to filter your search and create your own reports, and add a schedule so that you can receive the most up to date version straight to your inbox!



Care Opinion Bitesized

Running and scheduling repo



Refer back to running and scheduling reports & Visualisations: [WATCH HERE](#)

Thank you for Listening

We run regular training on
lots of site features...

<https://www.careopinion.org.uk/info/support-webinars>

Contact Us: **info@careopinion.org.uk**