futureNHS collaboration platform
User guide
New care models programme

Our values:
clinical engagement, patient involvement, local ownership, national support

www.england.nhs.uk/vanguards

#futureNHS

Version 1.1
Welcome to the futureNHS collaboration platform user manual

The new care models programme is making strides in improving and integrating services, helping to create a blueprint for the NHS moving forward and the inspiration for the rest of the health and care system.

A fundamental principle of the new care models programme is that we capture and share learning, both amongst ourselves and with other areas of the NHS and the social care system.

The futureNHS collaboration platform has been implemented as a direct response to a request from vanguards, central teams and other models of care for a place to work together more collaboratively. The platform will enable us to learn from one another, ‘steal’ ideas and will also reduce the duplication of effort.

Through the platform you can:

- Keep people up to date with the progress of your work
- Exchange ideas and ask people directly for their input and support
- Create forums to encourage the cross-fertilisation of ideas
- Store, share and access key documents securely in one central hub
- Create, manage and deliver projects

There is a huge opportunity for us to work together more collectively and more effectively to lead the delivery of high quality, integrated health and care services for patients and service users.
In addition to the support provided through this guide, all users can always seek additional online help and support through the platform. Details of how to access this support can be found in Section 4 of this guide.
1. What is the futureNHS collaboration platform?

By creating an online workspace through the futureNHS collaboration platform users instantly breakdown barriers to communication and make collaboration easier between individuals, teams and stakeholders.

The platform brings users together to share ideas and work together where there is a need to manage activity, collaborate, innovate, share knowledge, share best practice and more.

Below is a summary of the main features and functionalities of the futureNHS collaboration platform:

**File sharing:** Documents are always kept safe through secure collaboration software and advanced access control.

**Project reporting:** Allows for group collaboration, group analysis of issues and the ability to create both charts and export data in any format.

**Online task and project management:** Users can complete tasks in agreed timeframes to view and track progress at a glance.

**Online team management:** Allows users to comment on any item of content and collaborate on documents section by section.

**Online workspaces:** Users can create workspaces for any purpose and work with relevant individuals.

**Consultation:** Allows users to comment and feedback views via discussion forums, quick polls and interactive questionnaires.

**Stakeholder management:** Assign users to teams, control permissions to add and modify content. Users can also add content to workspaces and user profiles for an added sense of community and identity.

**Users and managers**

When using the platform most people who have registered can be described as a ‘user’. This simply means they are a member of one of more workspaces. As a user you can view content in any of the workspaces you are a member of and, where appropriate, comment on content and/or upload documents.

Each workspace will also have a dedicated ‘manager’, who will be responsible for managing and updating the content of a workspace. A manager will have access to some additional functionality, to enable them to fulfil this role. Workspace managers can seek additional support, as required, through the ‘Workspace managers’ workspace on the platform.
2. Registering for the futureNHS collaboration platform

The futureNHS collaboration platform is an invitation based platform. Anyone wishing to become a user should request access to a workspace by emailing the following information to collaborationplatform-manager@futurenhs.kahootz.com with the subject, “futureNHS platform (workspace name) registration request”

- First name
- Last name
- Email address
- Job title
- Organisation and vanguard name

Once the request has been processed the user will be registered (issued with a license) to access the desired workspace on the platform. The level of access the user has within this workspace is determined by the Workspace Manager. The user will also be sent an email with a log on link to the desired workspace. Once received the link will be valid for 28 days after which users will have to re-register.

Once users have registered, and accessed the requested workspace via the invitation email, the platform can be accessed by going to the following web address: https://futurenhs.kahootz.com
3. Accessing the futureNHS collaboration platform

Once registered for the futureNHS collaboration platform (see section 2), users will be able to log on using the following link: https://futurenhs.kahootz.com, or via the initial invitation email sent from the Workspace Manager.
4. Help and support

Users can access help and support from their initial dashboard page. Users can access a knowledgebase of information, view previously asked questions or ask the Kahootz (platform software creators) based support team.

Users can also click on help at the top left of any screen within the platform to access the help option. It is then simply a case of entering your query i.e ‘creating a folder’ and you will be given access to simple step by step instructions of how to complete the task.
5. What is the dashboard?

The dashboard is the user's homepage. It collates the recent items from all the workspaces they are a member of, and keeps them up to date so they do not need to log in to each workspace to access the latest updates.

In this area users can access any workspaces they are a member of, check any notifications they have received, check any calendar entries, set or check outstanding tasks, view private messages and access their personal account settings.

Clicking the cog wheel symbol allows users to configure their dashboard homepage with various options (see below).
6. Private messages

Private messages can be accessed via the dashboard and via the account tab within a workspace.

Users can send a new message by clicking on “New private message”. These can be sent to a workspace member, the workspace manager or the platform owner.

The “To” box will offer you a choice of people to whom a message can be sent.

Once the message has been composed select “Send Message”.
7. Notifications

Any notifications received can be accessed via the notifications tab located at the top of a user’s workspace page.

Any requests to join a new workspace, or messages users receive, can be viewed here. Any actions the user can make such as joining a workspace or posting a comment will be highlighted in blue within a notification allowing the user to click on them to complete that action.

Any important notifications users have requested to be notified about can also be viewed here. However users should be mindful of the number of notifications they will receive should they choose to be notified about everything that happens within a particular workspace.

Notifications can be managed via the account tab then via both email preferences and subscriptions tabs.
8. Search

Using the search icon at the top screen allows users to search across all the workspaces they are a member of. The search function enables users to search the content of any document or text on the system.

Initially the search form will do a simple search which allows users to enter a search term or phrase and searches for any items in the workspace that match the words entered. From the search results page users can then do an advanced search which allows for more details to be entered. Users can either search for documents, or across all content across all workspaces they are a member of, or across a few selected workspaces. Users can also restrict the search to items changed in the last day or week.
9. Workspaces

A workspace is an area where members of a community can work collaboratively.

All the workspaces a user is a member of can be accessed by clicking on “My Workspaces”.

Clicking on the desired workspace name will take a user to that particular workspace.

There are 3 types of workspace:

**Open**
All users can see and join these workspaces.

**Restricted**
All users can see these workspaces but membership has to be approved by the workspace manager.

**Private**
Only invited users can see these workspaces.
10. Workspace homepage

From the workspace homepage users can see the latest content for that particular workspace.

If the workspace manager has given permission to do so, then by clicking the (create new item) symbol, at both the top and bottom of the page, users can choose to create any of the items listed below.
11. Documents

Choosing create new item and then selecting document gives users the option of uploading up to 100 documents per upload. Once uploaded, users will be able to name, describe and set permissions for the documents.

Clicking on “Choose Files” will open the file section on a user’s PC or device allowing for multiple files to be selected and then dragged and dropped into the area marked “Drop files here”.

Folders of documents can be exported to a ZIP file via the download all documents option within the actions menu when within a folder. This will only include the latest version of each document though.
12. Questionnaires

Users can create questionnaires to engage with workspace members about particular issues. As users respond, the results are automatically tabulated and displayed.

Formatting: allows for help text and questionnaire progress information. Permissions: who can view and who can modify the questionnaire. Visibility of responses: who can see a summary of results and responses. Notifications: allows the questionnaire creator to notify other workspace users.

Users can select what form the questionnaire will take and both the number and type of questions it contains.
13. Databases

A database allows users to create and share either simple lists or more complex tables of information. Databases can be created online and data can also be imported from an existing source and then shared online.

From the actions menu at the bottom of a workspace screen select create new item followed by questionnaire and this will lead to the screen below.

Users can create their own bespoke database or use a template.

Available templates are:

**Asset manager**: This template allows you to record information about assets and their location e.g. company phone, printers and computers.

**Customer relationship manager**: This is used to record key contact information about clients and/or customers.

**Issues register**: This is a useful template to use when you need to log a company dispute or issue within the office.

**Lessons learnt log**: This template is used for recording what has been learnt during a project.

**Organisation contacts**: This is used for recording the contact details of people within your organisation.

**Risk register**: This template is used for recognising risks and includes the ability to RAG rate content.

**SWOT**: This template is used for the recording of the Strengths, Weaknesses, Opportunities and Threats, ideal for health and safety situations.
14. Task lists

Task lists let you create, assign and manage tasks, whilst monitoring their progress. To create a task list go to the actions menu at the bottom of a workspace screen, select create new item then task list and add a name and description. In the Permissions section users decide who can view the task list and who can modify the task list.

Any tasks that the user has either assigned to others, or been assigned by others will be visible here.

Task lists can also be created on a user’s dashboard offering a general overview of all tasks that are related to the user. Click on the cog wheel then my tasks to create a dashboard task list.
15. Folders

Folders are an easy way to arrange information in a workspace.

The creator of the folder can expand the display and sorting, permissions and notifications sections in order to set rules as to what can be created within the folder and who can view its contents.

Folder permissions are:

**View:** Who can see this folder and browse it. (This does not control who can see the items in the folder - they have their own permissions.)

**Modify:** Who can modify a folder’s name and permissions. (This does not control who can modify items in the folder - they have their own permissions.)

**Create:** Who can create items in the folder; which items can be created is controlled by the list below. Managers can always create all types of items.
16. Structured documents

A structured document allows members to collaboratively prepare, create and review documents together. Members can import existing documents or create a new one.

Structured documents are an easy-to-use and flexible way for workspace members to read, comment on and collaboratively edit large documents.
**17. Picture albums**

Picture albums let users upload, arrange and share pictures and images, and view them in different styles and layouts. Users can use albums for a variety of image related purposes such as storing stock images, collating pictures of products or saving screen shots to name but a few.

Alternatively users can upload a zip file containing multiple pictures and the platform will automatically unzip them and extract the individual pictures. Additionally users can also place pictures within albums and then upload the picture to any workspace area as an image using the options available in the actions menu.
18. Web pages

Web pages allow users to share small amounts of information within a workspace that do not warrant a full web page.

Users can either link to external websites, to other areas on the platform or within a workspace.
19. Web links

Web links let users save and arrange links to other websites via the website address or URL and then share them with workspace members.

Web links are created from the actions menu at the bottom of a workspace.
20. Calendars

Calendars let you view and manage shared events within a workspace which can have one or more calendars. Calendars are created via the workspace action menu.

Once a calendar is created by clicking the add new event option and then the add more details option users can add agendas, outcomes and ask members how interested they are in particular events.

In order for added events to be displayed within the workspace a calendar view must be added to the workspace via the configure workspace dashboard option at the top of the page.
21. Blogs

A blog lets users publish articles within a workspace that can be viewed by other users. Blogs are used to share news, views and opinions and articles can be arranged by topic or publication date.

To ensure maximum exposure users should be aware of who the target audience is and what permissions they need to give to a blog in order for the right users to be able to view it.
22. Forums

Forums can be created to collate discussions relating to a topic allowing users to have discussions with other members of a workspace.

Forums allow users to insert links, mention other users using the `@` symbol and create quick polls to canvas other users’ opinions.
23. Glossary

**Blog**: Used to document work associated with a subject, workspace or programme.

**Calendar**: Highlights important events relevant to a workspace/workstream.

**Dashboard**: A central area where users can access their workspaces.

**Database**: Users can create or import data

**Documents**: Content that is either uploaded or created by users.

**Folders**: Created by users to group items such as documents and pictures together.

**Forum**: Helps facilitate discussions between users of a workspace.

**Help**: A place where users can find assistance with functions within the platform.

**Notifications**: A collection of notifications relevant to the user.

**Picture album**: Allows users to upload, arrange and share pictures and images.

**Private messages**: A collection of messages sent and received with other users.

**Questionnaire**: Used for polling members of a workspace about relevant issues.

**Task lists**: Users can create, manage and assign tasks to other users.

**Search**: Allows users to search for items across all their workspaces.

**Structured documents**: Allow users to collaborate on a document together.

**Web link**: A shortcut to an external website or an individual item within a workspace.

**Webpage**: A link or collection of links, images and text relating to a workspace.

**Workspaces**: An area on the platform dedicated to a particular workstream.

**Workspace homepage**: Highlights the latest content for a workstream.