Voice Researcher User Manual

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Accessing the Voice dashboard

To access your dashboard area, you need to be logged into your Voice account. Once you are logged in, click on your name at the top of the page and select ‘Dashboard’.

Opportunities

All the opportunities you have created can be found in the opportunities tab of the dashboard. There are three tabs for opportunities: Active; Draft and Completed.

The 'Active' opportunities tab includes all opportunities which are approved or have been submitted or returned to you for changes to be made.

The 'Draft' opportunities tab includes all opportunities which you have started creating but haven't submitted.

The 'Completed' opportunities tab includes all opportunities that are complete or that have been rejected.

Use the search bar, to search for a particular opportunity or filter by opportunity type, status etc.

Create an Opportunity

To create an opportunity, click on the opportunity tab in the dashboard and click on the +New Opportunity button. From the drop-down select the research centre you work within, if your research centre is not listed then select the organisation you work for.

First you will need to select the opportunity type and category.

Opportunity Types

- Event – An opportunity for an audience to learn, interact and socialise, either in person, online or hybrid.
- In-Person Workshop – A facilitated workshop or focus group to discuss a topic or gather views, insights and experience. Usually involves 7-10 people but can be more.
- Online Workshop – Just like an in-person workshop but occurs online only. Beneficial if you would like to obtain a wide range of views from participants who aren't restricted by geographical location.
- Public Representative – An opportunity for a Voice member to contribute by taking on a role as a public representative, embedding the public perspective throughout a project.
- Study Participant – As study participants Voice members are the subjects of a research project or clinical trial.
- Survey – Promote your survey to Voice members and signpost them out to a third party survey tool such as Qualtrics or Survey Monkey.

Opportunity Categories

- Research – For opportunities which will either contribute to a funded research project, a pre-funding research proposal or that are simply for community engagement or knowledge exchange purposes.
- Policy – For opportunities which will directly influence the creation of new policy, regulations or guidelines.

Once you have selected your opportunity type and category, click the next button.

For additional help and tips throughout creating an opportunity, click on the icon next to each section.

1. Event

Step 1 - Info

Title

Choose an interesting and engaging title for your event. 80 Characters available.

Summary

Provide an overview of your event. 20 -120 characters available.

Description

In this section you can add all the details for your event. E.g. what the event is for/about, programme information etc.

Topics

Select 1-2 topics that best match your opportunity.

Opportunity dates and times

Event date and time

The date of your event must be at least 2 weeks from today's date.

Use the date picker to select the date and the drop down menus to select your start and end times.

Closing date and time

The closing date must be at least 3 days before your event.

The closing date will be automatically set according to your event date. If you would like the opportunity to close earlier than this date, use the date picker to select your date. Use the drop-down menu to select the time the opportunity closes.

Once the closing date has passed, members of Voice will not be able to register for your opportunity and it won't appear on the opportunities listing page.

Feedback date

Use the date picker to select the date where you can provide feedback to the members who attended.

Location and attendance details

In person

If your event is taking place in-person, enter the venue, address and number of spaces you have available. In the additional information box, enter any extra details necessary for attendees, e.g. directions on arrival, sign in at reception, etc.

Online

If your event is taking place online, enter the URL attendees will need to attend the event. E.g. Zoom, Teams, YouTube.

Please note URLs to external booking sites cannot be used in this section.

If you have any additional information attendees will need to join the event, please enter this in the additional information box. E.g. passcode, meeting ID. Leave blank if there is no additional joining information Voice members will need.

The URL for your event will not be shared publicly on the opportunity page. This will be shared with anyone who registers to attend the event.

Once you have filled in all the fields on this page, click Next. If you have missed any mandatory fields you will be asked to complete the areas highlighted in red.

Step 2 – Details

Opportunity image

Select an image to promote your opportunity and appear at the top of the opportunity page.

The image should be relevant to the topic of the opportunity. Avoid using posters for the event as the text won't display in full, as well as being inaccessible to those who use screen readers.

If you have your own image click on 'Select your own' and choose the image from your files. This must be less than 2MB in size. After uploading your image, please tick the box to confirm you have rights to use the image.

If you don't have your own image, click on 'Search Unsplash'. Unsplash is a royalty free image library which you can use to search for a relevant image.

Refreshments

This option will only appear if your event is taking place in-person. If you are providing refreshments please select Yes so Voice members will be prompted to provide any dietary requirements when they register.

If there will be no refreshments available at the event, please leave as 'No'.

Participant Experience

If you are looking for people with specific experience to attend, fill in the box with the details. Voice members will be asked to share more information about their experience when they register.

If you do not require attendees to have specific experience, leave blank.

If you require any additional information from attendees, you can add up to 3 additional questions. Type in your question and click the + button to add your question. To remove a question click on the bin icon. If you don't require any additional information, leave blank.

Please note Voice members' name, age, gender, ethnicity and location and accessibility requirements are automatically collected for all opportunities so you do not need to ask for this information in this section.

Speakers

To add details of the speakers at your event, click + Add a speaker, fill in the details and click Add. Repeat the process for each speaker. To remove a speaker, click on the bin icon.

This section is not mandatory so can be left blank.

Click next to continue to next step.

Step 3 – Data & Docs

Privacy policy

This automatically includes the details of your organisation's privacy policy and cannot be edited. Details of the privacy policy will be displayed when a Voice member applies or registers to take part in an opportunity.

Supporting documents

If you have any documents that provide extra information about your opportunity that is necessary for Voice members to read, you can upload them here. Leave blank if not required.

Only PDF files are allowed and the maximum file size is 2MB.

Step 4 – Review & Submit

In this section you can review all the information you have provided for the opportunity. To amend any details, click the previous button at the bottom of the page. If you would like to view the opportunity as Voice members will see it, click on the Preview button.

Once the opportunity is ready, click on the Submit button. The opportunity will now be submitted to your research centre or organisation admin for them to review.

For more information on what happens next, please go to the Submitted Opportunities section.

2. In-person workshop

Step 1 - Info

Title

Choose an interesting and engaging title for your workshop. 80 Characters available.

Summary

Provide an overview of your workshop. 20 -120 characters available.

Description

In this section you can add all the details for your workshop. Include details such as the aims of the project, any relevant background information and details of what Voice members will be asked to do in the workshop. Please ensure that you don't include any external sign-up links or ask Voice members to sign up via specific contact details as this causes confusion for members.

Topics

Select 1-2 topics that best match your opportunity.

Opportunity dates and times

Workshop date and time

The date of your workshop must be at least 4 weeks from today's date.

Use the date picker to select the date and the drop down menus to select your start and end times.

Closing date and time

The closing date must be at least 2 weeks before your workshop.

The closing date will be automatically set according to your workshop date. If you would like the opportunity to close earlier than this date, use the date picker to select your date. Use the drop down menu to select the time the opportunity closes.

Once the closing date has passed, members of Voice will not be able to apply for your opportunity and it won't appear on the opportunities listing page. After the closing date you will be able to select people to take part.

Feedback date

Use the date picker to select the date where you can provide feedback to the members who were involved.

Location

Enter the address where your workshop is taking place. In the additional information box, enter any extra details necessary for attendees, e.g. room details, directions on arrival, sign in at reception, etc.

Step 2 – Details

Opportunity image

Select an image to promote your opportunity and appear at the top of the opportunity page.

The image should be relevant to the topic of the opportunity. Avoid using posters as the text won't display in full, as well as being inaccessible to people who use screen readers.

If you have your own image click on 'Select your own' and choose the image from your files. This must be less than 2MB in size. After uploading your image, please tick the box to confirm you have rights to use the image.

If you don't have your own image, click on 'Search Unsplash'. Unsplash is a royalty free image library which you can use to search for a relevant image.

Refreshments

If you are providing refreshments, select 'Yes' so Voice members will be prompted to provide any dietary requirements when they register.

If there will be no refreshments, leave as 'No'.

Participant Eligibility

If you have any specific demographic eligibility criteria, change the toggle to on. If you aren't looking for specific demographics, leave the toggle off.

If you are looking for people within a specific range enter the minimum and/or maximum age. Enter the reason for your age range in the text box below. Leave both drop down menus as 'not set' if you are not looking for specific ages.

If you are looking for specific gender(s) to take part, select the applicable genders. Enter the reason for needing to involve specific genders in the text box below. Leave all as unchecked if you are not looking for specific genders.

If you are looking for people with specific sexual orientation(s) to take part, select the applicable sexual orientation. Enter the reason for needing to involve specific sexual orientations in the text box below. Leave all as unchecked if you are not looking for specific sexual orientations.

If you are looking for specific ethnicities to take part, select the applicable ethnicities. Enter the reason for needing to involve specific ethnicities in the text box below. Leave all as unchecked if you are not looking for specific ethnicities.

All notes where you have explained reasoning for your criteria are for your own personal record and will not be shared with Voice members.

Participant Experience

If you are looking for people with specific experience to be involved, fill in the box with the details. Voice members will be asked to share more information about their experience when they register.

If you do not require attendees to have specific experience, leave blank.

If you require any additional information to help you select people to take part, you can add up to 3 additional questions. Type in your question and click the + button to add your question. To remove a question, click on the bin icon. If you don’t require any additional information, leave blank.

Please note Voice members’ name, age, gender, ethnicity and location and accessibility requirements are automatically collected for all opportunities, so you do not need to ask for this information in this section.

Step 3 – Rewards & Funding

Reward Type

Select the reward Voice members will receive for taking part. If applicable, enter the value of the reward and the description. E.g. £25 Love2Shop voucher

If you are able to reimburse expenses, enter the details of what can be reimbursed and if known, how much. E.g. Travel, parking, carer costs etc.

Funding

If your project hasn’t been funded yet, select pre-funding and select the funder you are applying to. If known, enter the application deadline and date you expect to know the outcome.

If your project has already been funded, select the name of your funder from the drop down menu.

If funding isn’t applicable to your opportunity, select Not applicable from the funders drop down menu.

Step 4 – Data & Docs

Privacy policy

This automatically includes the details of your organisation’s privacy policy and cannot be edited. Details of the privacy policy will be displayed when a Voice member applies or registers to take part in an opportunity.

Supporting documents

If you have any documents that provide extra information about your opportunity that is necessary for Voice members to read, you can upload them here. Leave blank if not required.

Only PDF files are allowed and the maximum file size is 2MB.

Step 5 – Review & Submit

In this section you can review all the information you have provided for the opportunity. To amend any details, click the previous button at the bottom of the page. If you would like to view the opportunity as Voice members will see it, click on the Preview button.

Once the opportunity is ready, click on the Submit button. The opportunity will now be submitted to your research centre or organisation admin for them to review.

For more information on what happens next, please go to the Submitted Opportunities section.

3. Online workshop

Step 1 - Info

Title

Choose an interesting and engaging title for your workshop. 80 Characters available.

Summary

Provide an overview of your workshop. 20 -120 characters available.

Description

In this section you can add all the details for your workshop. Include details such as the aims of the project, any relevant background information and details of what Voice members will be asked to do in the workshop. Please ensure that you don't include any external sign-up links or ask Voice members to sign up via specific contact details as this causes confusion for members.

Topics

Select 1-2 topics that best match your opportunity.

Opportunity dates and times

Workshop date and time

The date of your workshop must be at least 4 weeks from today's date.

Use the date picker to select the date and the drop down menus to select your start and end times.

Closing date and time

The closing date must be at least 2 weeks before your workshop.

The closing date will be automatically set according to your workshop date. If you would like the opportunity to close earlier than this date, use the date picker to select your date. Use the drop down menu to select the time the opportunity closes.

Once the closing date has passed, members of Voice will not be able to apply for your opportunity and it won't appear on the opportunities listing page. After the closing date you will be able to select people to take part.

Feedback date

Use the date picker to select the date where you can provide feedback to the members who were involved.

Links

Enter the URL Voice members will need to join your online workshop. E.g. Zoom, Teams

In the additional information text box, enter details such as the passcode and/or meeting ID. If there is no additional joining information you need to share with Voice members, leave blank.

The link will only be shared with Voice members who you have selected to take part and will not be shared publicly on the opportunity page.

Step 2 – Details

Opportunity image

Select an image to promote your opportunity and appear at the top of the opportunity page.

The image should be relevant to the topic of the opportunity. Avoid using posters as the text won't display in full, as well as being inaccessible to people who use screen readers.

If you have your own image click on 'Select your own' and choose the image from your files. This must be less than 2MB in size. After uploading your image, please tick the box to confirm you have rights to use the image.

If you don't have your own image, click on 'Search Unsplash'. Unsplash is a royalty free image library which you can use to search for a relevant image.

Participant Eligibility

If you have any specific demographic eligibility criteria, change the toggle to on. If you aren't looking for specific demographics, leave the toggle off.

If you are looking for people within a specific range enter the minimum and/or maximum age. Enter the reason for your age range in the text box below. Leave both drop down menus as 'not set' if you are not looking for specific ages.

If you are looking for specific gender(s) to take part, select the applicable genders. Enter the reason for needing to involve specific genders in the text box below. Leave all as unchecked if you are not looking for specific genders.

If you are looking for people with specific sexual orientation(s) to take part, select the applicable sexual orientation. Enter the reason for needing to involve specific sexual orientations in the text box below. Leave all as unchecked if you are not looking for specific sexual orientations.

If you are looking for specific ethnicities to take part, select the applicable ethnicities. Enter the reason for needing to involve specific ethnicities in the text box below. Leave all as unchecked if you are not looking for specific ethnicities.

All notes where you have explained reasoning for your criteria are for your own personal record and will not be shared with Voice members.

Participant Experience

If you are looking for people with specific experience to be involved, fill in the box with the details. Voice members will be asked to share more information about their experience when they register.

If you do not require attendees to have specific experience, leave blank.

If you require any additional information to help you select people to take part, you can add up to 3 additional questions. Type in your question and click the + button to add your question. To remove a question click on the bin icon. If you don't require any additional information, leave blank.

Please note Voice members' name, age, gender, ethnicity and location and accessibility requirements are automatically collected for all opportunities so you do not need to ask for this information in this section.

Step 3 – Rewards & Funding

Reward Type

Select the reward Voice members will receive for taking part. If applicable, enter the value of the reward and the description. E.g. £25 Love2Shop voucher

If you are able to reimburse expenses, enter the details of what can be reimbursed and if known, how much. E.g. Travel, parking, carer costs etc.

Funding

If your project hasn't been funded yet, select pre-funding and select the funder you are applying to. If known, enter the application deadline and date you expect to know the outcome.

If your project has already been funded, select the name of your funder from the drop down menu.

If funding isn't applicable to your opportunity, select Not applicable from the funders drop down menu.

Step 4 – Data & Docs

Privacy policy

This automatically includes the details of your organisation's privacy policy and cannot be edited. Details of the privacy policy will be displayed when a Voice member applies or registers to take part in an opportunity.

Supporting documents

If you have any documents that provide extra information about your opportunity that is necessary for Voice members to read, you can upload them here. Leave blank if not required.

Only PDF files are allowed and the maximum file size is 2MB.

Step 5 – Review & Submit

In this section you can review all the information you have provided for the opportunity. To amend any details, click the previous button at the bottom of the page. If you would like to view the opportunity as Voice members will see it, click on the Preview button.

Once the opportunity is ready, click on the Submit button. The opportunity will now be submitted to your research centre or organisation admin for them to review.

For more information on what happens next, please go to the Submitted Opportunities section.

4. Public Representative

Step 1 - Info

Title

Choose an interesting and engaging title for your opportunity. 80 Characters available.

Summary

Provide an overview of your opportunity. 20 -120 characters available.

Description

In this section you can add all the details for your opportunity. Include details such as the aims of the project, any relevant background information and details of what Voice members involvement in the project will be. Please ensure that you don't include any external sign-up links or ask Voice members to sign up via specific contact details as this causes confusion for members.

Topics

Select 1-2 topics that best match your opportunity.

Dates

Participant commitment

When will Voice members' role start and how long will it last?

Use the date pickers to enter the start and end dates of the Voice members' involvement in the project.

Use the date picker to select the date and the drop down menus to select your start and end times.

Closing date and time

The closing date must be at least 2 weeks from today.

Use the date picker to select your closing date and the drop down menu to select the time the opportunity closes.

Once the closing date and time has passed, members of Voice will not be able to apply for your opportunity and it won't appear on the opportunities listing page. After the closing date you will be able to select people to take part.

Location

Enter the address where your opportunity will take place or where the project is based. In the additional information box, enter any extra details necessary for attendees, e.g. room details, directions on arrival, sign in at reception, etc. -

Step 2 – Details

Opportunity image

Select an image to promote your opportunity and appear at the top of the opportunity page.

The image should be relevant to the topic of the opportunity. Avoid using posters as the text won't display in full, as well as being inaccessible to people who use screen readers.

If you have your own image click on 'Select your own' and choose the image from your files. This must be less than 2MB in size. After uploading your image, please tick the box to confirm you have rights to use the image.

If you don't have your own image, click on 'Search Unsplash'. Unsplash is a royalty free image library which you can use to search for a relevant image.

Refreshments

If you are providing refreshments, select 'Yes' so Voice members will be prompted to provide any dietary requirements when they register.

If there will be no refreshments, leave as 'No'.

Participant Eligibility

If you have any specific demographic eligibility criteria, change the toggle to on. If you aren't looking for specific demographics, leave the toggle off.

If you are looking for people within a specific range enter the minimum and/or maximum age. Enter the reason for your age range in the text box below. Leave both drop down menus as 'not set' if you are not looking for specific ages.

If you are looking for specific gender(s) to take part, select the applicable genders. Enter the reason for needing to involve specific genders in the text box below. Leave all as unchecked if you are not looking for specific genders.

If you are looking for people with specific sexual orientation(s) to take part, select the applicable sexual orientation. Enter the reason for needing to involve specific sexual orientations in the text box below. Leave all as unchecked if you are not looking for specific sexual orientations.

If you are looking for specific ethnicities to take part, select the applicable ethnicities. Enter the reason for needing to involve specific ethnicities in the text box below. Leave all as unchecked if you are not looking for specific ethnicities.

All notes where you have explained reasoning for your criteria are for your own personal record and will not be shared with Voice members.

Participant Experience

If you are looking for people with specific experience to be involved, fill in the box with the details. Voice members will be asked to share more information about their experience when they register.

If you do not require attendees to have specific experience, leave blank.

If you require any additional information to help you select people to take part, you can add up to 3 additional questions. Type in your question and click the + button to add your question. To remove a question click on the bin icon. If you don't require any additional information, leave blank.

Please note Voice members' name, age, gender, ethnicity and location and accessibility requirements are automatically collected for all opportunities so you do not need to ask for this information in this section.

Step 3 – Rewards & Funding

Reward Type

Select the reward Voice members will receive for taking part. If applicable, enter the value of the reward and the description. E.g. £25 Love2Shop voucher

If you are able to reimburse expenses, enter the details of what can be reimbursed and if known, how much. E.g. Travel, parking, carer costs etc.

Funding

If your project hasn't been funded yet, select pre-funding and select the funder you are applying to. If known, enter the application deadline and date you expect to know the outcome.

If your project has already been funded, select the name of your funder from the drop down menu.

If funding isn't applicable to your opportunity, select Not applicable from the funders drop down menu.

Step 4 – Data & Docs

Privacy policy

This automatically includes the details of your organisation's privacy policy and cannot be edited. Details of the privacy policy will be displayed when a Voice member applies or registers to take part in an opportunity.

Supporting documents

If you have any documents that provide extra information about your opportunity that is necessary for Voice members to read, you can upload them here. Leave blank if not required.

Only PDF files are allowed and the maximum file size is 2MB.

Step 5 – Review & Submit

In this section you can review all the information you have provided for the opportunity. To amend any details, click the previous button at the bottom of the page. If you would like to view the opportunity as Voice members will see it, click on the Preview button.

Once the opportunity is ready, click on the Submit button. The opportunity will now be submitted to your research centre or organisation admin for them to review.

For more information on what happens next, please go to the Submitted Opportunities section.

5. Study participant

Step 1 - Info

Title

Choose an interesting and engaging title for your opportunity. 80 Characters available.

Summary

Provide an overview of your opportunity. 20 -120 characters available.

Description

In this section you can add all the details for your opportunity. Include details such as the aims of the research study, any relevant background information and details of what taking part in the study involves. Please ensure that you don't include any external sign-up links or ask Voice members to sign up via specific contact details as this causes confusion for members.

Topics

Select 1-2 topics that best match your opportunity.

Dates

Opportunity closing date and time

Use the date picker the select the date and time you would like to recruit participants until and you would like the opportunity to close.

Once the closing date and time has passed, members of Voice will not be able to apply for your opportunity and it won't appear on the opportunities listing page.

Feedback date

Use the date picker to select the date where you can provide feedback to the members who were involved.

Time commitment

Enter details of how long taking part in the study will take. E.g. 2 x 30 minute sessions

Location

Enter the address where your opportunity will take place or where the project is based. In the additional information box, enter any extra details necessary for attendees, e.g. room details, directions on arrival, sign in at reception, etc.

Step 2 – Details

Opportunity image

Select an image to promote your opportunity and appear at the top of the opportunity page.

The image should be relevant to the topic of the opportunity. Avoid using posters as the text won't display in full, as well as being inaccessible to people who use screen readers.

If you have your own image click on ‘Select your own’ and choose the image from your files. This must be less than 2MB in size. After uploading your image, please tick the box to confirm you have rights to use the image.

If you don’t have your own image, click on ‘Search Unsplash’. Unsplash is a royalty free image library which you can use to search for a relevant image.

Refreshments

If you are providing refreshments, select ‘Yes’ so Voice members will be prompted to provide any dietary requirements when they register.

If there will be no refreshments, leave as ‘No’.

Participant Eligibility

If you have any specific demographic eligibility criteria, change the toggle to on. If you aren’t looking for specific demographics, leave the toggle off.

If you are looking for people within a specific range enter the minimum and/or maximum age. Enter the reason for your age range in the text box below. Leave both drop down menus as ‘not set’ if you are not looking for specific ages.

If you are looking for specific gender(s) to take part, select the applicable genders. Enter the reason for needing to involve specific genders in the text box below. Leave all as unchecked if you are not looking for specific genders.

If you are looking for people with specific sexual orientation(s) to take part, select the applicable sexual orientation. Enter the reason for needing to involve specific sexual orientations in the text box below. Leave all as unchecked if you are not looking for specific sexual orientations.

If you are looking for specific ethnicities to take part, select the applicable ethnicities. Enter the reason for needing to involve specific ethnicities in the text box below. Leave all as unchecked if you are not looking for specific ethnicities.

All notes where you have explained reasoning for your criteria are for your own personal record and will not be shared with Voice members.

Participant Experience

If you are looking for people with specific experience to be involved, fill in the box with the details. Voice members will be asked to share more information about their experience when they register.

If you do not require attendees to have specific experience, leave blank.

If you require any additional information to help you select people to take part, you can add up to 3 additional questions. Type in your question and click the + button to add your question. To remove a question click on the bin icon. If you don’t require any additional information, leave blank.

Please note Voice members’ name, age, gender, ethnicity and location and accessibility requirements are automatically collected for all opportunities so you do not need to ask for this information in this section.

Step 3 – Rewards & Funding

Reward Type

Select the reward Voice members will receive for taking part. If applicable, enter the value of the reward and the description. E.g. £25 Love2Shop voucher

If you are able to reimburse expenses, enter the details of what can be reimbursed and if known, how much. E.g. Travel, parking, carer costs etc.

Funding

If your project hasn't been funded yet, select pre-funding and select the funder you are applying to. If known, enter the application deadline and date you expect to know the outcome.

If your project has already been funded, select the name of your funder from the drop down menu.

If funding isn't applicable to your opportunity, select Not applicable from the funders drop down menu.

Step 4 – Data & Docs

Privacy policy

This automatically includes the details of your organisation's privacy policy and cannot be edited. Details of the privacy policy will be displayed when a Voice member applies or registers to take part in an opportunity.

Supporting documents

If you have any documents that provide extra information about your opportunity that is necessary for Voice members to read, you can upload them here. Leave blank if not required.

Only PDF files are allowed and the maximum file size is 2MB.

Step 5 – Review & Submit

In this section you can review all the information you have provided for the opportunity. To amend any details, click the previous button at the bottom of the page. If you would like to view the opportunity as Voice members will see it, click on the Preview button.

Once the opportunity is ready, click on the Submit button. The opportunity will now be submitted to your research centre or organisation admin for them to review.

6. Survey

Step 1 - Info

Title

Choose an interesting and engaging title for your opportunity. 80 Characters available.

Summary

Provide an overview of your opportunity. 20 -120 characters available.

Description

In this section you can add all the details for your opportunity. Include details such as the aims of the survey and any relevant background information. Please ensure that you don't include any external sign-up links or ask Voice members to sign up via specific contact details as this causes confusion for members.

Topics

Select 1-2 topics that best match your opportunity.

Dates

Survey closing date and time

Use the date picker the select the date and time you would like the survey to be open for.

Once the closing date and time has passed, members of Voice will not be able to take part in your survey and it won't appear on the opportunities listing page.

Feedback date

Use the date picker to select the date where you can provide feedback to the members who were involved.

Time commitment

Enter details of how long it will take to complete the survey.

Links

Survey link

Enter the link to the survey.

If there is any additional information Voice members will need to access the survey, enter this in the text box below. Leave blank if there is no additional information to share.

Step 2 – Details

Opportunity image

Select an image to promote your opportunity and appear at the top of the opportunity page.

The image should be relevant to the topic of the opportunity. Avoid using posters as the text won't display in full, as well as being inaccessible to people who use screen readers.

If you have your own image click on 'Select your own' and choose the image from your files. This must be less than 2MB in size. After uploading your image, please tick the box to confirm you have rights to use the image.

If you don't have your own image, click on 'Search Unsplash'. Unsplash is a royalty free image library which you can use to search for a relevant image.

Participant Eligibility

If you have any specific demographic eligibility criteria, change the toggle to on. If you aren't looking for specific demographics, leave the toggle off.

If you are looking for people within a specific range enter the minimum and/or maximum age. Enter the reason for your age range in the text box below. Leave both drop down menus as 'not set' if you are not looking for specific ages.

If you are looking for specific gender(s) to take part, select the applicable genders. Enter the reason for needing to involve specific genders in the text box below. Leave all as unchecked if you are not looking for specific genders.

If you are looking for people with specific sexual orientation(s) to take part, select the applicable sexual orientation. Enter the reason for needing to involve specific sexual orientations in the text box below. Leave all as unchecked if you are not looking for specific sexual orientations.

If you are looking for specific ethnicities to take part, select the applicable ethnicities. Enter the reason for needing to involve specific ethnicities in the text box below. Leave all as unchecked if you are not looking for specific ethnicities.

All notes where you have explained reasoning for your criteria are for your own personal record and will not be shared with Voice members.

Participant Experience

If you are looking for people with specific experience to be involved, fill in the box with the details. Voice members will be asked to share more information about their experience when they register.

If you do not require attendees to have specific experience, leave blank.

If you require any additional information to help you select people to take part, you can add up to 3 additional questions. Type in your question and click the + button to add your question. To remove a question click on the bin icon. If you don't require any additional information, leave blank.

Please note Voice members' name, age, gender, ethnicity and location and accessibility requirements are automatically collected for all opportunities so you do not need to ask for this information in this section.

Step 3 – Rewards & Funding

Reward Type

Select the reward Voice members will receive for taking part. If applicable, enter the value of the reward and the description. E.g. £25 Love2Shop voucher

Funding

If your project hasn't been funded yet, select pre-funding and select the funder you are applying to. If known, enter the application deadline and date you expect to know the outcome.

If your project has already been funded, select the name of your funder from the drop down menu.

If funding isn't applicable to your opportunity, select Not applicable from the funders drop down menu.

Step 4 – Data & Docs

Privacy policy

This automatically includes the details of your organisation's privacy policy and cannot be edited. Details of the privacy policy will be displayed when a Voice member applies or registers to take part in an opportunity.

Supporting documents

If you have any documents that provide extra information about your opportunity that is necessary for Voice members to read, you can upload them here. Leave blank if not required.

Only PDF files are allowed and the maximum file size is 2MB.

Step 5 – Review & Submit

In this section you can review all the information you have provided for the opportunity. To amend any details, click the previous button at the bottom of the page. If you would like to view the opportunity as Voice members will see it, click on the Preview button.

Once the opportunity is ready, click on the Submit button. The opportunity will now be submitted to your research centre or organisation admin for them to review.

Submitted opportunities

Your opportunity will now appear in your organisation admin's dashboard to review and approve. The admin will have the option to either approve, request changes, or reject your opportunity.

Approve

If your opportunity is approved by the admin, you will receive an email to let you know that it has been approved and published on the Voice platform. The status of the opportunity in your dashboard will change from Submitted to Approved. Voice members will now be able to view and apply to take part in your opportunity.

Changes required

The admin might ask you to make some changes to the opportunity or add additional information.

You will receive an email to let you know the admin has requested you to make some changes. The status of the opportunity will change to 'Returned'. To open the opportunity, click on the name of the opportunity or the arrow icon. You can view the details of the change requests in the activity tab of the opportunity.

To make changes to the opportunity, click the Edit & Resubmit button at the top of the page. Going through each step by clicking the Next button, make the necessary changes and click the Submit button. The admin will be notified you have re-submitted your opportunity. The status of the opportunity will change to Submitted.

Reject

If your opportunity falls outside the remit of Voice, the admin will reject your opportunity. This means the opportunity will not be published on the Voice platform. You will receive an email to let you know and the opportunity will be moved into the 'Completed' tab.

Managing opportunities

1. Edit an opportunity

If you need to make any changes to your opportunity after it has been published, please contact your organisation admin.

2. Selecting participants

Selecting participants is not needed for the following opportunity types:

- Event
- Survey

You will need to wait until the opportunity has closed to select people to take part in the following opportunity types:

- In person workshop
- Online workshop
- Public representative

You will receive an email to remind you of when the opportunity closes. You will have 7 days to make your selection and notify Voice members of the outcome of their application.

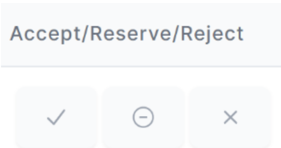
For these opportunity types, you also have the option to create a 'Reserve' list of people to invite if any of your selected participants can no longer take part.

You can select people to take part in the opportunity at any time for the following opportunity types:

- Study participant

If your opportunity asked for specific experience or additional questions, you can view each applicants response in the opportunity overview page by clicking on the 'Answers' button next to each applications name. You can view all responses together by clicking on the ellipsis icon at the top of the page next to the opportunity name and selecting 'Data Export'. This will download anonymised responses into a csv file. You can also use this option to download a registration list for events.

You must let all members know the outcome of their application by selecting one of the icons next to their name.



Use the tick icon to accept the application.

Use the circle icon in the middle to put the applicant on the reserve list. This means that if any spaces become available later, you will be able to invite them to take part.

Use the cross icon to decline the application.

To re-start your selection, you can click the undo button. When you are happy with your selection, click the Confirm selection button.

An email will then be automatically sent to each member letting them know the outcome of their application. The email sent to the selected members will prompt them to confirm their attendance.

3. Managing participants

Once you have made your selection, the members will be automatically moved into the Participants tab and Reserves tab if applicable.

In the participants tab you will be able to view any accessibility and/or dietary requirements the member has provided.

If you need to get in touch with your participants click the Message all participants button. A box will appear for you to enter your Subject and Message. Click send to send the message, this will email all the members in the participants list.

If you need to contact an individual participant, click on the Options drop down menu next to their name and select Send Message.

If any of your selected participants are no longer able to take part, they can withdraw from the opportunity. If this happens, you will receive an email to let you know. If you have anyone on your reserve list, go to the Reserves tab to view their details. To invite them to take part, click on the Invite button next to their name. This will send an email to them to let them know a space has become available.

If anyone gets in touch with you directly to withdraw from the opportunity, you can use the Options drop down menu next to their name to remove them from the participants list.

4. Cancelling an opportunity

If for any reason you need to cancel the opportunity, click on the ellipsis icon at the top of the page and select 'Cancel Opportunity'. A modal will appear where you will be asked to select the reason and enter any additional information and click confirm. This will send an email to all Voice members on the participants list to let them know the opportunity is cancelled and the reason(s) why.

5. Completing an opportunity

After an opportunity has passed, you will receive an email to remind you to 'Complete' your opportunity. In the dashboard, click on the opportunity which is completed, click on the ellipsis icon and select 'Complete Opportunity'. This will automatically move the your opportunity from the 'Active' tab to the 'Completed tab' in your opportunities dashboard.

Groups

All groups you have created can be found in the Groups tab in the dashboard. There are three tabs for Groups: Active; Draft and Completed.

The 'Active' groups tab includes all groups which are approved or that you have submitted or ones that have been returned to you to make changes.

The 'Draft' groups tab includes all groups where you have started creating the group, but haven't submitted.

The 'Completed' groups tab includes all groups that have been closed or that have been rejected.

Use the search bar, to search for a particular group or filter by group type, status etc. in each tab.

Create a Group

To create a group, click on the +New Group button.

Group Type

First, you will need to select the type of group you want to create. Select the type from the dropdown menu.

Public – Anyone is able to join the group

Gated – Members have to request to join the group, you will need accept/decline requests to join

Group Title

Enter the name of your group. Maximum of 80 characters.

Summary

Enter a description of your group to let people looking at the website know what it is, and what the group page is for. This will let members know if anyone is welcome to join or if there is specific experience required and help them decide if they want to join.

This will be visible to everyone.

Content

This section will only be visible to group members.

Enter the main content for your group page here.

Topics

Please choose up to two topics for your group. You must select at least one.

Group image

Select an image which relates to the main theme of your group.

If you have your own image click on 'Select your own' and choose the image from your files. This must be less than 2MB in size. After uploading your image, please tick the box to confirm you have rights to use the image.

If you don't have your own image, click on 'Search Unsplash'. Unsplash is a royalty free image library which you can use to search for a relevant image.

Group resources

If you want group members to have access to documents, upload them here.

These must be PDF files and the maximum file size is 2MB.

Participant experience

If you would like group members to have specific experience, enter the details here. Voice members will be asked to share more information about their experience when they join or request to join the group.

If you do not require group members to have specific experience, leave blank.

If you require any additional information about group members, you can add up to 3 additional questions. Type in your question and click the + button to add your question. To remove a question click on the bin icon. If you don't require any additional information, leave blank.

Please note Voice members' name, age, gender, ethnicity and location are automatically collected for all groups so you do not need to ask for this information in this section.

Contact details

Enter the email address you would like members of the group to contact you on.

You can also enter a telephone number if needed.

Submit & Publish

If you have finished creating your group, click the Submit for approval button. This will notify your organisation's admin.

If you aren't ready to submit the group, click save for later and the group will be saved in your draft groups tab.

Submitted groups

Your group will now appear in your organisation admin's dashboard to review and approve. The admin will have the option to either approve, request changes, or reject your group.

Approve

If your group is approved by the admin, you will receive an email to let you know that it has been approved and published on the Voice platform. The status of the group in your dashboard will change from Submitted to Approved. Voice members will now be able to view and either join or request to join your group.

Changes required

The admin might ask you to make some changes to the group or add additional information.

You will receive an email to let you know the admin has requested you to make some changes. The status of the group will change to 'Returned'. To open the group, click on the name of the opportunity or the arrow icon. You can view the details of the change requests in the activity tab of the opportunity.

To make changes to the group, click the Edit button at the top of the page. Make the necessary changes and click the Submit for approval button. The admin will be notified you have re-submitted your group. The status of the group will change to Submitted.

Reject

If your group falls outside the remit of Voice, the admin will reject your group. This means the group will not be published on the Voice platform. You will receive an email to let you know and the group will be moved into the 'Completed' tab.

Managing groups

1. Edit a group

Click on the arrow icon or the group title in the group page in the dashboard to open the group overview page. To edit the group, click the edit button at the top right-hand side of the screen. Make the necessary changes and click the 'Update' button at the bottom of the page.

2. Accept group members

If your group asked for specific experience or additional questions, you can view each response in the group overview page by clicking on the 'Answers' button next to each member's name.

For gated groups, you must let all members know the outcome of their request by selecting one of the icons next to their name. When someone requests to join your gated group, you will receive an email to let you know.

Use the tick icon to accept the request.

Use the cross icon to decline the decline.

To re-start your selection, you can click the undo button. When you are happy with your selection, click the Confirm selection button.

An email will then be automatically sent to each member letting them know the outcome of their request to join the group. Once they have been accepted to join a group, the member will have access to the content on the group page.

3. Managing group members

If you need to get in touch with the members of your group, click the Message all group members button. A box will appear for you to enter your Subject and Message. Click send to send the message, this will send an email to all group members.

If you need to contact an individual group member, click on the Options drop down menu next to their name and select Send Message.

To remove a member of the group, click on the Options drop down menu next to their name and select Remove member.

4. Group discussions

Each group page has a discussion area where all members can post comments and reply to comments. To view and reply to the comments, visit the group page.

5. Closing a group

If the group page is no longer needed, you can close a group. Click on the group name or arrow icon to open the group overview page and click the ‘Close’ button at the top of the screen. Enter the reason for closing the group and click confirm. This will send an email to all group members to let them know the group has closed, and the reason why.

Articles

All articles you have created can be found in the Articles tab in the dashboard. There are three tabs for Articles Active; Draft and Archive.

The ‘Active’ articles tab includes all articles which are approved and published or that you have submitted or returned to you for changes.

The ‘Draft’ articles tab includes all articles you have started writing, but not submitted.

The ‘Archive’ articles tab includes any draft articles that have been deleted or any rejected articles.

Use the search bar, to search for a particular article or filter by status etc. in each tab.

Create an article

To create a new article click on the + New Article button at the top of the page.

Title

Create a short and snappy title for your article. 80 characters maximum.

Content

Enter the full article/news item/case study/blog in this section.

Topics

Select at least one and up to two topics related to your article.

Image

Select an image to appear with your article.

If you have your own image click on 'Select your own' and choose the image from your files. This must be less than 2MB in size. After uploading your image, please tick the box to confirm you have rights to use the image.

If you don't have your own image, click on 'Search Unsplash'. Unsplash is a royalty free image library which you can use to search for a relevant image.

Publish

If your article is ready to publish, click on the Submit button. An email will be sent to your organisation's admin for approval.

If your article isn't ready to submit, click 'Save to drafts'. This will save your article in your drafts tab.

Submitted articles

Your article will now appear in your organisation admin's dashboard to review and approve. The admin will have the option to either approve, request changes, or reject your article.

Approve

If your article is approved by the admin, you will receive an email to let you know that it has been approved and published on the Voice platform. The status of the article in your dashboard will change from Submitted to Approved. Voice members will now be able to view the news item.

Changes required

The admin might ask you to make some changes to the article or add additional information.

You will receive an email to let you know the admin has requested you to make some changes. The status of the article will change to 'Returned'. To open the article, click on the name of the opportunity or the arrow icon. You can view the details of the change requests in the activity tab of the opportunity.

To make changes to the article, click the Edit button at the top of the page. Make the necessary changes and click the Submit button. The admin will be notified you have re-submitted your article. The status of the article will change to Submitted.

Reject

If your article falls outside the remit of Voice, the admin will reject your article. This means the article will not be published on the Voice platform. You will receive an email to let you know and the article will be moved into the 'Archive' tab.

Editing articles

If you need to make any changes to your article after it has been published, please contact your organisation admin.