

Blue 8

Your questions answered

Topics

- **Upgrading your Blue instance**
- **Self Enrollment**
- **Fillout Experience**
- **Mid-Term Evaluations**
- **Question Personalization**
- **Subject Management**
- **Task Settings / Schedule**
- **User Impersonation**

Poll: Have you watched/participated in any of the previous Blue 8 webinars?

- Yes
- Not yet

What we won't cover today

Overview of Blue 8 changes in features and functionality

- Please watch the previous Blue 8 webinars, which can be accessed via the Archived Webinars on www.bluenotesgroup.com
- Search in the Blue Help Center for “Blue 8” to find Release Notes, a Welcome Guide, FAQs, and more!

Questions specific to your instance/solution of Blue

- Your Professional Services team or Customer Success Manager are your best resources for questions related to your unique usage of Blue

Training on Blue 8

- If you have an Explorance Academy Subscription, updated Blue 8 training will be available in the next couple of months
- Reach out to your Professional Services team or Customer Success Manager if you need individual support

Upgrading Your Blue Instance

Blue 8 is available now!

You can upgrade your Blue instance when any live projects have ended.

Reach out to your Professional Services Team when you are ready to upgrade!

Upgrading: Impact on Past Projects

- **How will projects created in Blue 7 work in Blue 8?**
- **Will archived projects be converted to Blue 8?**
- **Will existing messages and text rollover from Blue 7 when we update to Blue 8?**

Self Enrollment

How does Self-Enrollment work?

- Enable self-enrollment in the Fillout Task > Advanced Options
- Authentication is required to Enable self-enrollment

Advanced options [Hide](#)

Access and synchronization

- Allow rater to modify their responses after submitting
- Limit fillout window to specific days and times
- Apply updated task dates to all open tasks

Changing the dates for open tasks is done automatically every time the project is saved. Any date changes that are made from Project management or a Subject management task will not be overwritten.

Start conditions

- Rater selection
- Rater selection signing
- Question personalization
- Question personalization signing

Authentication

- Require authentication
 - Include sign out link
 - Enable self-enrollment
 - Display demographics in Courses list

Subject field

 SA

***Course & Instructor Evaluation**
Hi Scott Abraham, you have been invited to provide feedback for the fo... [Show more](#)

[+ Add Courses](#)

101848 Modern Art	Completed	Ends on: 2021-05-01
102033 Graphics	Completed	Ends on: 2021-05-01
201821 Bioarchaeology	Open	Ends on: 2021-05-01

Self Enrollment

How does Self-Enrollment work?

- End users (raters) select what to evaluate
- Useful for conference or seminar surveys but can also be used in subject-based surveys
- Can select demographic data to display on selection form (e.g. Department, School)
- Recommend using SSO
- Only available if your Blue instance is hosted with Explorance

Fillout Experience

Can you unselect/clear an answer in single selection and leave it unanswered?

Please indicate your rating.

The quality of the food

Terrible

Poor

Average

Good

Great

Please indicate your rating.

The quality of the food

Terrible

Poor

Average

Good

Great

Optimized Fillout Experience on Mobile Devices

Do the single selection tables appear better on mobile?

 explorance.

Evaluation for 101815 Cultures of Modern Canada

Please indicate your rating.	Terrible	Poor	Average	Good	Great
The quality of the food	<input type="radio"/>				
The number of items	<input type="radio"/>				
The person's fashion sense	<input type="radio"/>				
The kind of car you currently own	<input type="radio"/>				

 explorance. (BB)

Evaluation for 101815 Cultures of Modern Canada Save

Please indicate your rating.

The quality of the food

Terrible

Poor

Average

Good

Great

Mid-Term Evaluations

How are mid-term evaluations set up in Blue 8?

Configure delegation settings

Subject evaluation participation

Allow task owner to set primary subject participation

Participation

Allow task owner to set secondary subject participation

Participation

Evaluation medium

Pending

MC Course & Instructor Evaluation - Midterm
101848 Modern Art

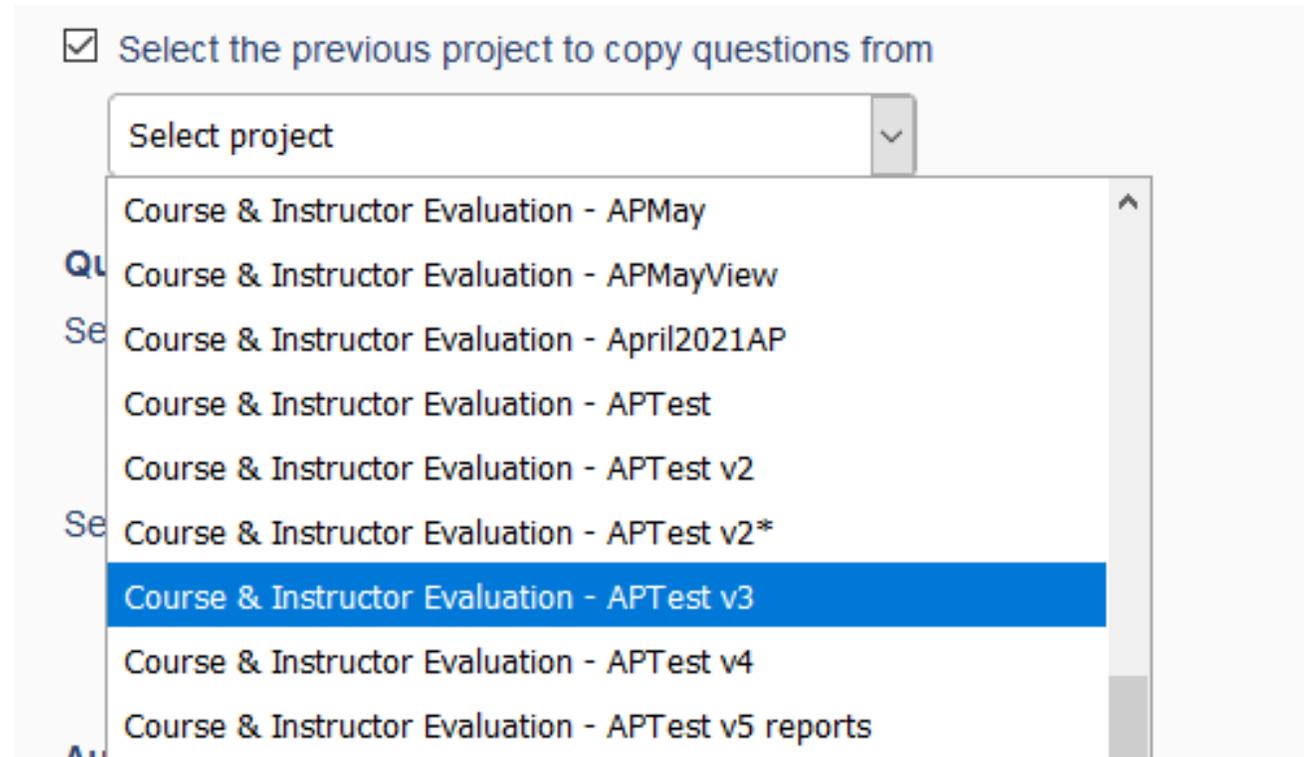
 **Get started!**
Create the evaluation to begin.
Before: **2021-06-04**

Create

Question Personalization: Copy from previous project

How does QP – Copy from previous project work?

- **Enable in the QP Task > Configure > Advanced options**



Question Personalization: Copy from Previous Project

How does “Copy from Previous Project” Work?

- Can only select a single past project
- Can copy from projects that were created in Blue 7
- Past project has to use the same definition
- Customized question text of past project is copied

Question Personalization: Question Limits

How do the limits work with Question Personalization?

Project Administrator QP Task Settings
– Primary/Secondary Subject Pairings
(incl. Multiple Secondary)

Question selection quota

Selectable and customizable questions - Courses quota

Minimum 1 Maximum 2

Selectable and customizable questions - Instructor

Minimum 1 Maximum 2

Project Administrator QP Task Settings
– Subject Definition

Question selection quota

Optional and customizable questions quota

Minimum Maximum

Question personalization for 101815 Cultures of Modern Canada (Annette Fong)

Number of questions: Min: 0 Max: 3 ▲ Maximum number of questions reached for this questionnaire

QP Owner View

View all

Preview Save Submit

- The course instructor expressed an interest in student understanding when explaining course concepts. Exclude Included
- The course instructor encouraged students to be actively aware of their learning throughout the course. Exclude Included
- The course instructor provided opportunity for questions during lectures. Excluded Include

Go to top

Student Engagement - Section 2

Max: 0 ✓

Show question previews

- The course instructor provided opportunity for classroom discussion. Exclude Included
- The course instructor provided opportunity for group work with respect to classroom activities, assignment and/or projects. Exclude Included
- The course instructor ensured classroom discussions were focused. Excluded Include

Question Personalization: Triggers

Will triggers work with Question Personalization?

▼ How would you rate this course overall?

▼ How would you rate your instructor?

▼ Civil Engineering Question

▼ Selectable Question Number One

▼ Selectable Question Number Two

▼ Personalized Instructor Question One

▼ Personalized Instructor Question Two

▼ How would you rate this course overall?

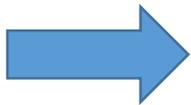
▼ How would you rate your instructor?

▼ Selectable Question Number One

▼ Selectable Question Number Two

▼ Personalized Instructor Question One

▼ Personalized Instructor Question Two



Subject View Management (SVM) Task Status

Can we hide the Task status from the Subject Management View tiles?

Advanced options [Hide](#)

Access and synchronization

Apply updated task dates to all open tasks

Changing the dates for open tasks is done automatically every time the project is saved. Any date changes that are made from Project management or a Subject management task will not be overwritten.

Authentication

Require authentication

Include sign out link

Raw data

Include a link to download response data

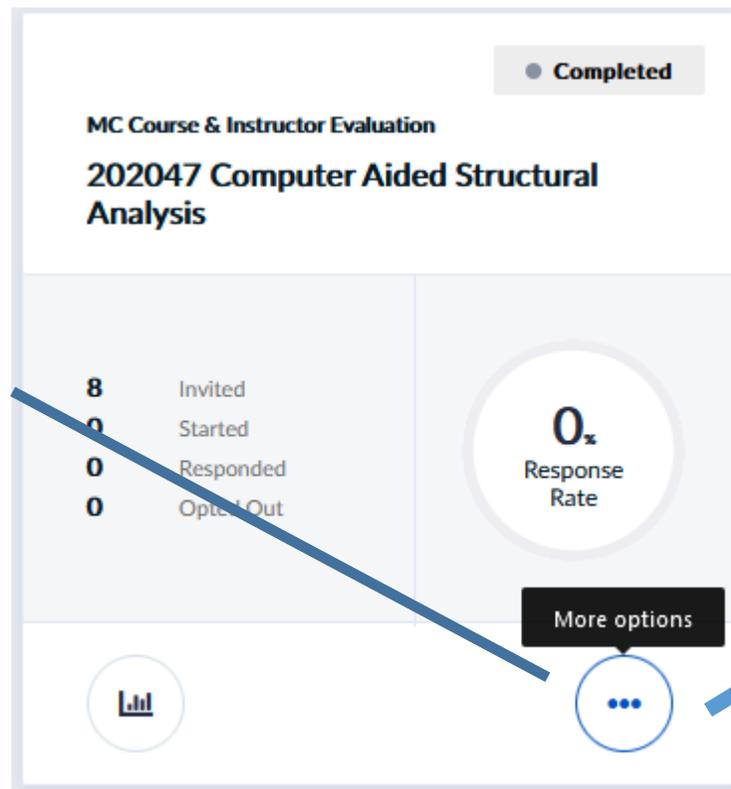
Response details

Show task status

This is disabled by default. Task status will not display unless enabled in the Task Settings for Subject View Management > Advanced Settings.

SVM Task Status

If “Show Task Status” is enabled, click the 3 horizontal dots on the bottom corner of the Subject tile, then select “View Respondents” to view the Task Status for each rater.



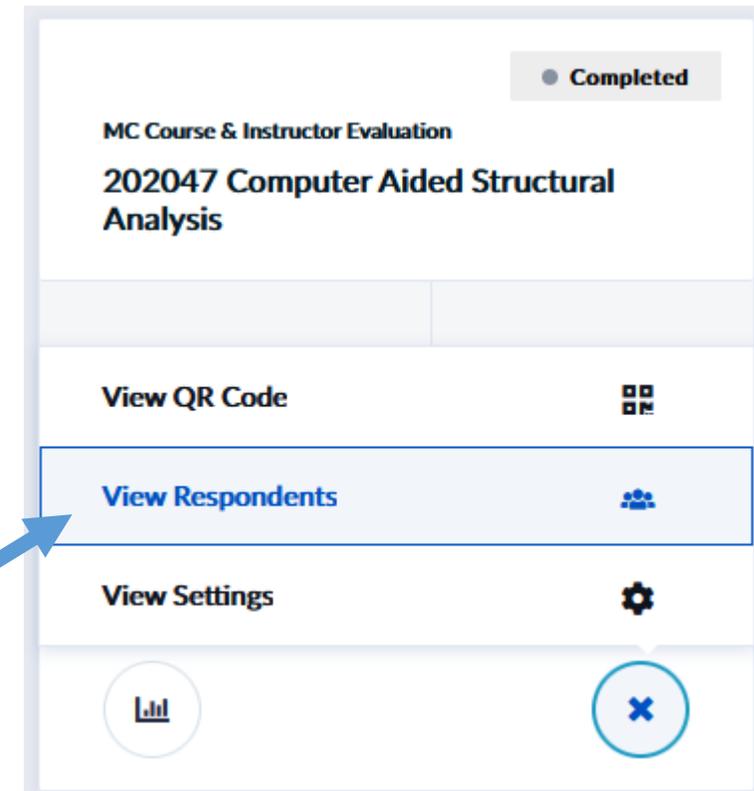
Completed

MC Course & Instructor Evaluation
202047 Computer Aided Structural Analysis

8	Invited
0	Started
0	Responded
0	Opted Out

0% Response Rate

More options



Completed

MC Course & Instructor Evaluation
202047 Computer Aided Structural Analysis

View QR Code 

View Respondents 

View Settings 

SVM Task Status: Enabled

Response details for
202047 Computer Aided Structural Analysis

Cancel



Given Name	Family Name	Course	User	Email Status	Task Status
Abbas	Agarwal	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent	Not Completed
Keyly	Allen	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent	Not Completed
Michael Scott	Agarwal	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent	Not Completed
Nicole	Ackerman	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent	Not Completed
Scott	Abraham	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent	Not Completed
Setareh	Ahn	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent	Not Completed
Sophia	Adler	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent	Not Completed
Ye	Alma	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent	Not Completed

Resend invitation emails to all raters who have not yet submitted. 

SVM Task Status: Disabled

Response details for
202047 Computer Aided Structural Analysis

Cancel 

Given Name	Family Name	Course	User	Email Status
Abbas	Agarwal	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent
Keyly	Allen	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent
Michael Scott	Agarwal	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent
Nicole	Ackerman	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent
Scott	Abraham	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent
Setareh	Ahn	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent
Sophia	Adler	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent
Ye	Alma	202047 Computer Aided Structural Analysis	[Multiple context]	Not sent

Resend invitation emails to all raters who have not yet submitted. 

SVM: Emails to Task Owner

Can we disable the ability for Subject Management Task owners to stop receiving reminder emails?

The image illustrates a three-step process to manage reminder emails for a task owner:

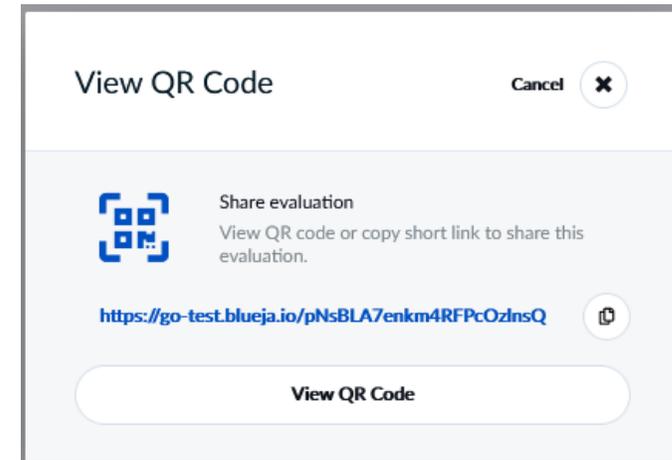
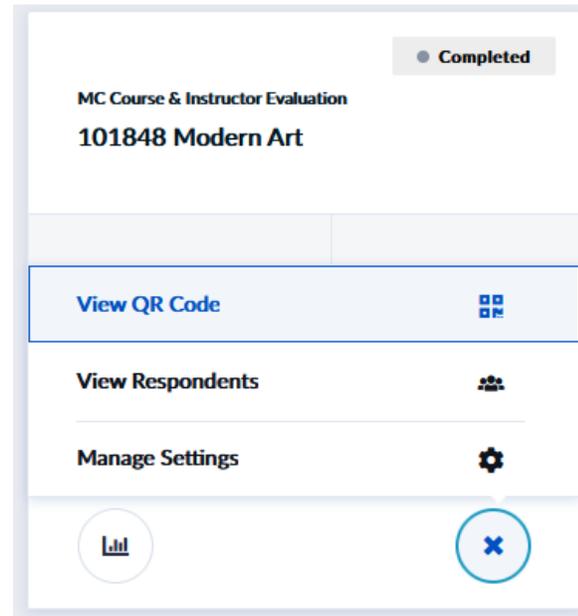
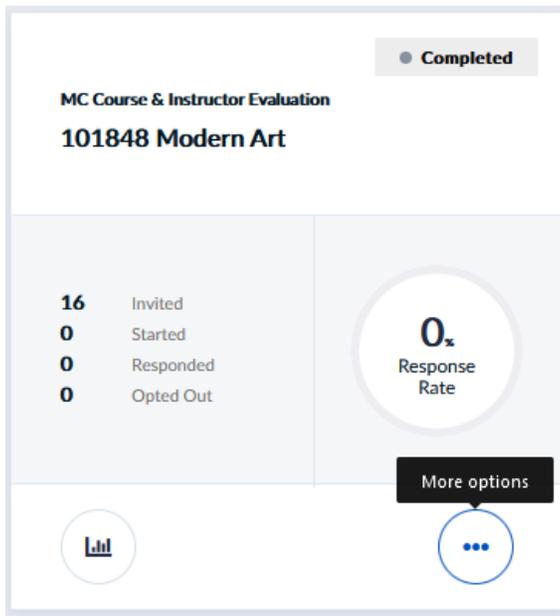
- Task Overview:** A task card for "MC Course & Instructor Evaluation 102033 Graphics" is shown. It includes a "Completed" status, a "Response Rate" of 0%, and a list of participant counts: 27 Invited, 0 Started, 0 Responded, and 0 Opted Out. A "More options" menu is visible at the bottom right.
- Manage Settings:** The "More options" menu is expanded, and the "Manage Settings" option is selected. This leads to a settings page for the task.
- Settings Dialog:** A settings dialog is displayed with the title "MC Course & Instructor Evaluation 102033 Graphics" and a "Manage by" date of "2021-06-06". A checkbox is present with the text "I have finished all my tasks, please stop sending me reminders". An "Update" button is located at the bottom of the dialog.

SVM: Turn Off Emails to SM Task owner

<p>Subject management for 101848 Modern Art (2 Instructors)</p> <p>N/A  <input checked="" type="checkbox"/> Supervisor QP SM: Bernard Baker (Started)</p> <p>N/A  <input checked="" type="checkbox"/> Supervisor QP SM: Mandy Bush (Started)</p> <p>STARTED  Start Date: 2021-05-18 14:20  End Date: 2021-06-06 13:13  Schedule: SM Task</p>	<p> Not Completed</p>
<p>Subject management for 102033 Graphics (Bernard Baker)</p> <p>N/A  <input checked="" type="checkbox"/> Supervisor QP SM: Bernard Baker (Started)</p> <p>STARTED  Start Date: 2021-05-18 14:20  End Date: 2021-06-06 13:13  Schedule: SM Task</p>	<p> Completed</p>

SVM: QR Code and Custom Link

If we use the QR code or shared link, will a student need to login before they can participate in the survey?



SVM: QR Code and Custom Link



101848 Modern Art

Students

<https://go-test.blueja.io/pNsBLA7enkm4RFPcOzlnsQ>



To access the evaluation, scan this QR code with your mobile phone.

SVM: Tile View

Do SVM Task Owners (e.g. Instructors) only see one Subject at a time on their Dashboard?

Clicking a single subject displays the tile for that one subject

- View and manage questionnaire settings for 101815 Cultures of Modern Canada in the Course and Instructor Evaluation DS2021
Mon, Jun 28, 2021 11:59 PM Open
- View and manage questionnaire settings for 101815 Cultures of Modern Canada in the Course and Instructor Evaluation DS2021
Mon, Jun 28, 2021 11:59 PM Open
- View and manage questionnaire settings for 201821 Bioarchaeology in the Course and Instructor Evaluation DS2021
Mon, Jun 28, 2021 11:59 PM Open
- View and manage questionnaire settings for 201821 Bioarchaeology in the Course and Instructor Evaluation DS2021
Mon, Jun 28, 2021 11:59 PM Open



Subject Management

Hi Annette Fong, you have been invited to manage the following subjects.

Search...

Copy of Course and Instructor Evaluation DS2021
● Live

101815 Cultures of Modern Canada

22	Invited	<div style="border: 1px solid #ccc; border-radius: 50%; width: 60px; height: 60px; display: flex; align-items: center; justify-content: center; margin: 0 auto;"> 0% Response Rate </div>
0	Started	
0	Responded	
0	Opted Out	

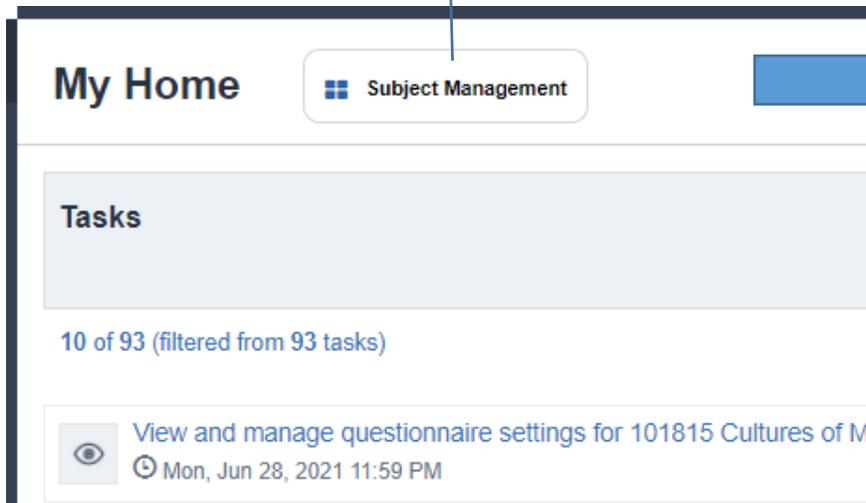
Ends on: **2021-06-27**



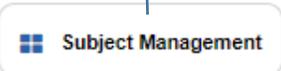

SVM: Tile View

Do SVM Task Owners (e.g. Instructors) only see one Subject at a time on their Dashboard?

Clicking the Subject Management button (or using the link from the Subject Management email) will display all subjects



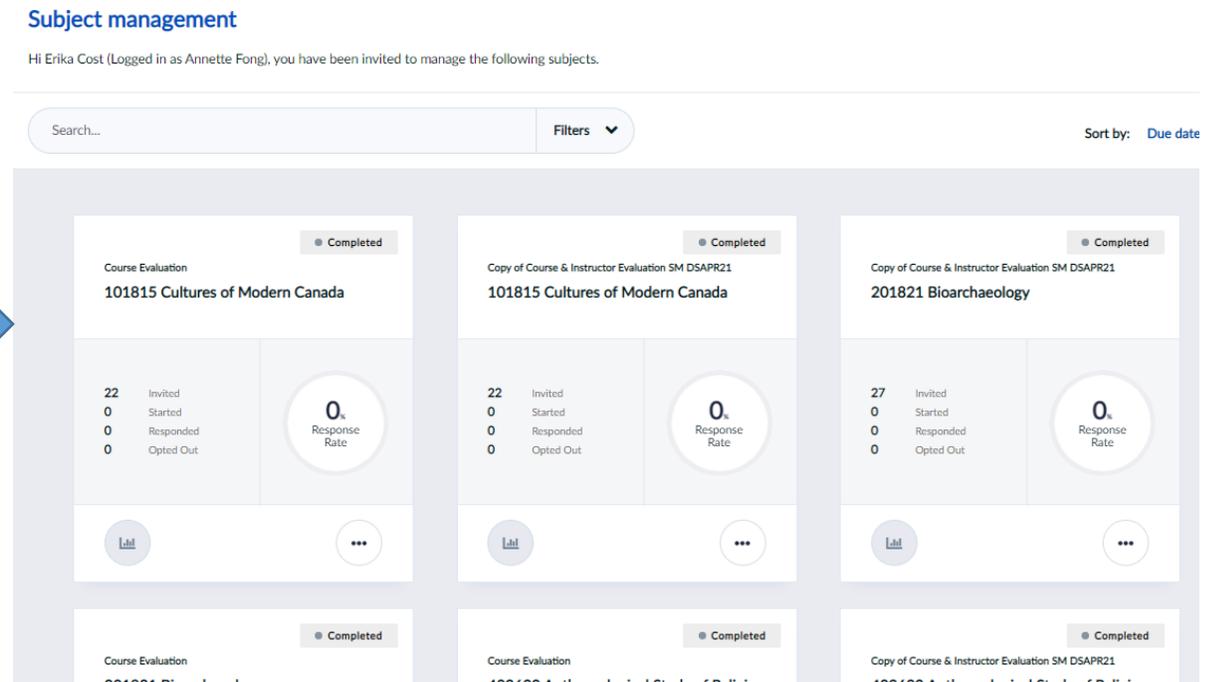
My Home

 Subject Management

Tasks

10 of 93 (filtered from 93 tasks)

 View and manage questionnaire settings for 101815 Cultures of M
Mon, Jun 28, 2021 11:59 PM

Subject management

Hi Erika Cost (Logged in as Annette Fong), you have been invited to manage the following subjects.

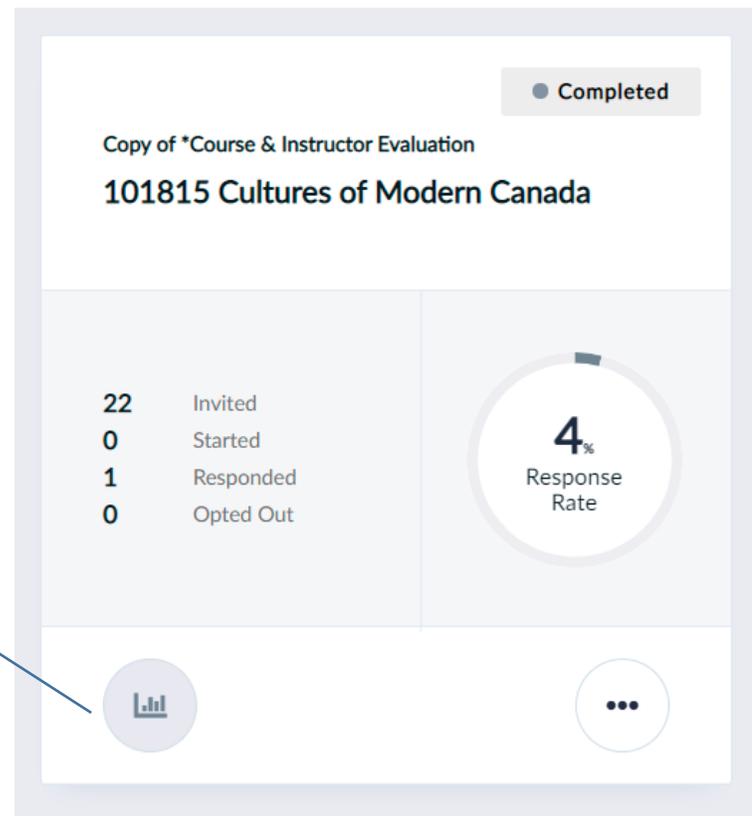
Search... Filters Sort by: Due date

Subject Name	Invited	Started	Responded	Opted Out	Response Rate
Course Evaluation 101815 Cultures of Modern Canada	22	0	0	0	0%
Copy of Course & Instructor Evaluation SM DSAPR21 101815 Cultures of Modern Canada	22	0	0	0	0%
Copy of Course & Instructor Evaluation SM DSAPR21 201821 Bioarchaeology	27	0	0	0	0%

SVM: Tile View Report Access

Can accessing reports from the SVM Tile View be disabled?

If reports are available, they can be accessed here. There is no way to “turn off” this option on the SVM Tile.



SVM: Tile View Opt Out

Will subject tiles still display if an Instructor has opted out?

MC Course & Instructor Evaluation - subsequent term
201821 Bioarchaeology

Cancel

Opt in to this evaluation? Yes

Manage by: 2021-06-06

Select Instructors

Opted out courses will still display on the Instructor's SVM Dashboard

The image shows three tiles from an SVM dashboard for the course '101815 Cultures of Modern Canada'. Each tile displays a 'Response Rate' and a list of student statuses. The first tile shows a 0% response rate with 22 invited, 0 started, 0 responded, and 0 opted out. The second tile shows a 13% response rate with 22 invited, 0 started, 3 responded, and 1 opted out. The third tile shows a 0% response rate with 22 invited, 0 started, 0 responded, and 0 opted out. A blue callout box points to the 13% response rate tile.

Tile Title	Response Rate	Invited	Started	Responded	Opted Out
Copy of Course & Instructor Evaluation QP DSAPR21	0%	22	0	0	0
Course & Instructor Evaluation DSAPR21	13%	22	0	3	1
Course & Instructor Evaluation - MB May13 QP	0%	22	0	0	0

Rater Selection

Can participants add raters after they have submitted and met the minimum number required?

Access and synchronization

- Allow modification after submitting
- Allow raters to be members of multiple groups
- Apply updated task dates to all open tasks

Changing the dates for open tasks is done automatically every time the project is saved. Any date changes that are made from Project management or Subject Management task will not be overwritten.

- Set the maximum number of times each rater can be invited

Maximum

Task Settings: Schedule

Can schedules be based on start/end time of courses or based on a specific date?

Relative Scheduling (e.g. based on course end date)

Define start date

Based on Relative date **Condition** From date field **Field** Courses.CourseEndDate

Set date 10 Days Before Courses.CourseEndDate

Set time Fixed time 10:11

Fixed Scheduling

Define start date

Based on Fixed date

Set date and time 2021-07-31 10:11

Task Settings: Schedule

How do Dynamic Days work in Blue 8?

Dynamic Days/Conditional Scheduling in Blue 8 is all handled within the Tasks Scheduling functionality. All the same features from Blue 7 still exist but are now in one centralized location.

The screenshot displays the 'Tasks' configuration page in Explorance. The top navigation bar includes 'Info', 'Questionnaire', 'Definition', 'Subjects', 'Members', 'Triggers', 'Access', 'Tasks', 'Language', and 'Publish'. Below this, there are tabs for 'Task configuration' and 'Centralized emails'. The main content area is titled 'Fillout' and contains a 'Schedule list' section with the instruction: 'Tasks will use the first schedule that meets all of the conditions.' Below this is a table with columns for 'Priority', 'Schedule name', 'Notifications', and 'Actions'. The table lists four schedules: 'FO - Bioarchaeology', 'FO - Anthropology', 'FO - Fine Art', and 'FO - Engineering'. Each row has a 'Configure' link and a 'Modify conditions' link. A 'Move to position' dialog box is open over the table, and a modal window is also open, showing configuration options for a 'Fillout - Fill Out Task - Normal Duration'. The modal includes a 'Select condition type' dropdown set to 'From date range', a 'Filter Condition' section, and a 'Select a date range' section with dropdowns for 'Courses', 'CourseStartDate', and 'CourseEndDate'. Below this, it shows a comparison operator '>=' and a value of '50' followed by 'Days'. 'Done' and 'Cancel' buttons are at the bottom of the modal.

Priority	Schedule name	Notifications	Actions
1	FO - Bioarchaeology		Configure Modify conditions
2	FO - Anthropology		Configure Modify conditions
3	FO - Fine Art		Configure Modify conditions
4	FO - Engineering		Configure Modify conditions

Task Settings: Schedule

Is it possible to export the various schedules to check that the schedules were set up correctly?

“Export Summary” from the Publish tab

Schedule Name is included in the Export

Courses Name	Schedule	Start Date	End Date
101815 Cultures of Modern Canada	Fill Out Task	5/19/2021 8:30	5/29/2021 14:09
101815 Cultures of Modern Canada	Fill Out Task	5/19/2021 8:30	5/29/2021 14:09
101815 Cultures of Modern Canada	Fill Out Task	5/19/2021 8:30	5/29/2021 14:09
101815 Cultures of Modern Canada	Fill Out Task	5/19/2021 8:30	5/29/2021 14:09
101848 Modern Art	Fill Out Task	5/19/2021 8:30	5/29/2021 14:09
101848 Modern Art	Fill Out Task	5/19/2021 8:30	5/29/2021 14:09
102033 Graphics	Fill Out Task	5/19/2021 8:30	6/9/2021 13:23

Task Settings: Schedule Date Format

How are dates formatted in the Task Schedule(s) and can that format be changed?

Task type	Schedule dates
Subject management	Start: 2021-05-19 End: 2021-05-28
Question personalization	Start: 2021-05-19 End: 2021-05-28
Fillout	Start: 2021-05-19 End: 2021-05-29

Task Settings: Completion Certificate

How do the Completion Certifications work?

Thank you message

We put feedback at the core of everything we do. We greatly appreciate you taking the time to complete this learning evaluation.

Thank you for providing your feedback. en *

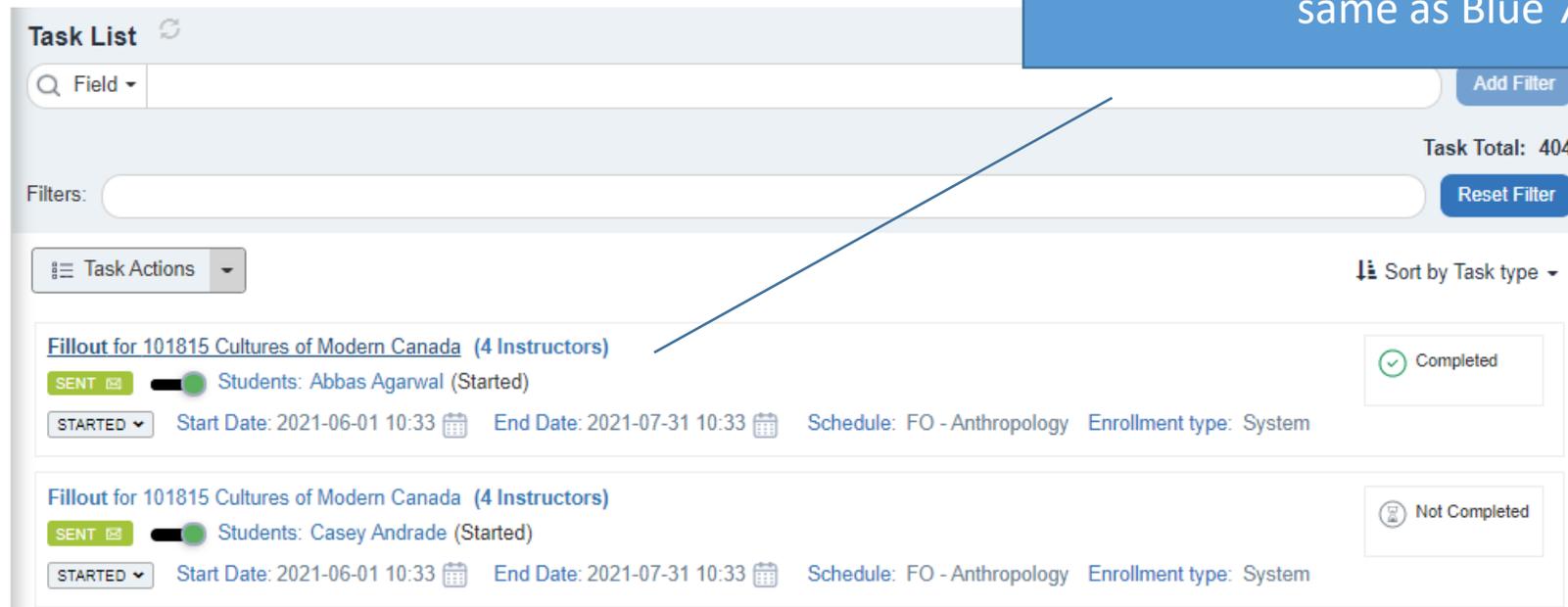
- Include task list on thank you page
- Enable certificates

 [Customize](#)

User Impersonation

Does Blue 8 allow user impersonation without publishing the project?

Tasks can only be viewed as the end user after the project has been published – same as Blue 7



Task List 

Field Add Filter

Filters: Reset Filter

Task Total: 404

Task Actions Sort by Task type

<p>Fillout for 101815 Cultures of Modern Canada (4 Instructors)</p> <p>SENT  Students: Abbas Agarwal (Started)</p> <p>STARTED <input type="button" value="v"/> Start Date: 2021-06-01 10:33  End Date: 2021-07-31 10:33  Schedule: FO - Anthropology Enrollment type: System</p>	<p> Completed</p>
<p>Fillout for 101815 Cultures of Modern Canada (4 Instructors)</p> <p>SENT  Students: Casey Andrade (Started)</p> <p>STARTED <input type="button" value="v"/> Start Date: 2021-06-01 10:33  End Date: 2021-07-31 10:33  Schedule: FO - Anthropology Enrollment type: System</p>	<p> Not Completed</p>

Poll: Which feature in Blue 8 are you most excited about?

Questions?

THANK YOU



www.explorance.com