



Blue 8.1: A Modernized Reporting Experience and More!

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What's new?

Reports

- New theme / new look reports
- Updated Admin controls and report list view

Projects

- Changes to default security settings for better protection
- Support for public groups in private projects

Blue Connector 3.1

Item Bank version 3

Help Center 3.0





Modernized Reporting

- New theme / new look reports
- Updated Admin controls and report list view





Reports: New theme / New look

Added new "Modern Blue" report theme

- · Overhaul of report look and feel, both online and PDF
- Can be applied to new reports and retroactively to older ones (project setting)
- · Changes pave the way for custom branding, colors, and fonts

Theme Application

- Not applied automatically: won't interfere with current report look/branding
- · Affects reports only, not project-based web forms

^{*}Custom CSS Guide on Help Center: Some customizations will require help of our Support team

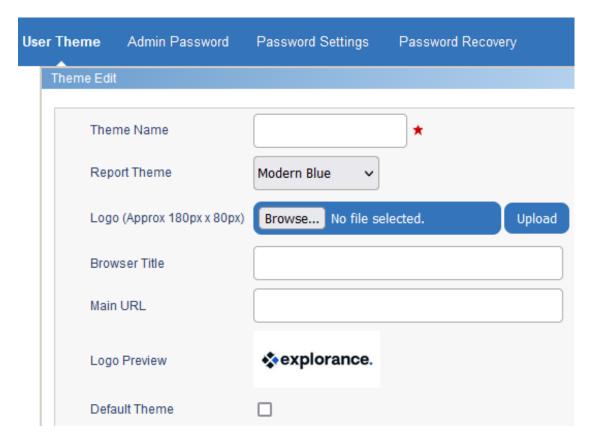




New theme

Admin > Configuration > User Theme

Create New theme to select and use







Reports: Updated Admin UI

Reorganized Admin controls

- Updated settings that impact report look and layout
- · Regrouped for better organization / ease of use
- · Consistent with changes to Project admin settings

Updated Report List

- Provides look and feel that mirrors Task List pages
- · New option to hide reports that don't meet response thresholds

No content changes for block types, group elements, calculation methods, or statistics





Updated Report List View

Report List - Individual reports

This table provides a list of links to reports in both PDF and HTML format. The PDF versions of the reports listed here are not WCAG 2.0 compliant. Please use the HTML version by opening the link located in the Report Title column of the table as an accessible alternative.

Q Search...

Report Title 4	PDF	CSV	Threshold Status
Individual report for Annette Fong 101815 Cultures of Modern Canada	K	ш	Met
Individual report for Annette Fong 201821 Bioarchaeology	K	lı l	Met
Individual report for Annette Fong 402622 Anthropological Study of Religion	K	II.	Not Met
Individual report for Annette Fong 402623 Biblical Studies in Film	K	lii.	Not Met





Project Enhancements

- Changes to default security settings for better protection
- Support for public groups in private projects





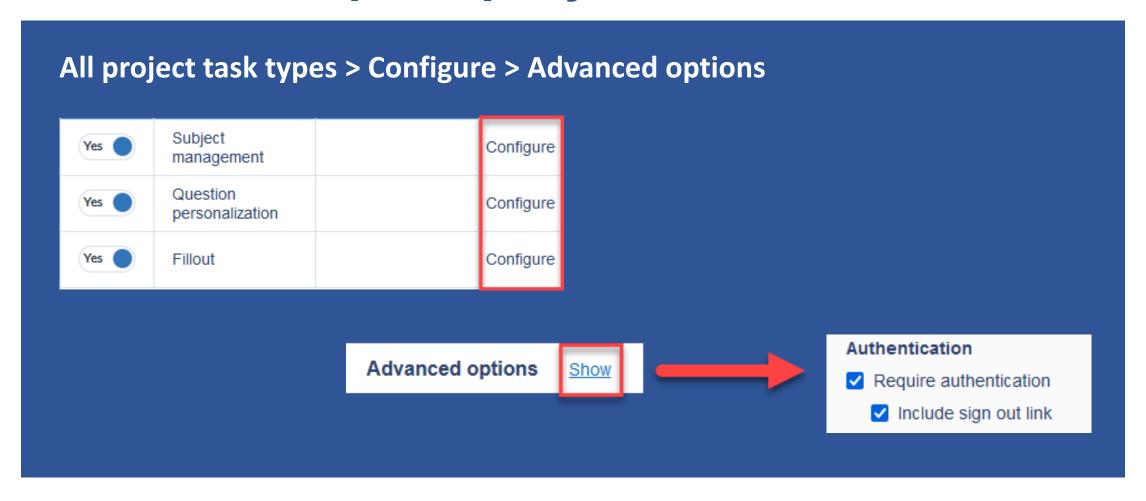
Projects: Changes to Default Security Settings

- · Highest level security enabled by default when creating a **NEW** project
- Require authentication and Sign out link enabled for all task types in Projects, and Distribution options in Reports
- · Impacts project types that connect to a User datasource (not Simplified surveys)
- · Can be disabled based on your needs
- Copying existing projects will retain original settings





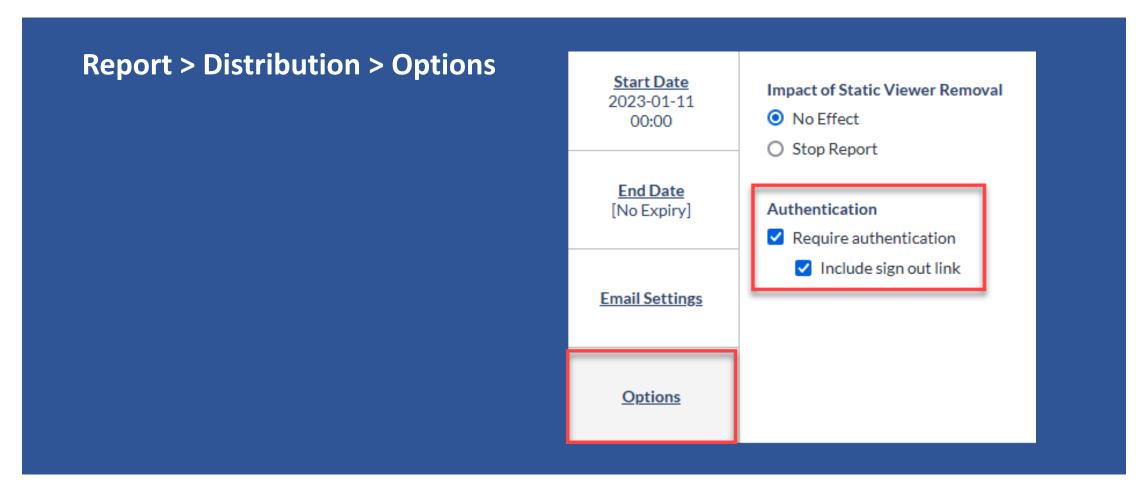
Task security for projects with user data







Security settings for viewing reports







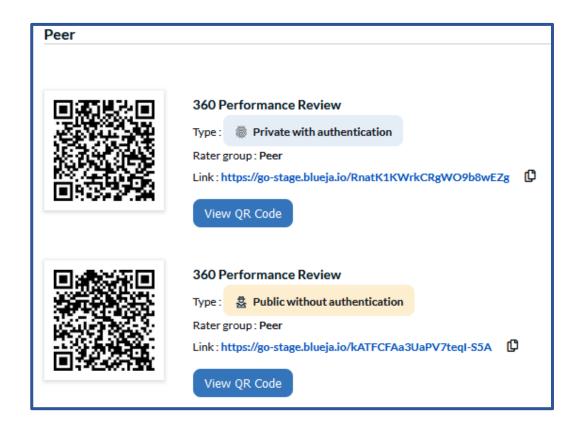
Private projects with public groups

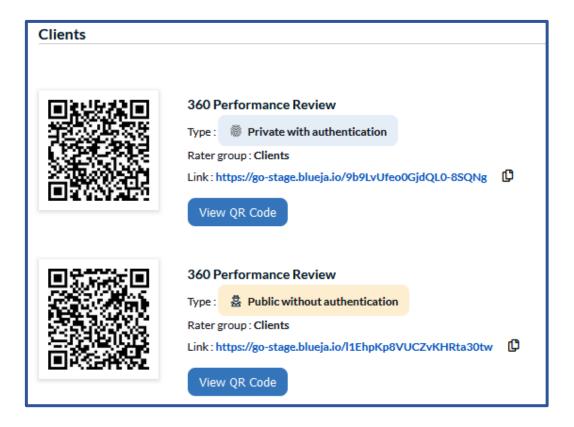
- Designed for 360 / Subjects only projects that require a combination of private and public groups to access FO tasks
- Examples:
 - Medical environment: feedback from employees (private groups) and patients (public group)
 - Corporate: participants include employees (private) and outside vendors (public)
- Both private and public links are created automatically for each FO group; no changes to project or definition settings required
- Not supported in Primary / Secondary subject (course evaluation) type projects





Dual set of links for each FO group

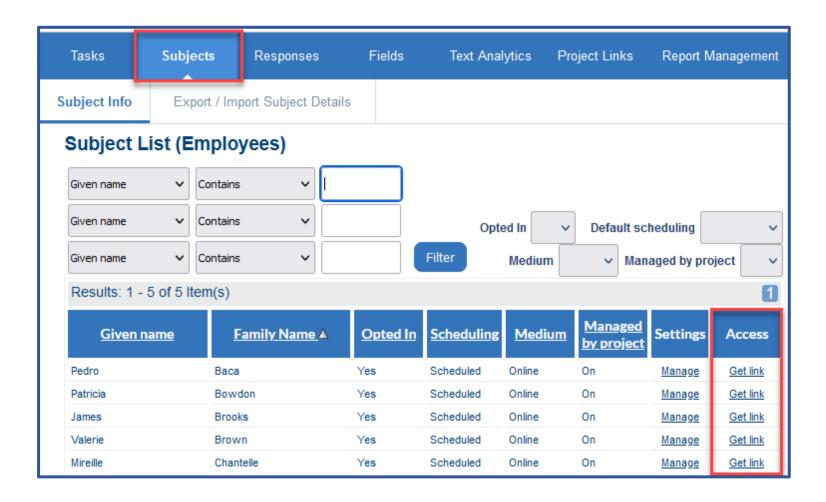








Accessing the links







Key points

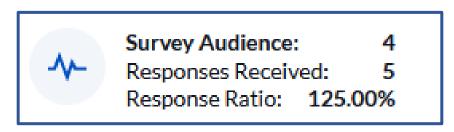
Private links: distributed in emails via regular task email processes

Public links:

- · Visible only to project admins; must be distributed manually to targeted people
- Can be used for people who fit 'private' group category, e.g., Peers, but who aren't employees of the organization

Reports:

- · Survey Audience: private group members
- Total responses received and % rate include public members







Blue Connector 3.1

- Customizable login prompt in Canvas
- Updated User Interface





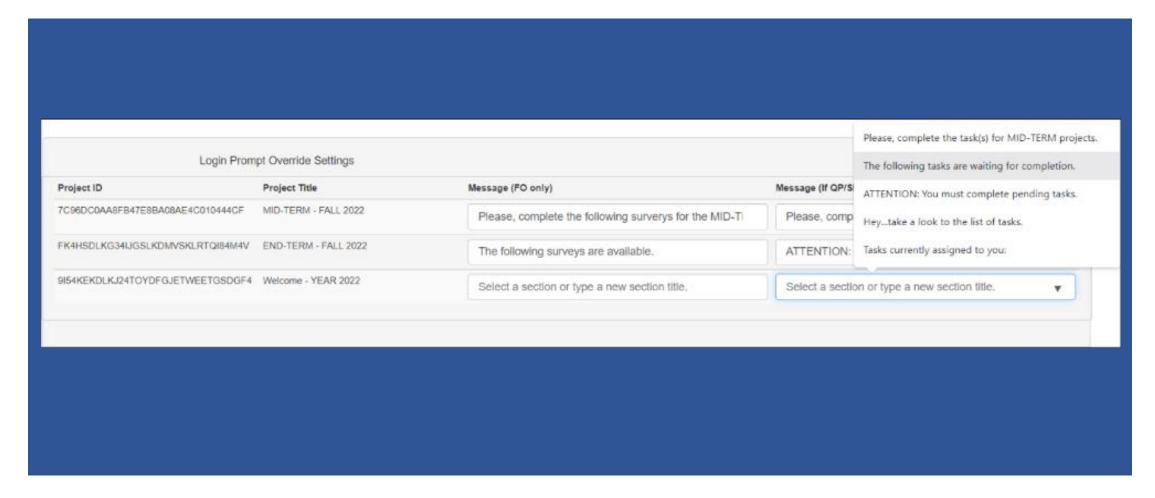
Blue Connector 3.1

- Supports use of multiple, concurrently running projects
- UI changes to accommodate creation of project-specific messages
- Tasks are grouped together by status to allow users to focus on new/not completed tasks more easily
- Completed tasks will be grouped together





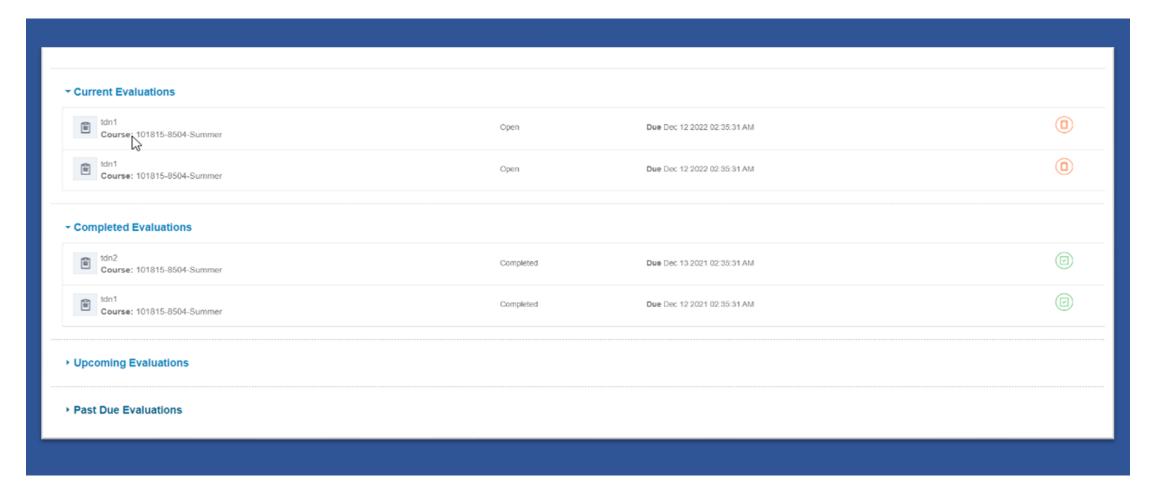
Multi-Project Support: Admin View







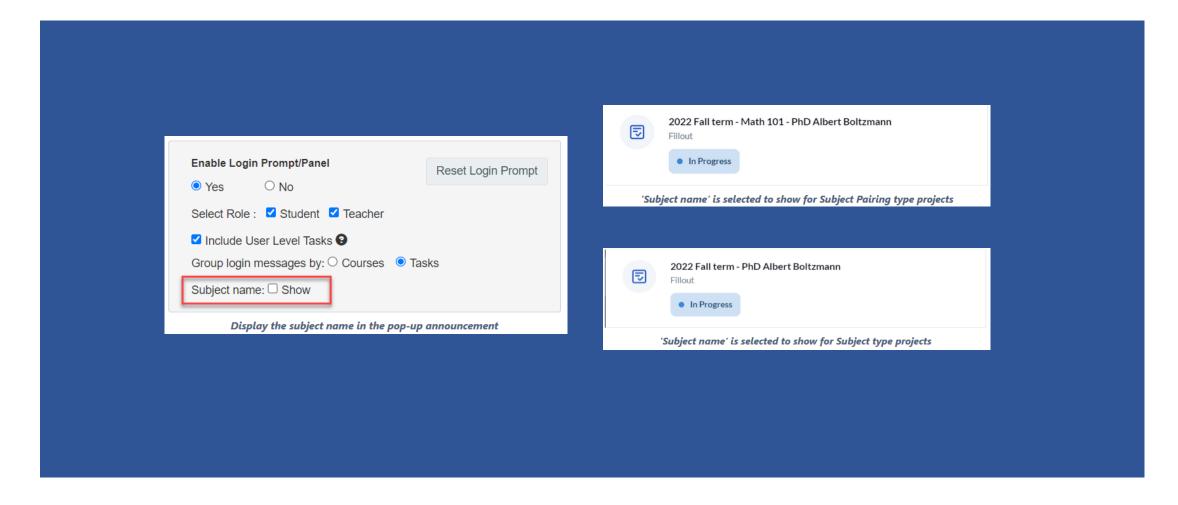
Grouped Tasks: Student View







Task vs Course name: Student View







Item Bank v3

Cascaded evaluation framework





Item Bank - version 3

- Cascaded evaluation framework based on the University of Toronto model; similar in principle to the Question Bank
- Newly classified and reorganizes questions (into 6 tabs) to make them easier to identify and locate for specific questions based on needs & cohorts
- License-controlled feature: please contact your Account Manager if interested in upgrading or to find out more information
- Information is also available in our Help Center





Help Center 3.0

- Updated Help Center landing page
- French User Manuals...and more!





Help Center 3.0

- Landing page changes Regrouped topics to make things easier to find:
 - User guides
 - Community articles
 - Explorance news
- Shortcuts to user manuals, quick links to most important/active topics from the community
- Spotlights latest product updates with use cases, solutions
- New Explorance events calendar
 - Schedules for upcoming conferences, trainings, webinars, community meetups and other major events





Questions?

Thank you for attending.