

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

User Theme
Admin Password
Password Settings
Password Recovery

Theme Edit

Theme Name

★

Report Theme

Modern Blue

▼


Logo (Approx 180px x 80px)

Browse...
No file selected.
Upload

Browser Title

Main URL

Logo Preview



Default Theme

☐

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.

	Report Title 	PDF	CSV	Threshold Status
<input type="checkbox"/>	Individual report for Annette Fong 101815 Cultures of Modern Canada			Met
<input type="checkbox"/>	Individual report for Annette Fong 201821 Bioarchaeology			Met
<input type="checkbox"/>	Individual report for Annette Fong 402622 Anthropological Study of Religion			Not Met
<input type="checkbox"/>	Individual report for Annette Fong 402623 Biblical Studies in Film			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

All project task types > Configure > Advanced options

Yes <input checked="" type="radio"/>	Subject management	Configure
Yes <input checked="" type="radio"/>	Question personalization	Configure
Yes <input checked="" type="radio"/>	Fillout	Configure

Advanced options

[Show](#)

Authentication

- ☒ Require authentication
- ☒ Include sign out link

Security settings for viewing reports

Report > Distribution > Options


<u>Start Date</u> 2023-01-11 00:00	Impact of Static Viewer Removal <input checked="" type="radio"/> No Effect <input type="radio"/> Stop Report
<u>End Date</u> [No Expiry]	<div style="border: 2px solid red; padding: 5px;"> <u>Authentication</u> <input checked="" type="checkbox"/> Require authentication <input checked="" type="checkbox"/> Include sign out link </div>
<u>Email Settings</u>	
<div style="border: 2px solid red; padding: 5px; text-align: center;"> <u>Options</u> </div>	



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



Peer



360 Performance Review
 Type :  Private with authentication
 Rater group : Peer
 Link : <https://go-stage.blueja.io/RnatK1KWrkCRgWO9b8wEZg> 


View QR Code





360 Performance Review
 Type :  Public without authentication
 Rater group : Peer
 Link : <https://go-stage.blueja.io/kATFCFAa3UaPV7teqI-S5A> 


View QR Code



Clients



360 Performance Review
 Type :  Private with authentication
 Rater group : Clients
 Link : <https://go-stage.blueja.io/9b9LvUfeo0GjdQL0-8SQNg> 

View QR Code



360 Performance Review
 Type :  Public without authentication
 Rater group : Clients
 Link : <https://go-stage.blueja.io/l1EhpKp8VUCZvKHRta30tw> 

View QR Code

Accessing the links

Tasks
Subjects
Responses
Fields
Text Analytics
Project Links
Report Management

Subject Info

Export / Import Subject Details

Subject List (Employees)

Given name

Contains

Given name

Contains

Given name

Contains

Filter

Opted In

Default scheduling

Medium

Managed by project

Results: 1 - 5 of 5 Item(s)

Given name	Family Name	Opted In	Scheduling	Medium	Managed by project	Settings	Access
Pedro	Baca	Yes	Scheduled	Online	On	Manage	Get link
Patricia	Bowdon	Yes	Scheduled	Online	On	Manage	Get link
James	Brooks	Yes	Scheduled	Online	On	Manage	Get link
Valerie	Brown	Yes	Scheduled	Online	On	Manage	Get link
Mireille	Chantelle	Yes	Scheduled	Online	On	Manage	Get link

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

	Survey Audience:	4
	Responses Received:	5
	Response Ratio:	125.00%

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

Login Prompt Override Settings

Project ID	Project Title	Message (FO only)	Message (If QP/S)
7C96DC0AA8FB47E8BA08AE4C010444CF	MID-TERM - FALL 2022	Please, complete the following surveyys for the MID-TI	Please, comp
FK4HSDLKG34IJGSLKDMVSKLRTQI84M4V	END-TERM - FALL 2022	The following surveys are available.	ATTENTION:
9I54KEKDLKJ24TOYDFGJETWEETGSDGF4	Welcome - YEAR 2022	Select a section or type a new section title.	Select a section or type a new section title.

Please, complete the task(s) for MID-TERM projects.
The following tasks are waiting for completion.
ATTENTION: You must complete pending tasks.
Hey...take a look to the list of tasks.
Tasks currently assigned to you:

Grouped Tasks: Student View


▼ Current Evaluations				
	tdn1 Course: 101815-8504-Summer	Open	Due Dec 12 2022 02:35:31 AM	
	tdn1 Course: 101815-8504-Summer	Open	Due Dec 12 2022 02:35:31 AM	
▼ Completed Evaluations				
	tdn2 Course: 101815-8504-Summer	Completed	Due Dec 13 2021 02:35:31 AM	
	tdn1 Course: 101815-8504-Summer	Completed	Due Dec 12 2021 02:35:31 AM	
▶ Upcoming Evaluations				
▶ Past Due Evaluations				

Task vs Course name: Student View

Enable Login Prompt/Panel Reset Login Prompt

☒ Yes
 ☐ No


Select Role : ☒ Student ☒ Teacher

☒ Include User Level Tasks 

Group login messages by: ☐ Courses ☒ Tasks

Subject name: ☐ Show

Display the subject name in the pop-up announcement




2022 Fall term - Math 101 - PhD Albert Boltzmann

Fillout

In Progress

'Subject name' is selected to show for Subject Pairing type projects



2022 Fall term - PhD Albert Boltzmann

Fillout

In Progress

'Subject name' is selected to show for Subject type projects

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.