

Blue 9.3 Release Webinar

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Housekeeping

- Please feel free to ask questions in the Q&A panel!
- A recording of this webinar will be available on the Help Center and on the Bluenotes Group website later this week (<https://www.bluenotesgroup.com/learningwebinars/>)
- Questions and Answers will also be posted to the [Webinar and Conference Discussion](#) Community Forum

Highlights of the 9.3 Release

- **Configurable SSO Login**
- **Default Passwords**
- **Access As**
- **3-Level Relationships**
- **Bulk Report Download**
- **End User Functionality**

Poll

Which of the 9.3 features are you most excited about? You can select more than one!

- A. Configurable SSO Login**
- B. Default Passwords**
- C. Access As**
- D. 3-Level Relationships**
- E. Bulk Report Download**
- F. End User Functionality**

What we won't cover today

Overview of all Blue 9 changes in features and functionality

- Please watch the previous Blue 9 webinars, which can be accessed via the Archived Webinars on www.bluenotesgroup.com or via the Help Center, and/or enroll in the Blue 9 Transition course
- Search in the Blue Help Center for “Blue 9” to find Release Notes, a Welcome Guide, FAQs, and more!

Training on Blue 9

- Please contact learning@explorance.com to get access to the Blue 9 Transition course
- Reach out to your Professional Services team if you need individual support

Questions specific to your instance/solution of Blue

- Your Professional Services team and Explorance Customer Support are your best resources for questions related to your unique usage of Blue or about upgrading to Blue 9

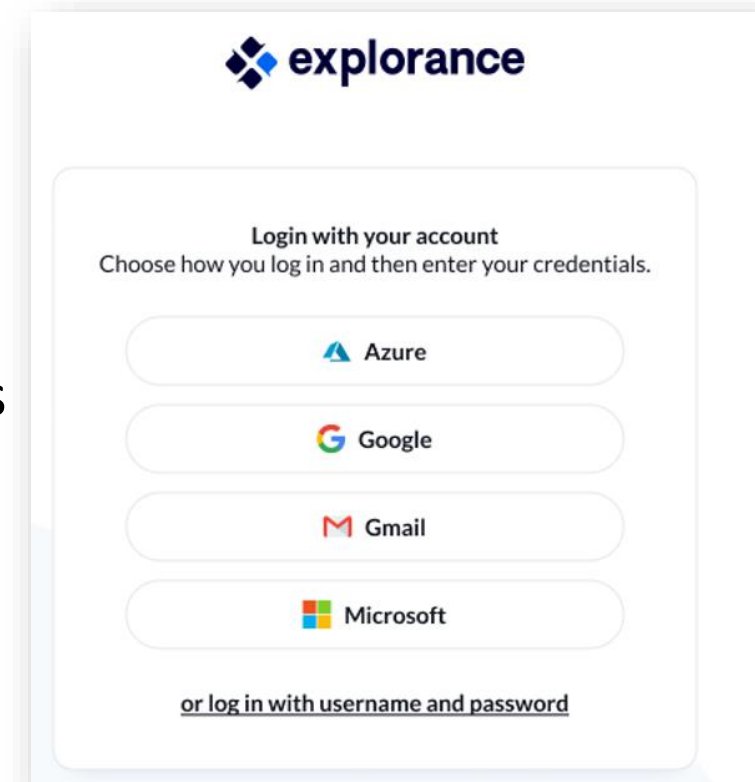
System Administration

- Configurable SSO Login
- Default Passwords

Configurable SSO Login

For multi-authentication scenarios, the SSO experience has been improved to allow greater configurability of the sign-in experience, tailoring the sign-in experience based on Users' needs and helping to alleviate confusion.

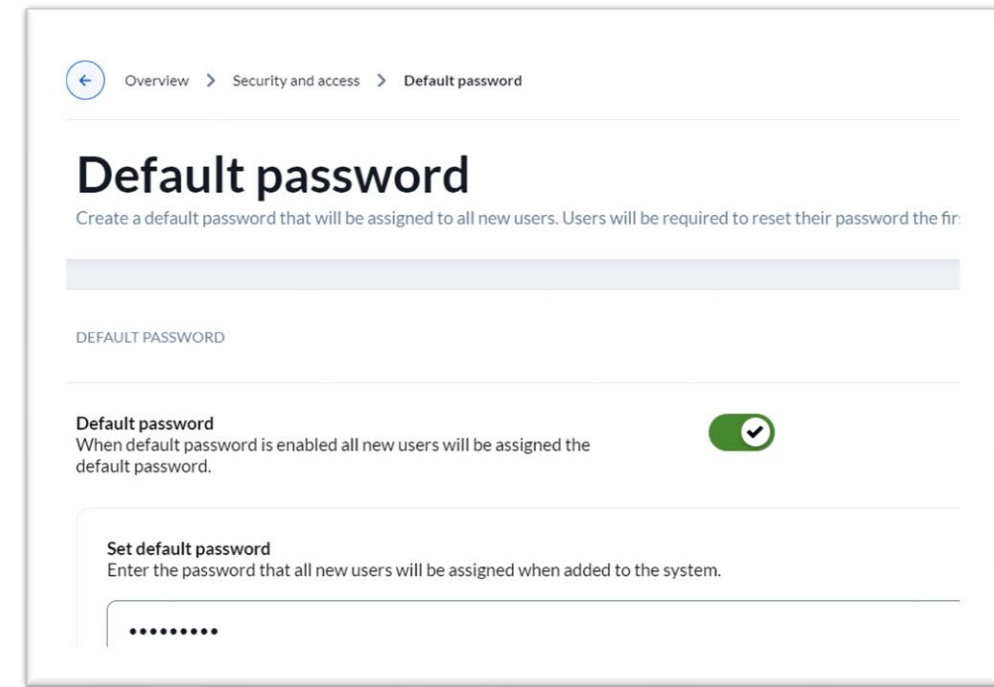
- If configured, SSOs will appear first, with an option to authenticate with username/password
- If only one SSO is used, an auto-redirect option can take users automatically to the SSO login page
- Customizable messages can provide additional instructions to users (multilingual available)



Default Passwords

Blue Admins can set a default password for one, many, or all Users. Enables simplified first-time access into Blue, while also supporting use cases where a user does not have an organizational email address.

- Admins can preset a singular password to bypass “forgot password” flow
- Forgot password still works for users with an email address
- Password is not communicated via Blue; Admin needs to communicate that password to the users
- Users will be forced by Blue to set their own password upon first login
- Will not be on by default; Admin needs to turn it on in the security settings



The screenshot shows the 'Default password' configuration page in the Explorance interface. At the top, a breadcrumb trail reads 'Overview > Security and access > Default password'. The main heading is 'Default password', followed by a descriptive sentence: 'Create a default password that will be assigned to all new users. Users will be required to reset their password the first time they log in.' Below this is a large, empty text input field for the password. Underneath the input field is a section titled 'Default password' with a toggle switch that is currently turned on, indicated by a green checkmark. The text next to the toggle says: 'When default password is enabled all new users will be assigned the default password.' Below the toggle is another section titled 'Set default password' with the instruction 'Enter the password that all new users will be assigned when added to the system.' This section contains a password input field with a masked password represented by eight dots.

Blue Administration

- Access As
- 3-Level Relationships

Access As

Admins, Project Managers, and Project Manager Assistants can access other Users' tasks, reports, and other details in projects they manage to validate project set-up as well as help Users troubleshoot any issues. This feature addresses a gap from Blue 8.

- Former Impersonation (“Log in as”)
- Can be enabled by Explorance Support for your environment
- View all assigned tasks, reports, and other details for a User's account
- New banner displays to indicate you're in Access as/view only mode
- Can “Access As” more than one user (one tab per user will open)
- All activities will be logged, including opening, saving, and submitting tasks and viewing reports

Teacher_For_Graduate

Picture

HomePage

Datasource Access Key(s)

Blue User Type

Language

Status

SMS Status

Display save warnings.

Transformed

Modifying any of the user's data will cause all of their preferences to be overwritten.

Access As Apply Changes Close

Access As

Blue banner indicates View only

 Welcome Erika Cost. You are viewing the Home of Juliet Barajas. Close this tab when you have finished.  English (US)

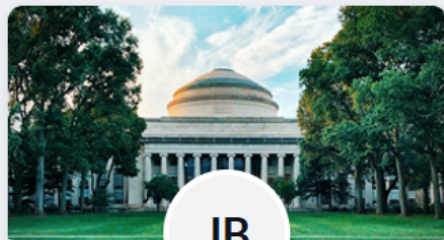
 explorance.

Q Search...

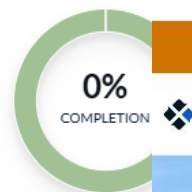
 Home

 Tasks

 Bookmarks



TASK PROGRESS



Orange banner indicates Editing

 Welcome Erika Cost. You are editing a task for Abdiel Jabir. Any updates you perform will be permanent. Close this tab when you have finished.



Evaluation for Abdiel Jabir

Hi Abdiel,

Your feedback matters! You have been invited to complete the evaluation for Abdiel Jabir.

Start Now

3-level relationships

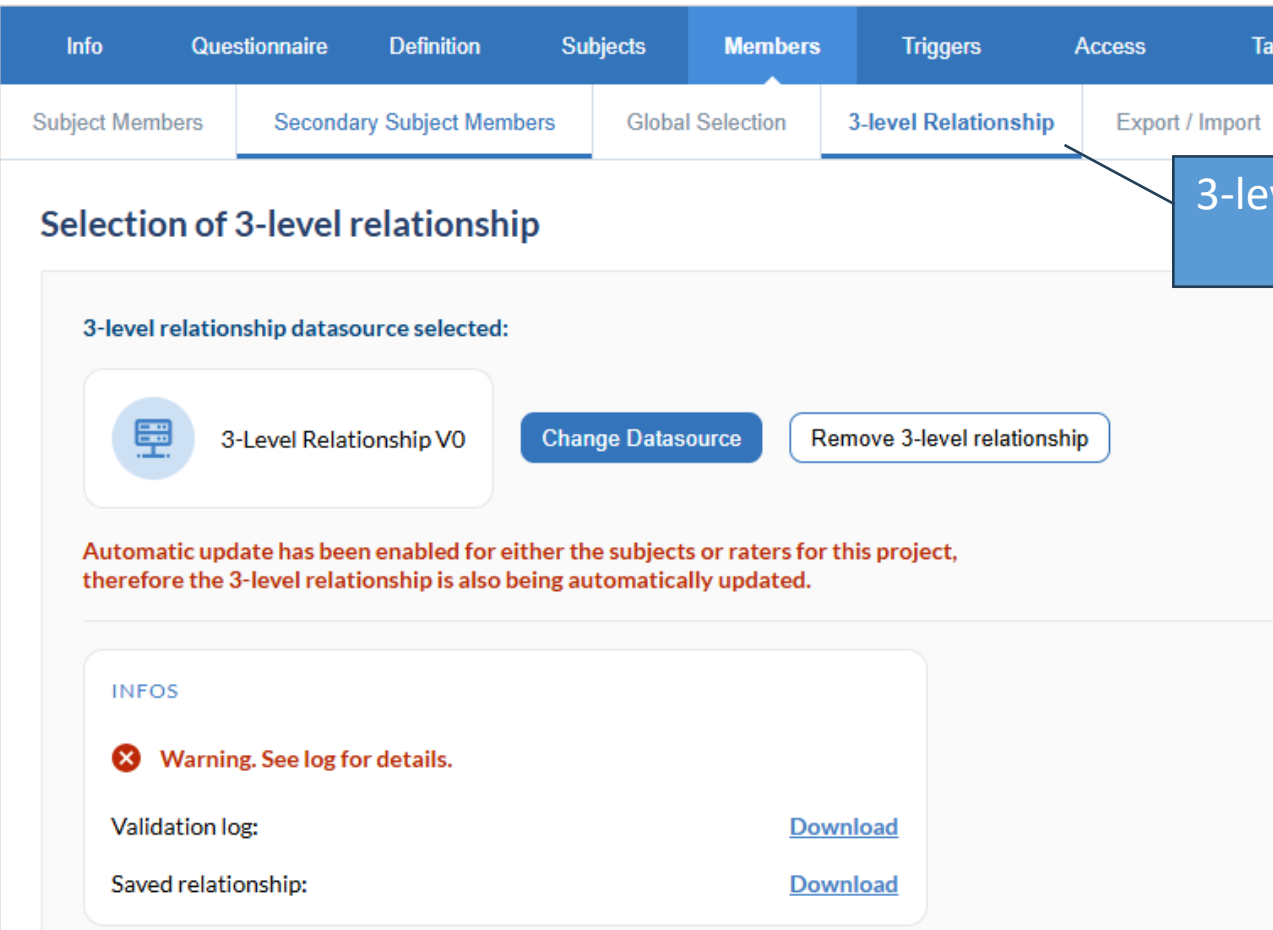
3-level relationship functionality enables Blue to limit the number of secondary subjects a rater can evaluate (e.g., in a course evaluation, limit the number of instructors that can be evaluated by students) by creating a link between the course-instructors-students.

- Pre-filters the list of secondary subjects (typically instructors) from which the student can select, provide a unique experience for each student
- Optionally configure for mandatory selection or secondary subject selection
 - Secondary subject selection allows for students to opt out
- Students NOT specified in the 3-level data will receive only course-related questions on the questionnaire, effectively opting them out of instructor evaluations (for institutions that support this option)

	A	B	C
1	InstructorCourse	Student	Teaching Role
2	afong();101815-8504-Summer	100830	Instructor
3	afong();101815-8504-Summer	70088	Instructor
4	afong();101815-8504-Summer	70918	Instructor
5	afong();101815-8504-Summer	90493	Instructor
6	afong();101815-8504-Summer	90884	Instructor
7	kknighthley();101815-8504-Summer	100830	Lab Instructor
8	kknighthley();101815-8504-Summer	70088	Lab Instructor
9	kknighthley();101815-8504-Summer	70918	Lab Instructor
10	kknighthley();101815-8504-Summer	90493	Lab Instructor
11	kknighthley();101815-8504-Summer	90884	Lab Instructor
12	mbush();101815-8504-Summer	100830	TA
13	mbush();101815-8504-Summer	70088	TA
14	mbush();101815-8504-Summer	70918	TA

3-level relationships

Configuration and Datasource selection under Members > 3-level Relationship



The screenshot displays the 'Members' tab in the Explorance interface, specifically the '3-level Relationship' sub-tab. The main heading is 'Selection of 3-level relationship'. Below this, it states '3-level relationship datasource selected:' followed by a card for '3-Level Relationship V0'. To the right of this card are two buttons: 'Change Datasource' and 'Remove 3-level relationship'. A red warning message indicates that automatic updates are enabled for subjects or raters, leading to automatic updates of the 3-level relationship. At the bottom, under an 'INFOS' section, there is a warning icon and text 'Warning. See log for details.', along with links to download the 'Validation log' and 'Saved relationship'.

3-level Relationship available in all accounts under Members

3-level relationships

Questionnaire > Secondary Subject Selection

Secondary Subject Grouping

All secondary subjects are selectable by default. Add groupings to specify which subsets are available for selection, once groupings are created, all other secondary subjects will be preselected.

Group secondary subjects where the relationship demographic field

Teaching_Role

is equal to

Add

Item	Min	Max	
Teaching_Role is 'TA'		2	<div>Remove</div>
Teaching_Role is 'Lab'		1	<div>Remove</div>

☐ Hide pre-selected secondary subjects (section will be hidden when only pre-selected secondary subjects are available).
Note: If there are not enough secondary subjects to meet the minimum threshold, the minimum threshold will be ignored.

☒ Filter the list of available selections based on the 3-level rater relationship

Optionally select to Hide pre-selected secondary subjects if you are mandating secondary subjects (students cannot select)

Must select “Filter the list...” in the Questionnaire > Secondary Subject Selection

3-Level Relationship Matrix Table

Subject (S) exists in project	Secondary Subject (SS) exists in project	Student (R) exists in project	3-Level Relationship file	CURRENT FO/Reporting Behaviour	9.3 FO/Reporting Behaviour
Yes	Yes	Yes	S-SS-R Exist	SS evaluated in FO Tasks Instructor report created Course report created	SS evaluated in FO Tasks Instructor report created Course report created
Yes	Yes	Yes	R doesn't exist	SS is NOT evaluated in FO Task R is NOT counted in Instructor report R is counted and reported in Course report	SS is NOT evaluated in FO Task R is NOT counted in Instructor report R is counted and reported in Course report
Yes	Yes	Yes	SS doesn't exist	SS is NOT evaluated in FO Task Instructor report is NOT created Course report is NOT created	SS is NOT evaluated in FO Task Instructor report is NOT created Course report is created
Yes	Optional (No)	Yes	Yes	SS is NOT evaluated in FO Task Instructor report is NOT created Course report is NOT created	SS is NOT evaluated in FO Task Instructor report is NOT created Course report is created
Yes	Yes	No	Yes	FO is not created	FO is not created

Instructor report = Individual type broken down by Secondary subject

Course report = Individual type with no breakdown

End-User Experience

- Bulk Report Download
- Mobile Survey Experience
- Rater Selection Experience (360s)

Bulk Report Download

Report Viewers can now bulk download reports into a zip file, saving time from having to download reports individually.

- Bulk download PDF copies of reports into a single zip file from the Home > Report page
- Report list has a new tabular structure, enhancing visual clarity and usability
- In Home Administration, select to display column for PDF reports and/or raw response report
- Zip file is available for 24 hrs. to re-download
- Max selection of 10,000 reports in a single zip*
- Also available via Access As
 - Only for Reports for which you are a viewer

*Note that larger zip files will take longer to create and can be slower to download. Consider dividing larger #s of reports into smaller zip files.

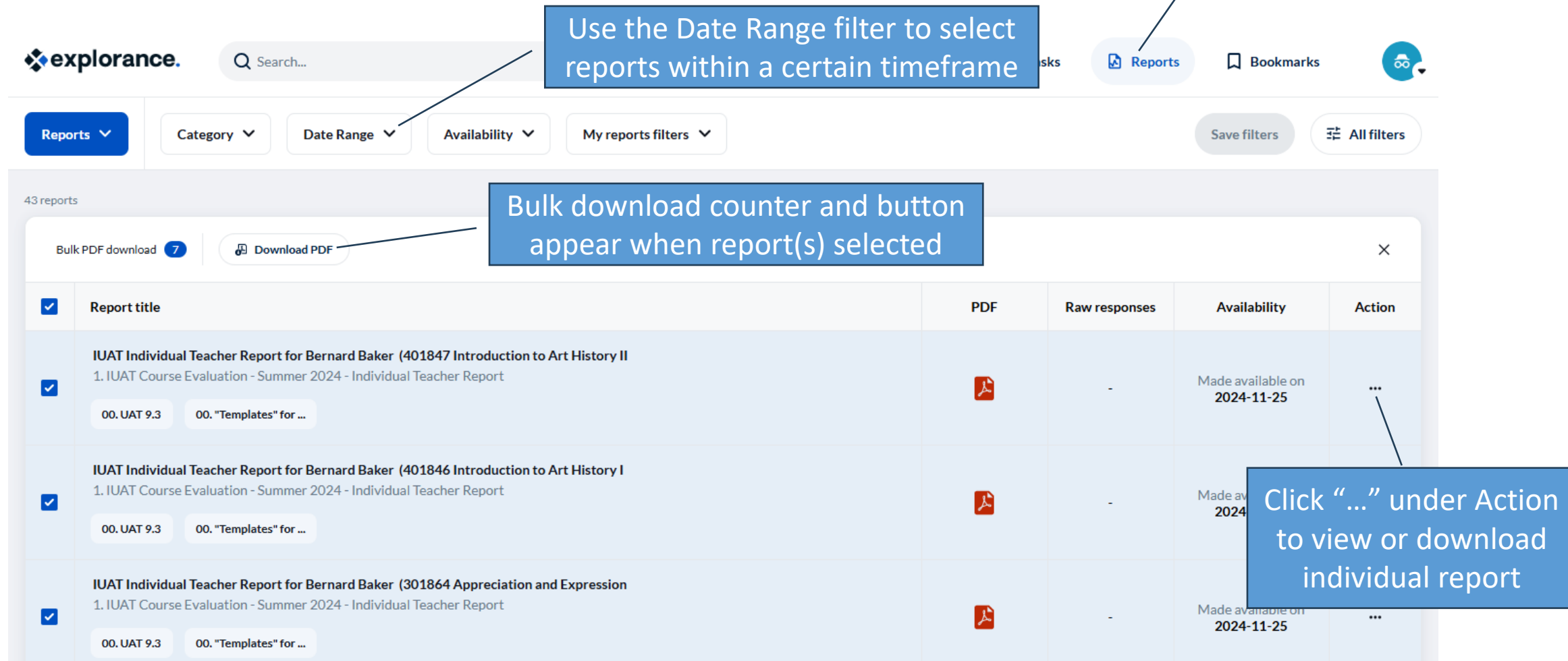
Bulk Report Download

Use the Date Range filter to select reports within a certain timeframe




Access report download from Reports menu

Bulk download counter and button appear when report(s) selected

Click “...” under Action to view or download individual report



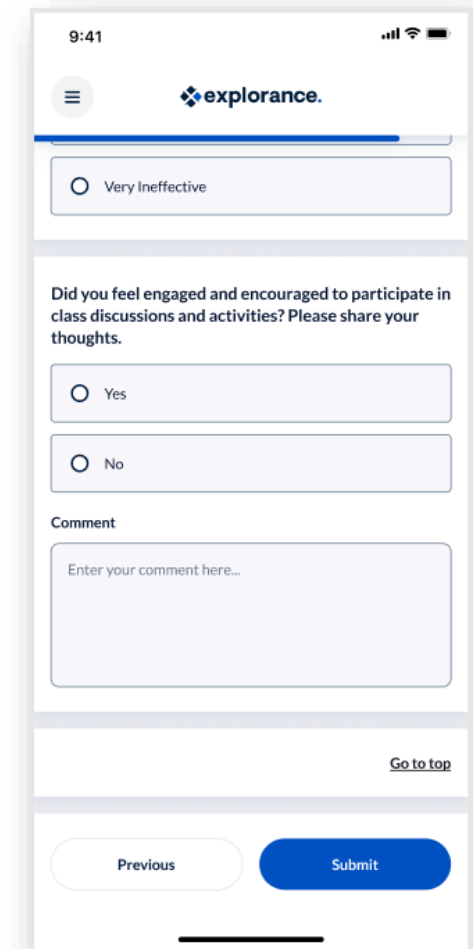
The screenshot shows the Explorance Reports interface. At the top, there is a search bar and a navigation menu with 'Reports', 'Bookmarks', and a user profile icon. Below the navigation bar, there are filter buttons: 'Reports', 'Category', 'Date Range', 'Availability', and 'My reports filters'. A 'Bulk PDF download' button with a counter '7' is visible. A 'Download PDF' button is also present. The main table lists reports with columns for 'Report title', 'PDF', 'Raw responses', 'Availability', and 'Action'. The first three reports are selected, and the 'Bulk PDF download' button is active. The 'Action' column for the first report shows a dropdown menu with options to view or download the report.

Report title	PDF	Raw responses	Availability	Action
<input checked="" type="checkbox"/> IUAT Individual Teacher Report for Bernard Baker (401847 Introduction to Art History II 1. IUAT Course Evaluation - Summer 2024 - Individual Teacher Report 00. UAT 9.3 00. "Templates" for ...		-	Made available on 2024-11-25	...
<input checked="" type="checkbox"/> IUAT Individual Teacher Report for Bernard Baker (401846 Introduction to Art History I 1. IUAT Course Evaluation - Summer 2024 - Individual Teacher Report 00. UAT 9.3 00. "Templates" for ...		-	Made available on 2024-11-25	...
<input checked="" type="checkbox"/> IUAT Individual Teacher Report for Bernard Baker (301864 Appreciation and Expression 1. IUAT Course Evaluation - Summer 2024 - Individual Teacher Report 00. UAT 9.3 00. "Templates" for ...		-	Made available on 2024-11-25	...

Mobile Survey Experience Enhancements

The mobile survey fillout experience has been improved to provide a more intuitive navigation experience for end users and to provide consistency with the standard Blue Fillout experience.

- Navigation buttons moved to bottom of the page
- Thickness of progress bar increased to better track progress through the survey and updates as user navigates forward/backward
- Header collapses when scrolling/swiping down and displays when scrolling/swiping up
- Hamburger menu updated to display additional options for a more intuitive experience

A screenshot of a mobile survey interface. At the top, the status bar shows 9:41 and signal icons. Below is a header with a hamburger menu icon and the 'explorance.' logo. A progress bar is visible. The first question is 'Very Ineffective' with a radio button. The second question is 'Did you feel engaged and encouraged to participate in class discussions and activities? Please share your thoughts.' with 'Yes' and 'No' radio buttons. Below is a 'Comment' section with a text input field. At the bottom, there are 'Previous' and 'Submit' buttons, and a 'Go to top' link.

360 Rater Selection Enhancements

End Users will note an enhanced Rater Selection experience with an improved display, layout, and search. Admins can select to hide empty rater groups and provide customized messaging to provide clarity.

- Empty Groups
 - Show/Hide empty rater groups
 - Customize the messaging for empty groups
- Bigger Rater selection modal experience
- Action buttons (Save/submit) in the header
- Auto Search (no longer need to press enter after entering a search term)

360 Rater Selection Enhancements

Rater selection for Madison Harris

Save

Submit

2. Managers

Minimum: 0 | Maximum: ∞

Admins can customize a message for empty rater groups

Based on your reporting structure, there are no raters available for this group.

Save/Submit buttons now appear at the top and are sticky

3. Rater Network

Minimum: 1 | Maximum: 5

Rater Selection table size has been increased to accommodate more demographic columns

	Name	Email	Position	Department	Division	Invites
<input type="checkbox"/>	Ava Estrada	aestrada@blu.eta	Major Gifts	Fundraising	Institutional Adv...	1/5
<input type="checkbox"/>	Damion Clemens	dclemens@blu.eta	Assoc. Dir. Alum...	Alumni Relations	Institutional Adv...	2/5
<input type="checkbox"/>	Jayda Terrell	jterrell@blu.eta	Network Admin	Information Tec...	Finance & Admin	1/5
<input type="checkbox"/>	Kyle Rollins	krollins@blu.eta	Corp & Foundati...	Fundraising	Institutional Adv...	1/5

Responsive search

Q da

×

4. External Raters

Minimum: 0 | Maximum: ∞

Cancel

+ Add

Explorance Proprietary: DO NOT DISTRIBUTE WITHOUT EXPLORANCE'S PERMISSION

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Additional 9.3 Enhancements

Additional 9.3 Features

Please refer to the Release Notes in the Blue Help Center for additional details about these release enhancements.

- **Blackboard Ultra**
 - Course Blocking
 - Pop-Up notifications for students to access evaluations
- **Afrikaans Language Pack**
- **Continued interface enhancements**
 - French interface updates
 - Accessibility Enhancements
- **Brightspace/D2L data (Datasource integration)**
- **Azure Support**
- **Blue Item Bank 4.0**

Fixes

A number of issues were resolved in the 9.3 release. Please review the release notes in the Blue Help Center for specific issues that were fixed.

Questions?

Poll

Now that you've learned more about the 9.3 enhancements, let's revisit the question: which of the 9.3 features are you most excited about? You can select more than one!

- A. Configurable SSO Login**
- B. Default Passwords**
- C. Access As**
- D. 3-Level Relationships**
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- F. End User Functionality**

Additional Resources

- [Transition to Blue 9 Community Discussion Forum](#)
- [Blue 9.3 Release Notes](#)
- [Blue 9 Transition Guide on the Explorance Online Help Center](#)

THANK YOU

www.explorance.com