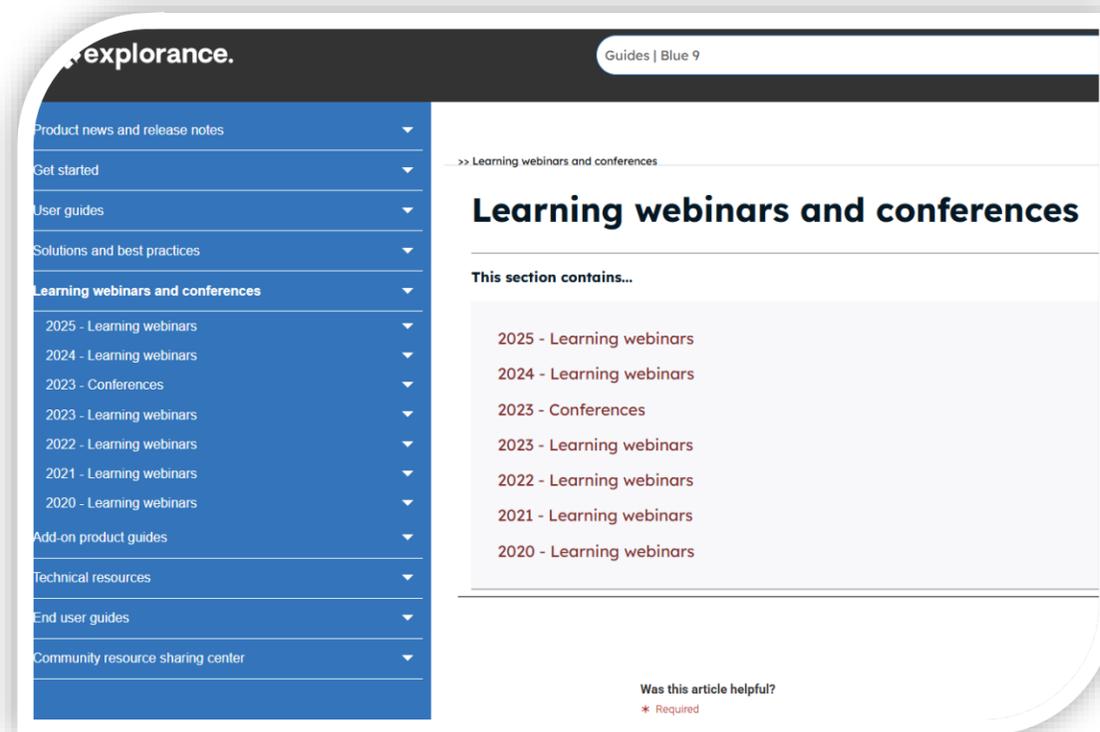


# Blue 9.4 Release Webinar



# ❖ Housekeeping

- Feel free to ask questions using the Q&A panel
- This webinar is being **recorded**
  - Recording will be made available in the Help Centre (<https://onlinehelp.explorance.com/>)



# ❖ Agenda

- Feature list of 9.4:
  - Blue Home Enhancements
  - Compact Report
  - Blue-MLY Integration
  - MLY Add-ons in Blue
- Planning your upgrade
- What's next?
- Community Resources

# ❖ Release info

Release date: May 13, 2025

## Blue 9 Release notes

- Features
- Known Issues
- Fixed Issues

*Tip: Check out the master to view a cumulative list of all features*

## Compatibility

- [Blue compatibility table](#)

The screenshot shows the Explorance Help Center interface for Blue 9. The top navigation bar includes the Explorance logo, a 'Submit/View a request' button, and links for News, Training, Community, and English. The main header features the 'blue' logo and the tagline 'The people insights platform.' Below the header, there are three main sections: 'User guides', 'Community', and 'News and updates'. The 'User guides' section has a 'Go to guides for Blue 8' button and a card for 'I'm new to Blue' with sub-sections like 'Intro to Blue', 'Enterprise', 'Higher Ed', and 'Training'. The 'Community' section includes 'Forums and community' with sub-sections 'Blue community forums' and 'Community resources', and a 'TOPICS' section with a topic 'Manual versus Scheduled Timing of Evaluations'. The 'News and updates' section has a 'View calendar' button and a 'Product news' card with sub-sections 'Welcome to Blue 9', 'Transition: Blue 8 to 9', and 'Release notes' (which is circled in blue). A date badge for 'October 22' is also visible.

# Blue Home enhancements



## ❖ Blue Home

Blue 9 introduced the Home page which:

Centralizes tasks and reports from all projects for the end user (even when the user may belong to different datasources)

Tasks:

- Provide updates re: task status using the Task progress widget
- Create urgency by customizing the Highlight expiring tasks option

Reports:

- Can search reports via filters, keyword search etc.
- Can bulk download PDF versions

## ❖ With 9.4 : Include “Upcoming” tasks

### ➤ In Home Administration:

#### ➤ New option to include Upcoming tasks

- Give a heads up by including the tasks that have not yet started

### ➤ If using the “include upcoming tasks” option with LMS integration

#### ➤ Can now provide a consistent experience for end users

# ❖ Include “Upcoming” tasks

**Home settings**

Back to Home

General settings

Widgets and layout

BLUE HOME CUSTOM FILTER LABELS

**Custom label for categories**  
Enter a custom label for the categories filter. This label will only be seen by users of Blue home.  29 / 30 8/25

**Custom label for subcategories**  
Enter a custom label for the subcategories filter. This label will only be seen by users of Blue home.  29 / 30 11/25

**Custom label for tags**  
Enter a custom label for the tags filter. This label will only be seen by users of Blue home.  29 / 30 4/25

GLOBAL TASK SETTINGS

Days Percentage

**Highlight expiring tasks**  
Set when a task should be highlighted based on its expiry date.  Days

**Upcoming tasks**  
Set the number of days before a task is available, that the task will appear in the task list (max 90 days).  Days

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Blue v.9.4.0.246

Tasks Status Category Tags Date Range My tasks filters Save filters All filters

17 tasks

MY TASKS

Sort by: Due date

Completed

Expired

In progress

Open

Opted out

Presubmitted

Upcoming

Reset Apply

1018	Subject management	Mandy Bush, Gina Wang, Mandy Bush	Open	Ends on 2025-05-18	Start Now
2018	Subject management	Luke Waldon, Mandy Bush, Luke Waldon, Mandy Bu	Open	Ends on 2025-05-18	Start Now
3018	Subject management	Barbara Tan, Mandy Bush, Barbara Tan, Mandy Bush	Open	Ends on 2025-05-18	Start Now
401846	Introduction to Art History I	Mandy Bush, Rosanne Chiba, Mandy Bush, Rosanne Chiba, Mandy Bush, Rosanne Chiba	Open	Ends on 2025-05-18	Start Now
402603	Human Origins-S1	Mandy Bush, Mandy Bush, Mandy Bush			

## ❖ With 9.4: Robust Home Experience

- Back-end update results in improved performance and stability for Blue Home
- Notable improvement in page loading time with reduced time-outs for a user with a large number of tasks/reports
- All reports will display (when accessing the Reports tab)
  - Which means no longer have to toggle Historical reports on to view reports older than 2 years

## ❖ Blue Home: Central place

- This update also allows pushing of tasks or reports from other Feedback Systems
  - Another step towards making Home truly the central place for all things feedback

## ❖ Common Scenario

- An instructor needs to provide their reports from the last 5 academic years for all the courses they taught for promotion/tenure review

or

- HR manager needs to pull all reports for a specific employee

# Compact Report Theme

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## ❖ Multiple themes to choose from

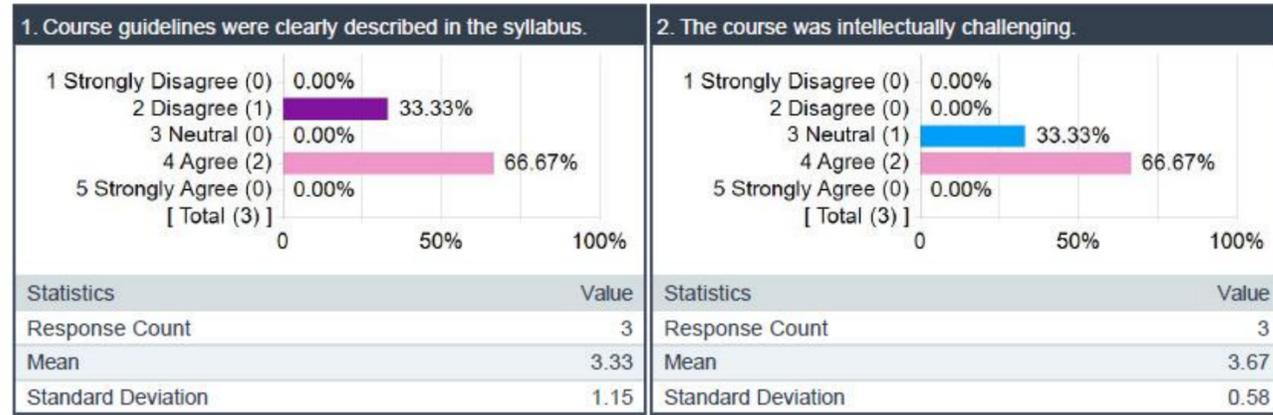
- Blue 8.1 introduced Modern Report theme: modernizing the look and feel of reports
- Feedback from you (our Community) – too much white space leading to too many pages in the PDF download

## ❖ Multiple themes to choose from cont'd

- Introducing with 9.4: Compact Modern Report theme
  - Look and feel of the Modern theme
  - Reduced white space – resulting in fewer pages for the PDF download (similar to the Classic theme)
- Choose the theme best suited for your viewers

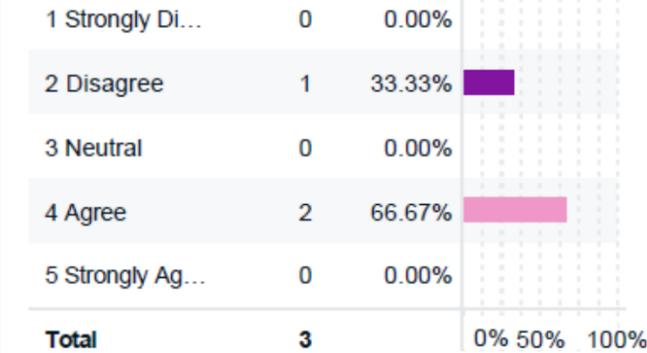
# ❖ Multiple themes to choose from cont'd

## Questions evaluating the Course



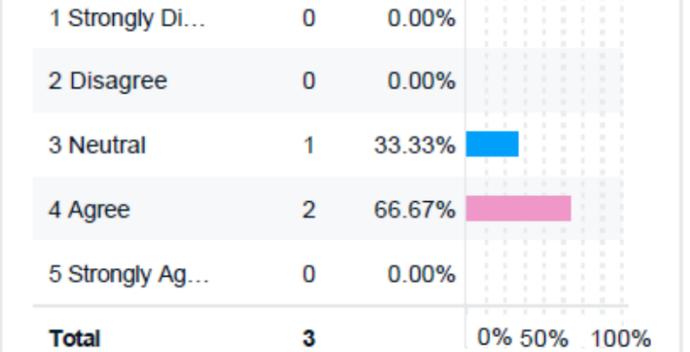
Classic

## 1. Course guidelines were clearly described in the syllabus.



Statistics	Value
Response Count	3
Mean	3.33
Standard Deviation	1.15

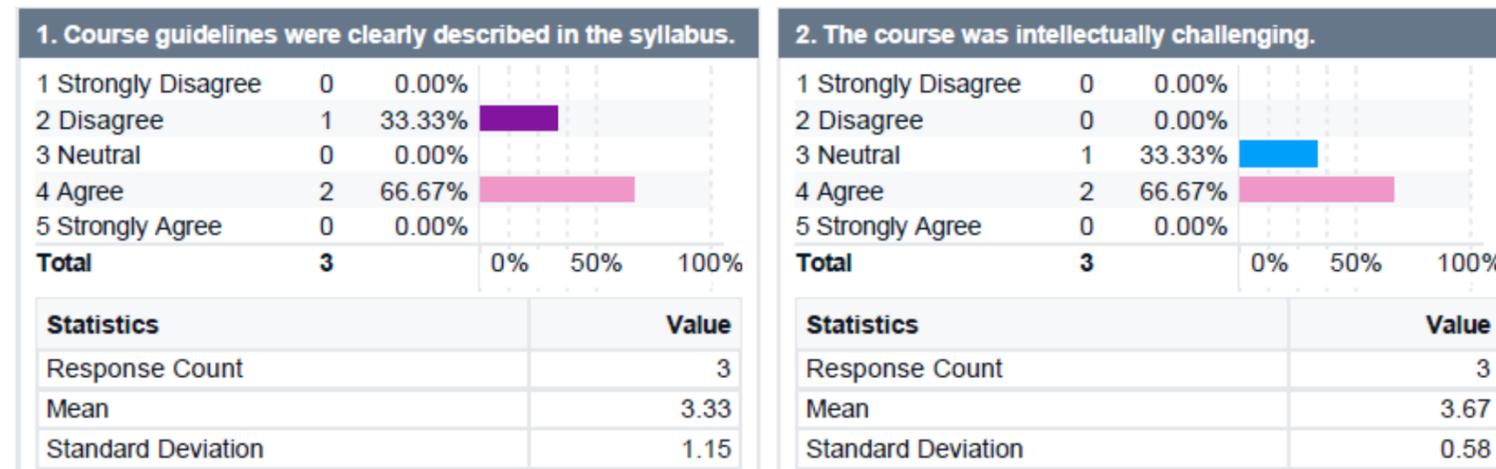
## 2. The course was intellectually challenging.



Statistics	Value
Response Count	3
Mean	3.67
Standard Deviation	0.58

Modern

## Questions evaluating the Course



Compact

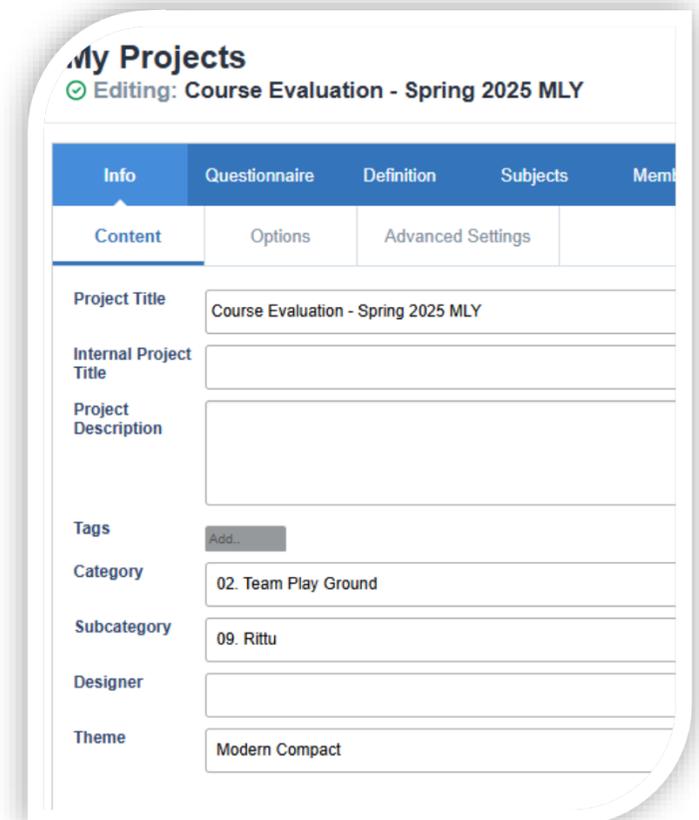
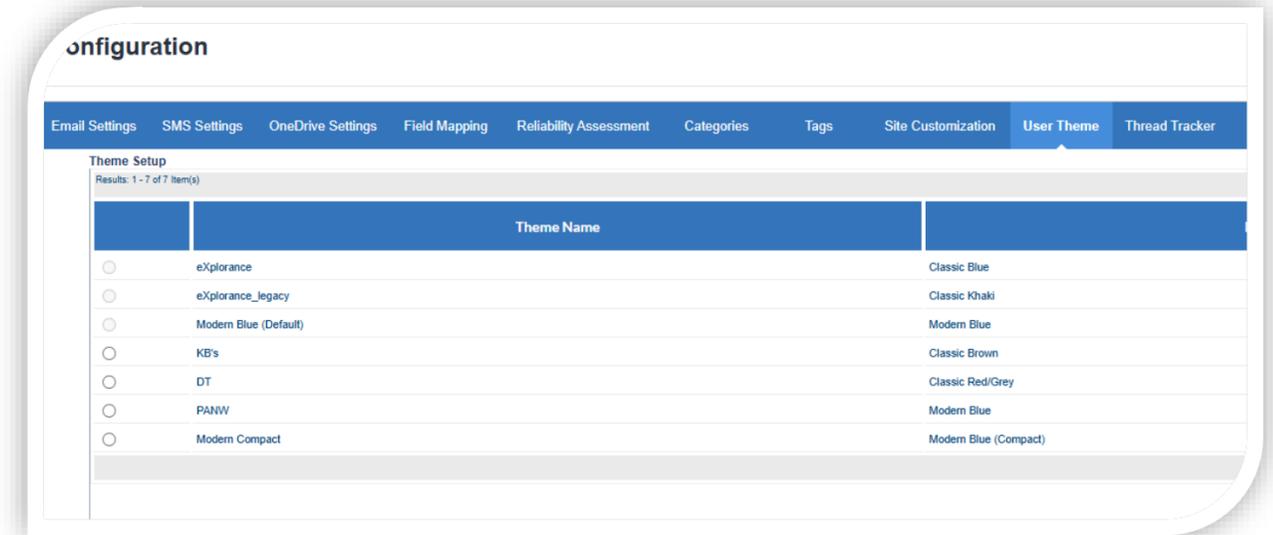
# ❖ Multiple themes to choose from cont'd

## ➤ Applying a report theme

- Create theme under Admin-configuration
- Choose in Project

## ➤ Changing a report theme

- Change theme in project
- Regenerate report



# ❖ Compact Modern Theme

What exactly is “compacted”?

- Mainly white space in between blocks
- Font size, block charts not affected

In my report, my questions gets cut off

- No change here, but your options include:
  - Can use FillOut labels on Questionnaire OR
  - Can adjust the settings of the Report block

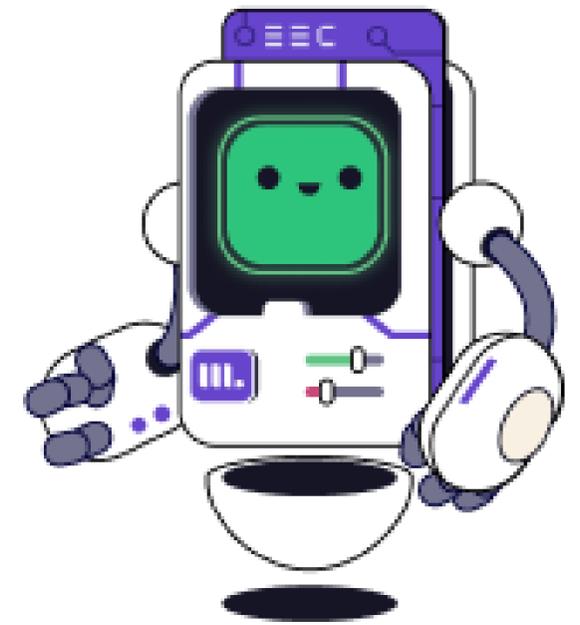
# Blue-MLY Integration



# ❖ Analyze open-ended feedback, quickly

Explorance MLY is an AI-powered qualitative analysis tool that turns open-ended comments into actionable insights

- Built to enable HE/HR leaders to listen at scale, the voice of students/employees
- Specialized categorization, sentiment analysis, Recommendations and Alerts models
- Key Benefits: time-saving efficiency, uncovering hidden insights, driving impactful decisions
- 3 models: Employee Experience Intelligence (EEI), Employee Learning Intelligence (ELI) and Student Experience Intelligence (SEI)



# ❖ Analyze open-ended feedback, quickly

## BTA: Text Analytic add-on

- Via an integrated experience with Blue – thousands of comments analyzed and visualization available via Report blocks
- BTA is Teaching & Learning only
- Questions need to be suitable to maximize coverage and accuracy
- Provides many insights but not enough connection into the why, the what and the how, without manual review

## ❖ With 9.4 - MLY Analytics in Blue

- With a similar integrated experience, the MLY analysis can now power the visualization in Report blocks
  - Any comment feedback data from course evals, experience surveys etc.
  - Enhances T&L analysis and categorization and can go beyond with MLY models
  - Includes: Alerts, Recommendations, Sentiment (sub-models)
  - Blocks in Report available: Comment(MLY), Frequency, Cross-tabulation



## ❖ MLY Analytics in Blue cont'd

- MLY license and instance required, which is then linked to Blue \*\*
- Using the MLY quota available, ability to :
  - Exclude non-essential comments and upload thousands of comments to MLY via the integrated experience
  - Can do a one-time upload or automate by syncing daily
  - Analysis is created and also accessible in MLY by the MLY Admin
  - We now have two ways to “share” analysis results with the same quota – in a static way (Blue Reports) or in an interactive interface (MLY)

*\*\* A MLY implementation includes onboarding with our PS team*

# ❖ MLY Analytics in Blue cont'd

**Management**  
Managing: Course Evaluation - Spring 2025 MLY

Tasks Subjects Responses Fields **Text Analytics** Project Links Report Management

Analyze Comment Responses -- MLY based text MLY Settings

**MLY Settings**

Exclude these comments from analysis

D/A, bob

**INFOS**

Comments last analyzed: Fri, Apr 04, 2025, 11:21

Comment logs: [Download log](#)

Total number of comments: 8

Total number of unanalyzed comments: 1

**ANALYSIS TYPE INFORMATION**

Analysis type used in MLY: Student

Version:

Analysis type configured in project:

Version:

Latest version available:

**AVAILABLE DEMOGRAPHICS**

- ▶ Course
- ▶ Students

**Synchronization settings**

**ANALYSIS SETTINGS**

**Please note:** Once the upload process has started, the settings are locked. If the settings are unlocked and changes are made, the comments must be uploaded and re-analyzed

Upload and analyze only new comments | MLY quota is used

Upload and re-analyze all comments | Discard previous data. MLY quota is used

Re-analyze all comments with the latest MLY version | MLY quota is not used

**Apply** | **Cancel** | **Unlock**

**Timing:** **Once** | **Daily**

Upload, analyze, and retrieve **Start**

# ❖ MLY Analytics in Blue – Visualization

Frequency block : explore key recommendations, sentiments, categorizations and compare against group norms

For example:

For Instructors/Employees (Individual)

- Can compare own results against normative analysis
- View top recommendations

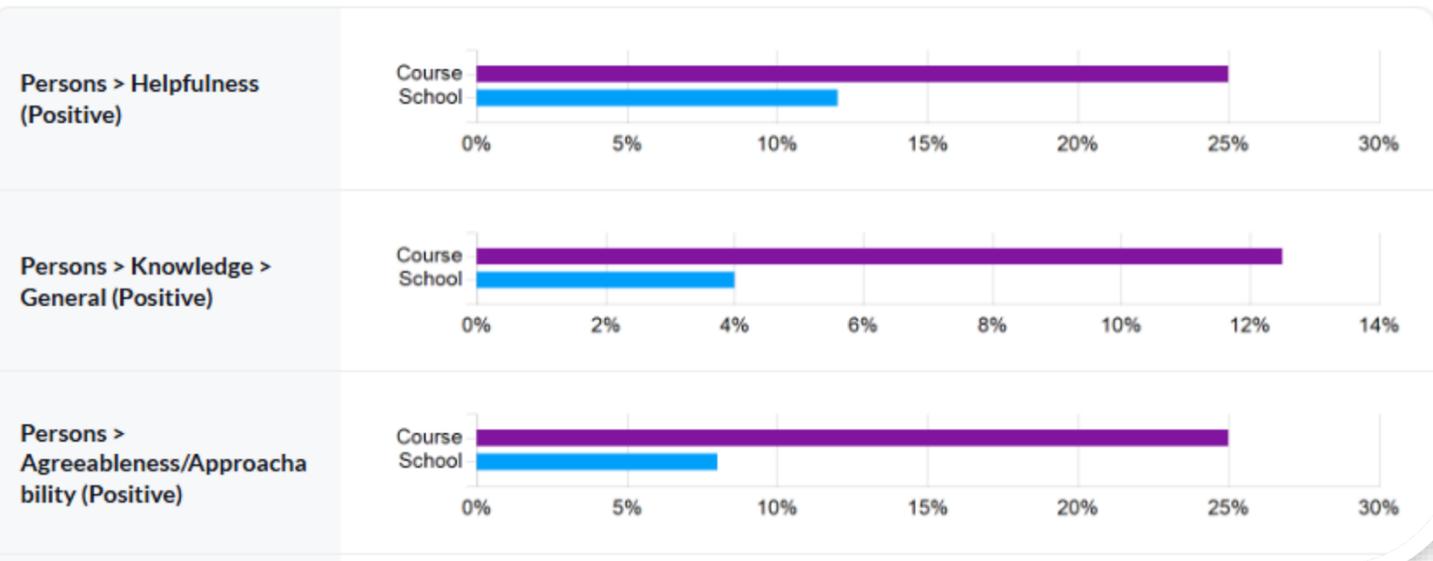
For Dept head/Dean, HR (aggregate-level)

- Access to **insights** from open-ended feedback
- Gives a quick snapshot of the top “X” most frequent topics that are being mentioned

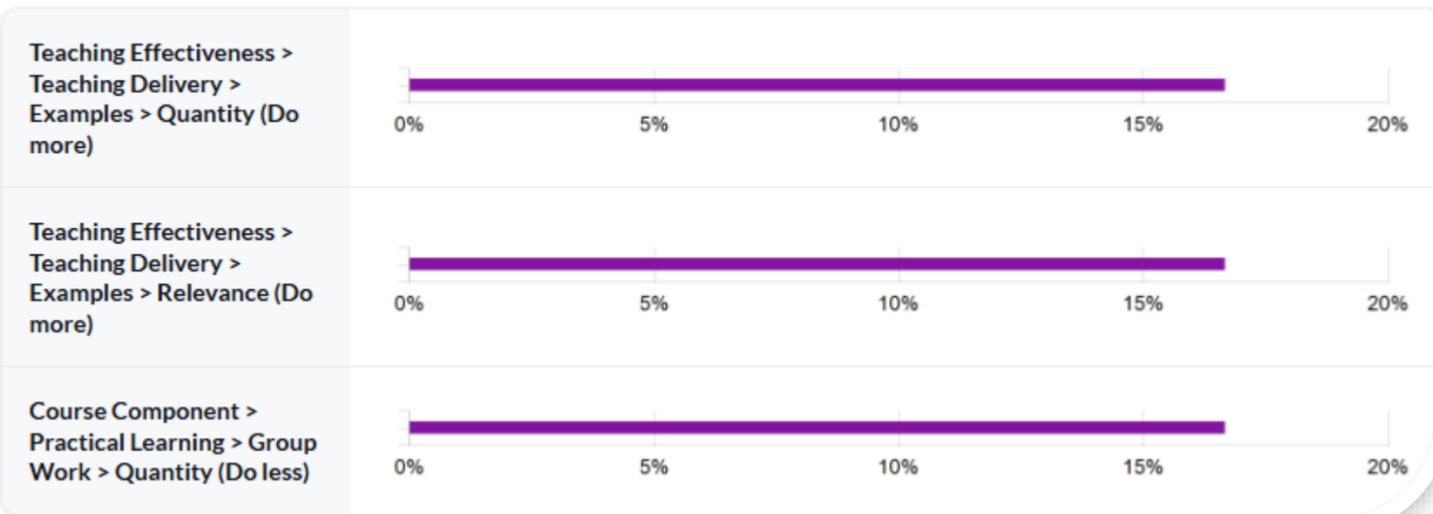
# ❖ MLY Analytics in Blue – Visualization

## Frequency block : Individual

### FREQUENCY - TOPICS COMPARE

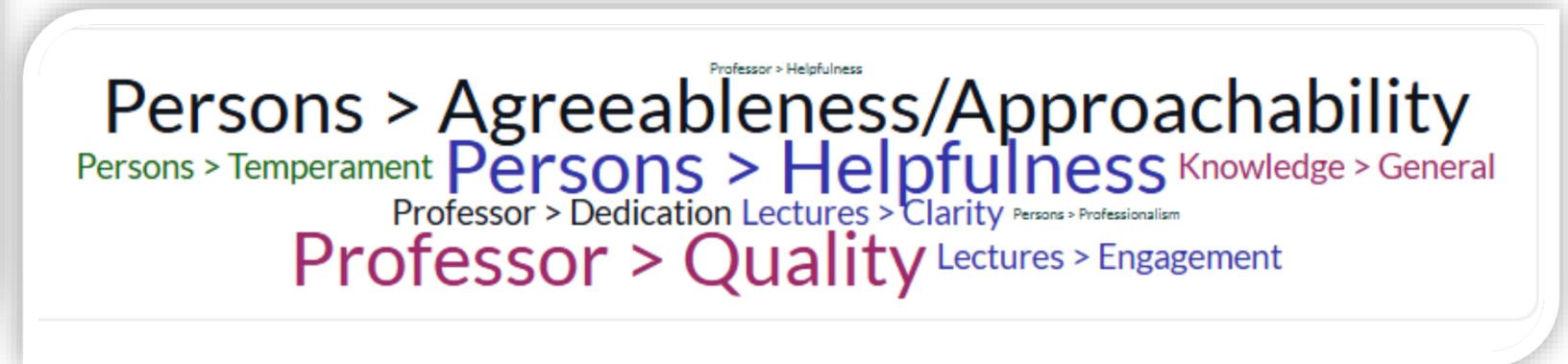
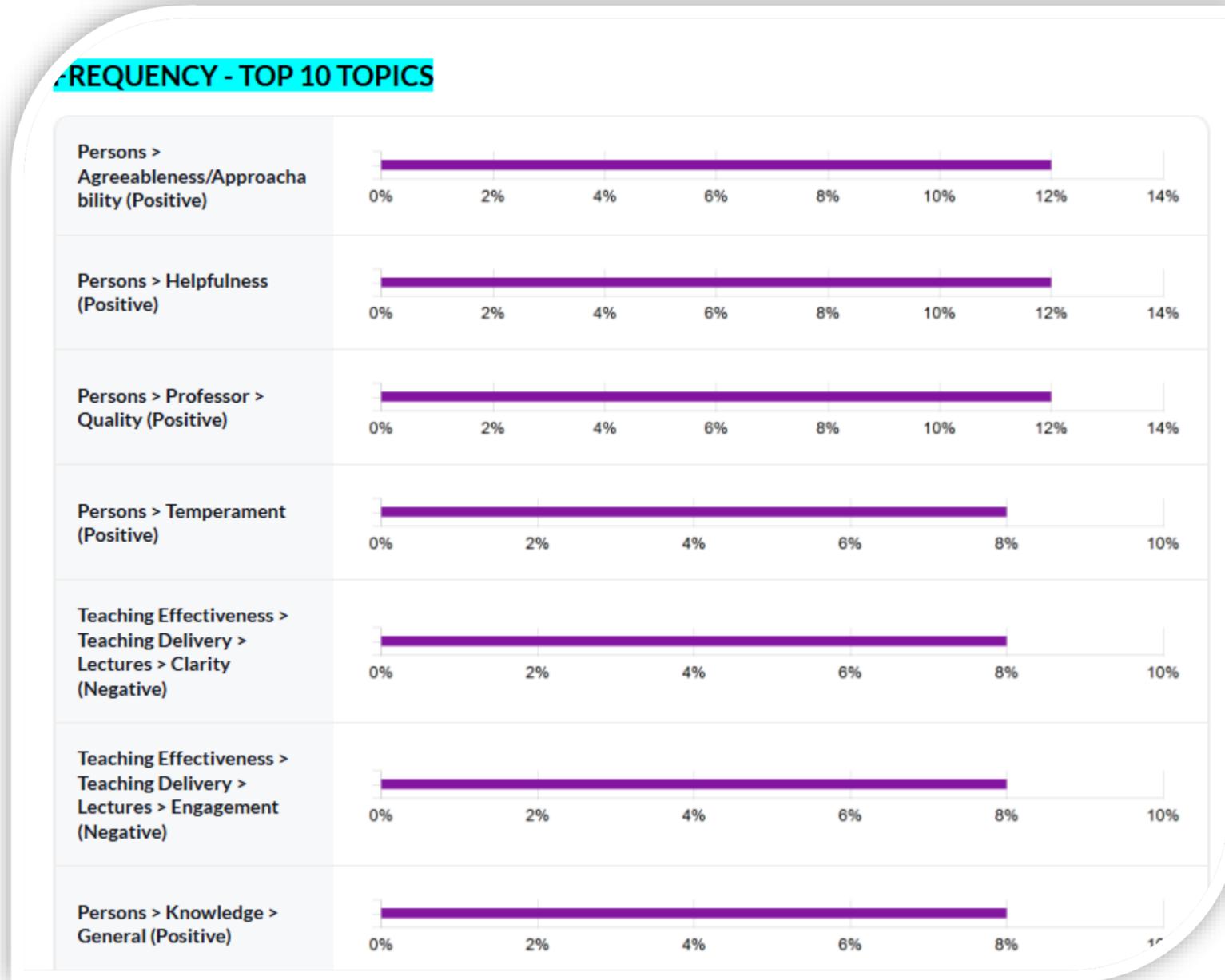


### FREQUENCY - RECOMMENDATIONS



# ❖ MLY Analytics in Blue – Visualization

Frequency block : Aggregate



## ❖ MLY Analytics in Blue – Visualization

Cross-tabulation block: identifies top discussion topics by rater demographic or question statistic

For example:

For Instructor, Employee (Individual)

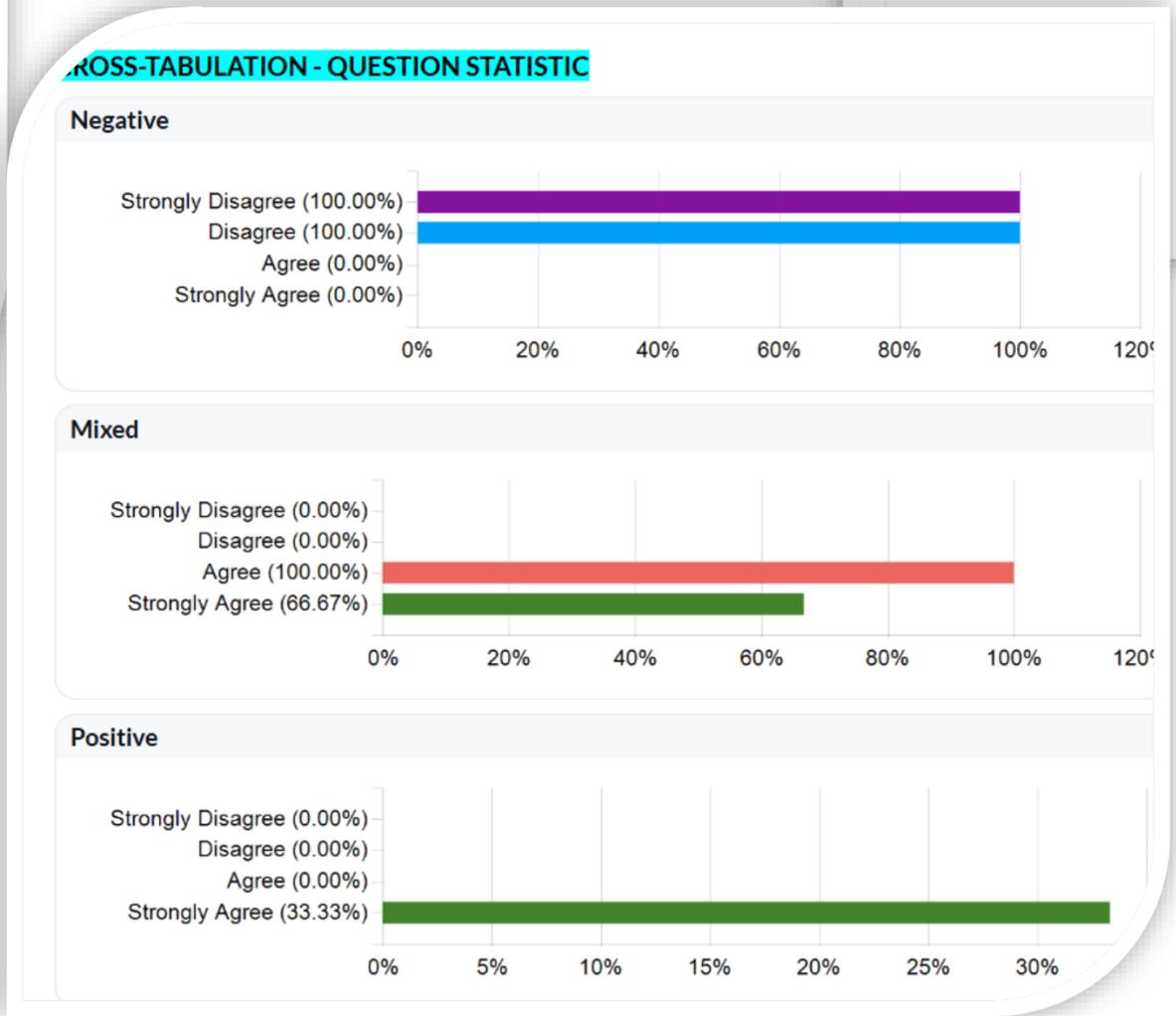
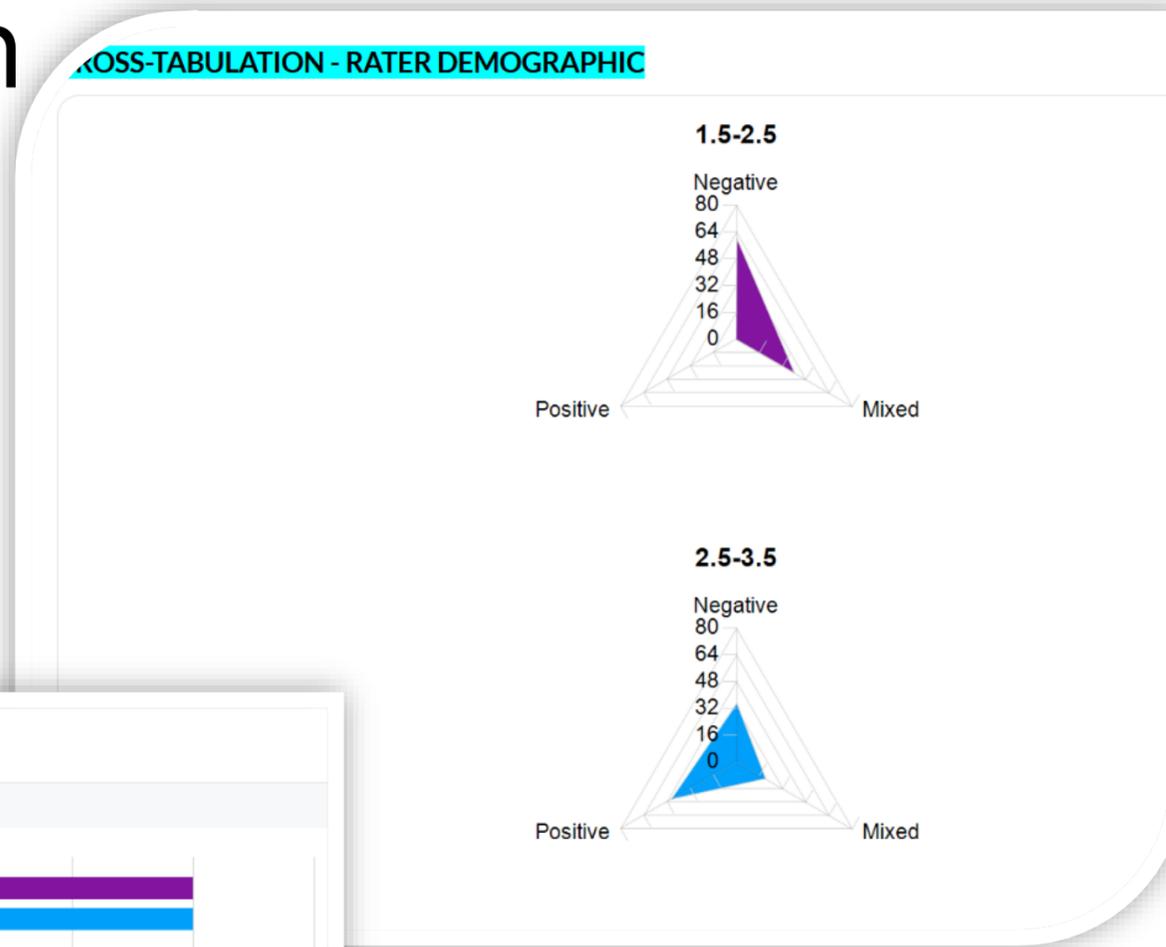
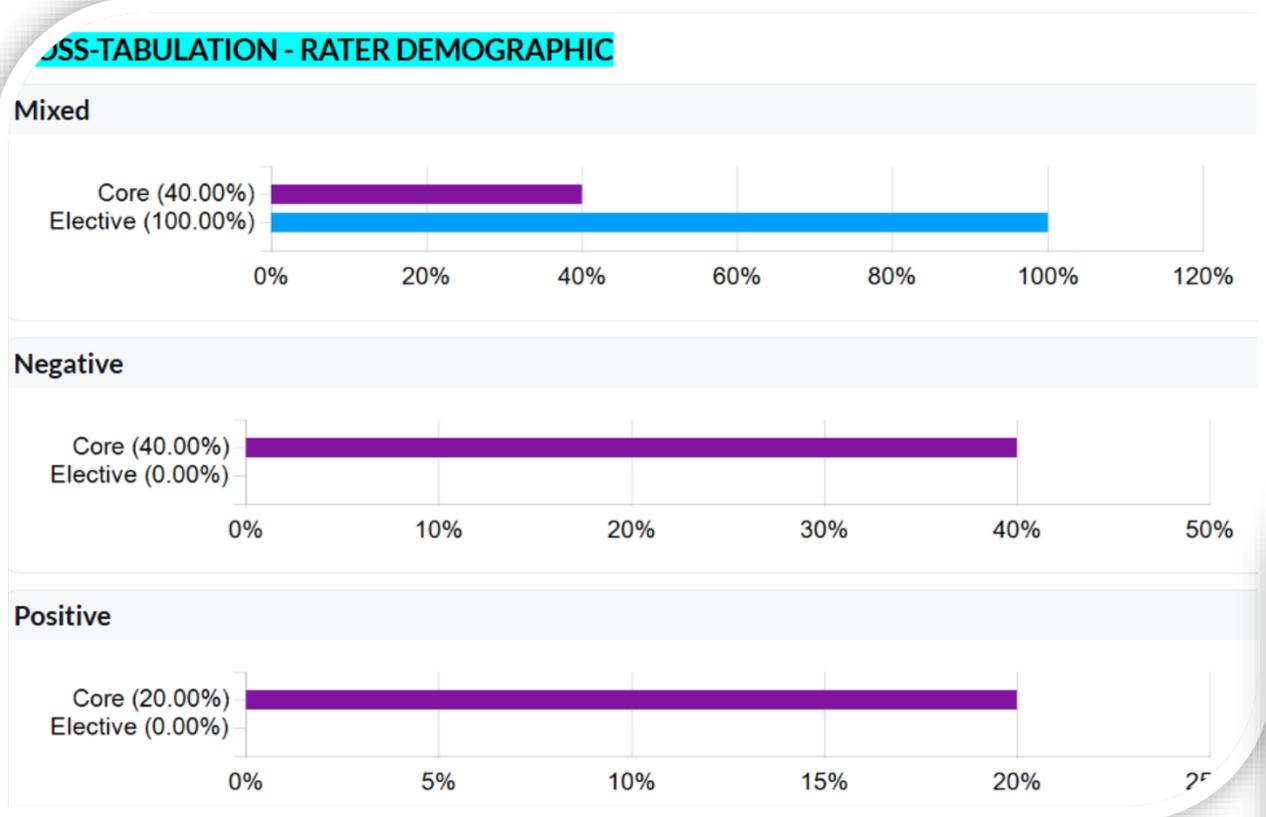
- Detect bias: cross-tab with a rater demographic
- Additional info on quantitative data – *why I received I may have received a particular rating*

For Dept head/Dean, HR (aggregate-level)

- Can view breakdown of analysis i.e. by rater year of study/service

# ✦ MLY Analytics in Blue – Visualization

## Cross-tabulation block



# ❖ MLY Analytics in Blue – Visualization

MLY Comment block

Scenario - I need to provide a report to highlight concerning comments

- Leveraging the MLY Alerts - can produce a report that includes comments that meet a defined threshold
- Highlight urgent and concerning feedback to allow viewer to determine appropriate action

## ❖ MLY Analytics in Blue

The benefits of using MLY for analyzing comment data:

- Opens possibilities for collecting more feedback :  
Example: course evaluations + student experience
- Simple Survey Design : needs one open-ended question with some guidance (don't need to include specific ones)
- Everything discussed till now is available with a basic MLY subscription

# MLY Add-ons in Blue



## ❖ MLY Comment Translation in Blue

MLY 3.0 introduced a Multilingual add-on which translates non-English comments to English

- With the add-on and leveraging Blue-MLY integration, can include translated comments in Report

(Both the original and English translation will appear)

- No data prep required - comments of all languages can simply be uploaded



Bernard Baker is an excellent teacher who cares deeply about passing on his subject. He devotes much of his time to private sessions with groups of students.

🌐 Original comment

Bernard Baker est un excellent prof qui a le soucis de bien transmettre sa matière. Il consacre beaucoup de son temps à faire des session privées avec des groupes d'élèves

## ❖ MLY Redactions in Blue

MLY 3.0 also introduced a Redaction add-on which allowed admins to :

- Identify terms to redact i.e harmful terms, nominative info
  - And then create rule sets to determine how to handle the terms as well as hide/exclude comments meeting a particular alert threshold
- 
- With the add-on and leveraging Blue-MLY integration, can use your Redaction rule set(s) in the Report
  - Access to multiple rule sets in Blue – can create varying rule sets such as “lightly-redacted” for Dept Chairs vs “fully-redacted” for instructors and apply to each report accordingly
  - Different rule sets can also be applied by block within the same report where the needs of viewers may vary





# MLY Redactions in Blue cont'd

## Course Evaluation - Summer 2025

### Individual instructor report - redacted comments for 101815 Cultures of Modern Canada (Mandy Bush Anthropology)

 Report prepared by Administrator  
Created Wednesday, May 7, 2025

 Course Audience: 6  
Responses Received: 6  
Response Ratio: 100 %  
Opted out: 0

Please suggest how the instructor could effectively facilitate learning by all students

Comment	
[Redacted comment]	<b>Redacted comment text</b> - Professor Bush is not a nice person. She's mean to students of color. She's a racist. (Alert score: 96%)
I don't like Mandy's teaching style. She doesn't prepare well her courses so she focuses a lot on students' exchange to [Redacted] time in her courses. That is just a [Redacted] waste of time.	<b>Redacted word</b> - stupid
Mandy was extremely helpful and open to student questions in class and during office hours. She was thoughtful about material and taught and reinforced what we learned in lecture.	
Mandy is funny, knowledgeable, intelligent, and very coherent. It is a mystery then that the lectures were never very clearly presented, or interesting. I hope it is due to the newness of the course.	
Mandy was always eager to open up the floor and have a casual and engaging discussion as a class. I appreciated the sincere and enthusiastic interest in the subject that she had. I didn't care for the many times we counted off into groups, I would often have a group that wouldn't want to honestly work on the assignment.	
Mandy is great! She sees positively students interaction and offers a lot of help!	

## ❖ MLY Redactions in Blue cont'd

Scenario : Decentralized

Each school/dept/unit follow different policies for comment redaction

i.e. School A redacts offensive language, School B redacts offensive language and removes nominative info

- In MLY, create a redaction rule set for School A and one for School B
- In the Report, can use triggers to present the block with the correct rule set

## ❖ MLY Redactions in Blue cont'd

Scenario : Manual redaction required

The Redaction function significantly reduces manual effort by automating the process, yet policy requires a final manual review to ensure compliance.

- From MLY : the analysis can be shared to the Reviewers to review and edit as necessary
- Once completed, the rule set will include both the automated redactions and any manual edits and can then be included in the Report

## ❖ Honourable mentions

- Multiple email address support
  - The ability to add multiple emails \*\* in a user record **has been restored in 9.4**
  - Any task/report notification will be sent to all addresses

*\*\* separated by semi-colon*

### Fixed issues:

- “Hide report that have not met threshold yet” will now apply to Blue Home as well as reporting list
- Dynamic Viewer groups will no longer be “Invalid” upon project copy

Full list available in the Release notes

## ❖ Polling Question

**Which feature of Blue 9.4 are you most likely going to use?  
(select all that apply)**

- “Upcoming Tasks” option in Home
- Compact Modern Report theme
- MLY in Blue Reports
- MLY in Blue Reports + translation
- MLY in Blue Reports + redaction

# Planning your Upgrade



## ❖ Planning your upgrade to Blue9 cont'd

Going from Blue 8 to 9 is a migration as there is a new architecture, so it involves:

- User migration : SSO and unique ID
- Configuration migration : SSO config, SMTP, LMS integration
- New URLs

So, what does this mean for you?

- Migration work is mainly done by our Support team but your IT resources are needed
- The Transition Guide is long (we know!), but it's designed to provide full, accessible details for your reference
- Time for migration: will vary depending on database size & your IT staff availability

# ❖ Planning your upgrade to Blue9

## Going from Blue 9.x to 9.4

- Migration done!
- Minor upgrade so minimal “downtime”
- Blue-MLY Integration:
  - Consider which roles will be needed
    - Do I have one central MLY admin ?
    - Do I add my Blue Project Mgrs as Analysts in MLY?
  - If you already have a MLY : please include the URL of your instance in your upgrade ticket
  - If you don't have a MLY:
    - Speak to your Account Manager
    - Reminder: onboarding is included with new implementations

# What's next?

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## ❖ What's next

- Alert categories for MLY & MLY in Blue reports
  - Versus just a % score, context about what type of alert it is
- Export tasks/reports links & status outside of Blue
- Workflow for manual redaction

# Community Resources



# ❖ Training & Documentation

Self-guided training: new module

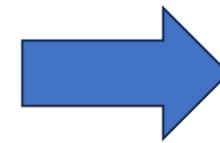
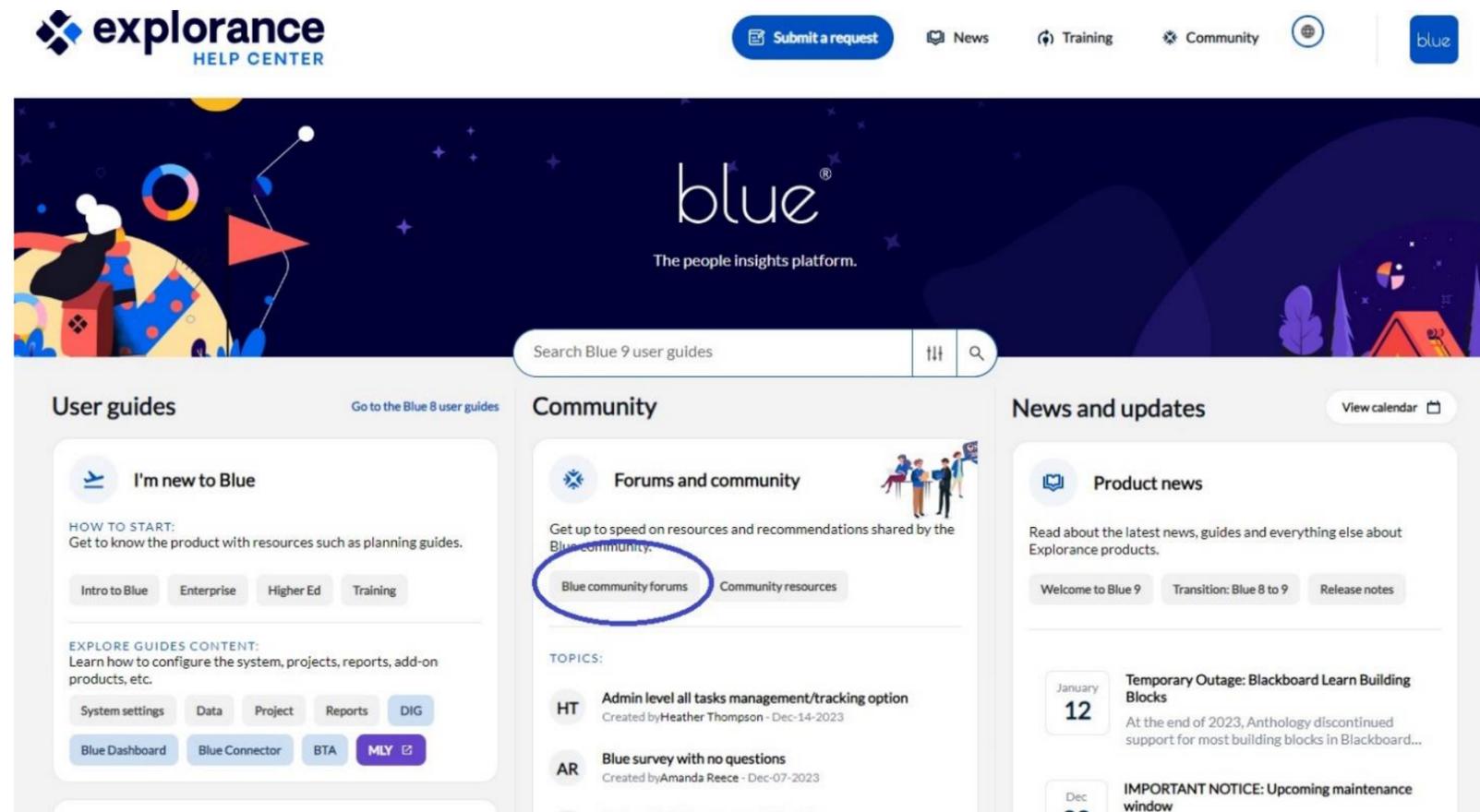
➤ MLY In Blue Reporting

[MLY in Blue Features](#) - Guides/additional pages in the Help Centre:

- Adding MLY to my Blue Instance : what do I need to know?
- MLY In Blue Reports – Guide
- MLY in Blue Reports – Redaction
- MLY in Blue Reports – Use Cases

# ❖ Q&A from today's webinar

Questions and Answers will be posted to the Webinar and Conference Discussion Community Forum



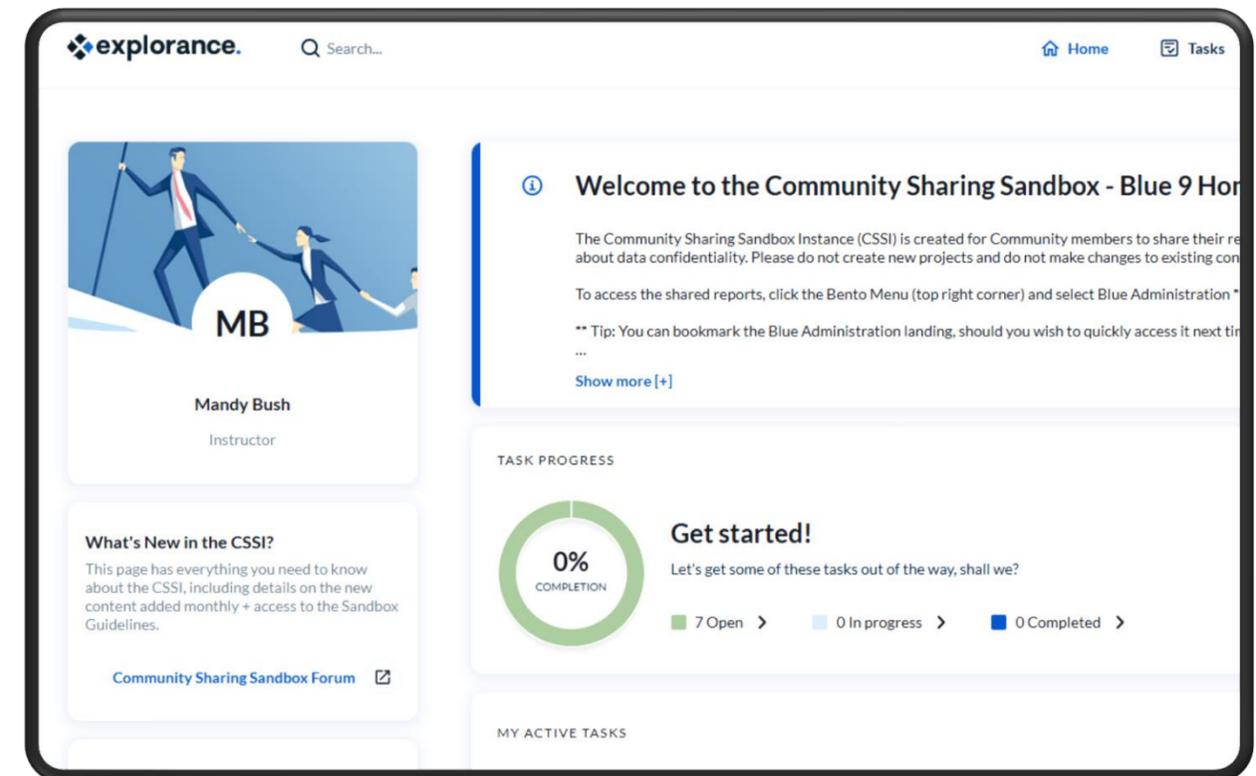
# ❖ Community Sharing Sandbox Instance (CSSI)

Co-developed by the Community, with the Community, for the Community

- Experience the latest version of Blue9
- See the monthly [“What’s New”](#) forum posts for details on what’s available in the CSSI
  - Stay tuned for May update that will include Blue-MLY integration
- Join today!

*(visit the Guidelines for details on how to request access)*

[Guidelines to using the Bluenotes CSSI](#)



❖ Join us for the next one!

Learning webinar: June 25th

[Uncover Deeper Insights through Qualitative and Quantitative Analysis with MLY in Blue Reporting](#)

Learning Webinar: July 30<sup>th</sup>

[Using Blue to Set up and Implement Program Evaluations](#)



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# Workshops and Sessions at Explorance World



**Elevate Teaching Effectiveness Reporting with Explorance Blue Latest Features**



**A Seamless Transition to Blue 9**



**Explore How MLY Can Make Your Redaction Easier for Your Course Evaluation Data**



**Blue for Teaching Effectiveness**

**Thank you!**