Blue 8 Welcome Guide

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Welcome to Blue 8

Blue 8 takes supporting all your organization's feedback gathering needs to the next level. There are exciting new experiences awaiting every Blue user, from your learners completing their course evaluations, to instructors interacting with their courses, staff participating in onboarding surveys and 360 reviews, and clients of all types providing crucial feedback at critical junctures. Our commitment to accessibility and equivalent experiences for all continues, which means that none of your stakeholders will be left out of your processes.

In this document, you will get an overview of what is new, how Blue 8 is different from previous releases, and what you should note before upgrading.

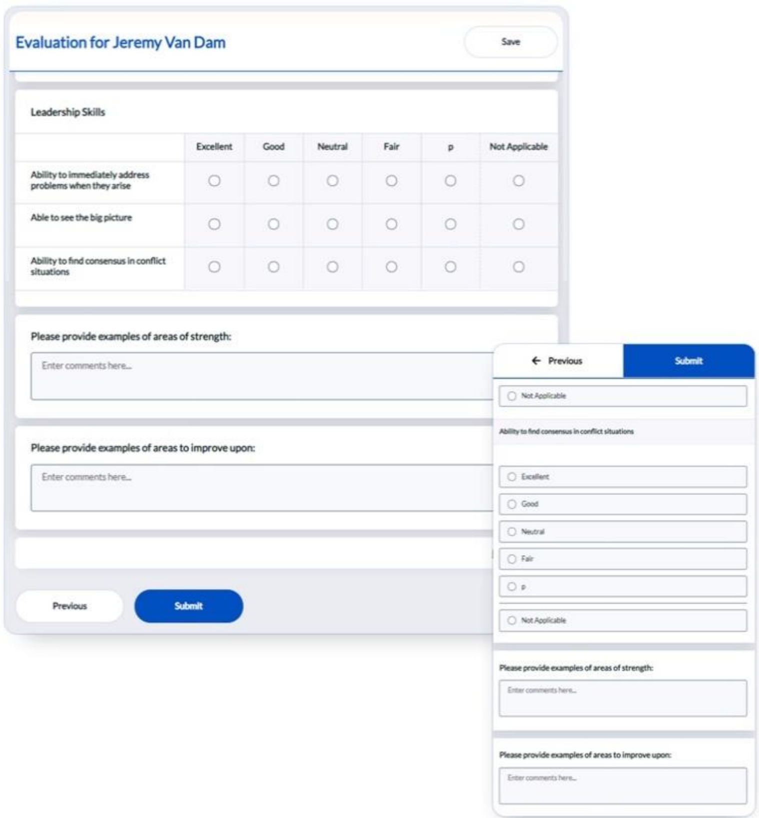
What’s New

In this section, discover the exciting new features that are made possible with the release of Blue 8.

Redesigned survey experience

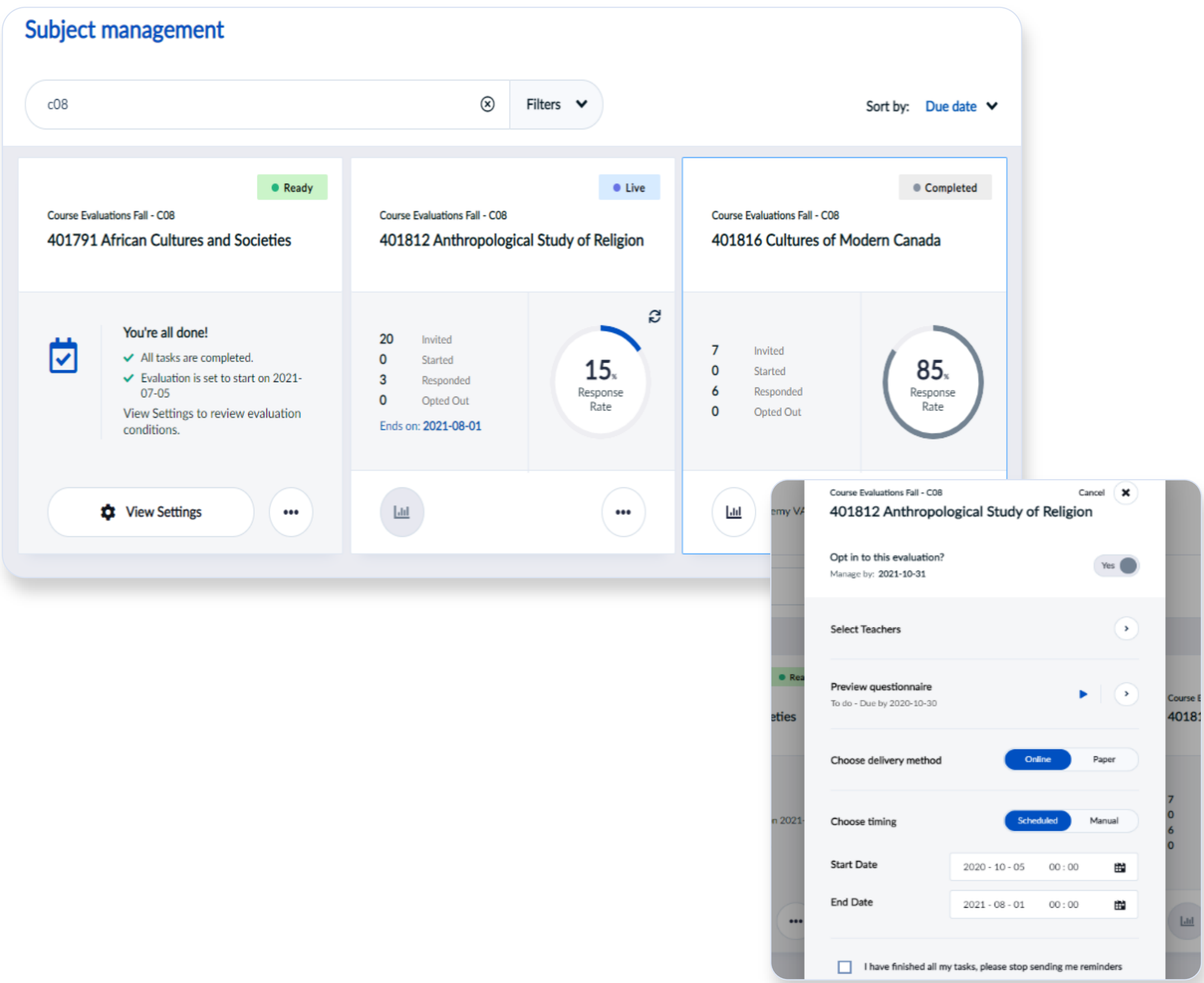
More engaging experiences await your survey respondents with an interface that looks and feels amazing on devices of all sizes. Special care has been taken to delight in several areas, including:

- New, beautifully designed project landing page listing each task and status
- Refreshed welcome page that introduces the survey
- Enhanced summary page that includes completion statuses per question for added clarity, including partially completed responses in tables
- New page load and mouse-over animations
- Improved thank you page that embeds the task list to keep respondents engaged
- Redesigned tables, drop-down menus, radio buttons, instructor picker, etc.
- Convenient sticky title bar at the top as well as Back to top navigation button at the bottom of the questionnaire
- All elements of the pages auto-adjusting for mobile, desktop and every size in between

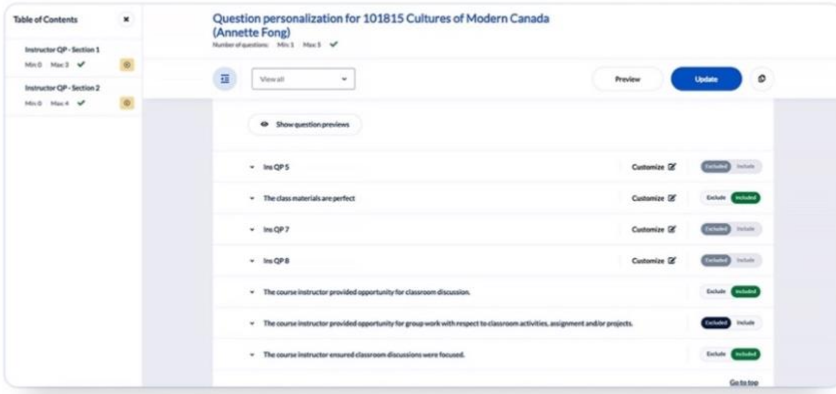


Reimagined Subject Management experience

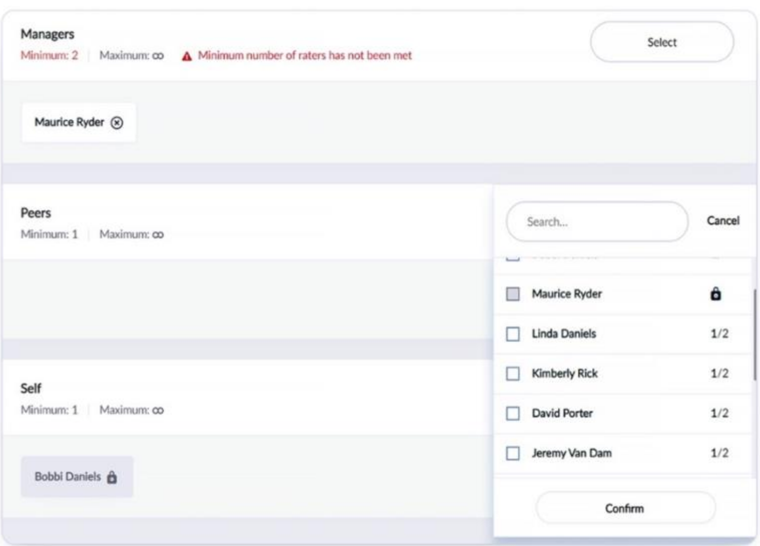
Your subjects being evaluated (e.g., instructors, employees in ongoing 360 reviews, etc.) can now see all activity related to their evaluations in a single comprehensive view. Relevant details and options are showcased for each evaluation right when your subjects need them, such as calls to action if tasks are incomplete, response rates for active evaluations, and reports for completed ones. Subject Management can be accessed easily by your subjects on their desktop and on mobile devices.



Question Personalization with copy from previous, new min/max and pre-select options



Locating groups of questions to add in Question Personalization has never been easier with the addition of a table of contents. Your users can also clearly see the limits you set for each group of questions, ensuring there is a proper mix of questions selected. You may also allow users to copy over questions added from a previous evaluation to speed up the process. Additionally, certain questions may be pre-selected by default by the administrator. These additions come in an updated user interface that is sure to delight.

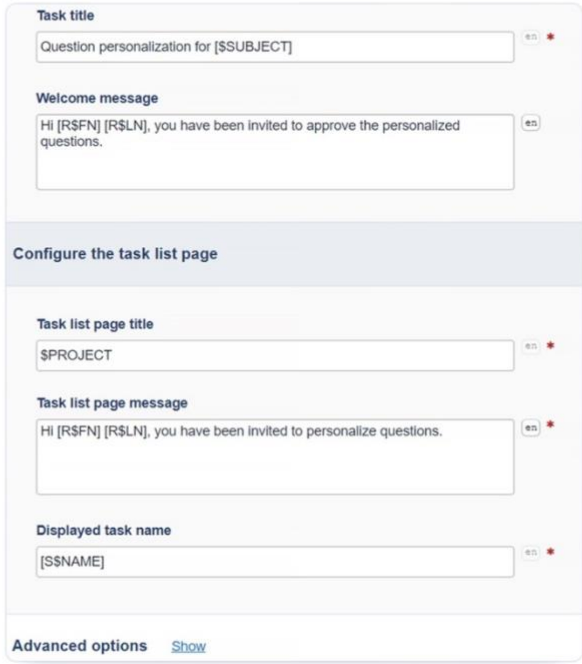


Refined Rater Selection with overall quotas

360-degree review participants enjoy further refinements within the rater selection experience, including improved warnings and enhanced drag-and-drop mechanics. Additionally, you may set an overall invitation limit to ensure that none of the raters in your process will be selected disproportionally to complete reviews.

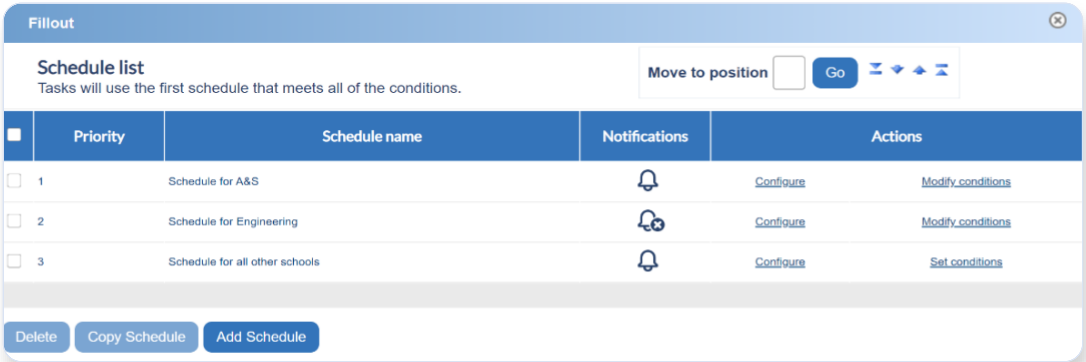
Consolidated project configuration settings

Configuring your projects has never been easier with a new task settings section that regroups all relevant configurations under their corresponding task type. You may configure a unique title and introductory message for each task type as well as customize the redesigned task listing to include specific demographics to better describe each task to your respective audiences. It is also easier to spot whether notifications are turned on or off per task type. These new options allow you to truly manage and tailor the experience of your users at each stage of your process.



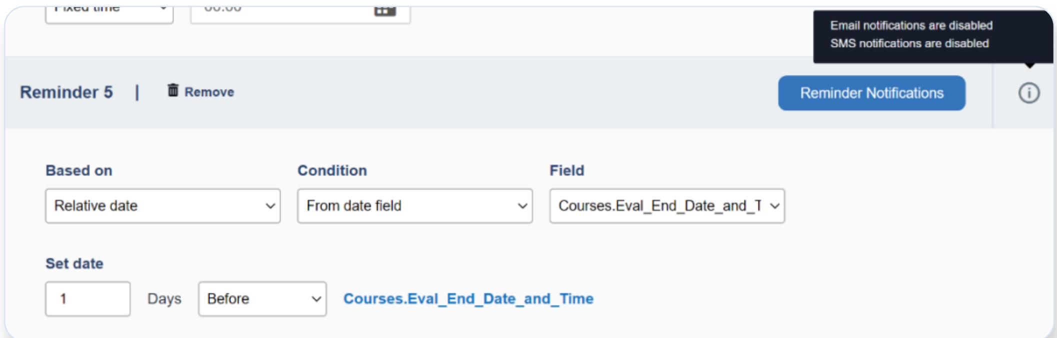
Introduction of Schedules to automate more processes in a single project

Schedules take Dynamic Days concepts to the next level, allowing you to consolidate even more processes under one single project. While it is still possible to set up distinct schedules based on class duration alone, you may also combine (or replace) these rules with course demographic conditions. And each schedule may be configured with distinct notification messages and evaluation window settings.



Additional reminders and a completion notification

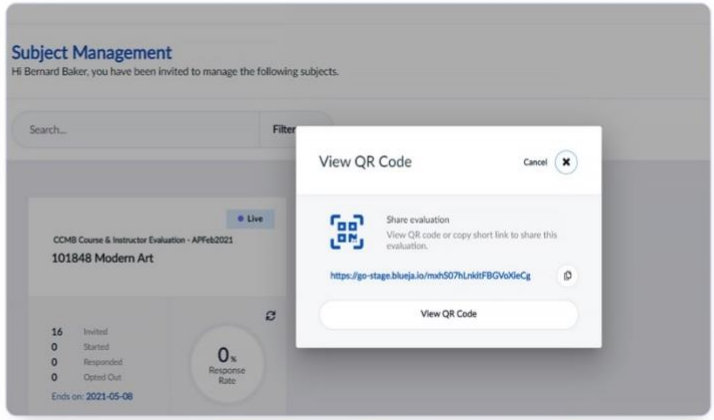
Automate up to five reminders. Additionally, you may configure an invitation and a completion notification to confirm when a participant’s task has been submitted successfully.



Introduction of survey completion certificates to promote engagement[1]

Include a certificate of completion that can be downloaded and kept for the respondent's records. You may include descriptive text of the accomplishment, add a seal, as well as customize the title, logo and signature.

Introduction of self-enrollment and QR codes to widen your survey audience[1]



Allow respondents to self-enroll into a survey, evaluation or conference. This makes it easy to gather feedback when all or a portion of your audience isn't known in advance but where you want to capture each respondent's submission only once. QR codes (scannable from camera capable mobile devices) make this process of enrolling directly in a topic of interest easy. For subject based projects, this means you may also simply display, print or send a unique link or QR code for each evaluation for direct access to the survey. The corresponding short-link (a shortened version of the survey URL) is displayed alongside each QR code.

SMS now supported for all task types[2]

To reach those who may not have access to email or who may not use email as their primary communication method, you may now configure all task types (e.g., Question Personalization in course evaluations and Rater Selection in 360 reviews) to notify your audience via only SMS or a combination of email and SMS.

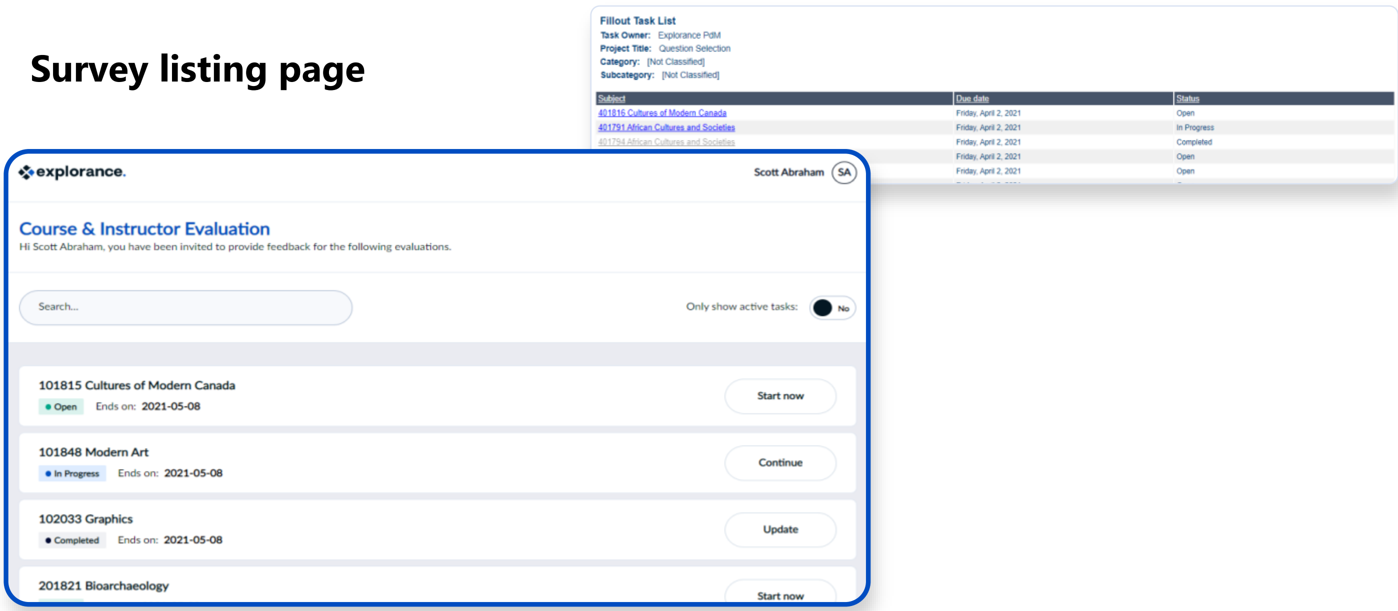
NOTE

1. *Subscription based features: Self-enrollment, QR code, short-link and certificate features are only available for hosted customers on a subscription basis.*
2. *SMS is only available for hosted customers on a subscription basis. For pricing details, consult your Account Manager.*

What’s Changed

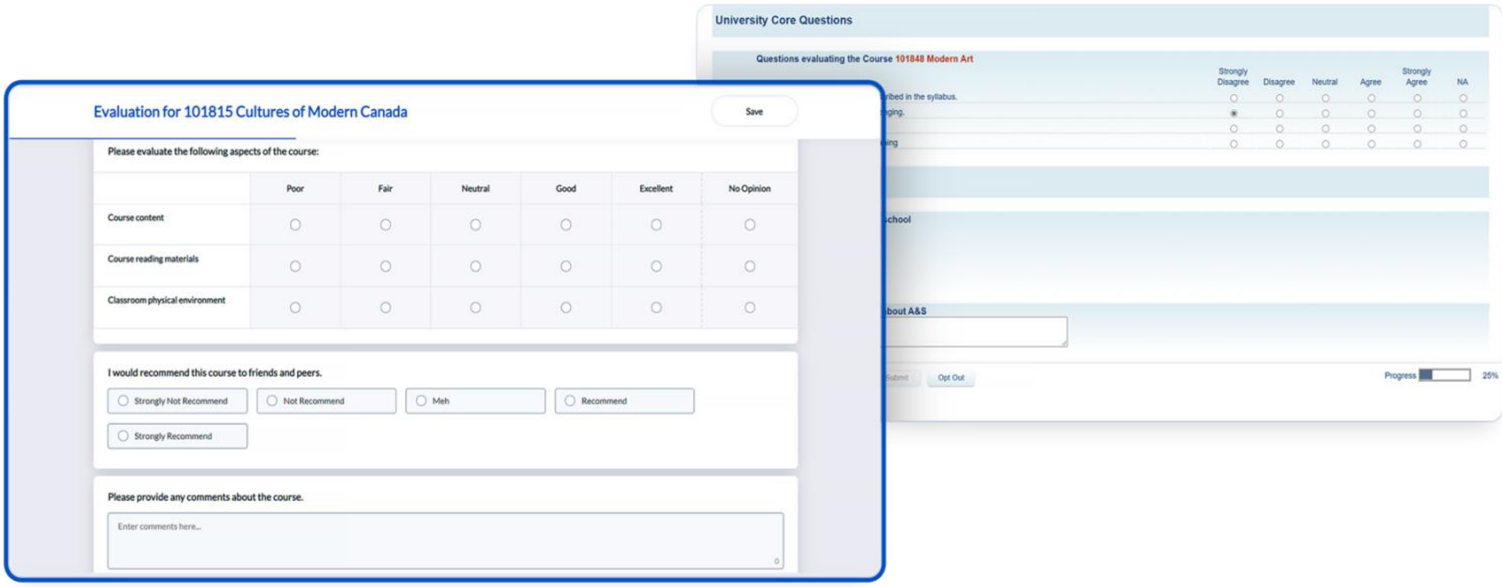
If you are curious to know what is different from an older version of Blue, here are some notable areas that have been updated.

Survey listing page

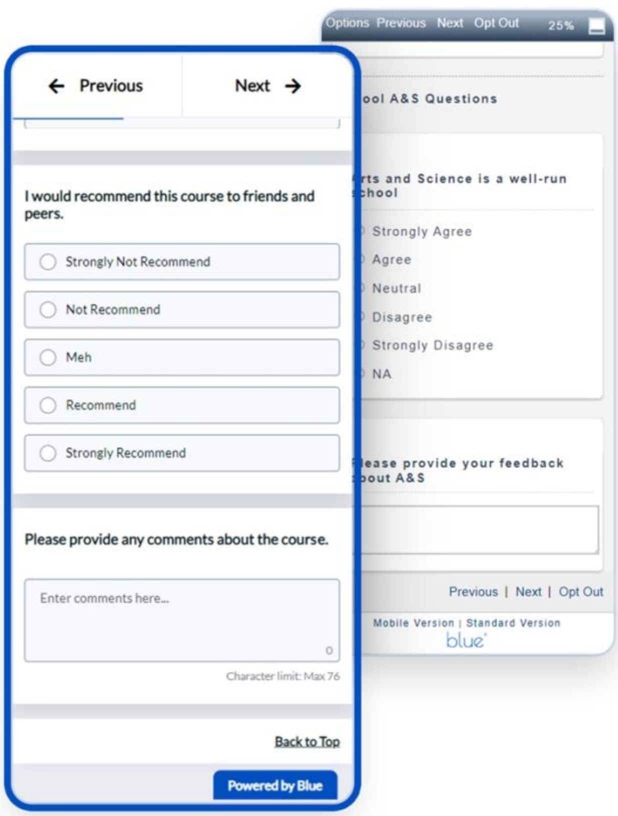


Survey Welcome page

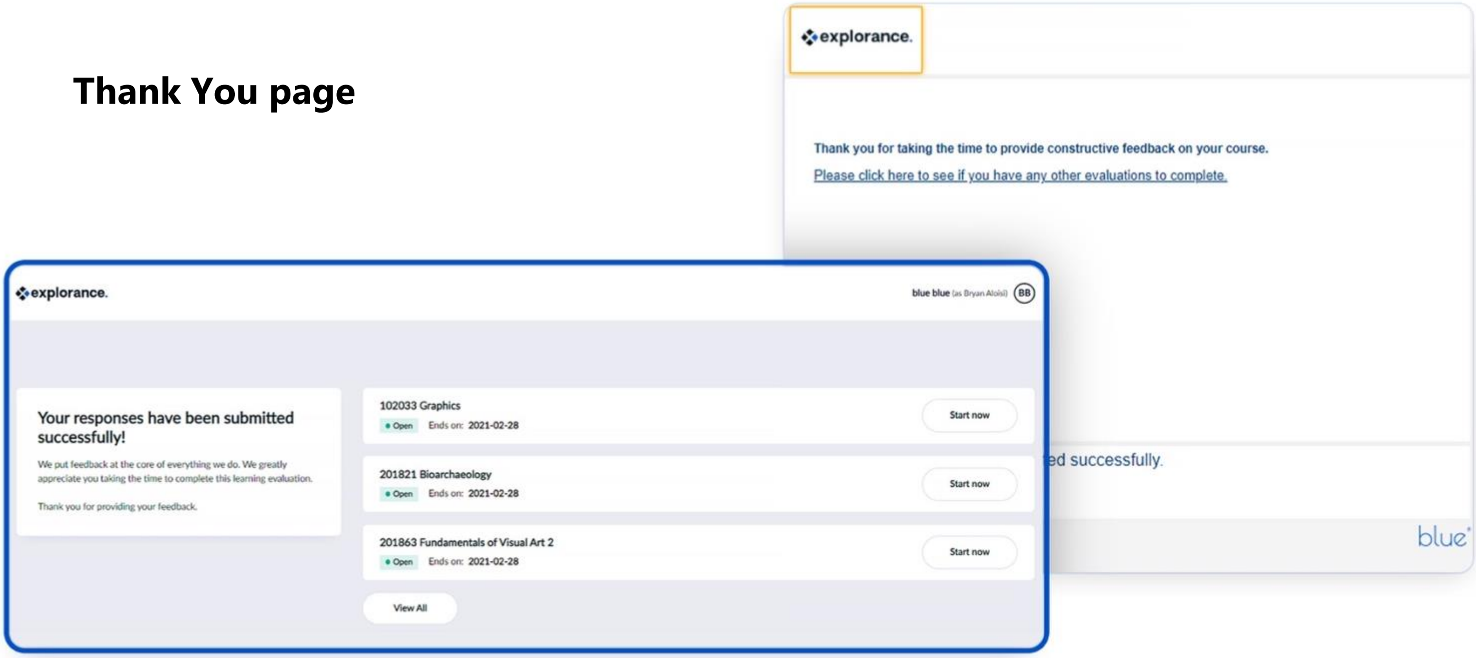
Survey experience on desktop



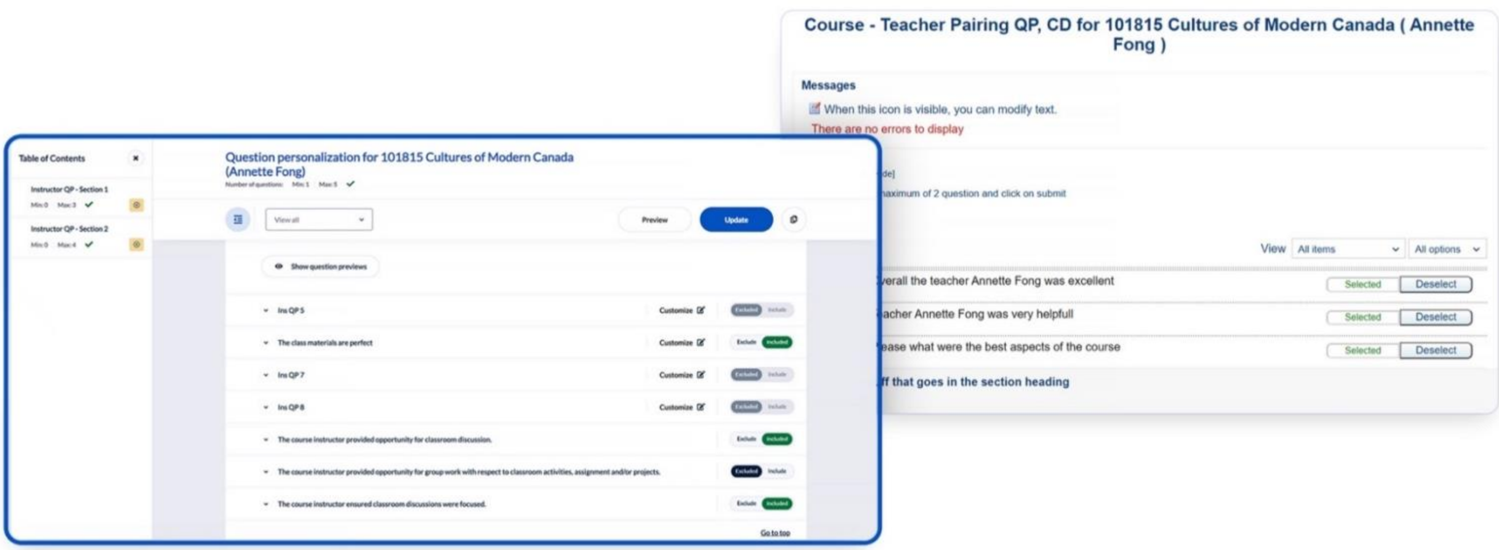
Survey experience on mobile



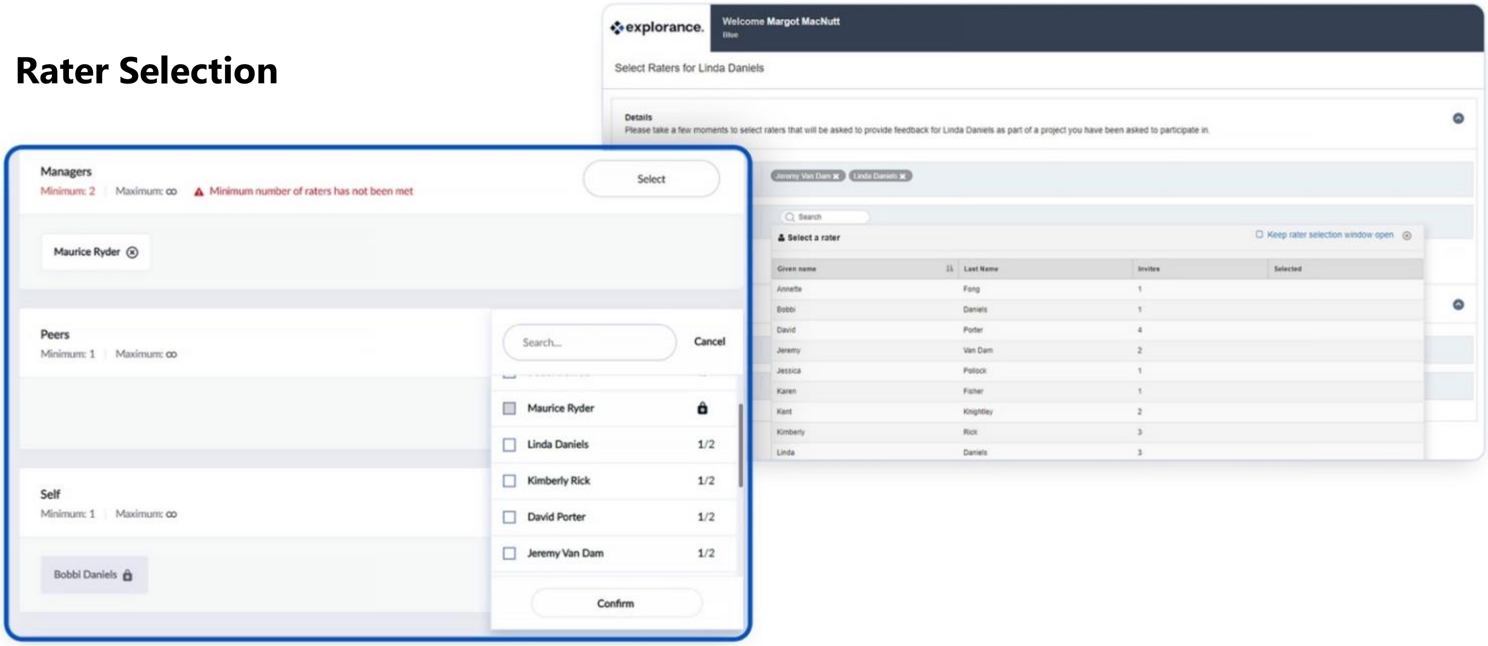
Thank You page



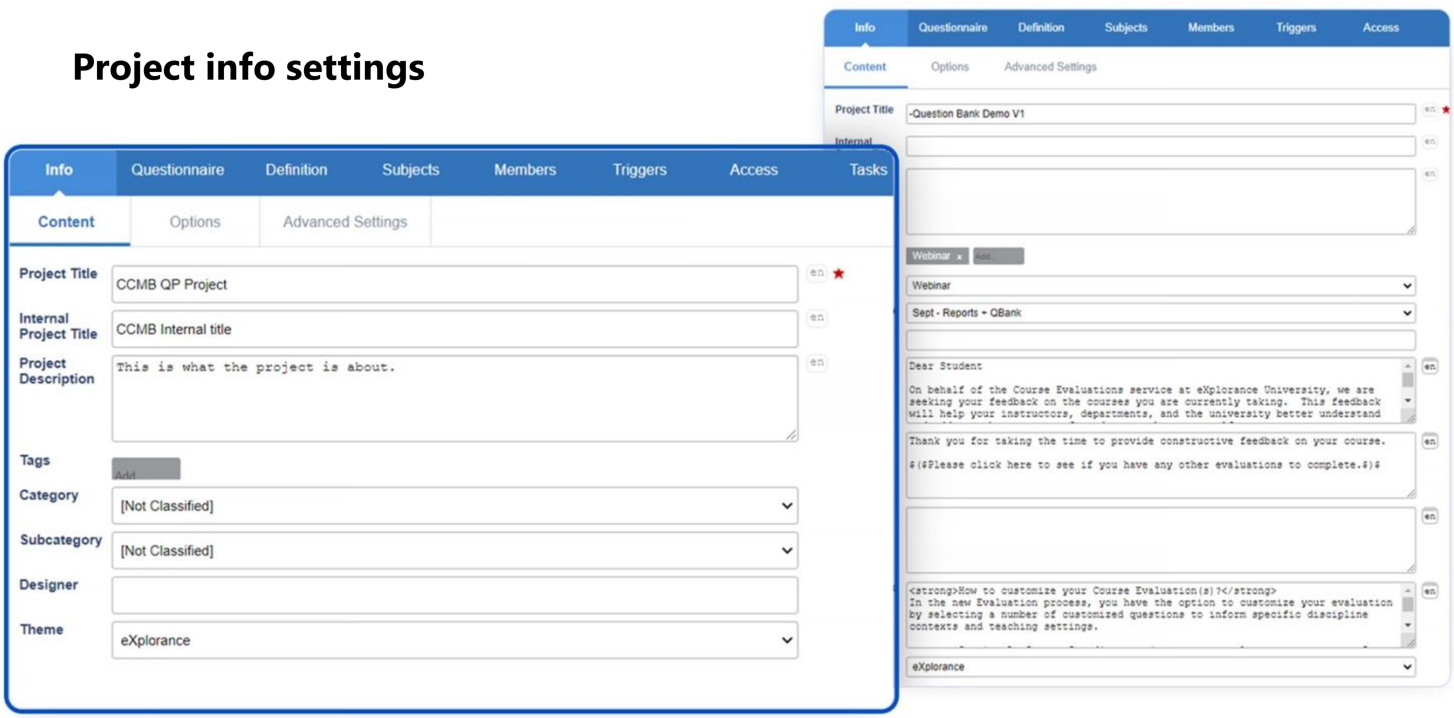
Question Personalization



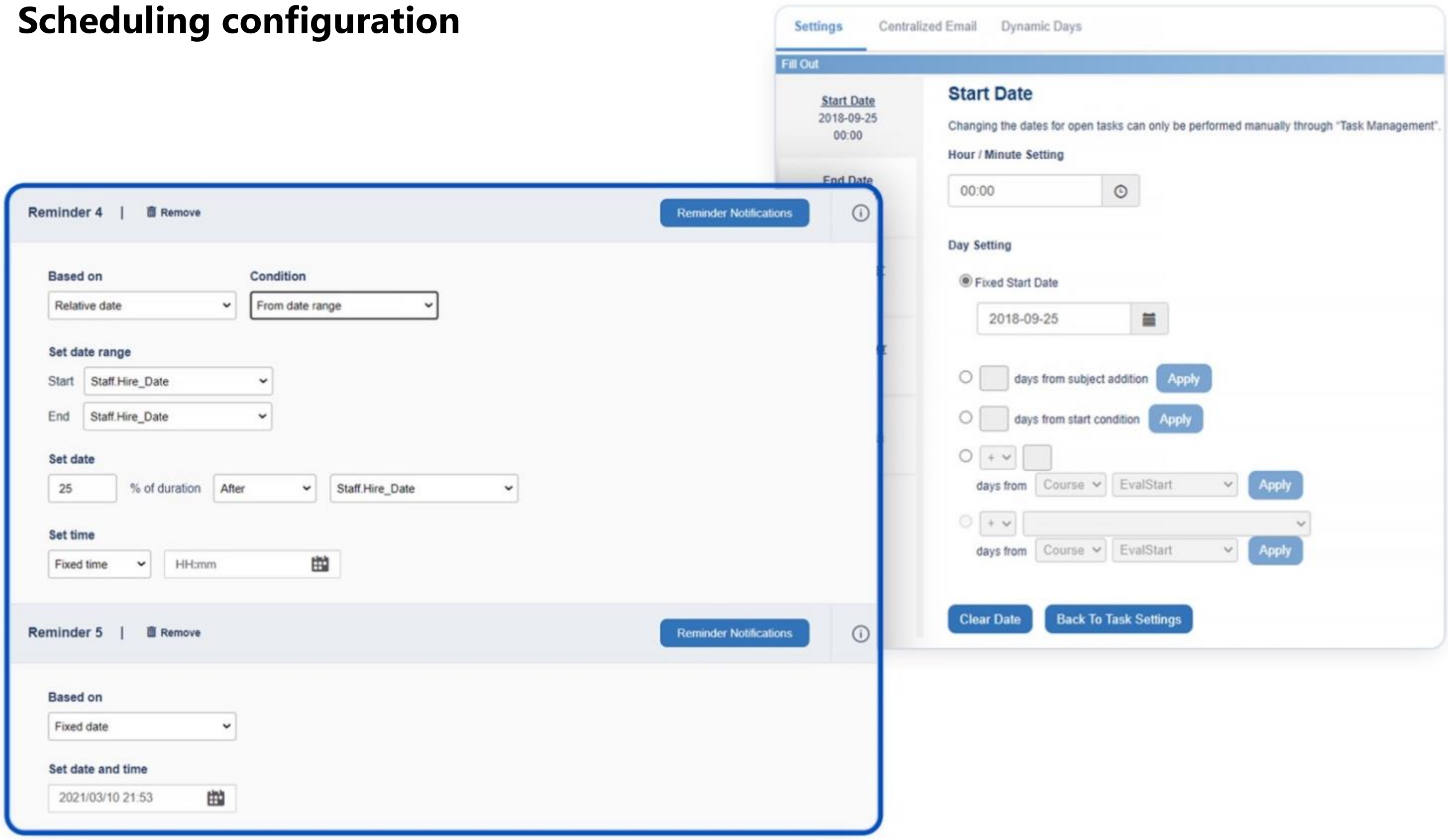
Rater Selection



Project info settings



Scheduling configuration



We can't wait for you to discover all these changes and more!

Upgrade FAQ

Question: Are there any changes to the webservices/APIs in Blue 8?

Answer: No. Aside from updates you may have missed (see next section), webservices/APIs will work as before. Please consult the release notes for further details.

Question: Will I see the new project configuration and Schedule settings in my older projects once I upgrade?

Answer: No. You will only see the new configuration and Schedule settings once you create a new project, or when you copy an older project to build a new one in Blue 8. Otherwise, your older projects will remain exactly as before.

Question: Will my messages and settings be carried over when I copy from an older project created in Blue 7 to create a new one in Blue 8?

Answer: Yes, but there are exceptions. While most settings (questionnaire, triggers, Welcome, Thank You Messages, etc.) are copied into your new project, the introduction of Schedules means that email content and timing, including reminders, will not be copied over. You will see default text that you should configure as needed once you add your Schedule(s) for the first time. From there, projects created in Blue 8 will be copied in their entirety to future projects.

Question: Will Archived projects be carried over during the upgrade?

Answer: Yes. All Archived projects that are not being retired in Blue 8 will carry over.

Question: Will my reports remain the same in Blue 8?

Answer: Yes. Aside from updates you may have missed (see next section), reports will work as before.

Question: Should I upgrade in the middle of a semester?

Answer: No. Since this is a major update, it is strongly advised to only upgrade to Blue 8 once all your projects have expired and you are no longer collecting responses or generating reports.

In case you missed it

There's more! Here are some other features and capabilities that have been developed over the last 12 months that are also included in Blue 8.

Usability

- UI/UX enhancements to Task Management (i.e., new deleted task filter and ability to quickly modify existing filters)
- UI/UX enhancements to the Canvas LMS experience for students when displaying pop-ups
- Questionnaire management usability enhancements displaying more metadata for each question, including question type and identifiers
- Increase in number of items displayed on the task list page from 5 to 10
- Expanded filtering capabilities in Report Management to include report start and end dates as well as email status
- Bulk management options for project and report listings allowing archiving or deletion of multiple items at once
- Additional language pack support for Hungarian, Turkish, and Czech
- Option to adjust default landing page sort order for tasks by End Date, Name, Status or Category/Subcategory
- LMS: Added report sorting ability in BPI
- LMS: Rich text formatting support for the message that appears when lists are empty (Blue Connector)

Integrations

- Blackboard Ultra connector
- Blackboard Learn SaaS version support update
- Bluepulse connector
- Interfolio integration

- OneDrive connector
- Bamboo HR connector
- Flexible user ID mapping when using SSO (Single Sign-On)
- Added notifications when synchronizing evaluation data with the LMS (BPI)

Reports

- Ability to calculate an overall across multiple questions in a tabular format in reports (Spreadsheet block enhancement)
- Ability to compare current report results to a norm when displaying frequency and frequency percentage in a tabular format in reports (Spreadsheet block enhancement)
- Automatic email notifications sent to Dynamic Groups (Dynamic Report Access enhancement)
- Option to customize specific email notifications for different Dynamic Groups (Dynamic Report Access enhancement)
- New charting options, including custom labels, norm/benchmark markers, and x-axis interval in certain bar charts in reports
- Further enhancements to response thresholds in reports when using cross-tabulation, to further protect against respondent identification
- Response rate and invited count added to aggregate respondent reports (Surveys)
- Ability to remove SubjectID evaluation column in raw data distribution to further protect respondent identification in merged or aggregate reports
- Enhanced look and feel for Score block charts

Value Add

- DIG enhancement to support hybrid of a) user synchronization for standard evaluations and b) manual user selection for evaluations that were created by DIG via split or merge
- UI/API export supported in JSON format
- Ability to export the Question Bank mapping into a spreadsheet for external review
- Option to include response timestamp in UI/API export
- Feedback Dashboards – Improvements to question mapping and cascaded questionnaire (Blue Question Bank support)
- Option to search by user or course ID in Record Management