



Bluenotes **GLOBAL** 2018
CONFERENCE

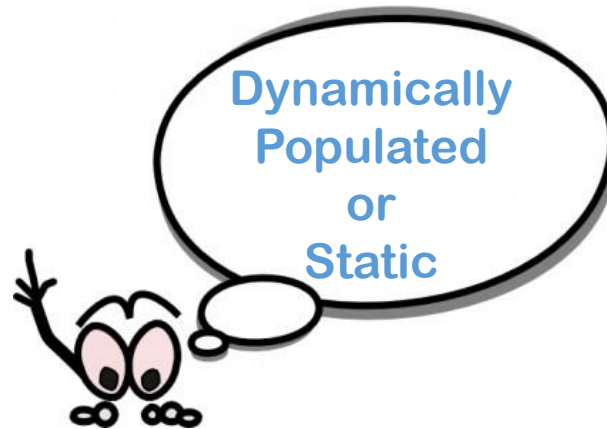
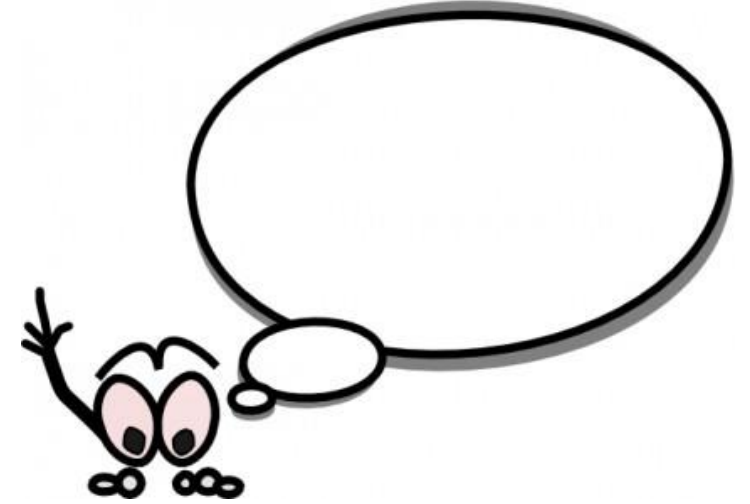
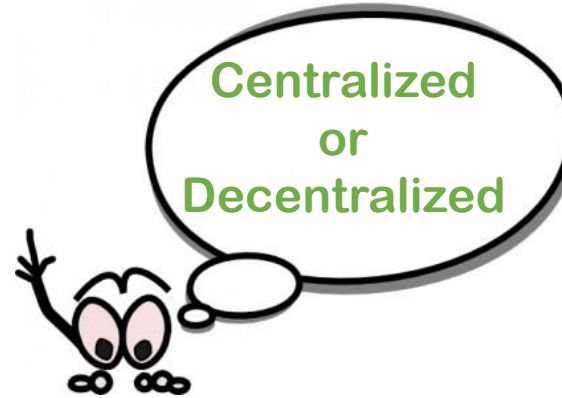
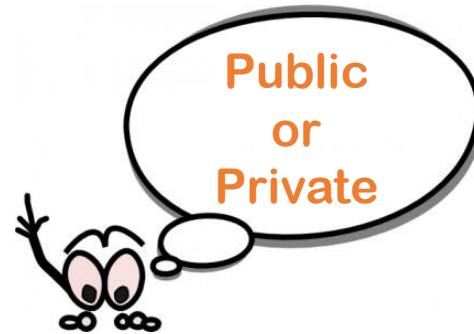
How to Leverage Blue Surveys at Your Institution

- ***Presented by : Krime Bouaou***
- *Director, Learning Center*



Agenda

- Discover some neat features when building surveys
- Discover some types of survey projects and reports





Some Examples of Surveys for Students



How We're Using Blue Survey

- Student Perception Survey (SPS)
- Student Support Services Survey (S⁴)
- Graduating Student Surveys (GSS)
- Recent Graduate Survey
- Information Technology (IT) Survey
- Living Learning Community Survey (LLC)
- Commuting Survey
- Ad-hoc/Special Requests (Chair/Dean Reviews, Voting Ballots, Event & Services Feedback)
- And more!



LOUISVILLE.EDU



UofL Webinar on Surveys and Help

- **Blue Surveys at UofL: A Case Study**

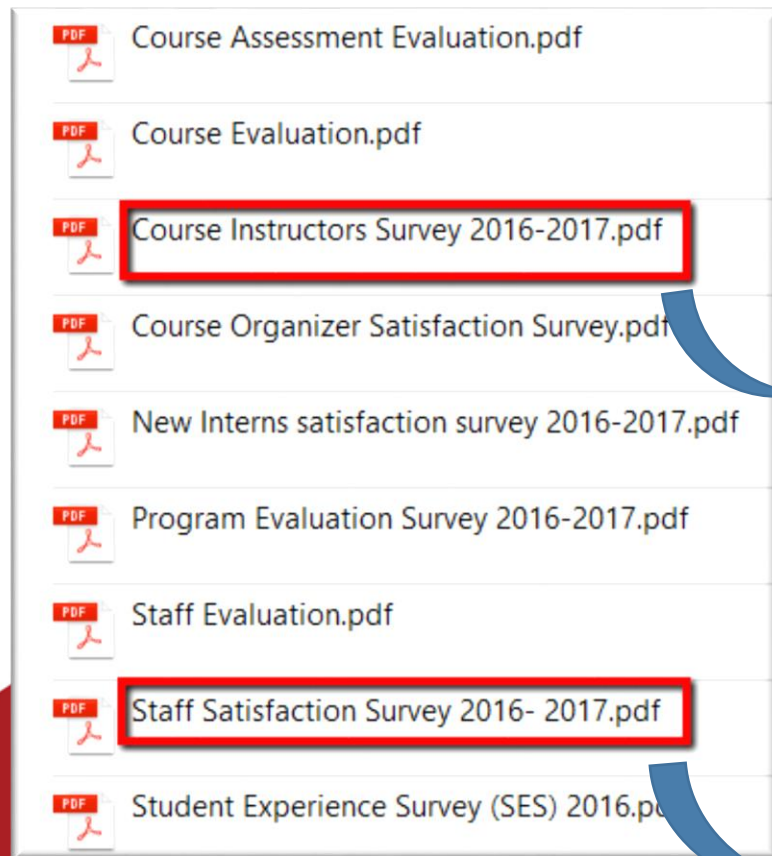
- <http://www.bluenotesgroup.com/community-led-webinar-blue-survey-at-uofl-a-case-study/?hilite=%22case%22%2C%22study%22>

- **Help on Survey Building provided by the Office of Institutional Effectiveness (IE)**

- <http://louisville.edu/oapa/ie/request-help-with-a-survey>



Surveys for Faculty Members



Dear Colleagues,

To ensure the effective participation of all parties involved in the educational process, the "Academic Quality Unit " is keen to get feedback from the faculty on their teaching in each course/block.

Dear staff member

The following questionnaire which you are kindly requested to fill is designed to evaluate your awareness and satisfaction about the various aspects of the college. This is a part of the college efforts for self-review and continuous improvement. Your contribution is of utmost value for the self-study process.



Surveys from the corporate world...

G	H	I	J	K	L	M	N
Origination Date	Sent to Processing Date	Appraisal Ordered Date	Appraisal Received Date	Documents Received Date	Funded Date	Cancelled Date	Declined Date
12/30/2013		01/13/2014	01/14/2014				
12/27/2013	01/14/2014		01/13/2014	01/14/2014			
12/23/2013	12/31/2013				01/13/2014		
12/20/2013	12/30/2013					01/13/2014	

A Survey is sent out to the client at each step of the process...

Projects » Customer Survey » Definition » Group Filter

Info Questionnaire Definition Members Triggers Access Tasks Language Publish

Group Shared Group **Group Filter**

Group Filter

Select Group Dynamic Group Add Filter Member Date () And Or Not

Results: 21 - 30 of 44 Item(s)

- ☐ Or
- ☐ Invite on date of Applicants.Appraisal_Received_Date Equal to + 3 day(s)
- ☐)
- ☐ And
- ☐ Applicants.Appraisal_Received_Date Greater than or equal to '01/01/2018'
- ☐ And
- ☐ Not
- ☐ (
- ☐ Applicants.Loan_ID Begins with 8
- ☐ Or

The Surveys
are triggered
by the date
of the activity

Subcategory
Appraiser Survey
Cancelled Survey
Cancelled Survey
Declined Survey
Funded Survey
Funded Survey
Application (Retail Sales) Survey
Declined Survey
Initial Call (Direct Sales) Survey
Initial Call (Direct Sales) Survey

«We send you 1 file, You send us back 1 file »

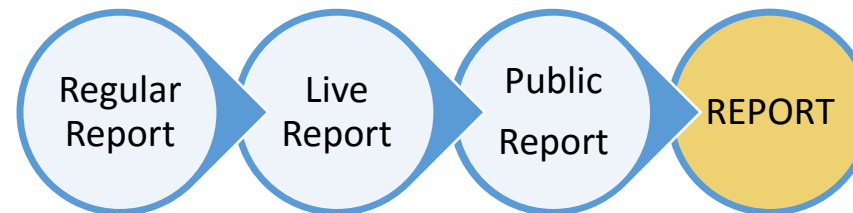
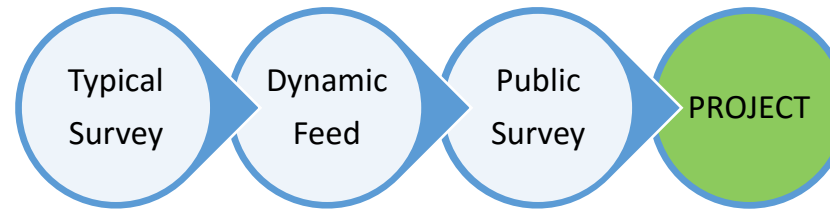


Neat Functionalities to enable in Surveys

- **Field Mapping**
- **Question Piping**
- **Branching**
- **Live Reporting**
- **Dual Scale**
- **Public Surveys**



Let's get things done!





Survey/Project Types

- **Two survey options in Blue:**
 - Simplified Surveys
 - Typical Surveys (w/o subjects)
- **Used for general topic content**
 - Participants only complete 1 survey form



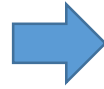
Why use a Simplified Survey?

- Ad-hoc, general topic surveys
- Participants may be external to organization
- Minimal participant data for private (email) access
 - Institutional data is unavailable or doesn't exist
 - Authentication not required/not possible
- May be used for Public surveys

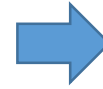
Feedback Process with Simplified Survey

Definition or Structure

1. Create Project



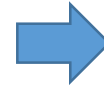
2. Identify Member Groups



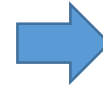
3. Import Member Data



4. Create Questionnaire



5. Publish and Manage



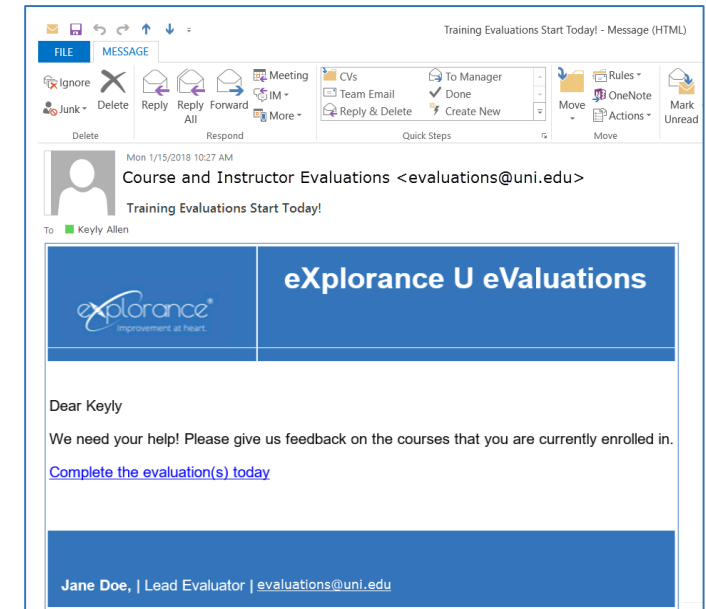
6. Report and Analyze





Survey Access Options

- **Email Notifications (Tasks)**
 - Each participant gets unique (private) link to survey
 - Schedule initial invitation and reminders
- **Optional Public Access**
 - Creates URL to access survey instead of email notifications
 - Usually used with Simple Surveys





Working with a Public Survey

- **Public survey**
 - Used for general access / No target audience
 - Provides URL for website or manual distribution
 - No Task setup required; No Fill Out tasks visible in Task Management



Working with a Public Survey

- **Response Management**
 - No target audience, therefore cannot track response rate
- **Live Reports**
 - Can be used to include newly completed survey results
 - Viewer access to report link triggers automatic update of results



Why use a Typical Survey?

- Used for general topic content
- Participants (Members) complete only 1 survey
- Uses organization's data and authentication systems
 - Requires a 'user' type datasource structure
 - Supports automated data transfer from SIS
- Members can be automatically added & updated
- May be used for Public surveys

Feedback Process with Typical Survey

(w/o Subject) Definition

1. Import Participant Data
(User Datasource)



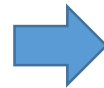
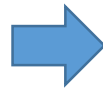
2. Create Project



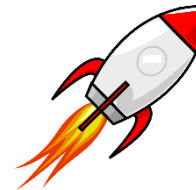
3. Identify Groups & Privileges
(Definition > Groups)



5. Create Questionnaire



6. Publish and Manage





Some Terms and Concepts

- **Dynamic Groups**
 - Automatically populates Group Members
 - Automatically updates group member changes
 - Dynamic Group structure only available with Typical Surveys
- **Members**
 - Determines who belongs to the identified groups and the group privileges they inherit

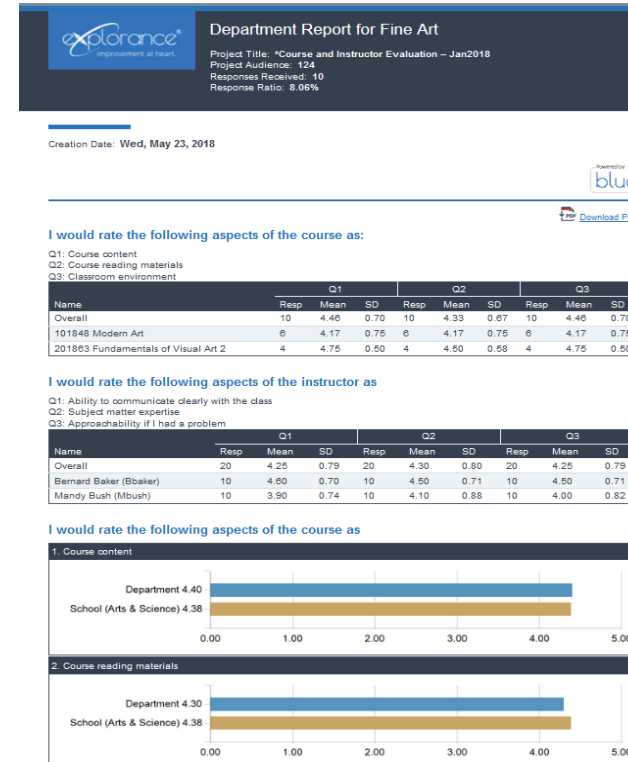


Some Terms and Concepts

- **Group Filter**
 - Used when targeting a subset of user population
 - Create conditions or rules to determine and limit group membership
 - Ensures that rules will automatically apply to updated data to prevent accidental inclusion of non-targeted users

Various reporting options:

- PDF
- HTML
- Raw data extracts
- APIs to export data
- Live Reporting
- No Export Report



Automated report distribution



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Thank you!

- Questions?

