Bluenotes **GLOBAL** 2021
VIRTUAL EXPERIENCE

Product Roadmap

Virtual Experience

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Products

blue

The Experience Management Platform

bluepulse

The Continuous Listening Solution

BlueML

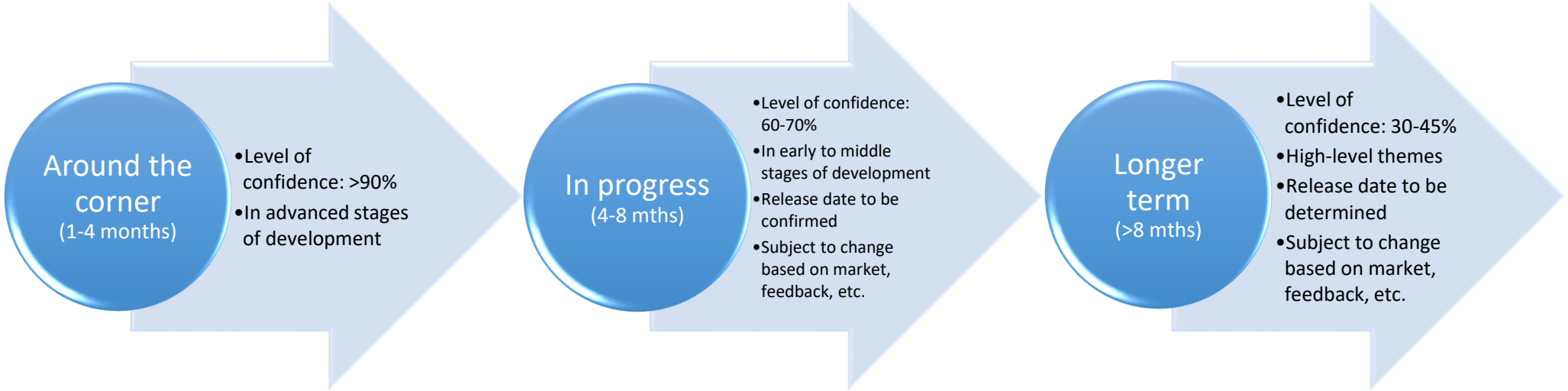
The Comment Analysis Solution

blueX

The Survey Software for Anyone

What goes into the roadmap?

How is the roadmap organized?



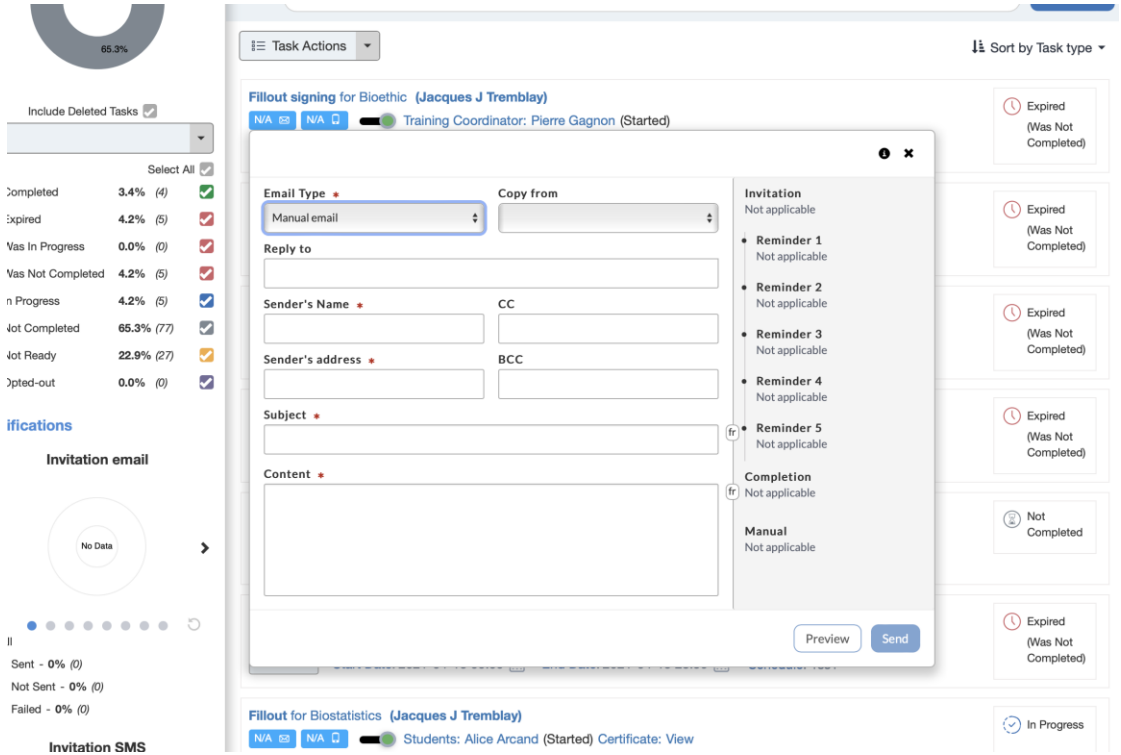
Roadmap

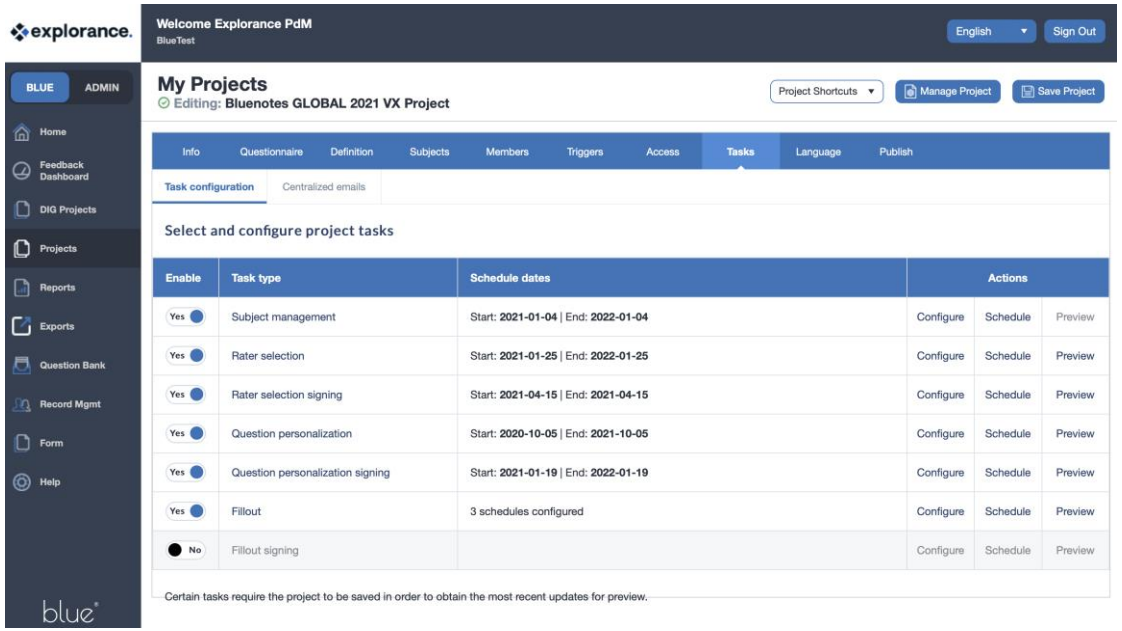
Blue 8

- Released on May 31st
- Incorporated many community feedback points - Both Admin and End-user centric
- Monumental challenge handled in Explorance fashion
- Sets a new foundation on which we will improve and build upon

Administrative improvements

- Re-designed task configuration experience
  - Centralized settings, Customizable task titles, task list titles (Relational demographic support to address cross-listed courses)
- Multiple task schedules
  - Custom notifications & schedule conditions (per schedule)
- Expanded notification options
  - 5 reminders, Completion notification, SMS support in all notifications
- Task Management
  - Redesigned manual email/SMS layout, copy configured notification content


65.3%
Include Deleted Tasks
Select All
Completed 3.4% (4)
Expired 4.2% (5)
Was In Progress 0.0% (0)
Was Not Completed 4.2% (5)
In Progress 4.2% (5)
Not Completed 65.3% (77)
Not Ready 22.9% (27)
Opted-out 0.0% (0)
ifications
Invitation email
No Data
Sent - 0% (0)
Not Sent - 0% (0)
Failed - 0% (0)
Invitation SMS
Task Actions
Sort by Task type
Fillout signing for Bioethic (Jacques J Tremblay)
N/A N/A Training Coordinator: Pierre Gagnon (Started)
Expired (Was Not Completed)
Email Type *
Manual email
Copy from
Reply to
Sender's Name *
CC
Sender's address *
BCC
Subject *
Content *
Invitation
Not applicable
Reminder 1
Not applicable
Reminder 2
Not applicable
Reminder 3
Not applicable
Reminder 4
Not applicable
Reminder 5
Not applicable
Completion
Not applicable
Manual
Not applicable
Preview
Send
Not Completed
Fillout for Biostatistics (Jacques J Tremblay)
N/A N/A Students: Alice Arcand (Started) Certificate: View
In Progress


explorance.
Welcome Explorance PdM
BlueTest
English
Sign Out
BLUE
ADMIN
Home
Feedback Dashboard
DIG Projects
Projects
Reports
Exports
Question Bank
Record Mgmt
Form
Help
blue
My Projects
Editing: Bluenotes GLOBAL 2021 VX Project
Project Shortcuts
Manage Project
Save Project
Info
Questionnaire
Definition
Subjects
Members
Triggers
Access
Tasks
Language
Publish
Task configuration
Centralized emails
Select and configure project tasks
Enable
Task type
Schedule dates
Actions
Yes Subject management Start: 2021-01-04 | End: 2022-01-04 Configure Schedule Preview
Yes Rater selection Start: 2021-01-25 | End: 2022-01-25 Configure Schedule Preview
Yes Rater selection signing Start: 2021-04-15 | End: 2021-04-15 Configure Schedule Preview
Yes Question personalization Start: 2020-10-05 | End: 2021-10-05 Configure Schedule Preview
Yes Question personalization signing Start: 2021-01-19 | End: 2022-01-19 Configure Schedule Preview
Yes Fillout 3 schedules configured Configure Schedule Preview
No Fillout signing Configure Schedule Preview
Certain tasks require the project to be saved in order to obtain the most recent updates for preview.

New capabilities

- Self Enrolment
- Completion Certificates
- QR codes, Short links
  - Project & Subject level

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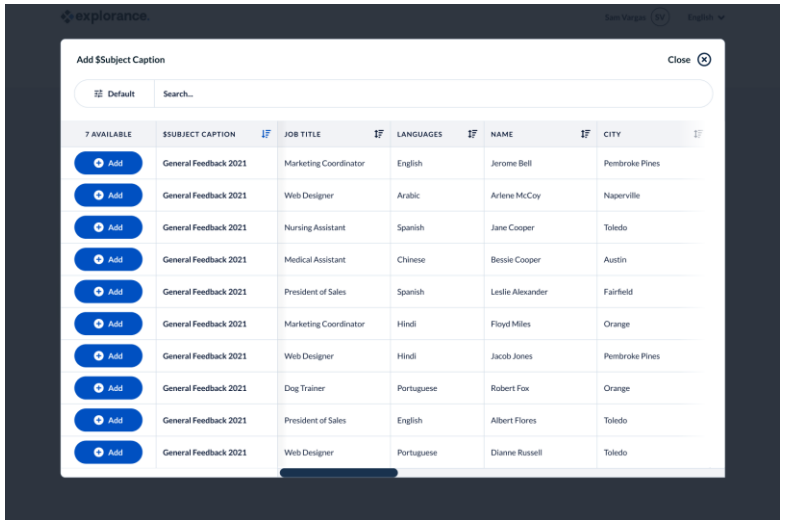

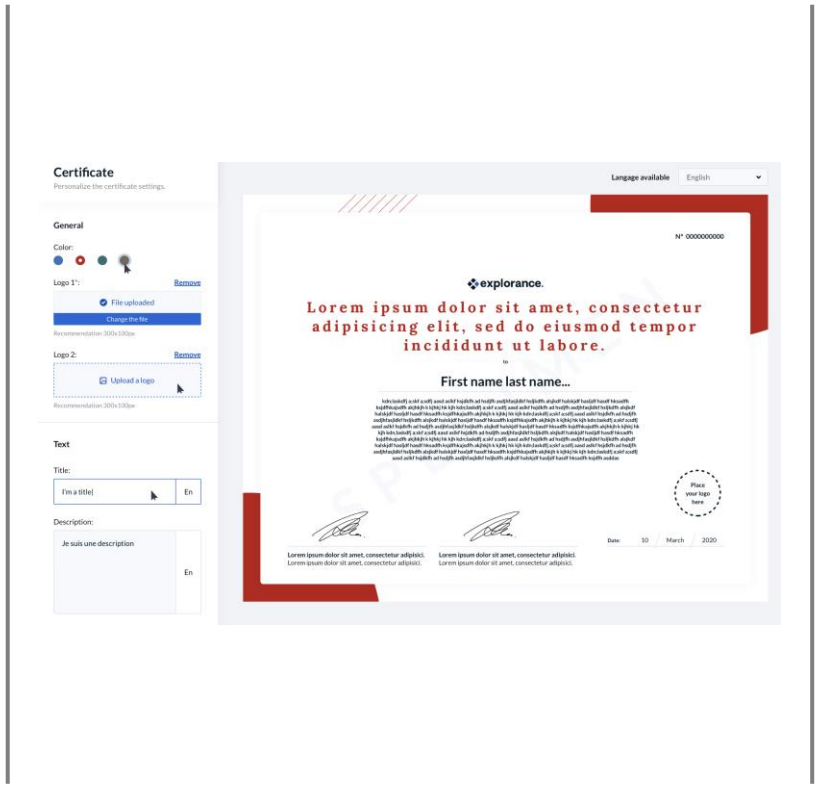

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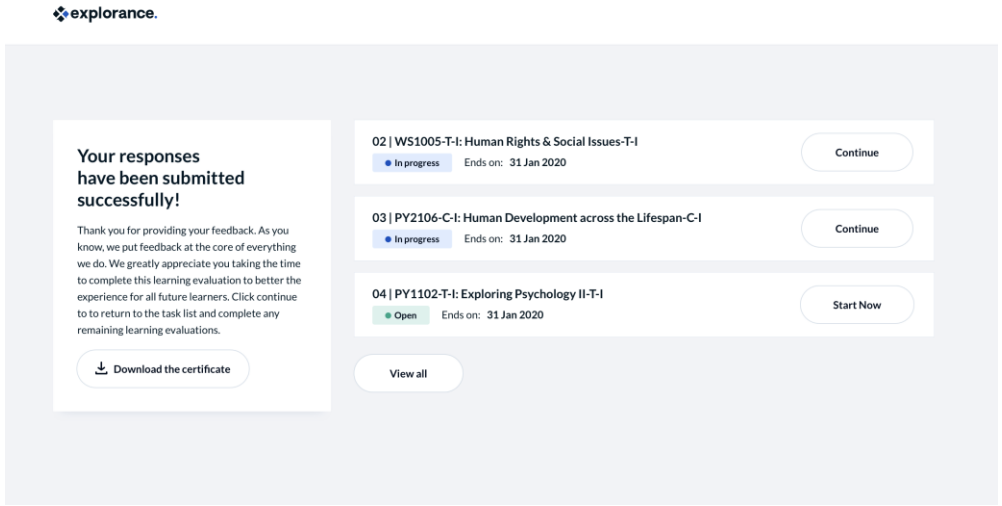
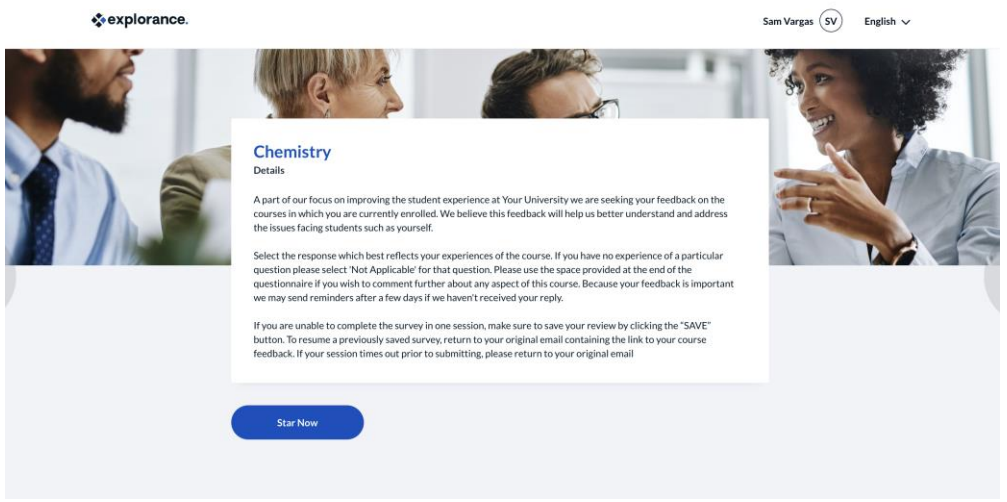
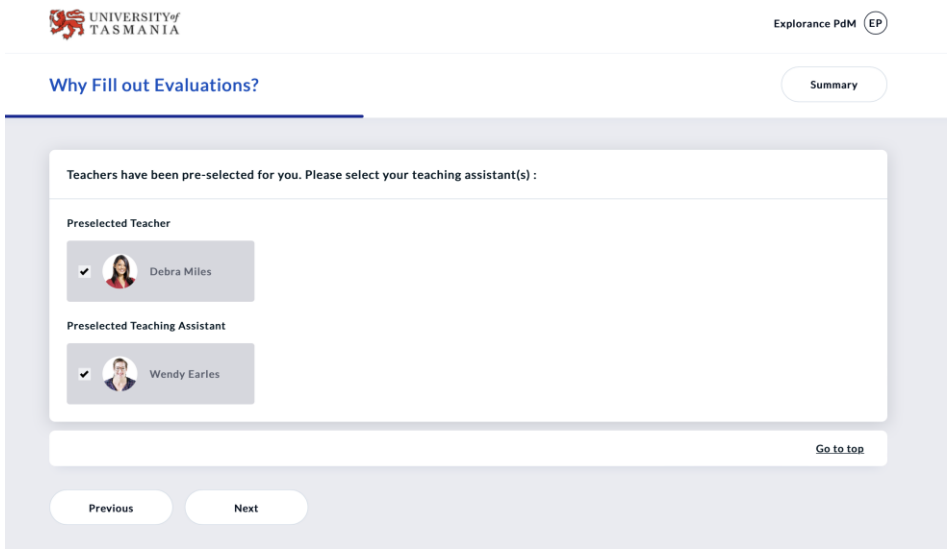
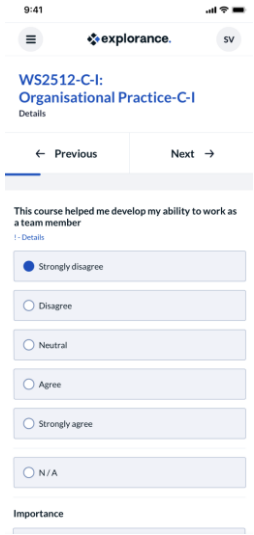
Fillout

- Welcome page background image
- Fully responsive design
  - Refined UI/UX for all question types
- Refined Summary List
  - Partial status
- Thank you page
  - Display list of open tasks
  - Completion Certificates









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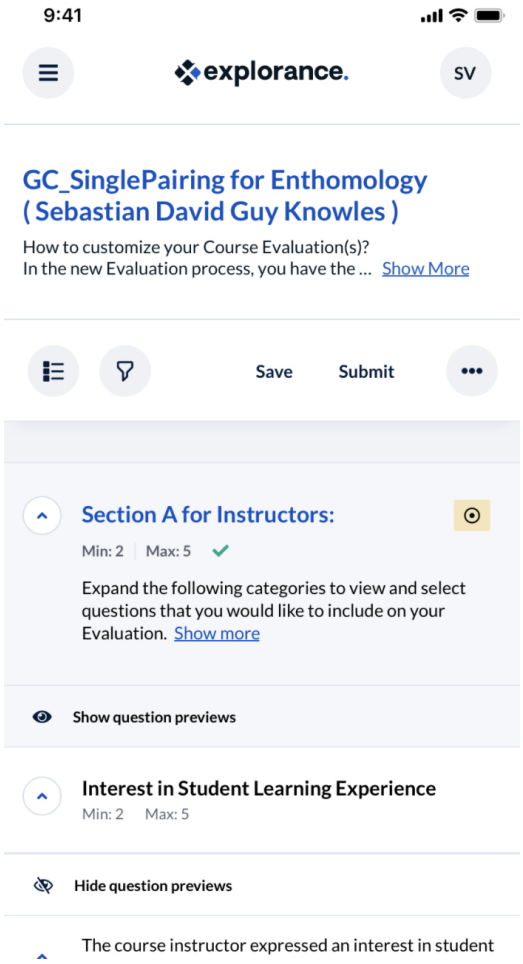
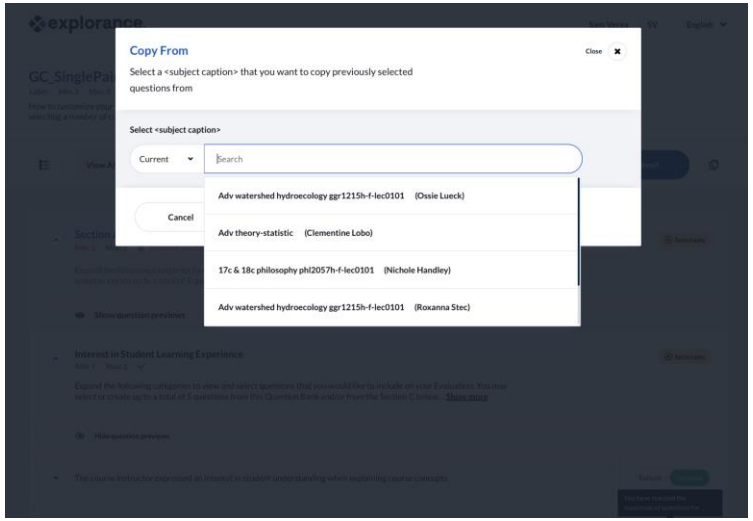
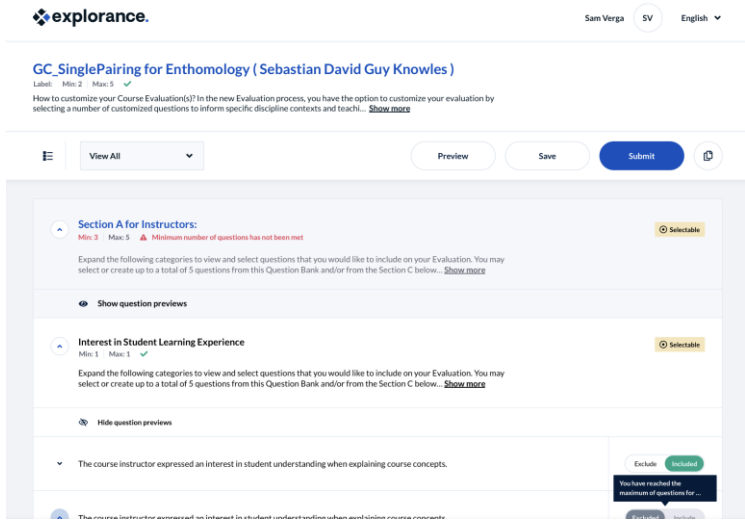
Question Personalization

- Table of Content
- Improved filtering
  - Core questions, modifiable questions
- Copy from previous Project
- Visual Min/Max limit
  - Overall
  - Section, sub-section level
- Multi-lingual – default fallback

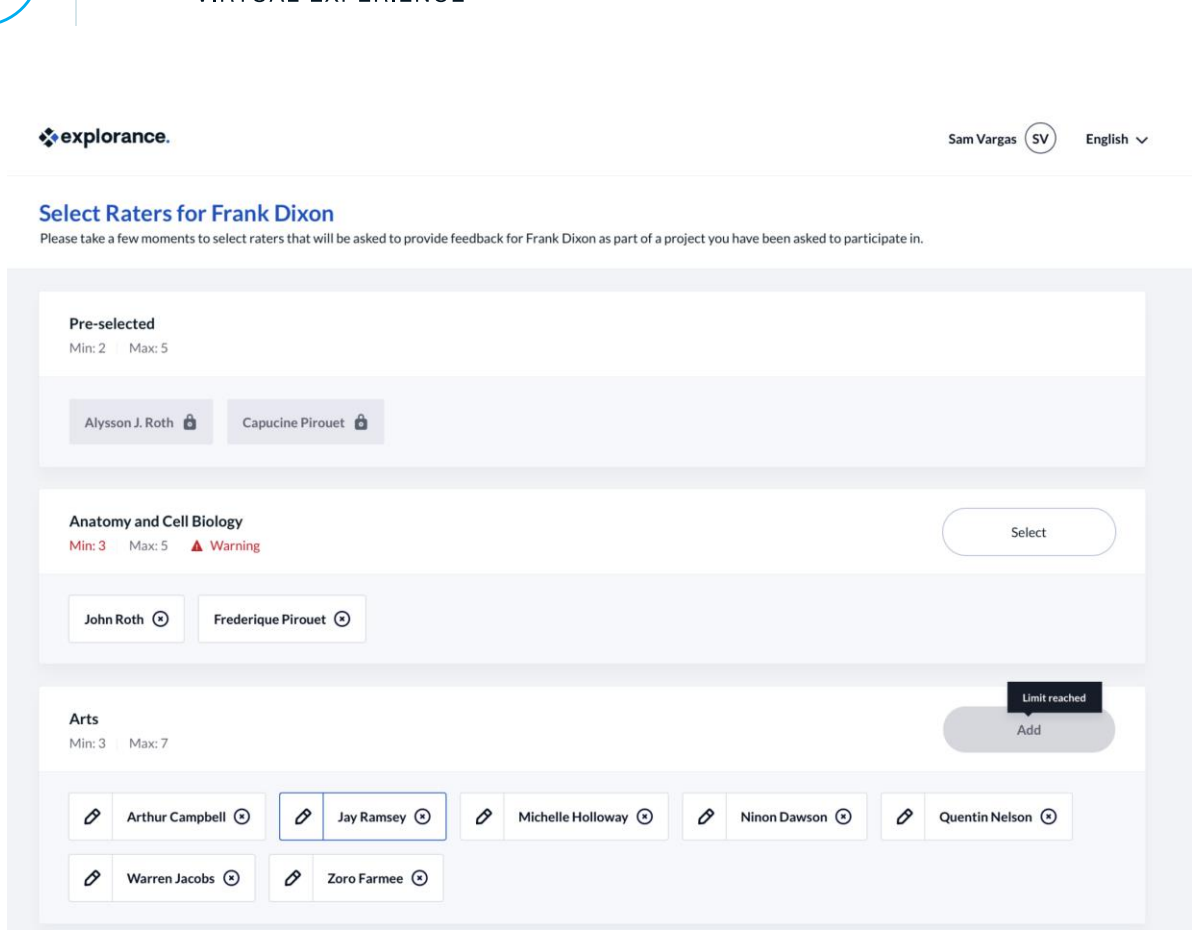

9:41
explorance.
SV
GC_SinglePairing for Enthomology (Sebastian David Guy Knowles)
How to customize your Course Evaluation(s)?
In the new Evaluation process, you have the ... Show More
Save
Submit
Section A for Instructors:
Min: 2 | Max: 5
Expand the following categories to view and select questions that you would like to include on your Evaluation. Show more
Show question previews
Interest in Student Learning Experience
Min: 2 Max: 5
Hide question previews
The course instructor expressed an interest in student

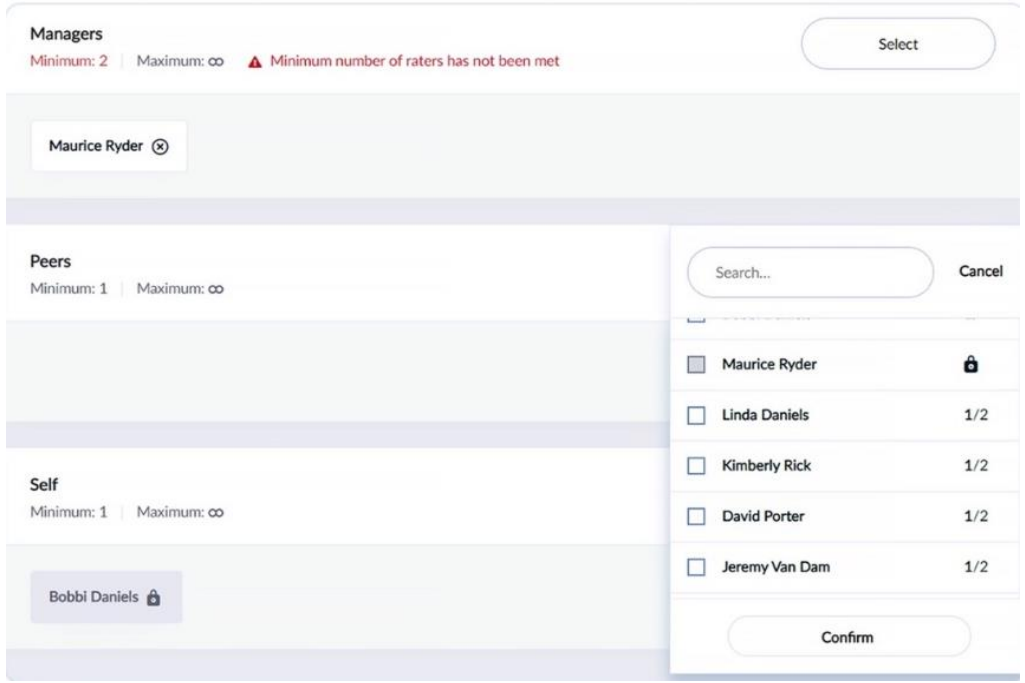

Copy From
Select a <subject caption> that you want to copy previously selected questions from
Close
Select <subject caption>
Current
Search
Cancel
Adv watershed hydroecology ggr1215h-f-lec0101 (Ossie Lueck)
Adv theory-statistic (Clementine Lobo)
17c & 18c philosophy phl2057h-f-lec0101 (Nichole Handley)
Adv watershed hydroecology ggr1215h-f-lec0101 (Roxanna Stec)


explorance.
Sam Verga
SV
English
GC_SinglePairing for Enthomology (Sebastian David Guy Knowles)
View All
Preview
Save
Submit
Section A for Instructors:
Selectable
Show question previews
Interest in Student Learning Experience
Selectable
Hide question previews
The course instructor expressed an interest in student understanding when explaining course concepts.
Exclude
Included

Rater Selection

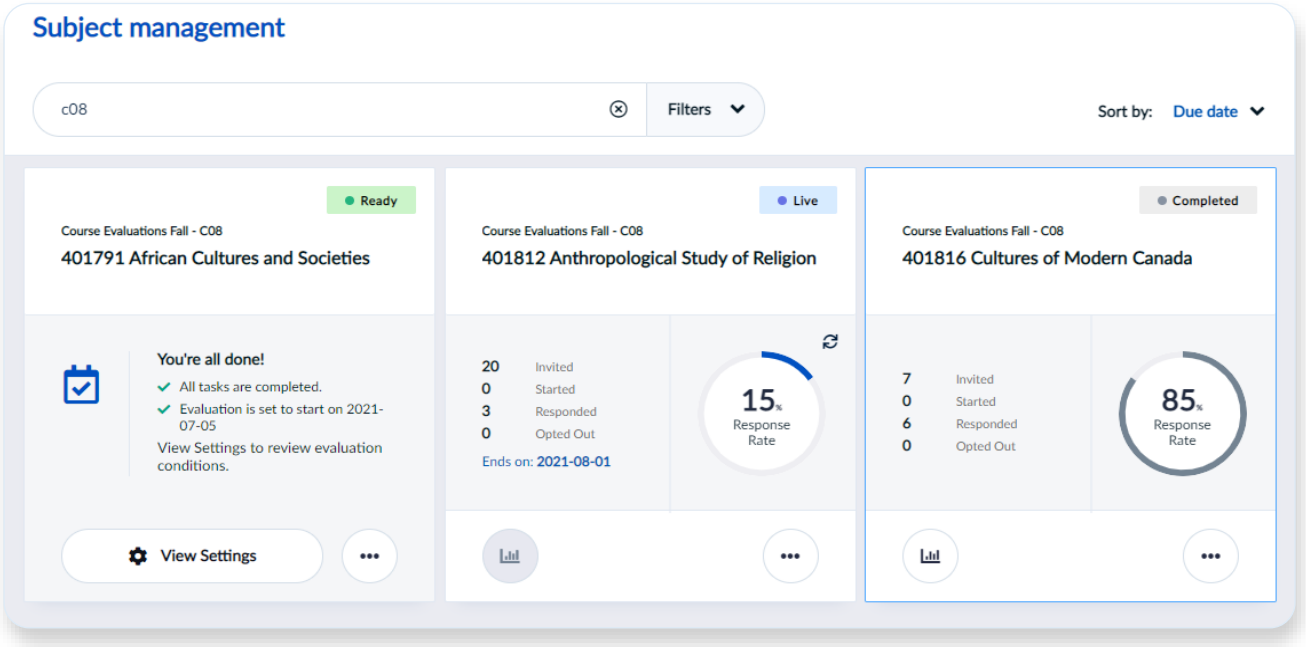
- Refined experience
  - User selection
  - Manual addition
- Rater quotas
- Drag & drop animations
- Submit/Update
  - Submit/ Update timestamp

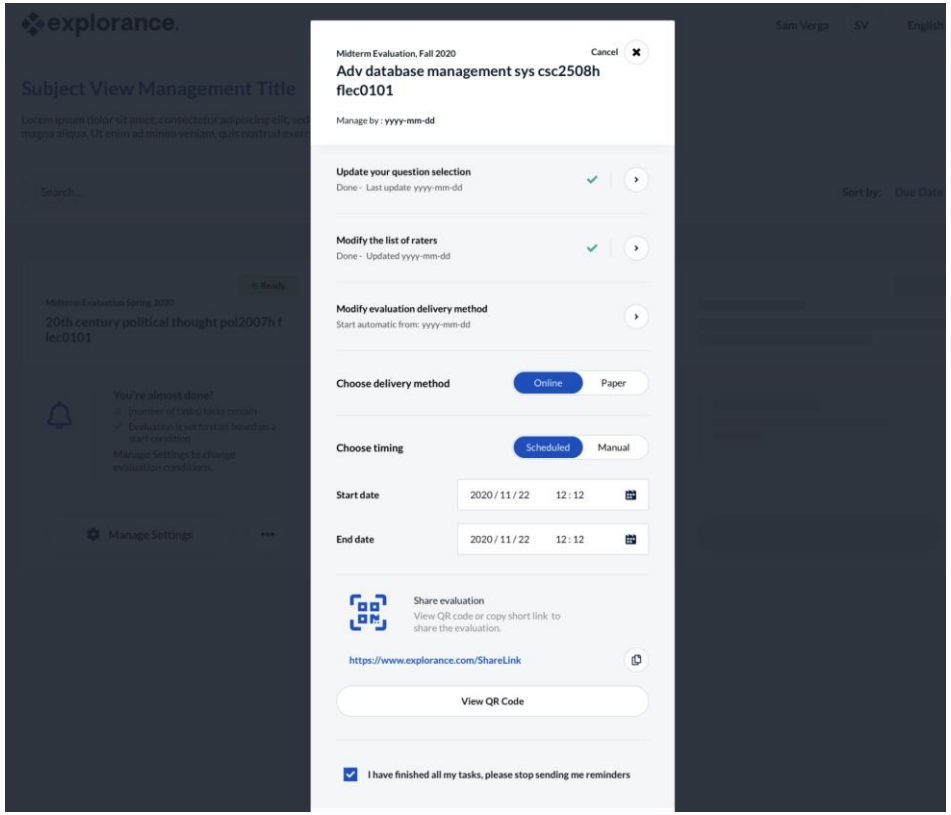

explorance.
Sam Vargas SV
English
Select Raters for Frank Dixon
Please take a few moments to select raters that will be asked to provide feedback for Frank Dixon as part of a project you have been asked to participate in.
Pre-selected
Min: 2 Max: 5
Alysson J. Roth
Capucine Pirouet
Anatomy and Cell Biology
Min: 3 Max: 5 Warning
Select
John Roth
Frederique Pirouet
Arts
Min: 3 Max: 7
Limit reached
Add
Arthur Campbell
Jay Ramsey
Michelle Holloway
Ninon Dawson
Quentin Nelson
Warren Jacobs
Zoro Farmee


Managers
Minimum: 2 Maximum: ∞ Minimum number of raters has not been met
Select
Maurice Ryder
Peers
Minimum: 1 Maximum: ∞
Search...
Cancel
Maurice Ryder
Linda Daniels 1/2
Kimberly Rick 1/2
David Porter 1/2
Jeremy Van Dam 1/2
Confirm
Self
Minimum: 1 Maximum: ∞
Bobbi Daniels

Subject Management

- New tile experience
- New SM status (Pending, Ready, Live)
- Streamlined configuration/task overview
- Detailed overlay when live
  - Response rate / invited list (optional)
- Show/Print QR code & shortlinks


Subject management
c08
Filters
Sort by: Due date
Ready
Course Evaluations Fall - C08
401791 African Cultures and Societies
You're all done!
All tasks are completed.
Evaluation is set to start on 2021-07-05
View Settings to review evaluation conditions.
View Settings
Live
Course Evaluations Fall - C08
401812 Anthropological Study of Religion
20 Invited
0 Started
3 Responded
0 Opted Out
Ends on: 2021-08-01
15% Response Rate
Completed
Course Evaluations Fall - C08
401816 Cultures of Modern Canada
7 Invited
0 Started
6 Responded
0 Opted Out
85% Response Rate


explorance.
Midterm Evaluation, Fall 2020
Cancel
Adv database management sys csc2508h flec0101
Manage by : yyyy-mm-dd
Update your question selection
Done - Last update yyyy-mm-dd
Modify the list of raters
Done - Updated yyyy-mm-dd
Modify evaluation delivery method
Start automatic from: yyyy-mm-dd
Choose delivery method
Online
Paper
Choose timing
Scheduled
Manual
Start date
2020 / 11 / 22 12 : 12
End date
2020 / 11 / 22 12 : 12
Share evaluation
View QR code or copy short link to share the evaluation.
https://www.explorance.com/ShareLink
View QR Code
I have finished all my tasks, please stop sending me reminders

Next

- 25+ language packs incl. Welsh, Catalan
- Self-Enrolment advanced filtering
- Fillout SST resizing refinements
- Blue Connector – All Course Block (Canvas)

In progress

- New Blue Central landing page experience
  - Including Bluepulse tasks
- Report triggers – Rater group level thresholds
- Refined Signing experience
- Redesigned Report Listing
  - Consolidated report configuration settings
- BI optimized exports

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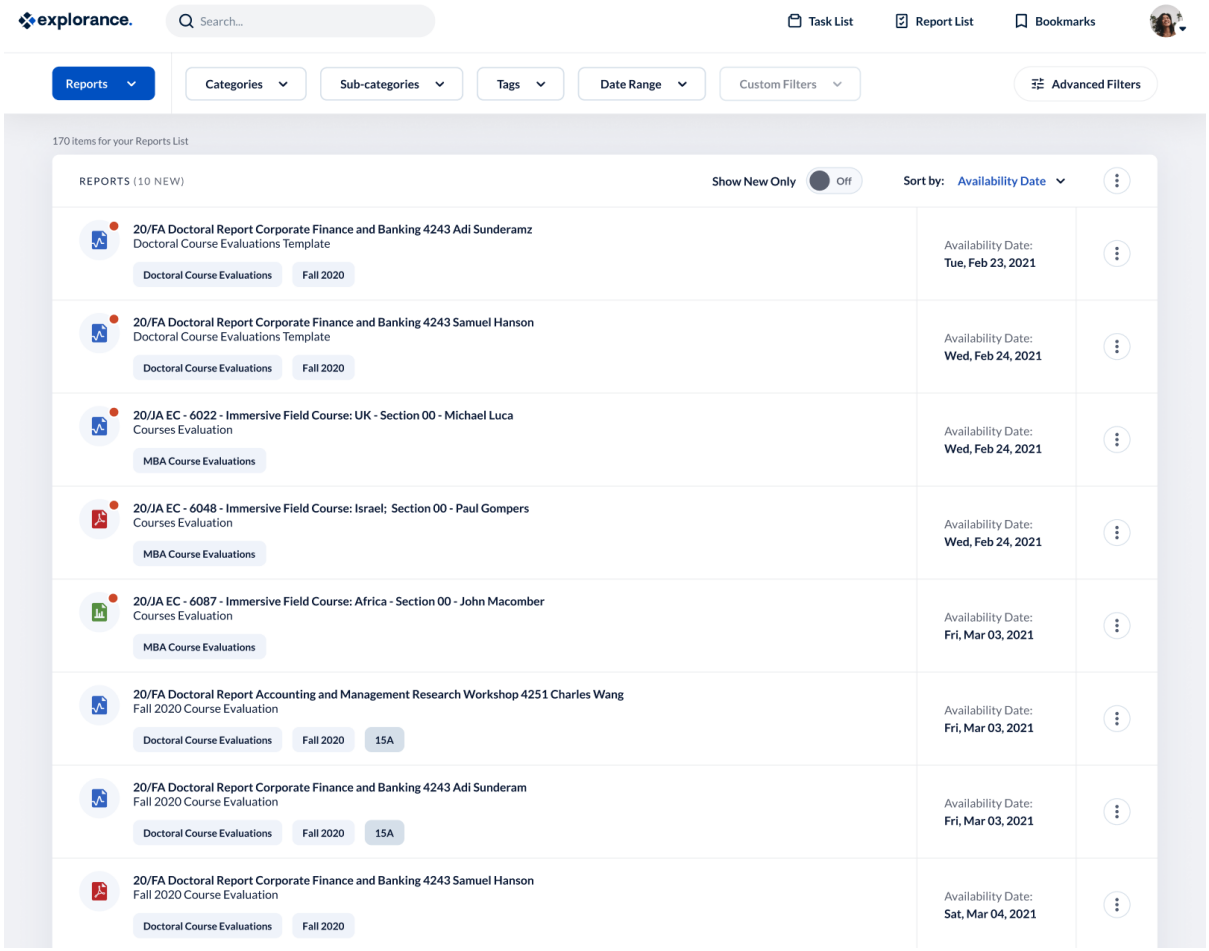
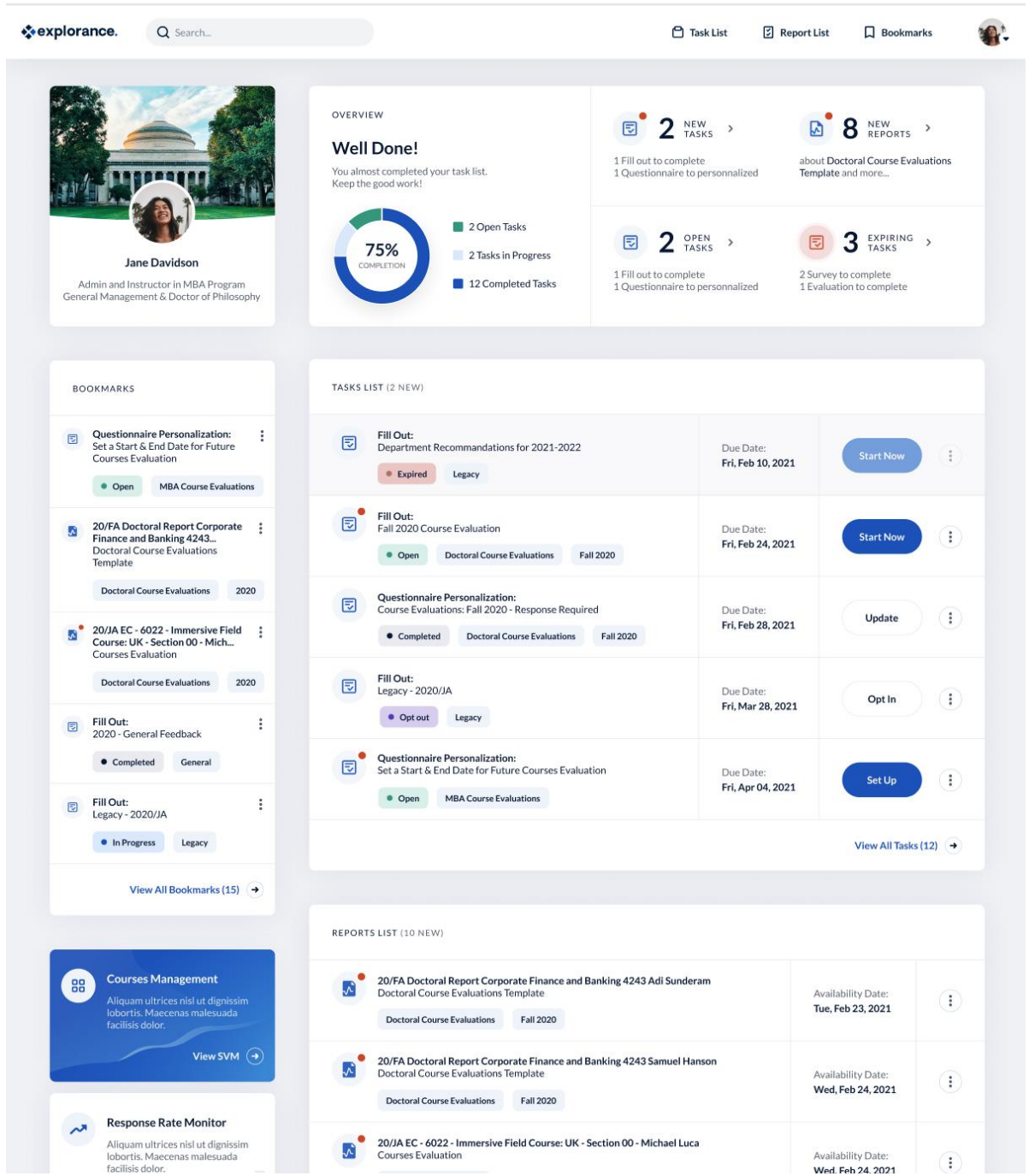




Longer term

- New Escalation & Alerts Task
- New Results Signing Task
  - In-the-moment results distribution and signing
- BlueML integration
- API enhancements

Explorance Help Center

Join the community, search the knowledge base, submit a request, and more.

Updates

User Guides

View the user guides for each product

Blue Help

MTM Help

BlueX Help

Bluepulse Help

BlueML Help

Notice Board

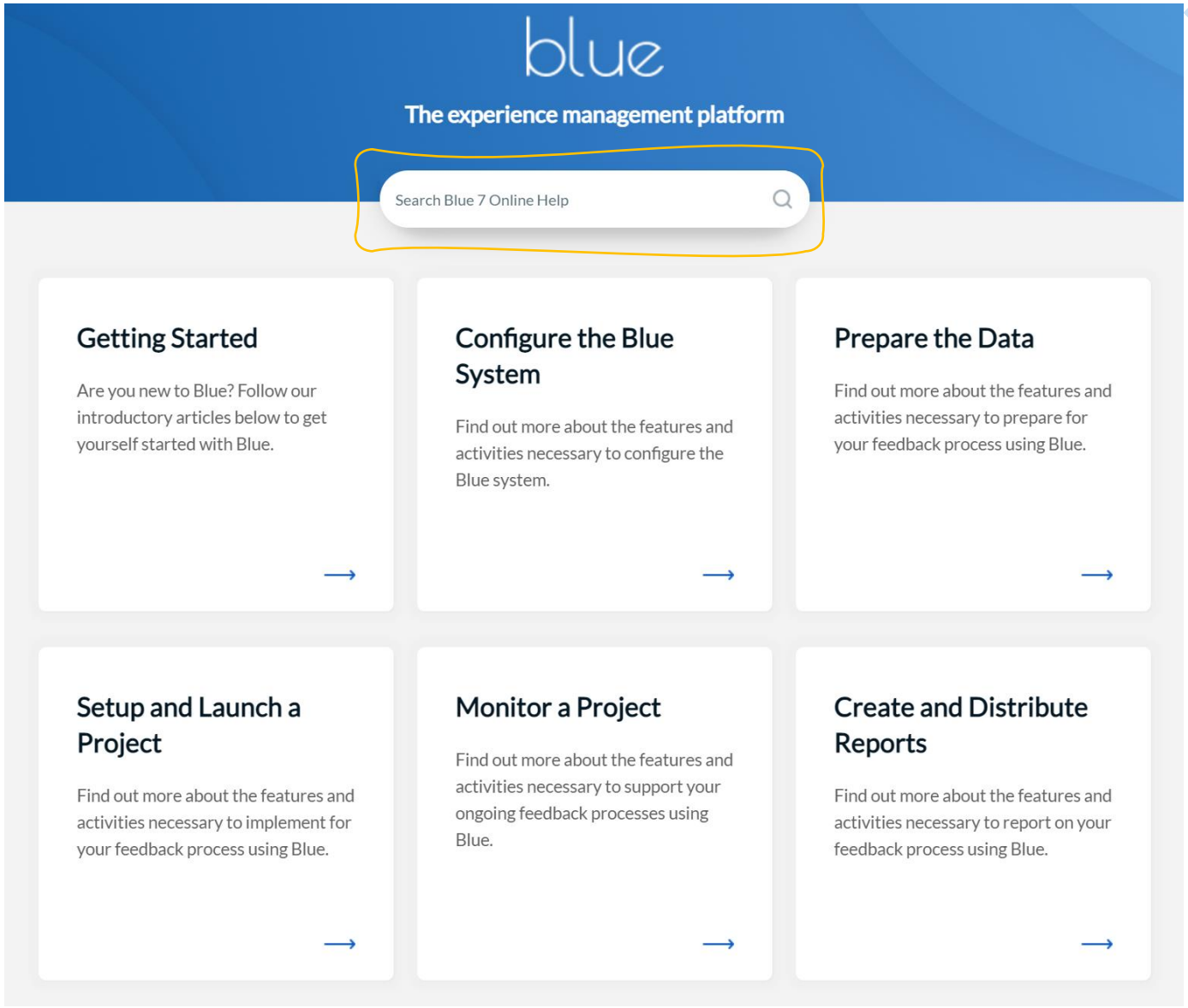
- Blue 8 Release Notes
- The Help Center Turns it up a Notch
- End of Support Notice: Blue v7.0 to v7.12
- Help Center Changes!
- Retiring of Legacy Project Types

Quick Links

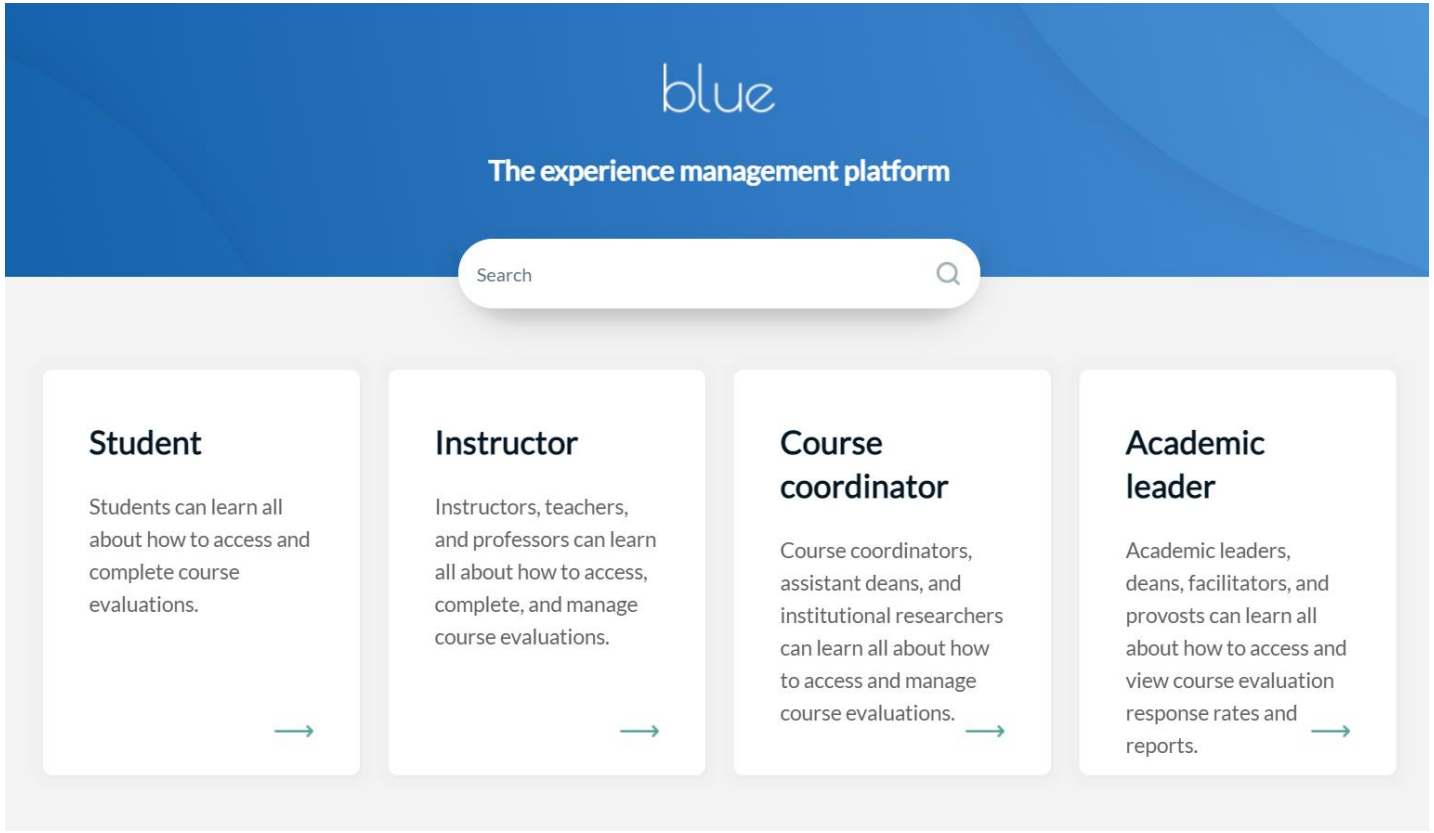
- Blue Learning Webinars
- Download Blue User Manuals
- Connect with the Bluenotes Community
- BAC Training Schedule
- Blue 7 Help

Blue 7 user guides

- Downloadable
- Searchable
- Release notes included



New Tasks Guides:
Manuals for your participants



New Tasks Guide: Students

Search

Contents

Get started
Higher education
Student guide
Access your evaluations
Complete your evaluation
Additional features you may see
Instructor guide
Course coordinator guide
Academic leader guide
Reports

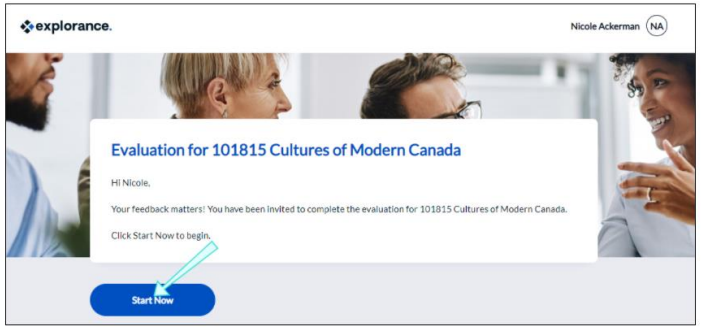
Updated: 2021-06-18

>> Higher education > Student guide > Complete your evaluation

Complete your evaluation

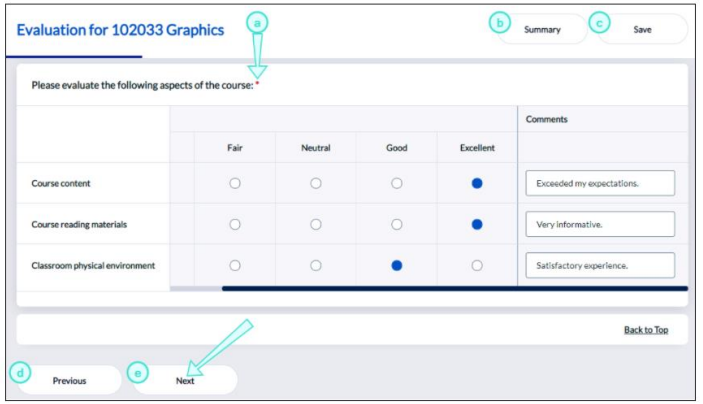
You have arrived to the first page of your evaluation. Your survey form may look different for each evaluation you complete, so please read the instructions carefully.

- Click **Start Now** to begin your evaluation.



You may have several pages to complete in your evaluation. On each page:

- Select or input responses that most accurately reflect your opinion.
- Click **Next** to access the next page.



a. **Mandatory question** - A red asterisk next to a question means the question is mandatory and must be completed in order to continue.
b. **Summary** - Opens the summary page, which displays a list of all questions and the responses

New Tasks Guide: Instructors

Search

Contents

Updated: 2021-06-18

>> Higher education > Instructor guide > Personalize your questions

- Get started
- Higher education
  - Student guide
  - Instructor guide
    - Access your evaluations and reports
    - View the Blue central page
    - View the Subject Management page
    - Personalize your questions
      - Copy questions between your courses
    - Course coordinator guide
    - Academic leader guide
- Reports

Personalize your questions

Question personalization allows you to add your own questions to a survey. You can access the Question Personalization page by selecting:

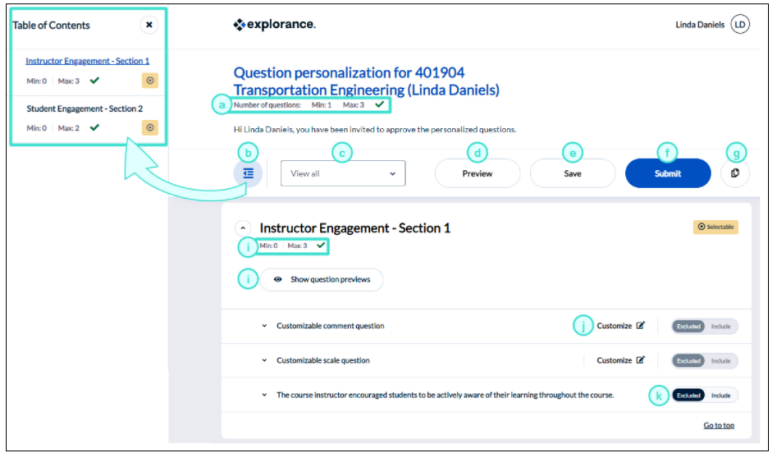
- A direct notification (email or SMS) that was provided to you.
- A question personalization task from your LMS, Blue central, or Subject Management page.

Access from your Subject Management page

Question personalization overview

On your Question Personalization page, you may see two types of questions to add to your evaluation:

Customizable
A type of question you can write in your own words to tailor towards your course and students.
Selectable
A type of question you can choose from a list.



QUESTION PERSONALIZATION MENU FEATURES

a. **Number of questions condition** - Displays the minimum and maximum number of personalized questions allowed for selection. A green check mark means the global conditions have been satisfied.
b. **Table of contents** - Provides a simplified overview of question sections you can personalize. The page will automatically scroll to the question section you selected.

New Tasks Guide: Coordinators

Get started
Higher education
Student guide
Instructor guide
Course coordinator guide
Data preparation
Evaluations
Access your evaluations
View the Blue central page
View the Subject Management page
Manage your evaluation settings
View the Response Rate Monitor
Academic leader guide
Reports

View the Subject Management page

This is an enhanced view that will allow you to see all activity related to your evaluations on a single comprehensive page. Relevant details and options are showcased for each evaluation right when you need them, such as calls to action if tasks are incomplete, viewing response rates for live evaluations, and reports for completed ones.

This section contains the following:

Evaluations
View the Subject Management page
Manage your evaluation settings

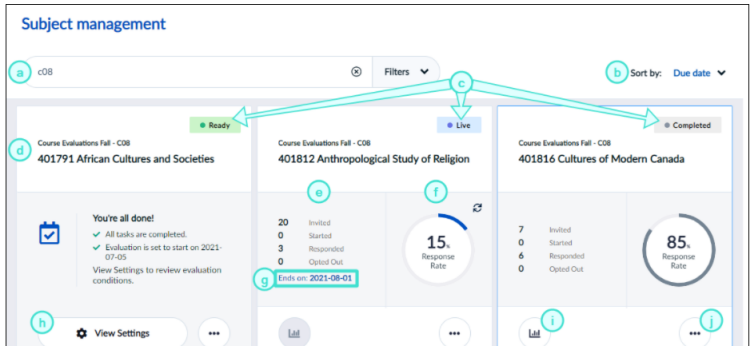
To access the Subject Management page from the Blue central page:

- Click **Subject Management**. A new page will appear where you will see **all your evaluations** represented as tiles.

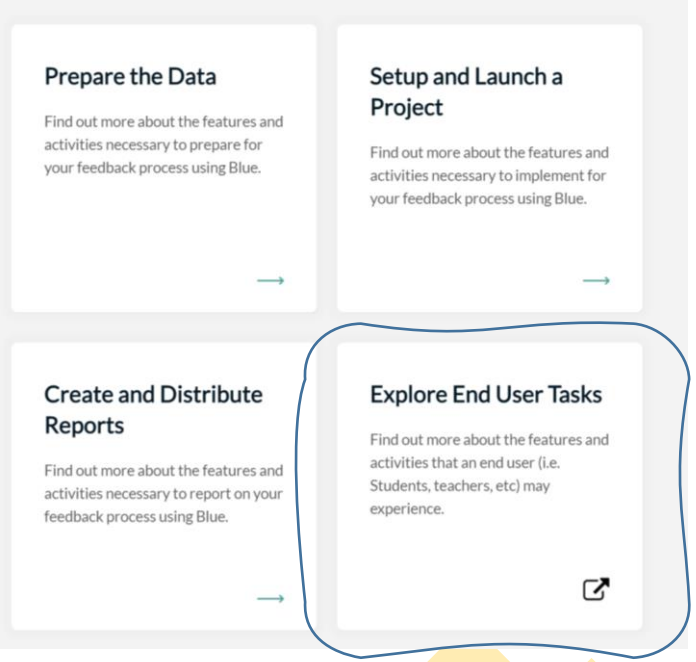
From this page, you will be able to:

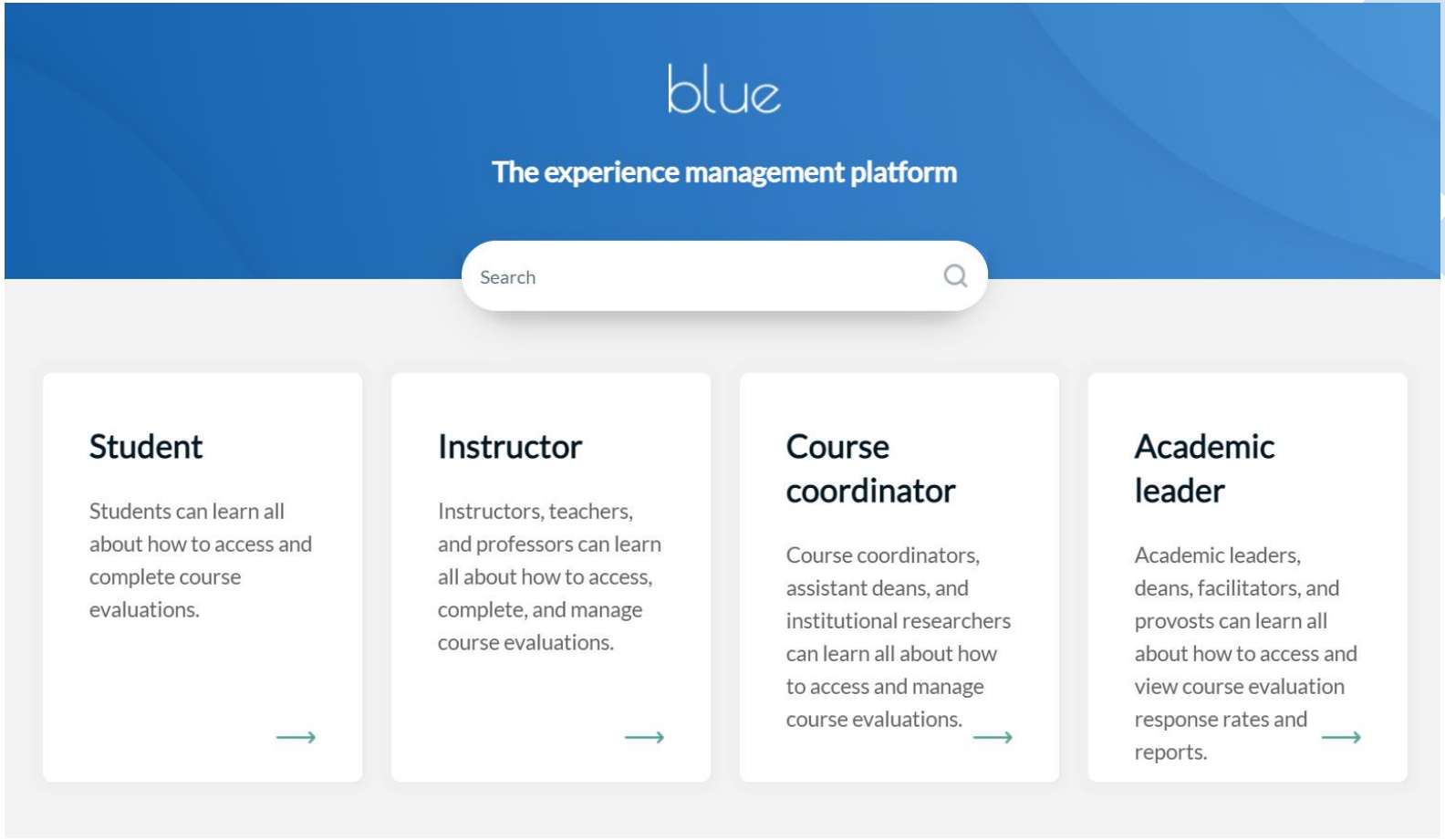
- **View response rates** - View real-time response rates to your live evaluation(s).
- **View or manage evaluation settings** - View or adjust settings to your evaluation(s).
- **View reports** - View individual or aggregate reports by course.

> **TIPS**
>
> Bookmark this page for easier access in the future.



New Tasks Guides: Manuals for your participants





How to

- Access tasks
- Complete tasks
- Access reports
- Use new Subject Management

FYI

- Focused on end-of-term and mid-term evaluation examples
- No log in required
- Will be updated w/ latest features

Explorance Help Center

Join the community, search the knowledge base, submit a request, and more.

Updates

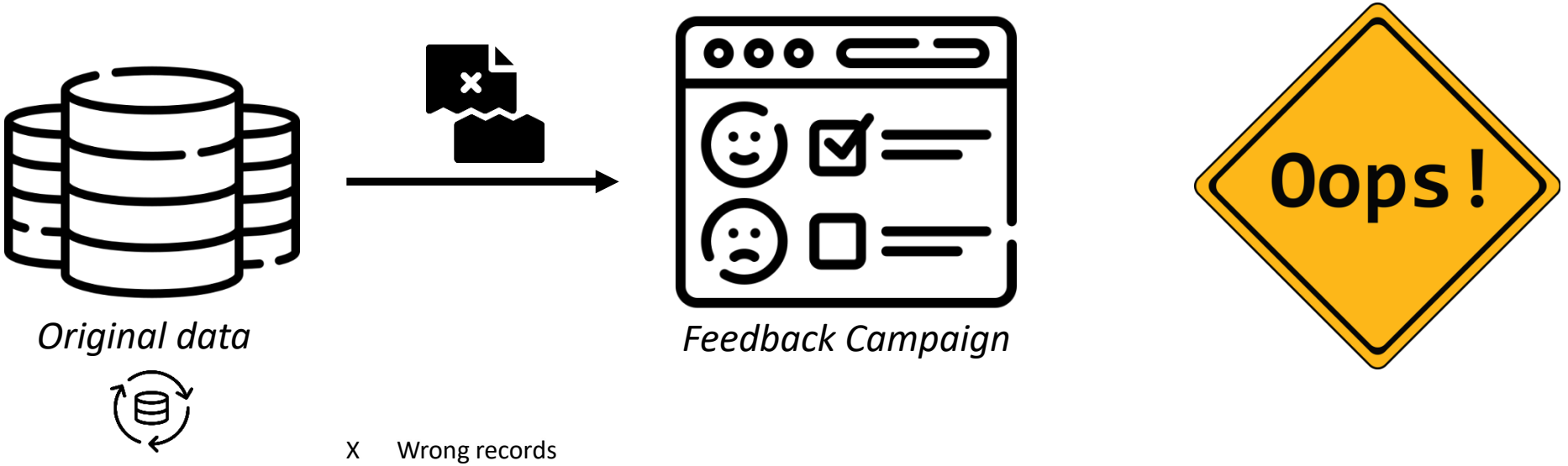
New look

Guides by product

Blue 7 guides fully available

Comprehensive task guides

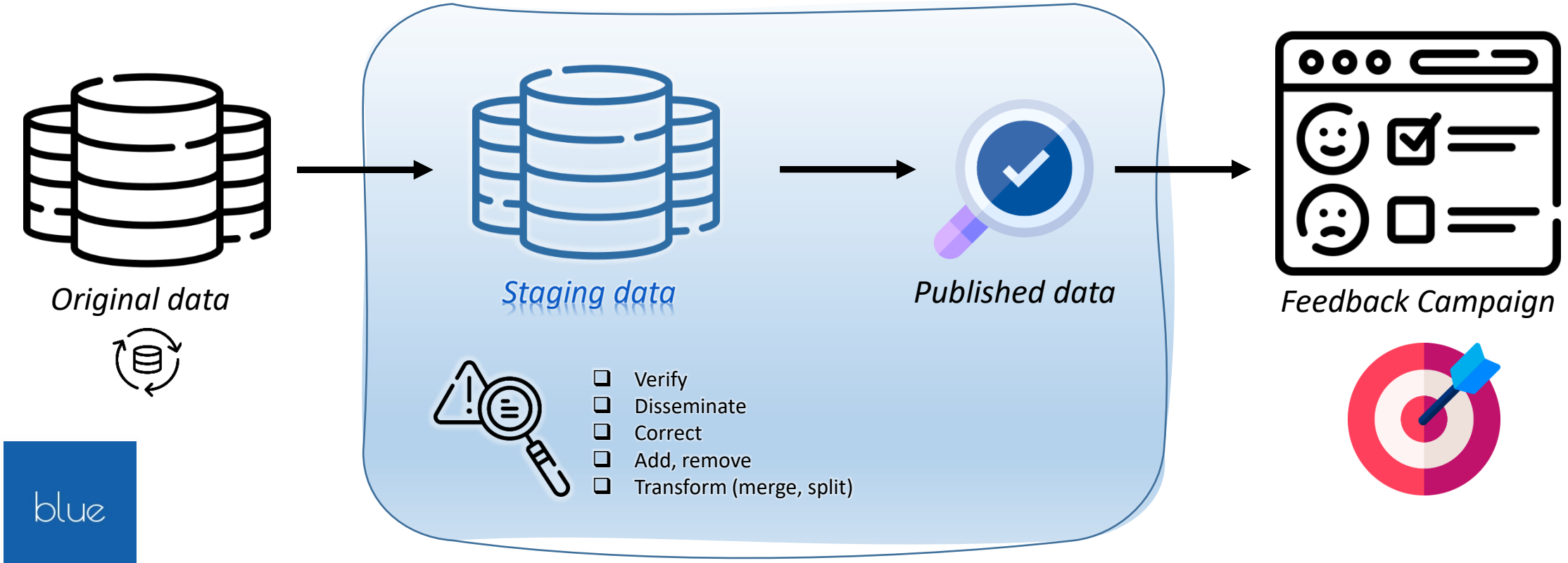
Data integrity…



X Wrong records
X Outdated relationships
X Incorrect demographics

Data integrity…

data integrity gateway



blue

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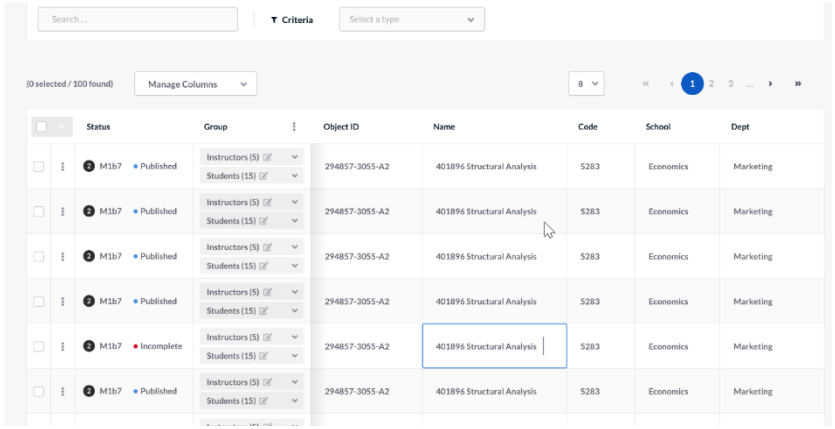
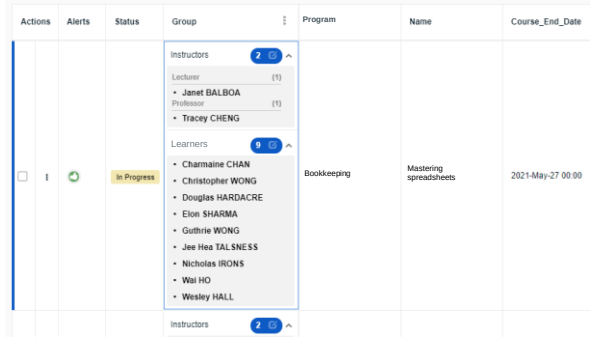
data integrity gateway v3 Roadmap

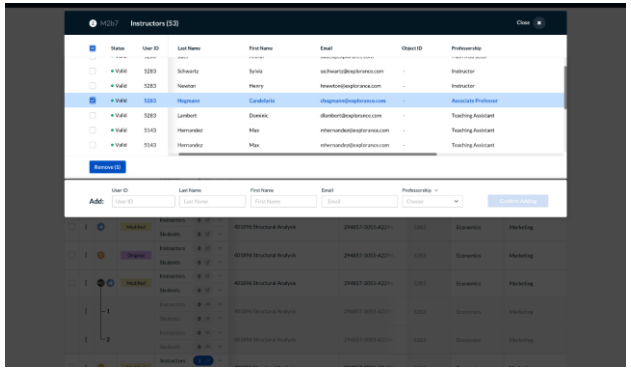
In-line edits



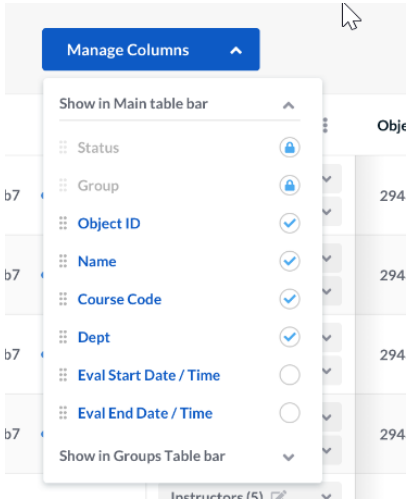
Quick roster check



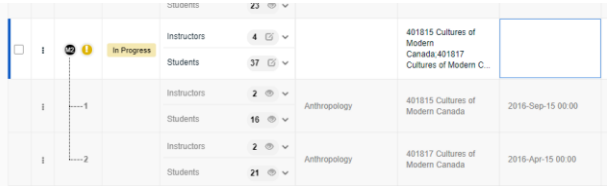
New roster management



Column management



Tree view for merge/splits



blue

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data integrity gateway v3 Roadmap

- In-line edits
- Quick roster check (incl. roles)
- Column management
- New roster management
- Tree view for merge/splits
- Plus:
  - -General UI (sticky cols/rows, new icons, etc.) and
  - -Single user data source support

In progress

Mid 2022

Blue Dashboard v3 Roadmap

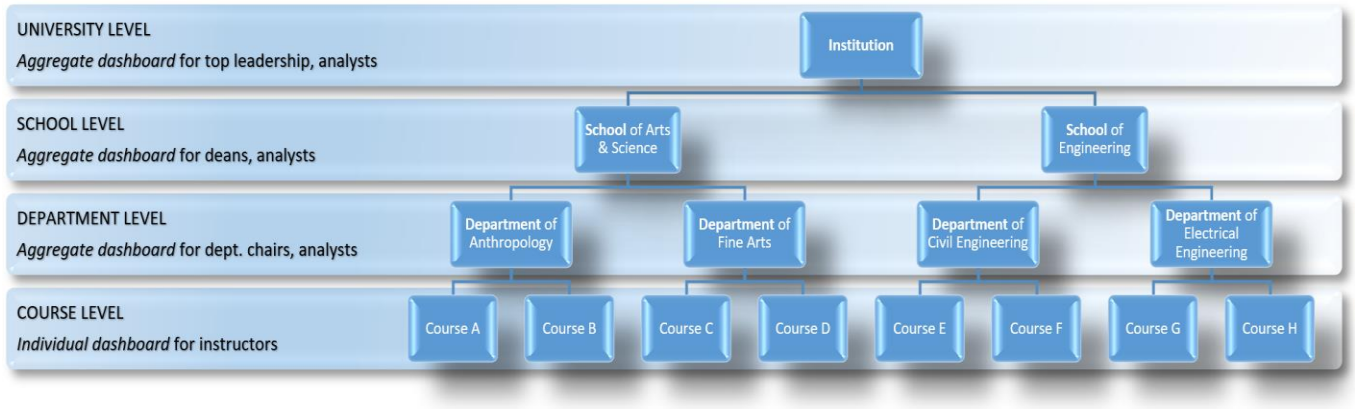
Built for	Version 2	Version 3
Instructors	✓	✓
System Administrator	✓	✓
Leadership (Provost, deans, dept. chairs, etc.)		✓
Teaching & Learning		✓
BI power users (Analysts, researchers, etc.)		✓

blue

Blue Dashboard v3 Roadmap

Aggregate Dashboard Access

- Leverage your hierarchy
- Select groups
- Update users automatically



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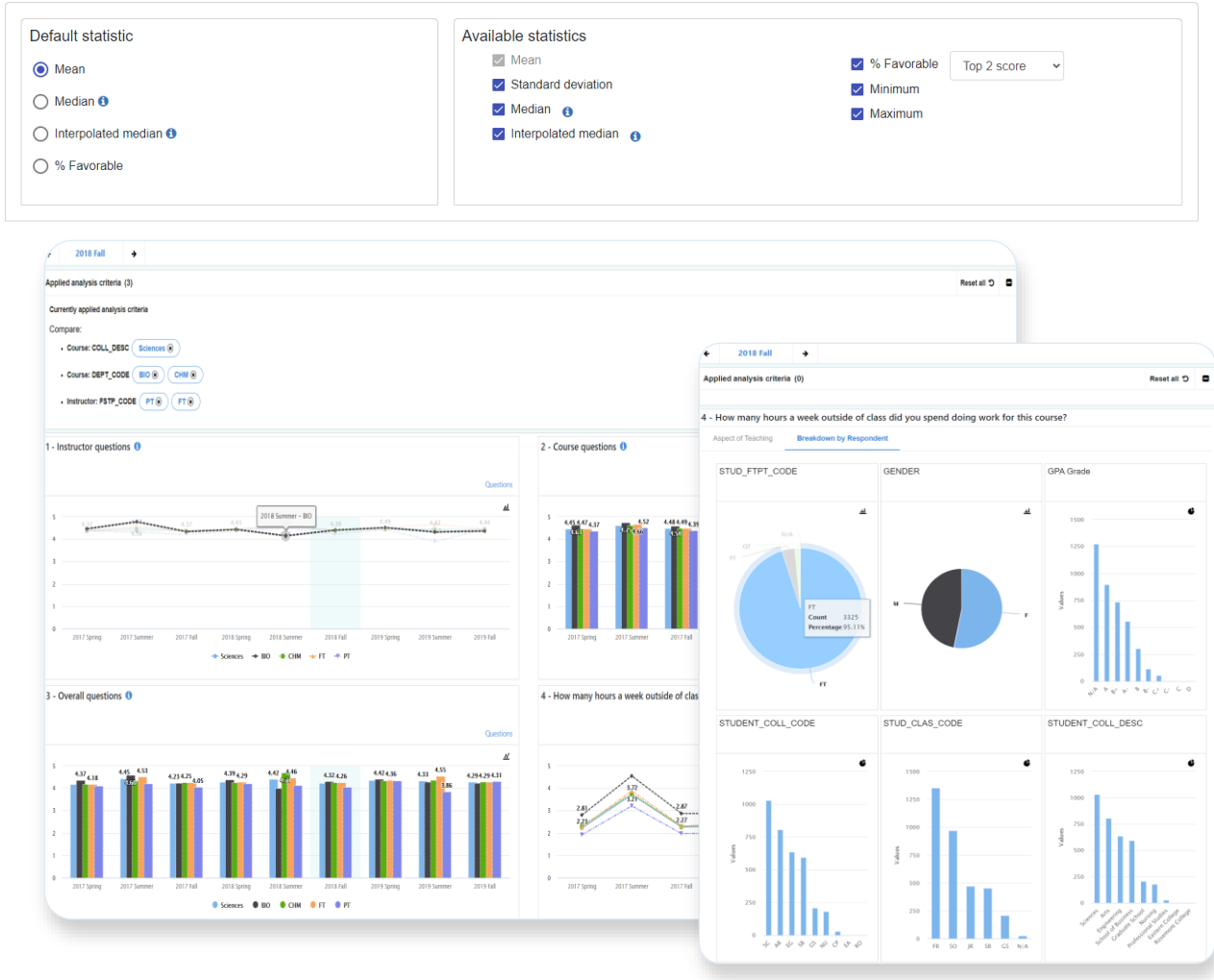
VIRTUAL EXPERIENCE

Blue Dashboard v3 Roadmap

- Access subject filtering (aggregate)
- Display more comparisons
- Leverage new stats: median, interpolated median, %fav



blue

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Blue Dashboard v3 Roadmap

- New aggregate dashboard
- Support for your organizational structure
- Subject filtering (aggregate)
- More comparisons
- New stats: median, interpolated median, %fav
- More

Around the corner

Fall 2021

Roadmap

BlueX

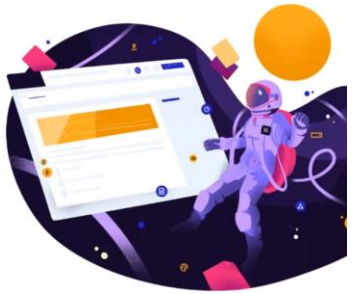
Welcome to BlueX

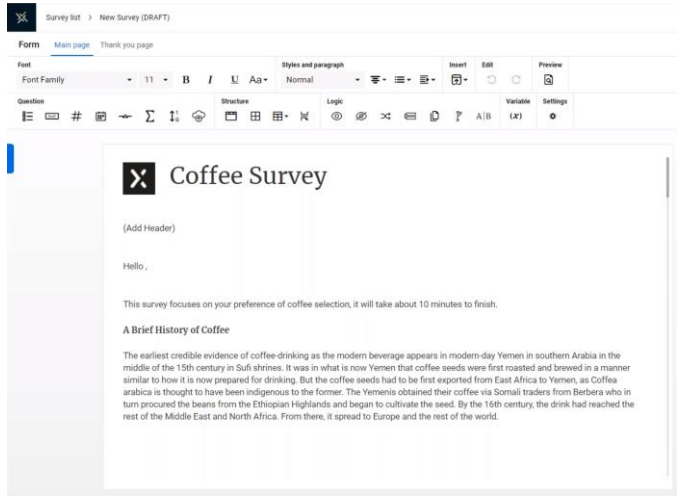
BlueX, an online survey solution that helps you to easily build rich and engaging questionnaires, newsletters, Forms and more. With an intuitive user-friendly interface, creating, monitoring and managing your surveys is simple.

"Your creativity is your only real limit"

Highlight features:

- Free-form editor
- 20+ question types
- 20 Predefined templates and themes
- Advanced Question logic
- Version control
- Survey Management features
- Customizable export





Roadmap: BlueX

Around the corner

- **Updates to editor**
  - Fluidity
  - Quick titles
  - Question ranking multiple
  - Constant sum on grid
- **Open surveys w/ invitation on event**
- **Multilingual survey creation and management (French)**

In progress

- **Introducing reporting w/**
  - Bar charts
  - Pie charts
  - Data tables
  - Comments
  - Cross-tabulation
  - Demographic filtering
- **Reports embedded in the editor/survey!**

Longer term

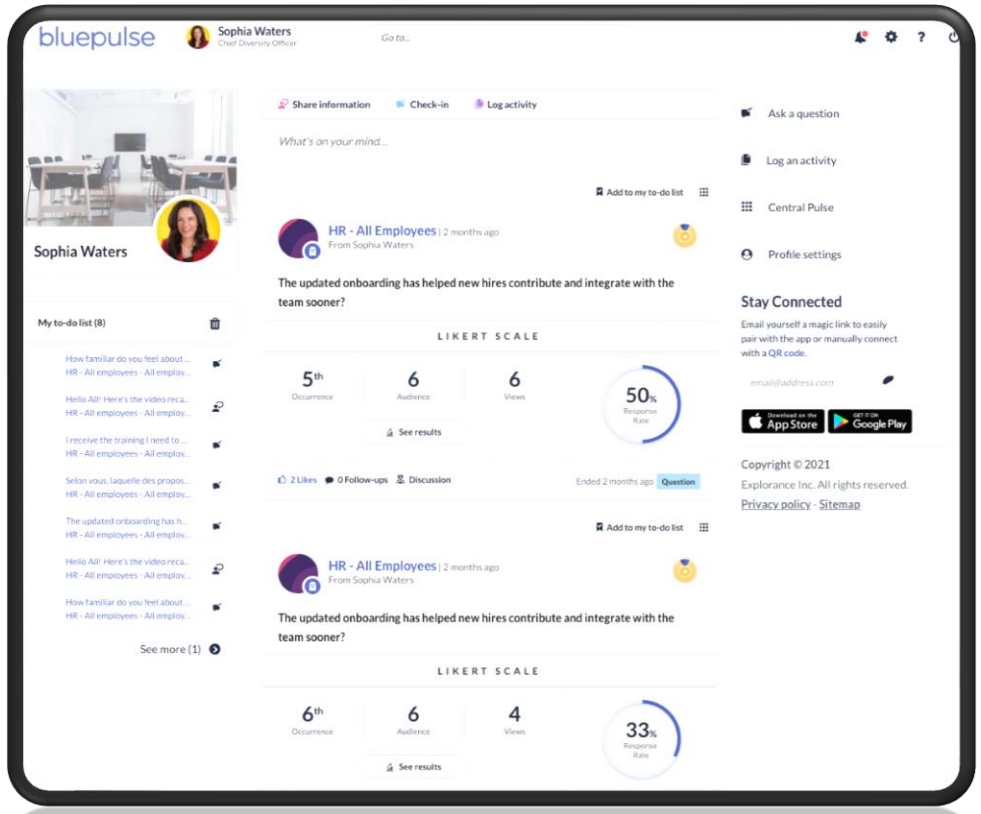
- **Recurring surveys**
- **Quotas**
- **Heatmap & hotspot**
- **Qualtrics connector (logic+results)**
- **Folders**
- **Survey sharing**

Roadmap

bluepulse

Bluepulse

The Continuous Listening Platform



- Check-in
- Follow-up
  - 2-way feedback
- Discussions
- Activity logging & Goals
- Mobile first experience

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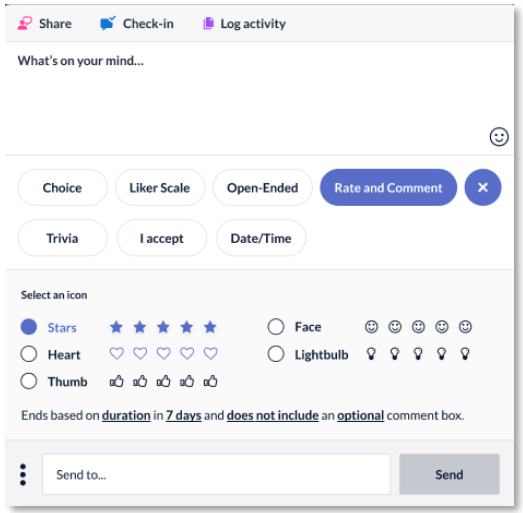
VIRTUAL EXPERIENCE

Bluepulse Roadmap

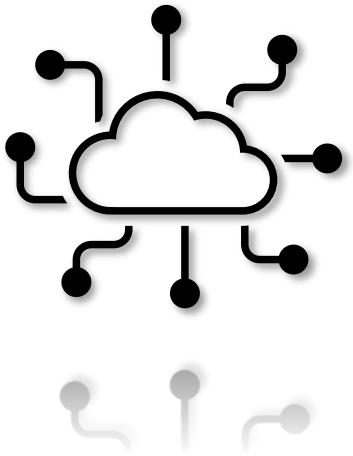
Recent

- Notifications when results are available
- Mandatory/non-mandatory comments



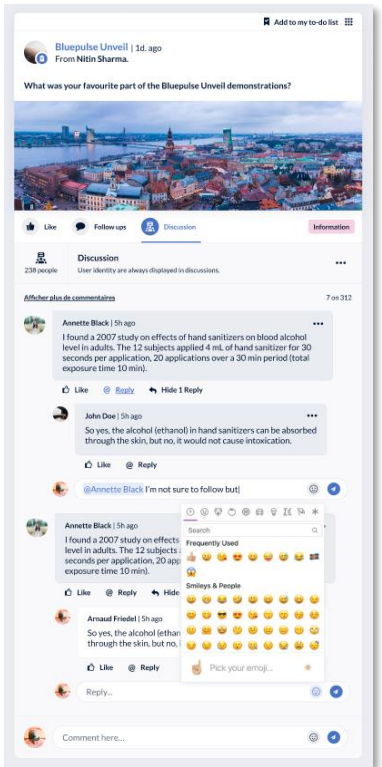
In progress

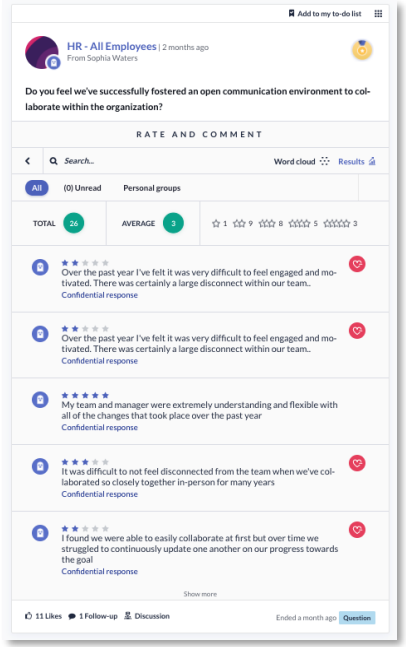
- New Blue Central landing page experience
  - Including Bluepulse tasks



Longer term

- Discussions 2.0
- BlueML integration
- Enhanced creation process





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Roadmap

BlueML

Roadmap: BlueML

Recent

- Student Experience Categorization (SEC)*
- BlueML Dashboard includes
  - Employee Engagement Categorization (EEC)
  - Employee Learning Categorization (ELC)
  - Poloarity (POL)
  - Recommendation (REC) model
- Support for demographics
- Slice-and-dice
- Thresholds for comment categories (min/max)

**in beta*

Next

- Widgets
- Drill-down by topic, subtopic
- Unique comment counter
- Custom categories
  - Virtual models (I.E Onboarding)
- Abbreviations and special organizational keywords
- Emotions model*
- Multilingual support*

**in beta*

In progress + Longer term

- Topic indices (scoring)
- Action recommendations
- Text redaction
  - Offensive or custom
- New types of widgets
  - Aggregate analysis
  - Cross tabs
  - Time trends
  - Custom

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VIRTUAL EXPERIENCE

Recap

New central landing page

DIG 3

Bluepulse leveraging Blue data

BlueML

BlueX Quotas

Help Center Updates

BlueML custom topics

Aggregate Dashboard

Task guides

QP copy from previous

Offensive text redaction

Escalation & Alerts

BlueX

BlueX reporting

Action recommendations

Blue Dashboard 3

Bluepulse Discussions 2.0

Manual email copy from

Emotions model

blue
The Experience Management Platform

bluepulse
The Continuous Listening Solution

BlueML
The Comment Analysis Solution

blueX
The Survey Software for Anyone

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Thank you!