Your Journey as a Blue 360 Administrator
Managing through Automation

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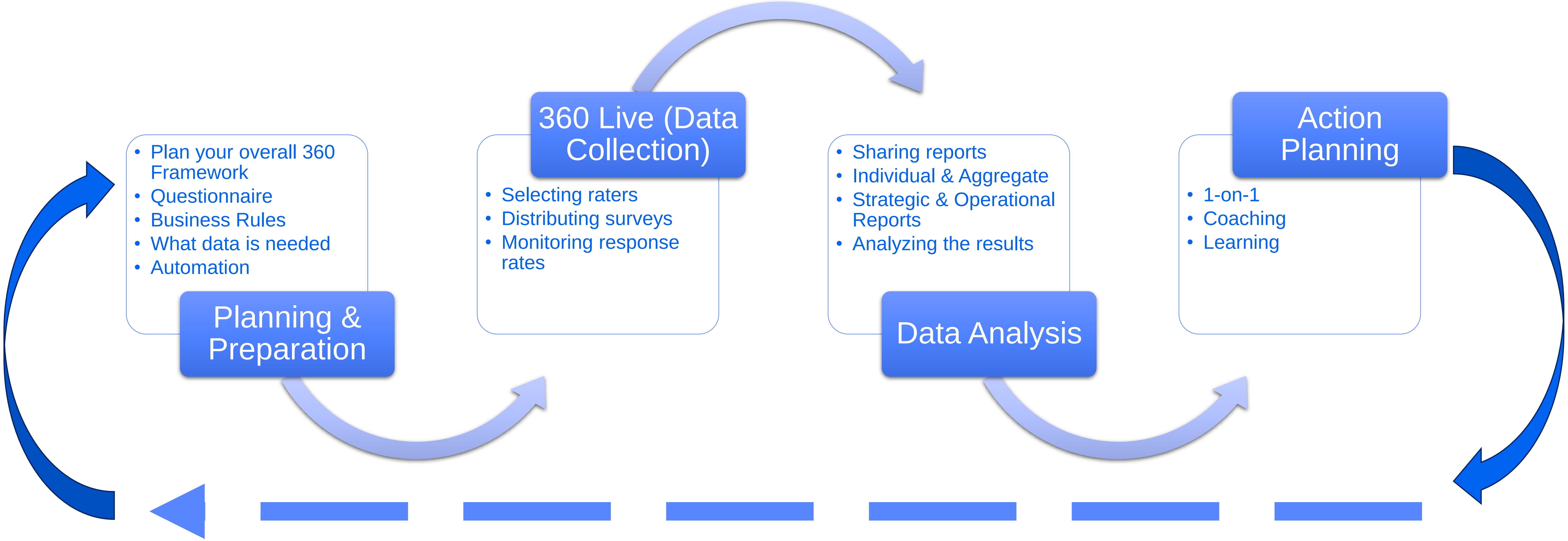
Agenda

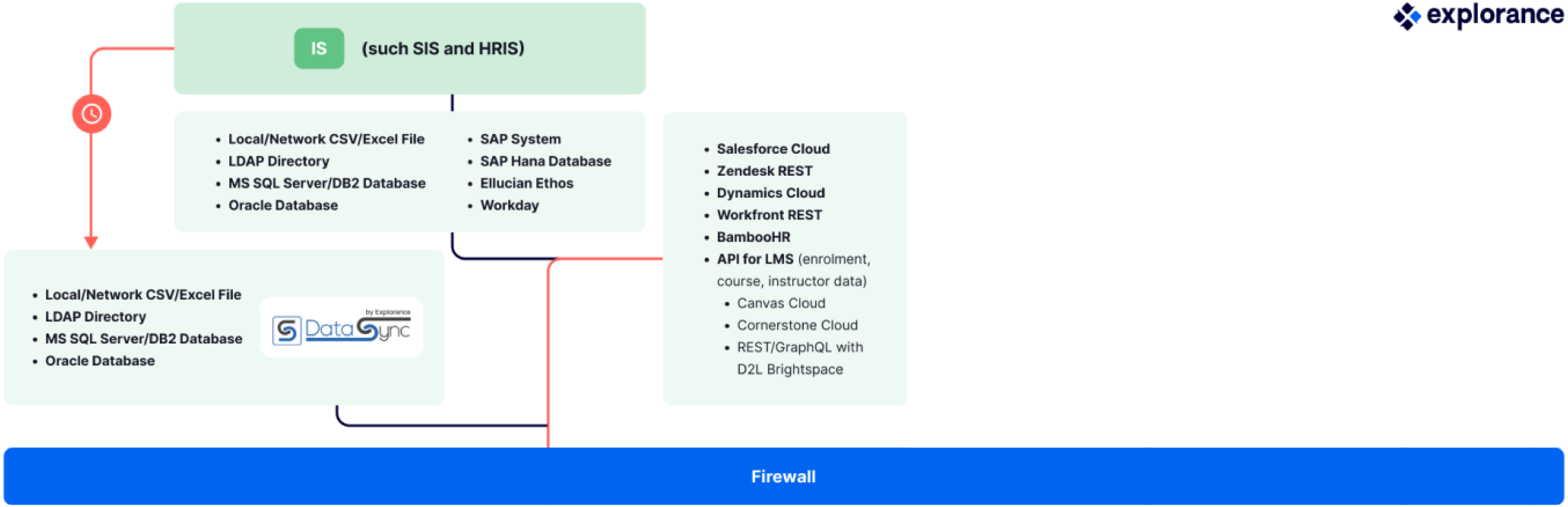
- 360 Ecosystem
- Automating the Participants' Rater Network Pool and Selection
  – Datasource
  – Extension Blocks
  – Datasource Hierarchy to Automate Rater Network
  – Subject and Dynamic Group Filters
- Automating your Survey Instrument and Schedule Assignment
  – Questionnaire logic and Triggers
  – Relative Survey Dates
  – Deadline settings (soft and hard line settings)
- Automating Report Access with Dynamic Role Access
  – Field Synchronization after Publishing
  – Organizational Hierarchy
  – Linking Viewers to Level

Journey of the 360 Initiative



Automation reduces manual effort and accelerates the planning cycle, allowing organizations to save time and resources. Automating increases adaptability and accommodates for changes in business strategies, market conditions, or other external factors. This adaptability enhances the organization's ability to stay agile and responsive. Automation frees up employees from repetitive, time-consuming tasks, allowing them to focus on more strategic and value-added activities allowing for innovation, decision-making, and analysis.

Understanding the Ecosystem



Automating the Participants' Rater Network Pool and Selection

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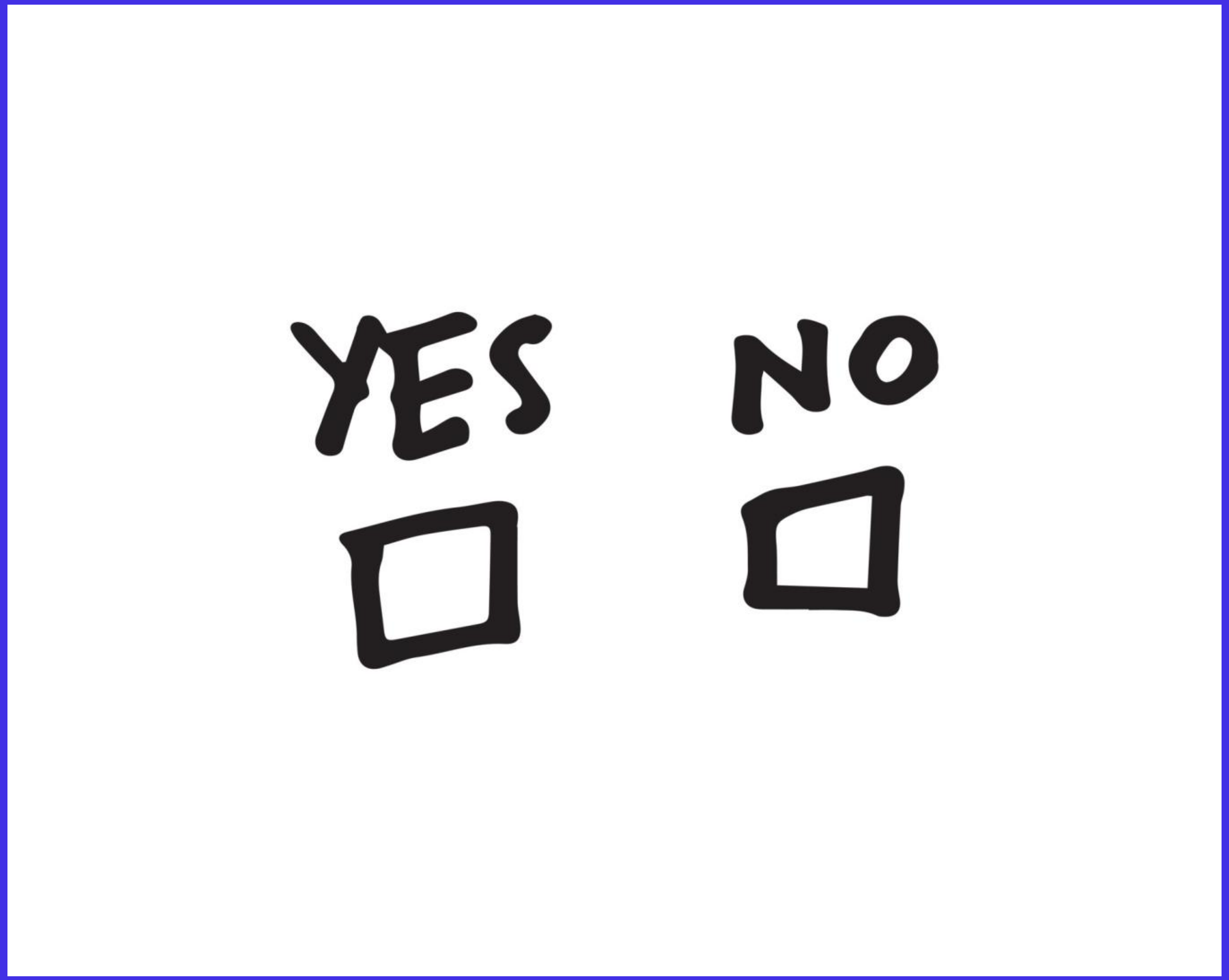
Polling Time!



Are you currently automating all of your datasources?

❖ Datasources

A datasource stores the data that will be used to power projects in Blue. The datasource is comprised of one or more data blocks into which your actual data will be imported into Blue.

Data Blocks allows you to establish a connection to Blue and form the data components of your Datasource.

For a User Datasource the following fields are required.

- User ID
- First Name
- Last Name
- Email
- Blue User Role - Participants or Subject need value of 23 to be evaluated

OriginalID	FullEmail	FirstName	LastName	Blue_Role
emp001	test1@explorance.com	Agnes	Au	23
emp002	test2@explorance.com	Beryl	Buckby	23
emp003	test3@explorance.com	Beth	Tinning	23
emp004	test4@explorance.com	Carolyn	Timms	23
emp005	test5@explorance.com	David	Cottrell	23
emp006	test6@explorance.com	Deborah	Graham	23
emp007	test7@explorance.com	Doug	Hunt	23
emp008	test8@explorance.com	Debra	Miles	23
emp009	test9@explorance.com	David	Mitchell	23
emp010	test10@explorance.com	Elizabeth	Howe	23
emp011	test11@explorance.com	Hayden	Lesbirel	23
emp012	test12@explorance.com	Kerry	McBain	23
emp013	test13@explorance.com	Merv	Bendle	23
emp014	test14@explorance.com	Michele	Surbey	23
emp015	test15@explorance.com	Nonie	Harris	23
emp016	test16@explorance.com	Peter	Garrity	23
emp017	test17@explorance.com	Peter	Raggatt	23
emp018	test18@explorance.com	Surin	Maisrikrod	23
emp019	test19@explorance.com	Stephen	Moston	23

❖ Extension Blocks

Extension Blocks allow you to append the data from your primary data block with additional data, usually from a different system of record or data file. This will allow you to have a complete data set to launch your 360 initiative.

Using a unique identifier that exist in both the primary block and the extension block, you can use a relationship mapping combining the data set into a single datasource.

Primary Block

OriginalID	FullEmail	FirstName	LastName	Blue_Role	ReportsTo
emp001	emp001@	Agnes	Au	23	
emp002	emp002@	Beryl	Buckby	23	emp001
emp003	emp003@	Beth	Tinning	23	emp001
emp004	emp004@	Carolyn	Timms	23	emp001
emp005	emp005@	David	Cottrell	23	emp002
emp006	emp006@	Deborah	Graham	23	emp002
emp007	emp007@	Doug	Hunt	23	emp002
emp008	emp008@	Debra	Miles	23	emp003
emp009	emp009@	David	Mitchell	23	emp003

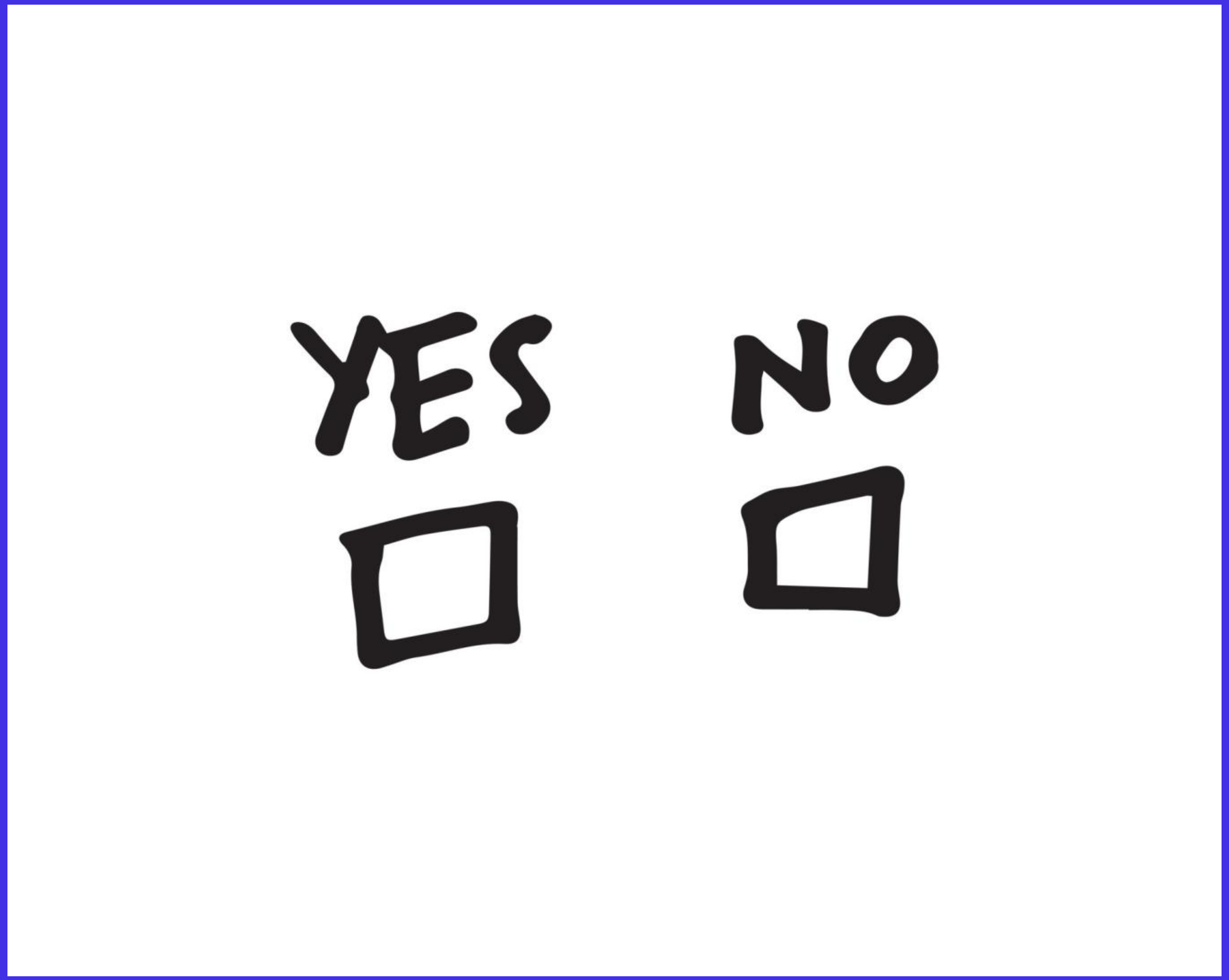
Extension Block

OriginalID	Start Date	End Dates	Departme	Region	Level_1
emp001	12/1/2023	12/14/2023	Marketing	Europe	Director
emp002	12/1/2023	12/14/2023	Marketing	LATAM	Manager
emp003	12/1/2023	12/14/2023	Operation	APAC	Sr. Manager
emp004	12/4/2023	12/17/2023	Operation	North Am	Manager
emp005	12/4/2023	12/17/2023	Marketing	North Am	Sr. Manager
emp006	12/4/2023	12/17/2023	Marketing	Africa	Director
emp007	12/4/2023	12/17/2023	Human Re	APAC	Manager
emp008	12/4/2023	12/17/2023	Operation	LATAM	Director
emp009	12/4/2023	12/17/2023	Marketing	Europe	Sr. Manager

Complete Data Block

OriginalID	FullEmail	FullCell	SmsOptin	FirstName	LastName	Blue_Role	ReportsTo_1	1$Start_Date	1$End_Dates	1$Department	1$Region	1$Level_1
emp001	emp001@explorance.com			Agnes	Au	23		12/1/2023 0:00	12/14/2023 0:00	Marketing	Europe	Director
emp002	emp002@explorance.com			Beryl	Buckby	23	emp001	12/1/2023 0:00	12/14/2023 0:00	Marketing	LATAM	Manager
emp003	emp003@explorance.com			Beth	Tinning	23	emp001	12/1/2023 0:00	12/14/2023 0:00	Operations	APAC	Sr. Manager
emp004	emp004@explorance.com			Carolyn	Timms	23	emp001	12/4/2023 0:00	12/17/2023 0:00	Operations	North America	Manager
emp005	emp005@explorance.com			David	Cottrell	23	emp002	12/4/2023 0:00	12/17/2023 0:00	Marketing	North America	Sr. Manager
emp006	emp006@explorance.com			Deborah	Graham	23	emp002	12/4/2023 0:00	12/17/2023 0:00	Marketing	Africa	Director
emp007	emp007@explorance.com			Doug	Hunt	23	emp002	12/4/2023 0:00	12/17/2023 0:00	Human Resources	APAC	Manager
emp008	emp008@explorance.com			Debra	Miles	23	emp003	12/4/2023 0:00	12/17/2023 0:00	Operations	LATAM	Director
emp009	emp009@explorance.com			David	Mitchell	23	emp003	12/4/2023 0:00	12/17/2023 0:00	Marketing	Europe	Sr. Manager

Polling Time!



Do you currently use Rater Selection as part of your 360 process?

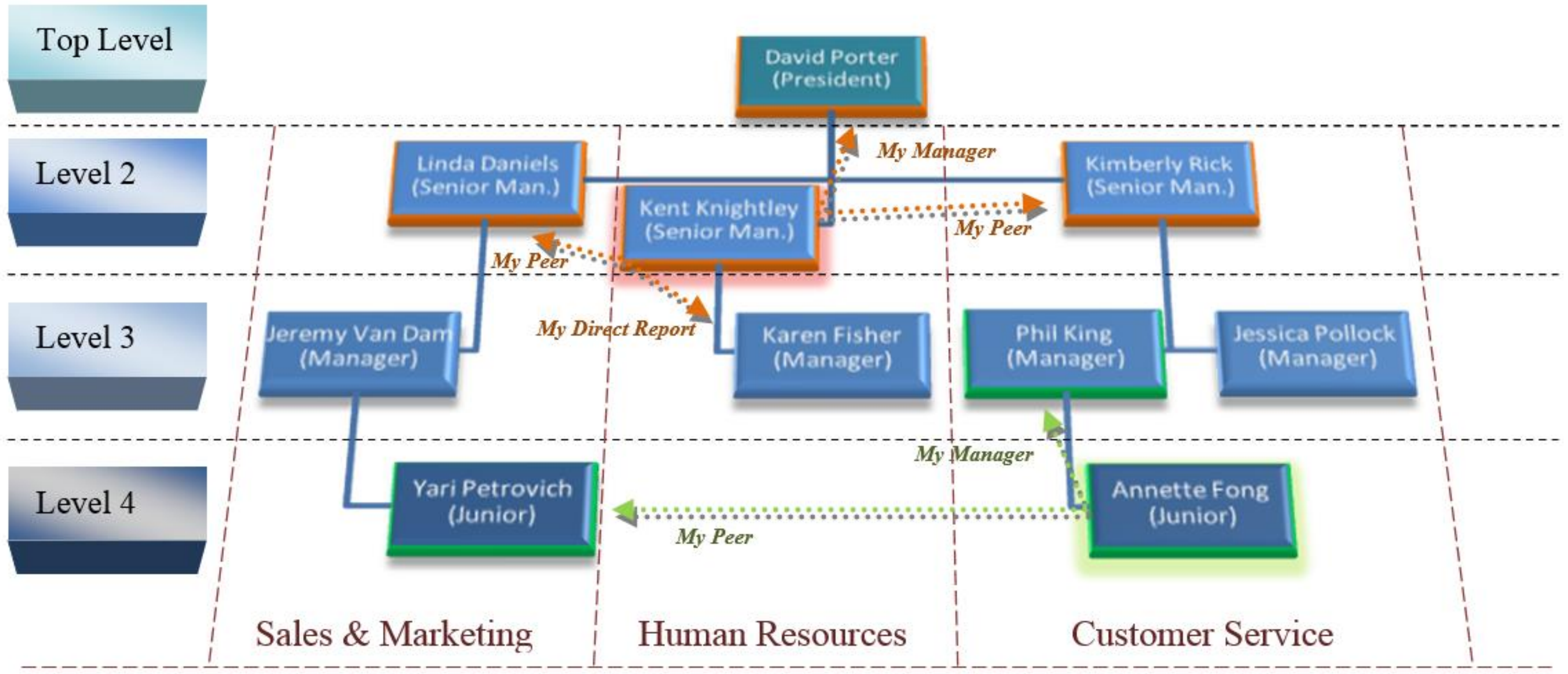
❖ Automating the Participants Rater Network

The hierarchy link type provides a simple means to identify a basic organizational hierarchy that identifies managers, peers, and direct reports. To implement this functionality, the user datasource must have a field that contains the User ID of the person that serves as the direct manager of the selected user. This differs from the Links to link type because the User ID of everyone in the hierarchy must be in the same datasource.

*Note: Hierarchical fields - are useful when creating definitions for 360 reviews. Once enabled, neither the field or the data block containing the hierarchical field can be removed.

User ID	First Name	Last Name	Email	Position	Reports To
SAF	David	Porter	blue@explorance.com	President	
SAB	Linda	Daniels	blue@explorance.com	Senior Manager - Sales & Marketing	SAF
SAD	Kimberly	Rick	blue@explorance.com	Senior Manager - Customer Service	SAF
SAL	Kent	Knightley	blue@explorance.com	Senior Manager - Human Resources	SAF
SAH	Jeremy	Van Dam	blue@explorance.com	Manager - Sales & Marketing	SAB
SAJ	Phil	King	blue@explorance.com	Manager - Customer Service	SAD
SAT	Jessica	Pollock	blue@explorance.com	Manager - Customer Service	SAD
SAR	Karen	Fisher	blue@explorance.com	Manager - Human Resources	SAL
SAN	Yari	Petrovich	blue@explorance.com	Junior - Sales & Marketing	SAH
SAP	Annette	Fong	blue@explorance.com	Junior - Customer Service	SAJ

'Reports To' references the User ID within the same Data Source



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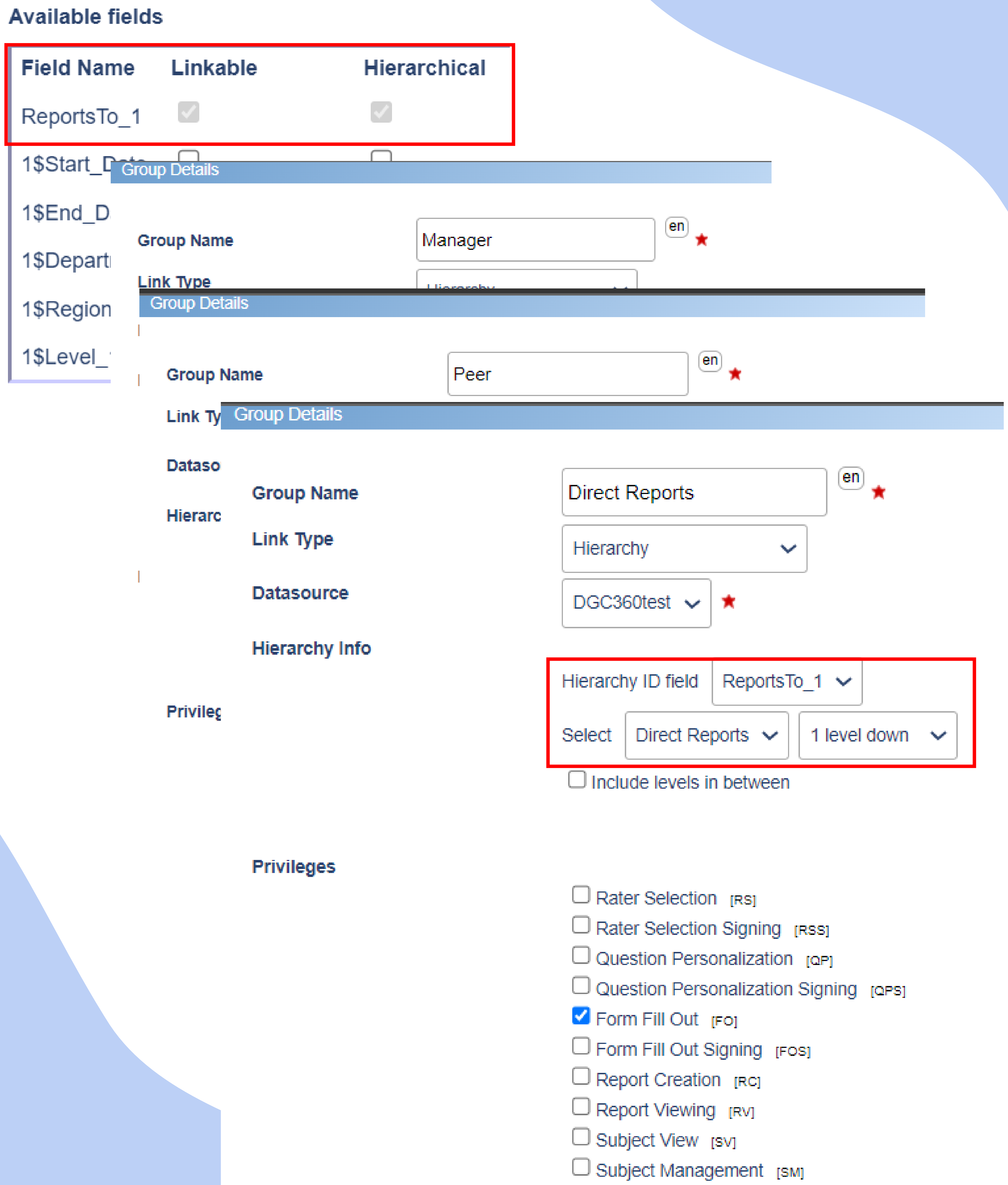
❖ Automating the Participants Rater Network

Selecting the hierarchical link field prior to importing will allow Blue to map the relationship of the raters to the participants.

Settings within the Group Details will determine how to build the rater network for each participant.

Automating this process will remove or reduce the steps needed within the Rater Selection task saving your participants time as well as alleviate the burden of them trying to determine who belongs in which rater group.



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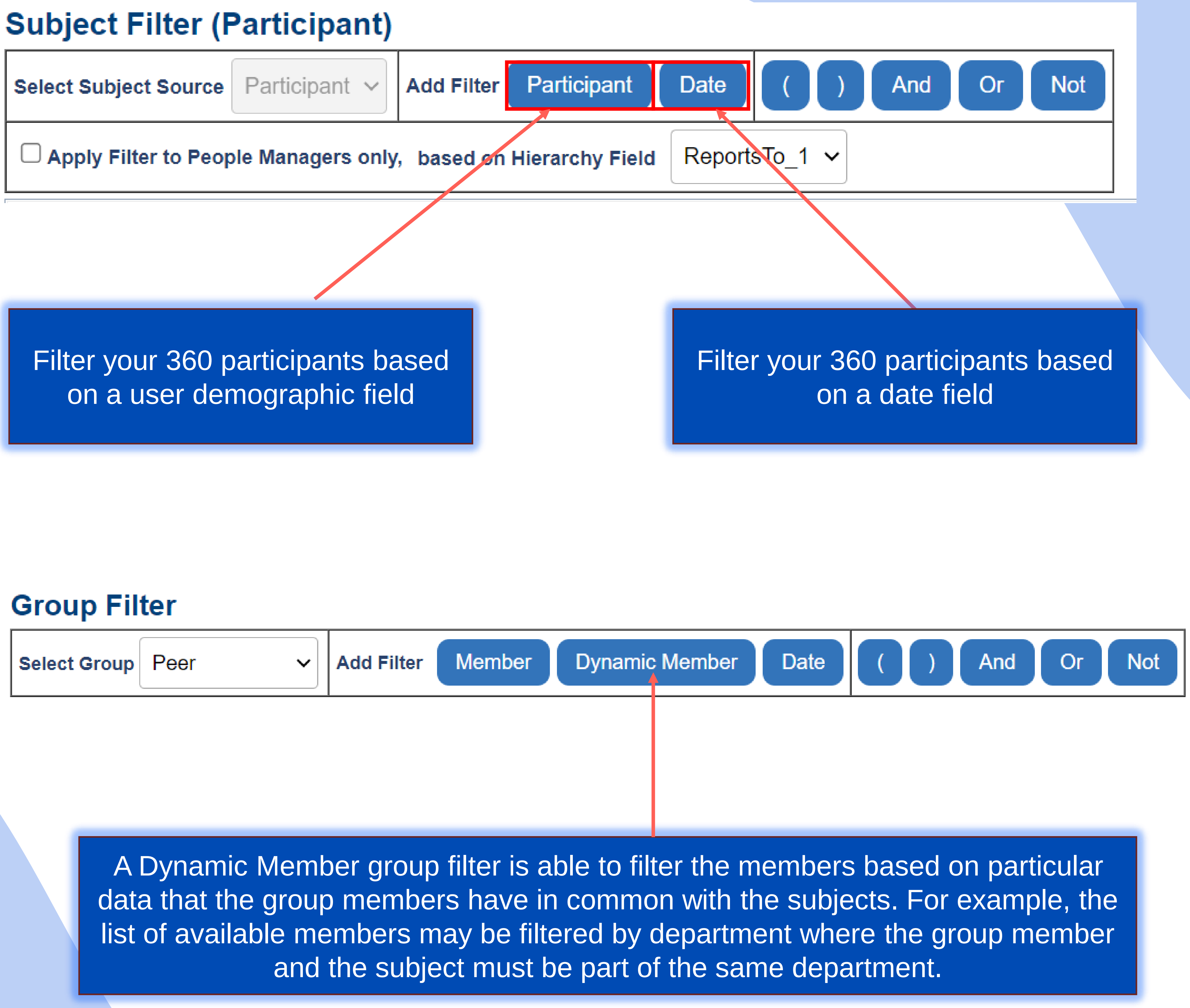
Subject and Dynamic Group Filters

Filter allow you to include or exclude specific sets of data from your overall project. Filters are managed in the definition and can be created for subjects, and group members. There are two main types of filters that can be created for subjects and groups. A demographics based filter or a date based filter. Additionally, dynamic member filters can be created for groups.



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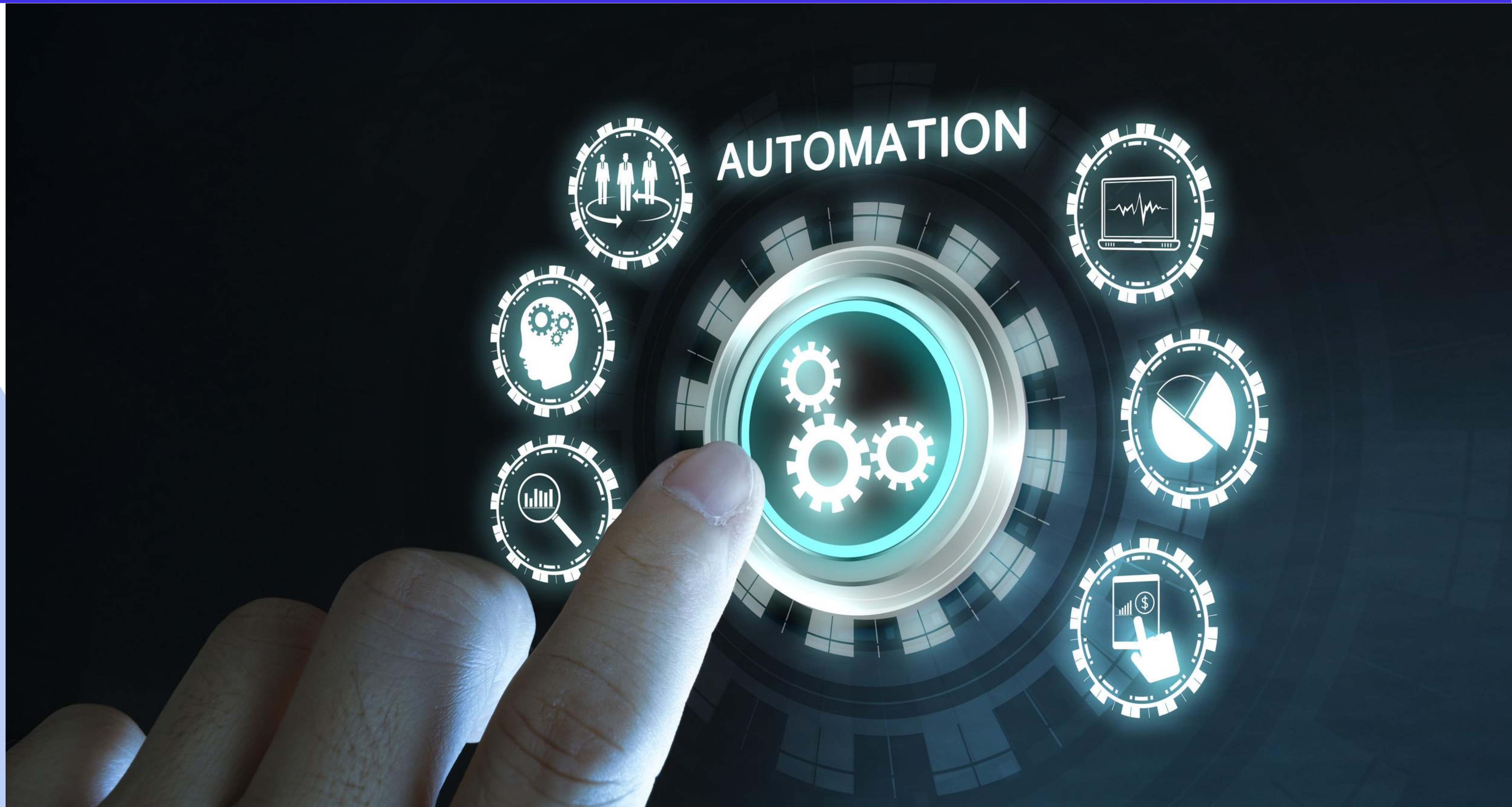
Automating your Survey Instrument and Schedule Assignment



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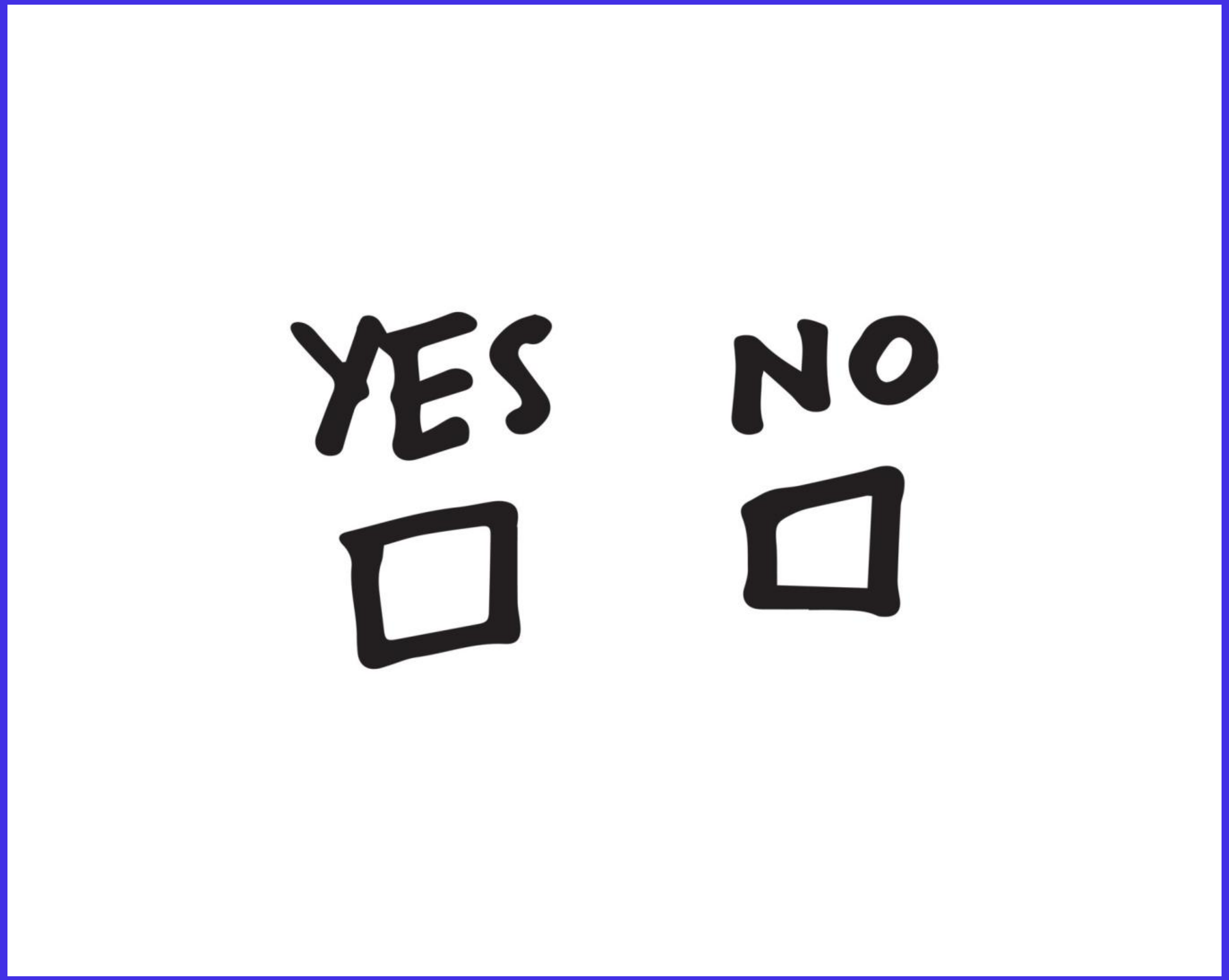


Do you use triggers within your questionnaire to display questions for a specific population?

❖ Survey Logic to Enhance Participants Experience

The use of logic and triggers in a 360 questionnaire enhances the participant experience by tailoring the survey to individual. This can result in more effective and efficient feedback loops within an organization.

Condition

The defined list of criteria that must be met in order to activate the trigger. Once the criteria are met and the condition is satisfied then the action will begin. If the condition is not met then the trigger will remain inactive and no action will take place.

Action

When the condition is met and the trigger is activated the action will be carried out

Trigger Name	Condition	Action
R&D	Condition	Action
Marketing	Condition	Action
Operations	Condition	Action
Product	Condition	Action
Sales	Condition	Action
Finance	Condition	Action
Direct Reports	Condition	Action

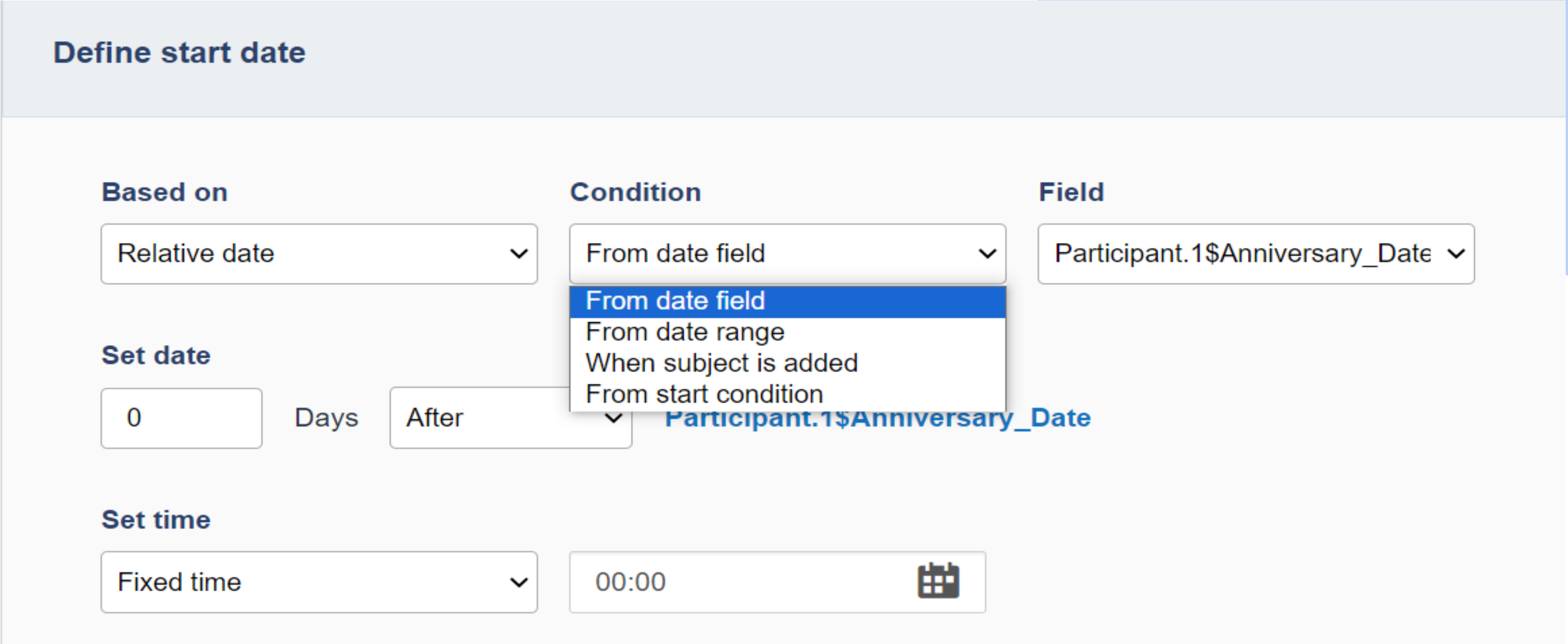
Question actions

Index	Question	Question Type	Is Visible		Is Mandatory	
			Default	Trigger Action	Default	Trigger Action
3	Questions from your company	Section Title	Yes	○ Yes ○ No ◉ N/A	No	○ Yes ○ No ◉ N/A
4	Empowering	Single Selection	Yes	○ Yes ○ No ◉ N/A	Yes	○ Yes ○ No ◉ N/A
5	Impact and Influence	Single Selection	Yes	○ Yes ○ No ◉ N/A	Yes	○ Yes ○ No ◉ N/A
6	Problem Solving	Single Selection	Yes	◉ Yes ○ No ○ N/A	Yes	○ Yes ○ No ◉ N/A
7	Page Break	Section Title	-	-	-	-
8	You are evaluating [C$FN] [C$LN]	Section Title	Yes	○ Yes ○ No ◉ N/A	No	○ Yes ○ No ◉ N/A
9	Questions from your division	Section Title	Yes	○ Yes ○ No ◉ N/A	No	○ Yes ○ No ◉ N/A
10	Interpersonal Skills	Single Selection	Yes	○ Yes ○ No ◉ N/A	No	○ Yes ○ No ◉ N/A
11	Business Acumen	Single Selection	Yes	○ Yes ○ No ◉ N/A	No	○ Yes ○ No ◉ N/A
12	Decision Making	Single Selection	Yes	○ Yes ○ No ◉ N/A	No	○ Yes ○ No ◉ N/A
13	Analytical	Single Selection	Yes	◉ Yes ○ No ○ N/A	No	○ Yes ○ No ◉ N/A
14	Communication	Single Selection	Yes	○ Yes ○ No ◉ N/A	No	○ Yes ○ No ◉ N/A
15	Technical Credibility	Single Selection	Yes	◉ Yes ○ No ○ N/A	No	○ Yes ○ No ◉ N/A
16	Page Break	Section Title	-	-	-	-

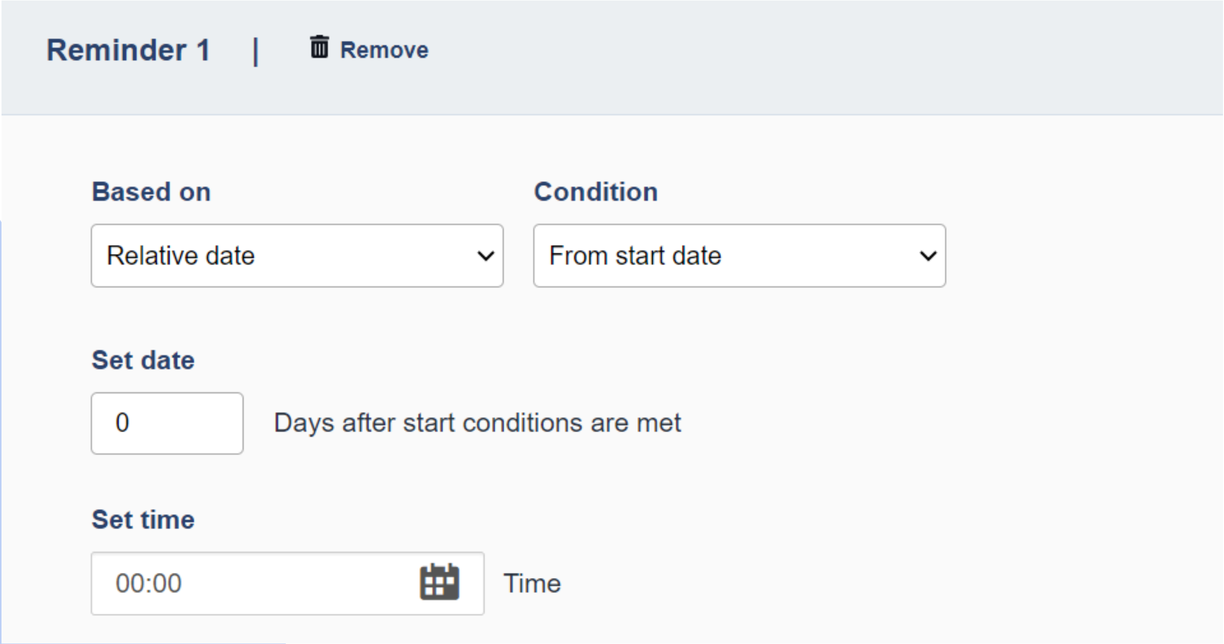
❖ Relative Dates to Automate Survey and Communication Schedule

Relative date - is dependent on a date that is specific to this task or subject and there are a number of relative dates that allow for highly flexible schedules. Relative dates include:

- **From date field**
- **From date range**
- **When subject is added** (start date only)
- **From start condition** (start date only)
- **From start date** (end date and reminders)
- **From end date** (reminders only)



- **From date field** - the number of days after a date that is available in a field of the datasource for that subject.
- **From date range** - the date range is established by selecting two different date fields from the datasource and then entering a percentage before or after one of the date fields available in the datasource.
- **When subject is added** - (start date only) the number of days after a subject has been added to the project.
- **From start condition** - (start date only) the number of days after all the start conditions have been met for that subject.



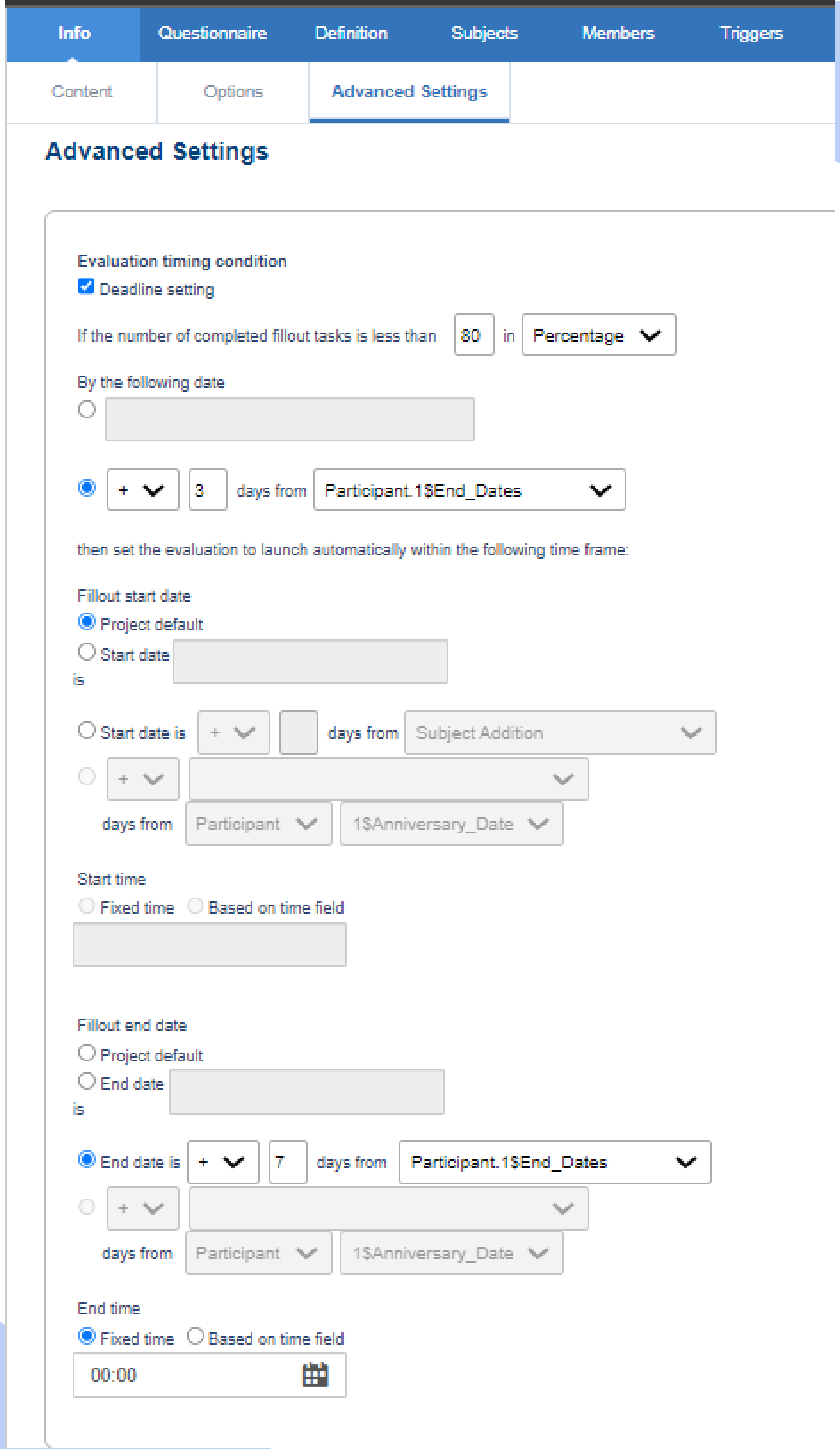
- **From start date** - (end date and reminders only) the number of days after the start date of the task.
- **From end date** - (reminders only) the number of days after the end date of the task.

❖ Deadline Settings - Soft and Hard Deadlines

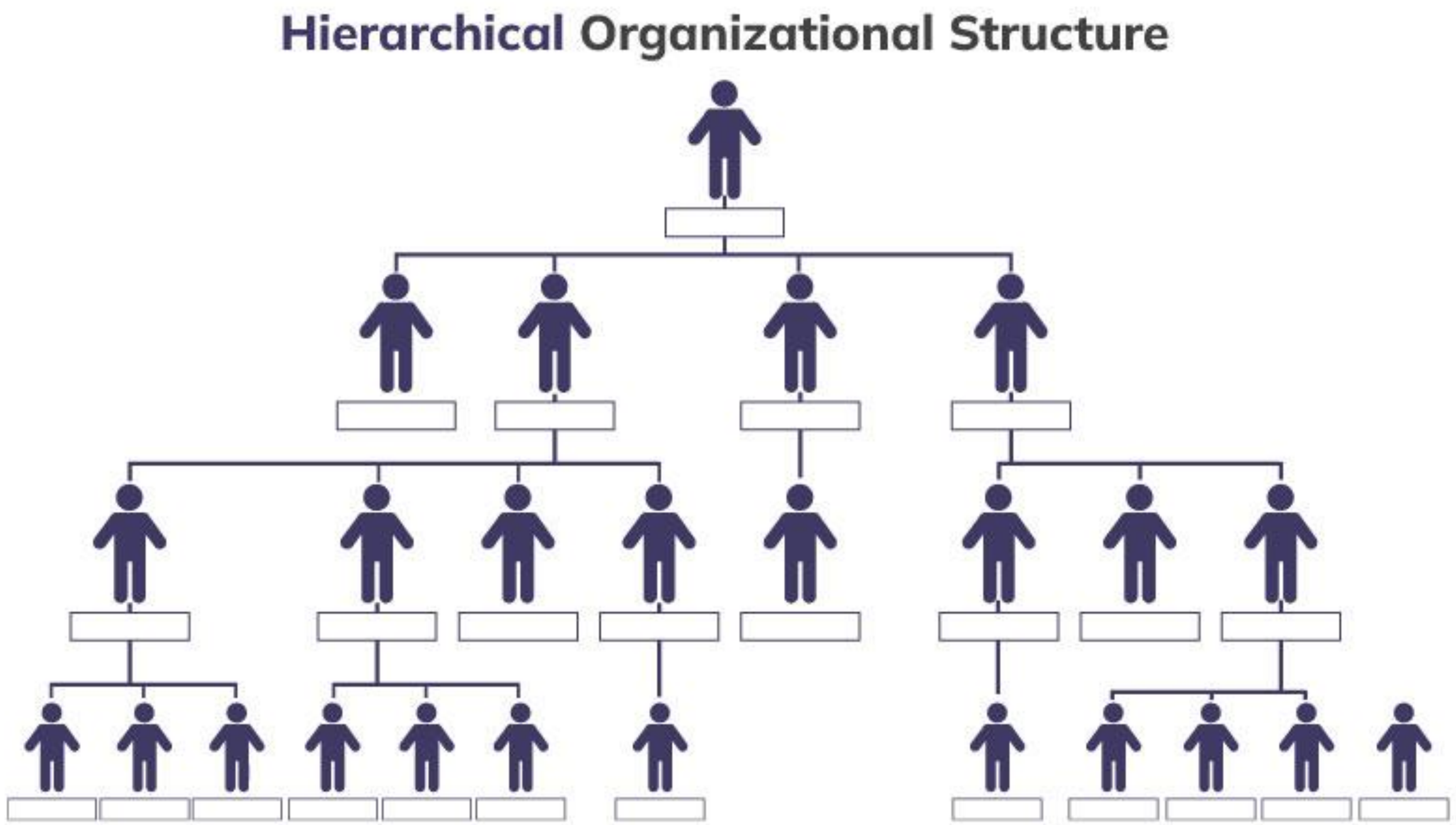
The project can also be configured so that the start and end dates of a fillout task change if certain criteria have not been met. For example, if insufficient responses have been received by a certain date, you can extend the deadlines to receive further responses.

The start date and end date of a fillout task can be changed if the number of completed fillout tasks (or a percentage of them) is less than a specified amount, by a specified date.

Automating this feature would alleviate some of the administrative burden of manually extending task end dates for participants or respondents who need more time.



Dynamic Role Access



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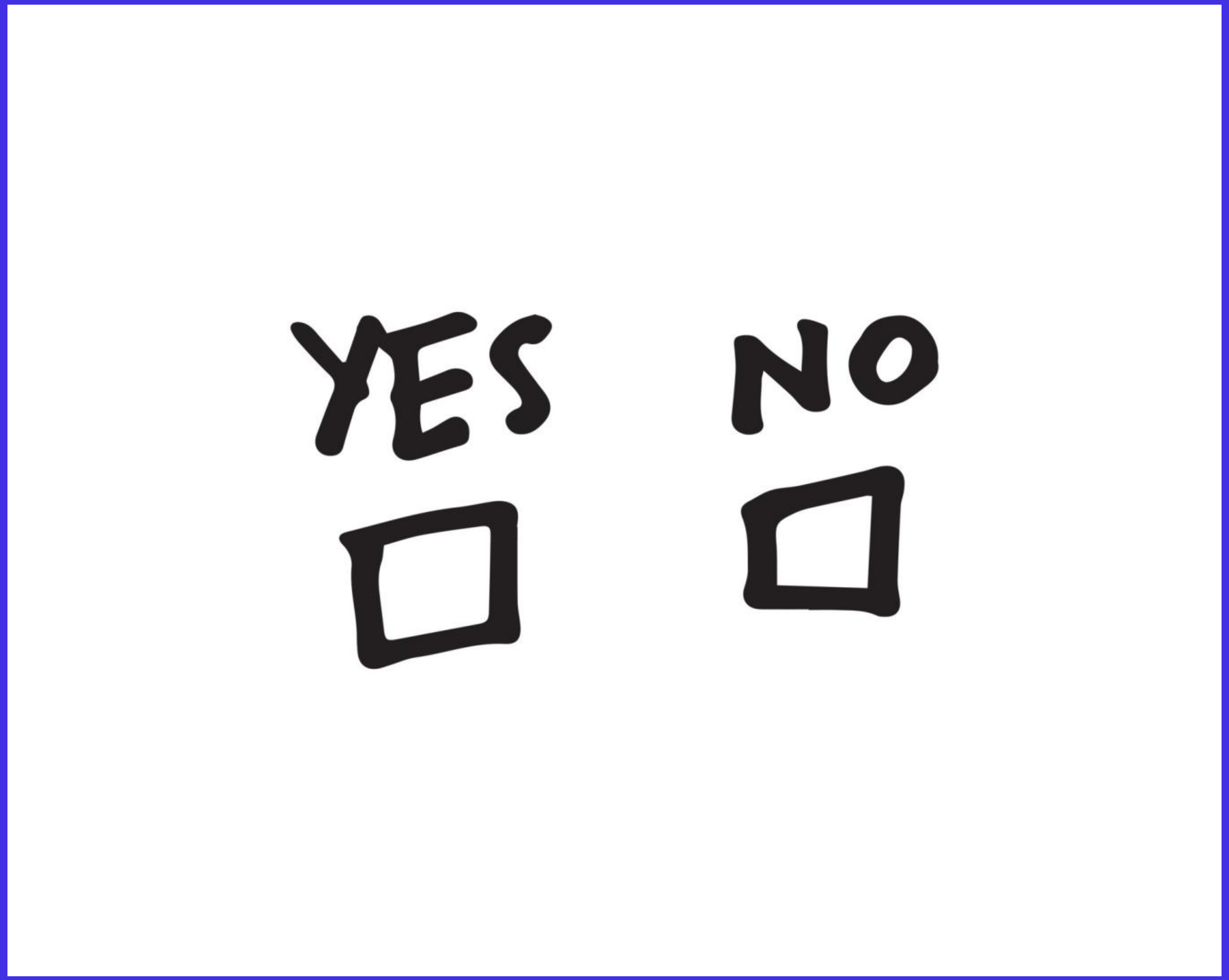
Polling Time!



Do you experience turnover at your organization where you need to provide both past reports and new reports to leaders by role?

❖ Field Synchronization after Publishing

When a project is published, it captures the current datasource data to which it is connected. Any modifications to the datasource does not update in a published or expired project.

To update project demographic data automatically after a project has been published this can be accomplished through a feature called **Automatic Field Synchronization.**

When data changes occur during or after a project has launch it may be important to update this information for data accuracy.

Project Fields

Results: 1 - 10 of 36 Item(s) 1 2 3 4

☐	Field Name	Automatic Sync	Added Date	Last Updated
☐	AgeGroup	No	9/20/2022 2:42:05 PM	
☐	Company	No	9/20/2022 2:42:05 PM	
☐	Datasource_Access_Key	No	9/20/2022 2:42:05 PM	
☐	Department	No	9/20/2022 2:42:05 PM	
☐	Division	No	10/1/2023 10:24:04 PM	10/1/2023 10:42:36 PM
☐	EducationLevel	No	9/20/2022 2:42:05 PM	
☐	Employee_StartDate	No	9/20/2022 2:42:05 PM	
☐	Employement_Status	No	9/20/2022 2:42:05 PM	
☐	First Name	No	9/20/2022 2:42:05 PM	
☐	Full_Name	No	9/20/2022 2:42:05 PM	

1 2 3 4

Update Data | Update All Data | Enable Automatic Sync | Disable Automatic Sync

Note: When you Update Data, all existing demographics for selected fields will be overwritten by the current demographic information.

❖ Dynamic Role Access

Dynamic Role Access (DRA) is a tool that helps you manage report access for your organizations leadership, such as CEO, VPs, Directors and Managers. You can easily assign or change access rights for these users based on their roles and responsibilities. Instead of manually updating each report, DRA can automatically synchronize with your organizational hierarchy and grant access accordingly. This automation saves you time and effort, and ensures that business leaders can access the reports they need.

Org Hierarchy

Node Id	Node Caption	Parent Node Id	Parent NodeCaption	Level
Company	Company			1
Finance	Finance	Company	Company	2
Operations	Operations	Company	Company	2
Product	Product	Company	Company	2
R&D	R&D	Company	Company	2
Sales	Sales	Company	Company	2
Accounts Payable	Accounts Payable	Finance	Finance	3
Accounts Recievable	Accounts Recievable	Finance	Finance	3
Payrole	Payrole	Finance	Finance	3
Taxes	Taxes	Finance	Finance	3

Hierarchy to Role Relationship

Source	Target	Target_type
Company	hcanedo	CEO/President
Finance	dsmith	VP
Operations	jdoe	VP
Product	bhayder	VP
R&D	smitchell	VP
Sales	hcleugher	VP
Accounts Payable	cdavis	Director
Accounts Recievable	bwhite	Director
Payrole	ehansen	Director
Taxes	kphillips	Director

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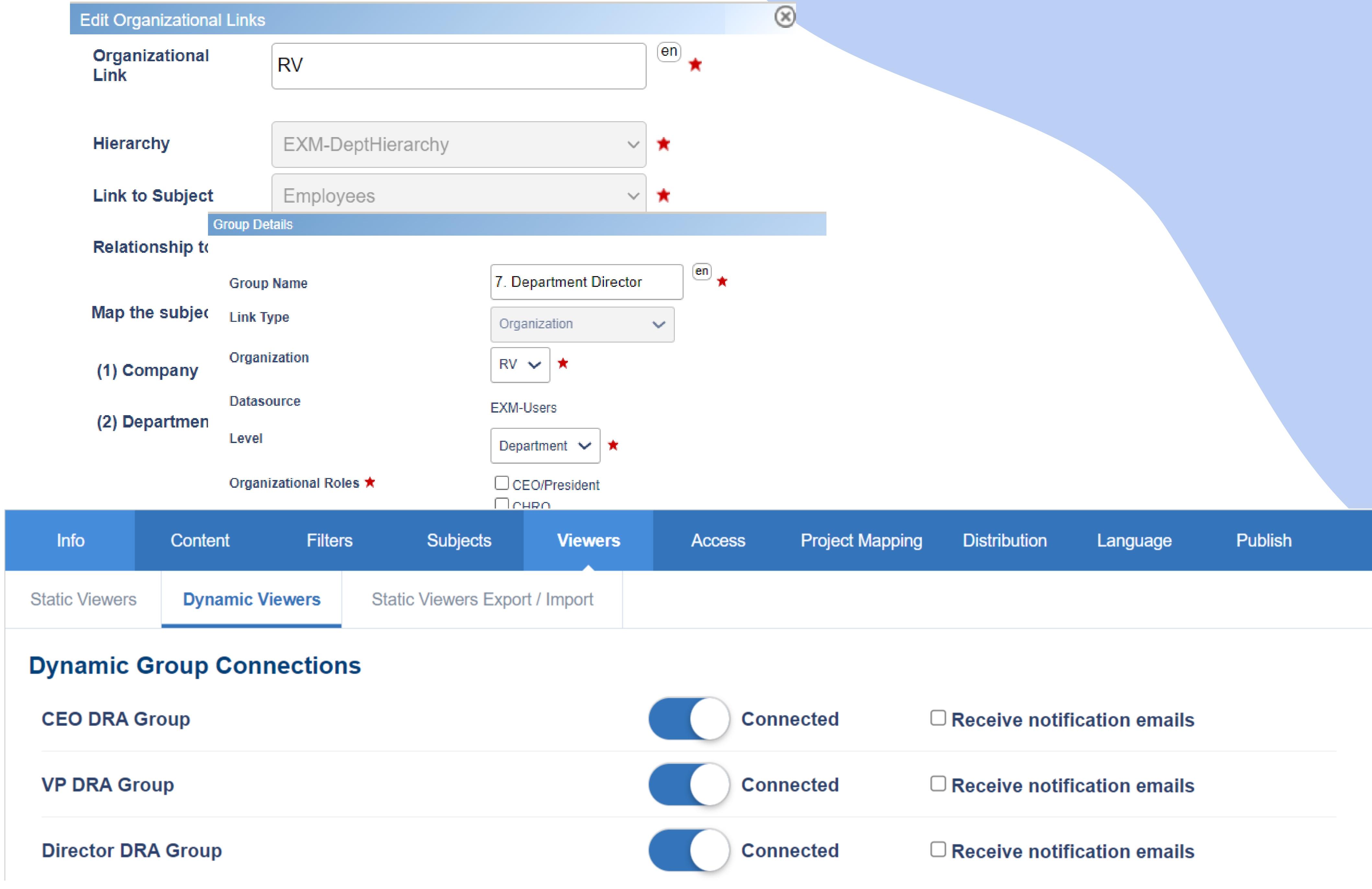
❖ Automate Projects and Reports for DRA

Organizational links represent the hierarchical structure of an organization. The links created on this page will be used to set up dynamic groups.

Create Dynamic groups that will be used in your reports. Create groups that are one-to-one with the roles you created (VP = VP role only), or you may combine several roles together (Division = both VP + Director roles).

Now that your organizational groups have been created, they will be available to activate (“connect”) in a special section of your report called Dynamic Viewers. Here you will see a listing of all the organizational groups you have configured for the project associated with this report.



Community Resources

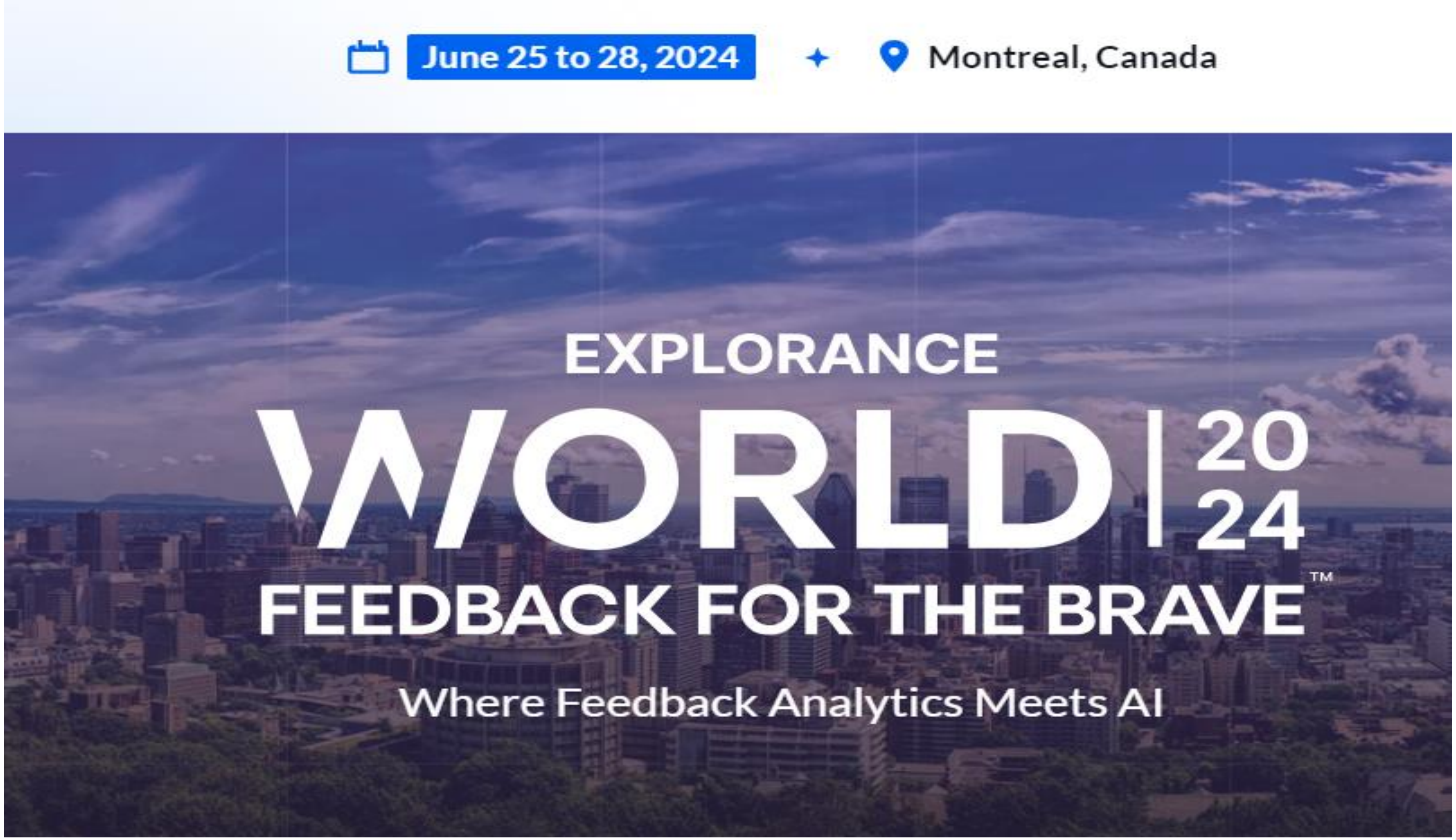
Community Discussion Forums

360-Degree Reviews
Community of Practice

Webinar and Conference Discussion

Q&A

Thank you!



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