Introduction & Welcome

Thank you to our customers, beta users, & staff who have all provided feedback that we are using to make Compyle even better.

Please send future feature suggestions to the Compyle, Control, & Scorecard support team at support@clearimpact.com.

Agenda: Upgrade Overview

- **Introduction: Tools for Cleaner Data**
  - Improving Data Quality at Entry
  - Enhancing Data Exports

- **Files**
  - Documents tab
  - My Downloads
  - Admin: Data Downloads

- **Field Types**
  - File field
  - Likert Scale
  - Time am/pm
  - URL & Email fields

- **Formatting**
  - Phone Numbers
  - Radio Button yes/no option
  - Number Fields (data entry & display)

- **Min & Max**
  - Word Counts
  - Numeric Values

- **Assorted Refinements**
  - Referral buttons & Referral network
  - Scorecard Feeds
  - Navigation improvements & Things work better

- **Conclusion**

- **Questions & Answers**

The Data Must Flow

Setting Clear Expectations: Improving Data Quality at Entry

It's easier to get the information you're looking for, if people can tell what you need from them.

- New field types to more efficiently gather data
- Display and formatting options guide users to enter usable data
- Minimum and maximum limits ensure data falls within desired parameters.

Putting It All in One Place: Enhancing Data Exports

There are almost twenty places you can export data from having a centralized home for those exports will help you keep track of where that data came from and when.

- Exports run behind the scenes to better support large data sets.
- New My Downloads page and Data Downloads pages make it easier to keep track of downloads
- Compyle-to-Scorecard Feeds scheduled feeds will run more efficiently.

Files: Document Tab

1) Increased File Size
   a) From 5 Mb to 100 MB per file
   b) Now matches Scorecard file size limits

2) Expanded File Types Allowed
   a) Old list: xlsx, xls, docx, jpg, pdf, txt, html, doc, pptx, png
   b) Now: all types allowed except application files (not allowed: .exe, cmd, run, js, json, sh, xml, python, xml, git, yml, sql,vbs, etc)

Customer Requested Feature Enhancement
This nonprofit provides resources for bullied youth and their adults. Often there is video or audio evidence of the bullying that needs to be connected to the participant's record. Those files are usually large and in formats Compyle could not accept until now. *With this change Compyle can hold the full case file with all of the related files and case notes in one place that is securely accessible online.*

Benefits: Compyle can now accept much larger files and many more types so that users do not have to edit files or split them before uploading. This makes it easier to have all the attachments for a participant in their folder in Compyle so it can be accessed anywhere.

Some of the Downloads & Exports in Compyle

All Participants List (search)

Filters ▼ | ⊞ | ☰ | ⋮ | Add New Participant ⊕

Export

Survey

Download Data ⤓

Print Participant Form 🖶 | Print Organization Form 🖶

Groups > Member List

Filters ▼ | 🔗 | ⊞ | ☰ | ⋮

Export
Edit Group
Delete Group
Add Participants
Export Survey Data
Export Survey Data (Wide)

Folder: Collected Data tab ⋮

+ Add Existing
⤓ Download Survey Data

Survey Instance

View Report 🖵 | View Questions ⑦ | Download Data ⤓

Submitted Survey Response

Download Data ⤓

Survey Instance > View Report

Download All Data ⤓

Folder: Notes tab

Download Notes ⤓

Note Type

Add New Compilation ▽ | Download Data ⤓

Survey Instance > View Report > Show Question Data

Close | Download Question Data

Admin > Universal Search

Filters ▼ | ☰ | ⋮

Export

Note Type Instance

Download Data ⤓

Participants > My Cases

Filters ▼ | ⊞ | ☰ | ⋮

Export

Admin > Manage Duplicates

Filters ▼ | Download Data ⤓

My Downloads & Data Downloads

1) All exports and data downloads save to the My Downloads page for each user and the Admin Data Downloads page.

2) Downloads can take 0-15 minutes to complete as this is an automated process.

3) My Downloads is specific to each user

4) Data Downloads is for the whole site and limited to administrators

5) Users can choose to receive an email when their files are ready. One email sends for each file, so this an opt-in setting.

6) Files will remain available for at least 30 days but may be removed to after that to conserve storage space and keep the lists from growing too big.

Exceptions
- Import templates, which only have one row of data
- Downloading documents from the Participant folder
- Downloading attached files from Survey Responses
- Export graph in Compylations
- Export data table in Compylations

Benefits: Handle large data sets. Avoid accidentally exporting the same file over again. Have an option to generate a download now but wait to access the file until you are on a more secure device.

My Downloads

1) Data Collections > My Downloads

2) The downloaded files list is broken up into categories based on the kind of export.

    a) Participants and Organizations

    b) Surveys and Data Forms

    c) Notes

    d) Scorecard Feeds

3) Users can choose to receive an email when their files are ready.

    a) One email sends for each file, so this an opt-in setting.

Benefits: Handle large data sets. Avoid accidentally exporting the same file over again. Have an option to generate a download now but wait to access the file until you are on a more secure device.

Data Downloads

1) Admin > Data Downloads

2) The downloaded files list is broken up into categories based on the kind of export.

    a) Participants and Organizations

    b) Surveys and Data Forms

    c) Notes

    d) Scorecard Feeds

    e) Admin Tools

3) Files will show as "Viewed" if anyone has downloaded that file, such as the user who requested it.

Benefits: See what files your users have requested for download. Export large data sets once and allow multiple admins to access the download. Avoid accidentally exporting the same file over again. Have an option to generate a download now but wait to access the file until you are on a more secure device.

File Field Type

1) Allows users to attach one file per field

2) A survey form can have more than one file field. (We recommend a max of 5.)

3) Participant and Survey forms only for now (We hope to add support for notes and public forms, too.

Allowed File Types

- Text (doc,docx,pdf,txt,gdoc,odt)

- Spreadsheet (csv,tsv,xls,xlsx,gsheet,ods)

- Presentation (ppt,pptx,ppsm,ppotx,gslides,odp)

- Image (png,jpg,jpeg,gif,bmp,svg,tiff,tif)

- Media (wmv,mp3,mp4,mov,gif,webm,mpeg,mpg,mpe,mp1,mp2)

Benefit: Allow participants to submit documents when completing a survey form. Get more information at once and more easily identify the documents you have.

Likert Scale Field Type

1) A standard survey question style with an odd number of text choices displayed along a horizontal line according to values assigned to the text.

2) Only a single option can be selected.

3) Limit of seven options per field

4) On multi-entry forms and small screens, displays as radio button field

Benefit: Present options more concisely and in a familiar format. More input variety to keep respondents engaged.

5-point scales

Satisfaction	Likelihood	Level of concern
1. Very dissatisfied	1. Very unlikely	1. Very unconcerned
2. Dissatisfied	2. Unlikely	2. Unconcerned
3. Neither dissatisfied or satisfied	3. Neutral	3. Neutral
4. Satisfied	4. Likely	4. Concerned
5. Very satisfied	5. Very likely	5. Very concerned

Agreement	Frequency	Awareness
1. Strongly disagree	1. Never	1. Very unaware
2. Disagree	2. Rarely	2. Unaware
3. Neither agree or disagree	3. Sometimes	3. Neither aware or unaware
4. Agree	4. Often	4. ware
5. Strongly agree	5. Always	5. Very aware

Familiarity	Quality	Importance
1. Very unfamiliar	1. Very poor	1. Very unimportant
2. Unfamiliar	2. Poor	2. Unimportant
3. Somewhat familiar	3. Acceptable	3. Neutral
4. Familiar	4. Good	4. Important
5. Very familiar	5. Very good	5. Very important

Scribbr

Bhandari, P. & Nikolopoulou, K. (2023, June 22). *What Is a Likert Scale? | Guide & Examples.* Scribbr. Retrieved August 21, 2023, from https://www.scribbr.com/methodology/likert-scale/
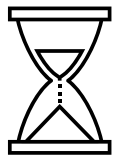
Time Field Type

New Time Field = Time of Day

Time Spent Field = How long

1) New 12-hour time format with am/pm setting

2) For capturing the time when something happened

3) This is a new field. The existing "Time" field is now "Time Spent." That field type collects hours and minutes without the time-of-day indicator.

Benefit: Make it easier to track when an activity occurred. Gather more precise time information.

URL and Email Field Types

🖥️ URL field:

1) Enter a website

2) On saved records

   a. 🔗 Link to open site

   b. 📄 Copy Link button

✉️ Email field:

1) Enter an email address (validation for format)

2) On saved records

   a. ✉️ Send Email button

   b. 📄 Copy Email Button

Benefit: Websites and emails are collected in a valid format. Users can easily copy that information for use outside of Compyle.
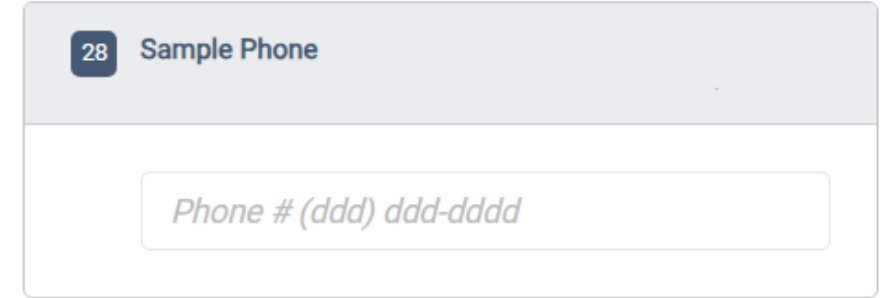
Formatting Options

Phone Number (Short Answer Field Type)

• Display style: (ddd) ddd-dddd

• Enter numbers in this field, and the system will display them in a standard U.S. format.

• Can be turned on for existing custom phone fields (Saved entries will not be changed unless the record is edited.)

Benefit: Phone numbers are more readable on saved records, in search, and in the folder info pane.

| 28 | Sample Phone |

> Phone # (ddd) ddd-dddd

A hotfix release is coming for the standard Participant Phone field so nonstandard entries will display again on saved records.

Saved entries will display below the field input a long with a copy button and a "call number" link for easier access.

Yes/No (Radio Button Field Type)

The Add Yes/No Options button adds two answer choices, Yes and No, with one click.

Benefit: Easier to create many Yes/No fields very quickly.

Numeric Fields

1) Unspecified
   a. Default setting for Number fields

2) Whole Number
   a. Integer (whole number) values only
   b. Options: display commas, allow negative numbers

3) Decimal
   a. A number with 1, 2, or 3 decimal places (tenths, hundredths, thousandths)
   b. Options: display commas, allow negative numbers, decimal places

4) Percent
   a. A number with a percent sign displayed after the value
   b. Options: 0-3 decimal places, allow negative numbers

5) Currency
   a. A number preceded by a currency symbol
   b. Options: 0-3 decimal places, symbol: US $, Australian $, Canadian $, New Zealand $, EU €, British Pound

Benefit: Gather more precise numeric data. Ensure that values are of the expected type.

Minimum & Maximum Limits

Min & Max Value for Number Fields

1) Min: Smallest acceptable value for the field

   a. Leave blank for no limit

   b. To allow values less than zero, select the Allow Negative option

   c. Formatting should match option settings (decimals and commas must be enabled to use in the Min value)

2) Max: Largest acceptable value for the field

   a. Leave blank for no limit

   b. Formatting should match option settings (decimals and commas must be enabled to use in the Max value)

Benefit: Set users up for success by ensuring they can only enter appropriate values for the number fields.

Min & Max Word Count (Paragraph, Short Answer)

1) Option for text entry fields: Short Answer and Paragraph
2) For counts, a word is one or more characters follow by blank space
3) Min:
   a. Blank is unlimited
   b. Number greater than 0
4) Max:
   a. Blank is unlimited
   b. Number greater than 0

5) For no limit, uncheck the Limit Word Count option.

Benefit: Easier to create many Yes/No fields very quickly.

Example of Word Limit in Data Entry Mode

Describe your Organization's Mission

We strive to improve the lives of students at under-resourced urban schools by providing wraparound services for their households to support the students' path from cradle to college.

29/75

Assorted Improvements
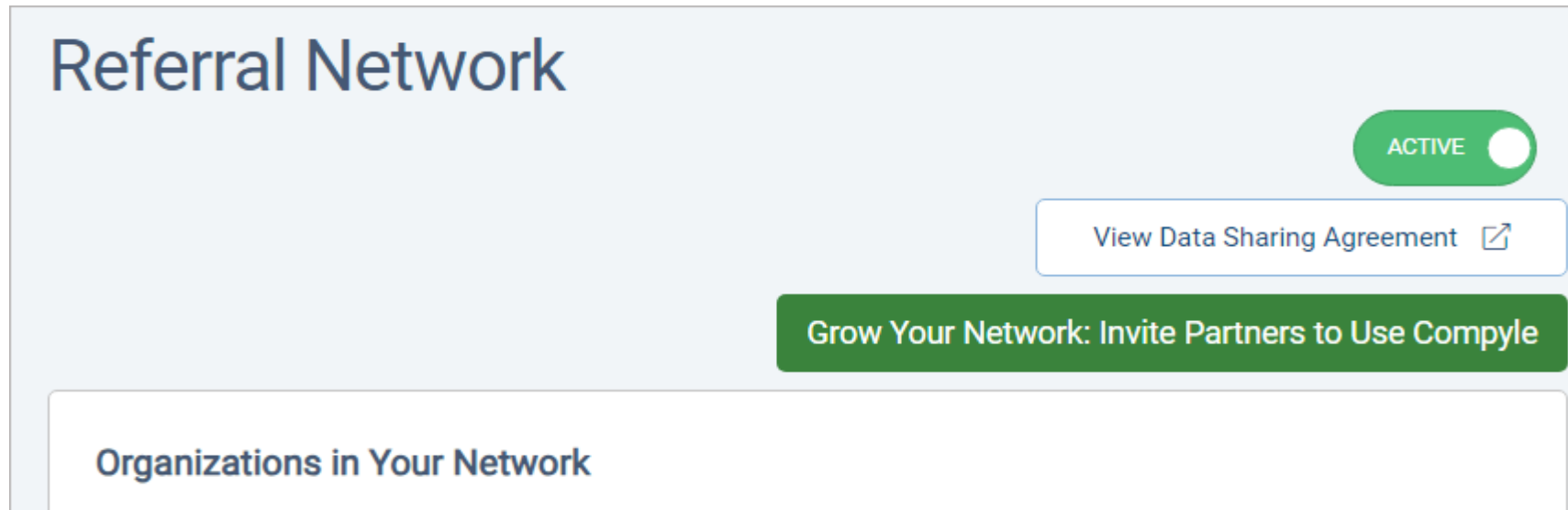
Referral Buttons

Refer Clear Impact button in top nav bar:
- Help organizations who could use Compyle/Scorecard connect with Clear Impact

Grow Your Network Button
- Referral network module: Referral Network page
- Instance Settings: Referral Network setting

Various Improvements

Scorecard Feeds
- Rename saved feeds
- Scheduled feeds will run in sets of 100 per hour overnight

Data Entry
- Double quotes entered in paragraph fields do not cause problems with viewing saved records.
- Age calculation can handle pre-1900 entries
- Hidden group fields no longer show in folder info pane
- Mobile view from emailed survey link will now display description fields
- Archiving participants and organizations removes them survey responders list & correctly adjusts the survey stats in view mode
- Cleaning up the Missing Required Fields messaging more

Navigation
- Permalinks to participant folders work again.
- My Cases (clear filters, filter fields, etc)
- Create Group -> Cancel button returns you to the group list
- Breadcrumbs/navigation blue links are not clickable before data to render the link loads

Conclusion

Wow, those are a lot of changes to help improve Compyle data entry, data quality, and navigation!

What's next: Form Logic (rules that apply within a form to conditionally show/hide/require fields).

➤ The next release is going to be worked on in smaller, more contained "sprints" as a single form logic rule can have broad effects.

➤ That means we will develop a key function, test it with all of the field types in each of the data entry modes with all supported browsers and devices.

➤ Then we may release it or add a new function and retest. This may result In a series of smaller more focused releases.

Resource Links

Documentation

➢ My Downloads: per user exports: https://support.clearimpact.com/en/my-downloads

➢ Data Downloads: all site exports: https://support.clearimpact.com/en/data-downloads

➢ Release Notes: https://support.clearimpact.com/en/compyle-release-notes-august-2023

➢ Compyle Design: Field Types: pictures of field types in edit mode and entry mode: https://support.clearimpact.com/en/compyle-implementation-field-types

Sample Fields Template Survey

➢ Request a copy of a survey with one of each field type from support@clearimpact.com.

Q & A

- Any questions?