Compyle
Summer Upgrade

August Alterations

Aug. 2024

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 via the [Support Request form](#) or email to support@clearimpact.com.

Agenda: Summer Upgrade Overview

- **Introduction: August Alterations**
  - Now & Next
- **Folder Finesse: Notes Tab Enhancements**
  - Notes Categories Phase I: Sections & Sorting for Notes
  - Standard Notes
  - Custom Note Type Forms
  - Working with Notes – Save Action
- **Forms Finesse**
  - Building Forms
  - Taking Surveys
  - Form Logic
  - Public Forms
- **Analytics Finesse: Compylations Changes**
  - Time Spent Field
  - Filter by New Field Types
  - Segment By File
- **Support Menu Modernization**
  - Help Request Form
  - Live Training Calendar
  - Direct Links to Videos
- **Conclusion**
  - Resources & Reminders
  - Questions & Answers

August Alterations Release

Our August release is rather eclectic as we made improvements to several areas.

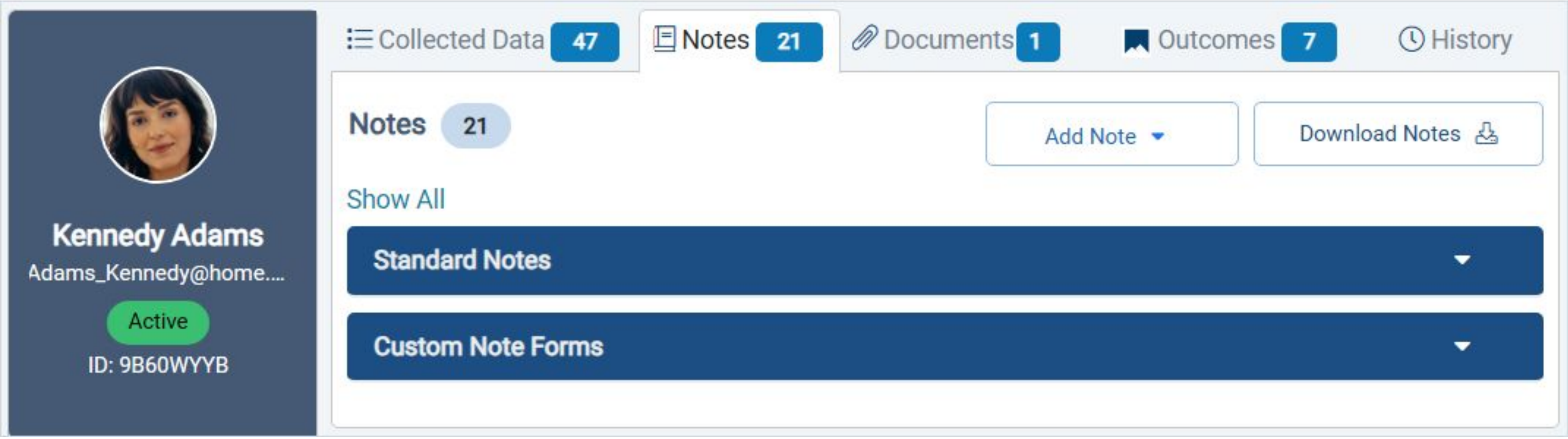
These refinements are what we could fit in while working on a larger project: expanding the reporting tools in Compyle. That project has taken a few different direction while we sought the best path. After a mid-August reset & refocus, we are on track with a sustainable solution that we hope to release in early fall.

Looking to the Future

- Additional Robust Reporting Tools for Compyle & Built-In Reports
- Accessibility Improvements & Interface Updates
- Expanded Import Functions & API
- Notes Categories & Permissions Expansion

Folder Finesse: Notes tab

Notes Tab Enhancements

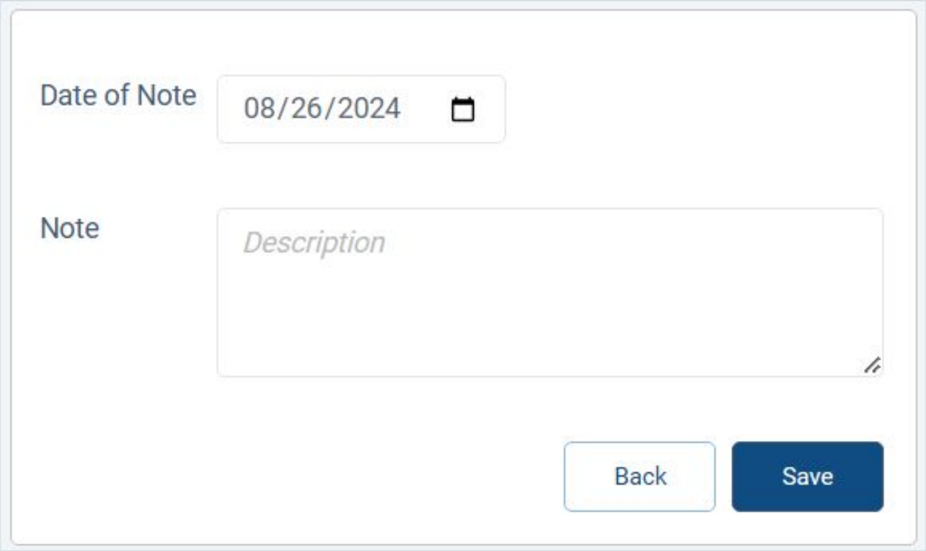


1) Notes are separated into two sections:
   - Standard Notes
   - Custom Note Forms
2) Save Action change: the Notes tab reopens after new notes are created and existing notes are edited.

Standard Notes Section

Standard Note Form

- A simple, built-in form for adding a quick note about a participant or organization
- Two fields: Date of Note and Note paragraph



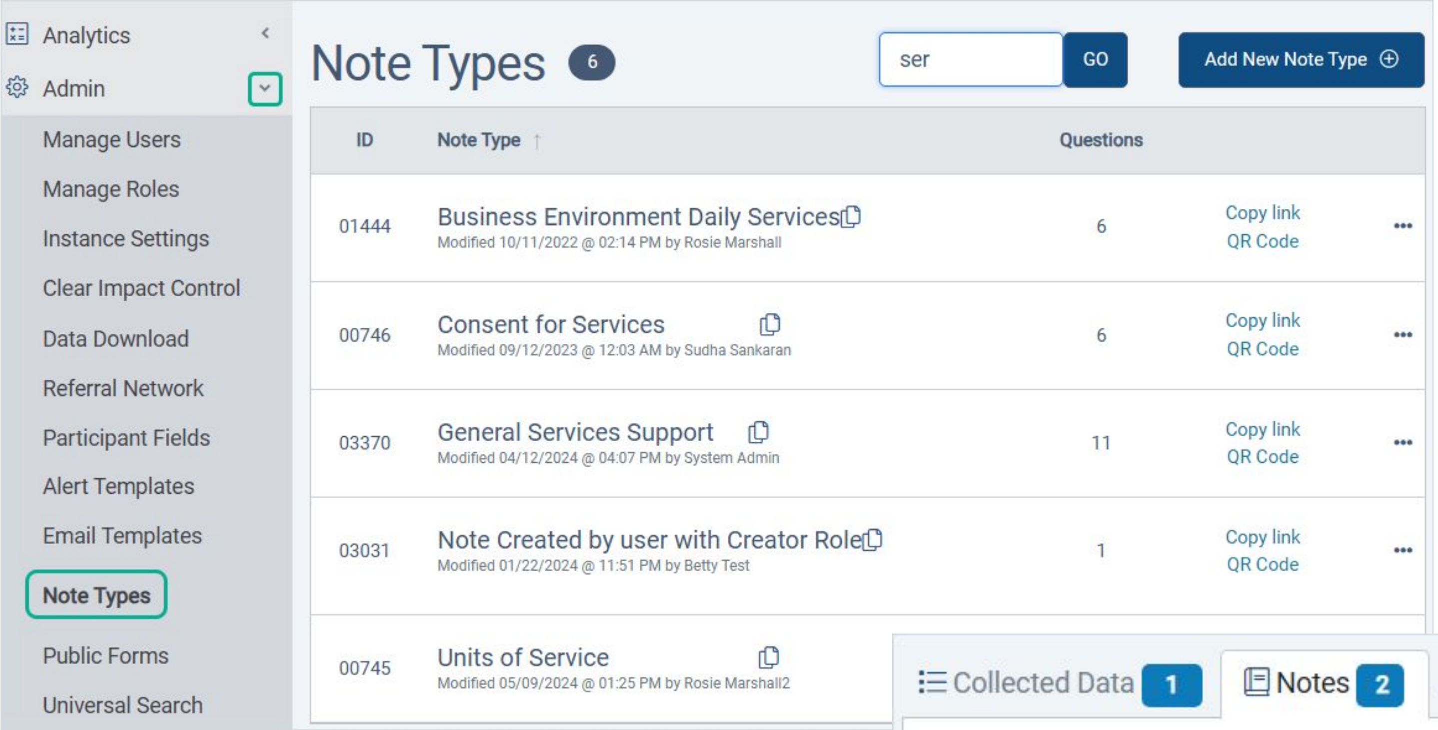
Standard Notes

ID ↓	Note	User ↑	Date of Note ↑	
134631	Kennedy called to let me know that she started a new job this week.	Rosie Marshall	08/21/2024	•••
116857	Scheduling call	Sudha Sankaran	02/08/2024	•••
35354	Initial intake interview is scheduled for next Tuesday.	Rosie Marshall	07/12/2022	•••

Standard Notes Section

This section allows users to see a preview of the note text, who created the note, and when. Standard notes can be sorted by ID, User, and Date of Note.

Note Type Forms

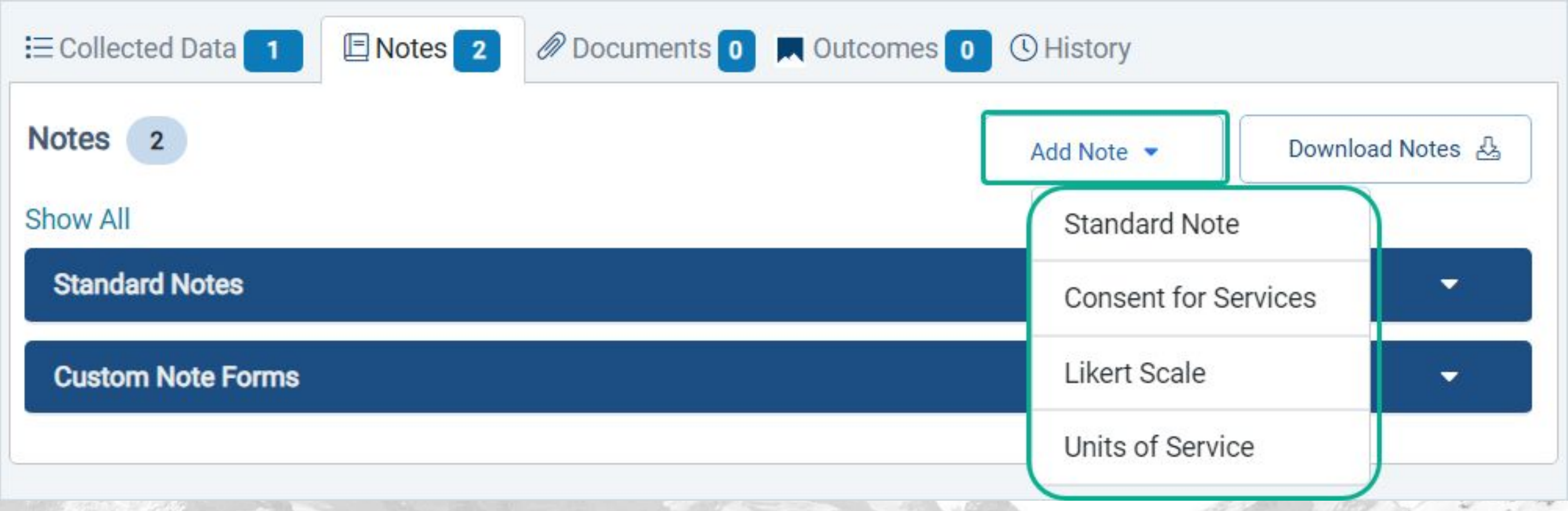


(Custom) Note Type Forms

Note Type forms have a variety of fields and a Date of Note field. They are usually built to capture information for a particular interaction, activity, or process.

Adding Note Type Records

Note records are created on the Notes tab in the folder using the Add Note menu.



Custom Note Forms Section

The Custom Note Forms section shows the:

- Note Form Title
- Date of Note
- Who Created the Note
- Date & Time Last Edited

All the columns, are click-to-sort, so you can easily find notes by name, date, and creator.

Custom Note Forms

Title ↑	Date of Note ↑	User ↑	Last Edited ↑	
Business Environment Daily Services	02/08/2024	Sudha Sankaran	08/26/2024 18:14:29	•••
Household Income	09/27/2023	Reji X		•••
Consent for Services	09/12/2023	Rosie Marshall	08/26/2024 18:14:56	•••
Units of Service	09/06/2023	Rosie Marshall		•••
Units of Service	07/06/2023	Rosie Marshall		•••

Pages < 1 of 4 >

Note Type Forms vs Survey Forms

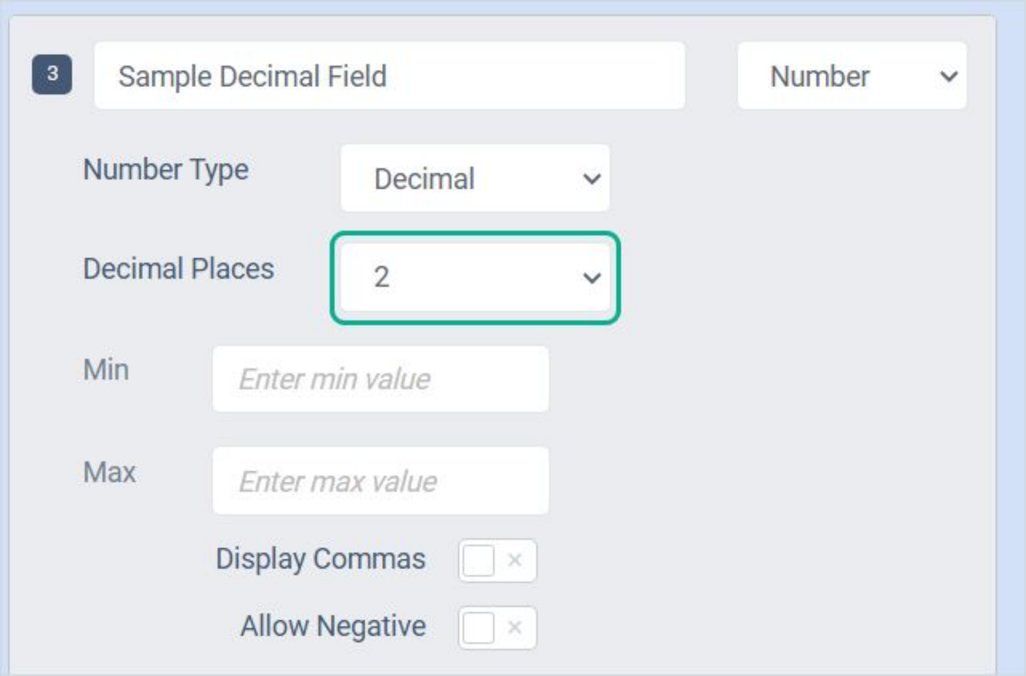
	Note Type Forms	Survey Forms
Form Added/ Fields Edited in	Admin > Note Types	Data Collection List
Sorted into Collections	No	Yes
Where New Records/ Responses are Added	On the Notes tab in the Folder or by a link shared with an external participant	By adding a participant to a Survey Instance, sharing a survey link or survey instance link, by a link in an email reminder, or Add Existing search in folder
Time Period	Daily	Varies: Daily, Monthly, Quarterly, Annual, etc.
Time Period Instances	Automatically created based on Date of Note	Survey Instances are created manually or by using a survey link
Form Logic & Sections	Yes	Yes
Save & Continue Option	No	Yes
Completed Status	When Saved the 1st Time	When Survey Instance Closes
Available in Analytics	Immediately	If Status is Completed
Multiples per Person for the same Time Period	Yes	No, one response per person per Survey Instance period
May be Copied	Yes	Yes
View Report for Instance	No	Yes

Forms Finesse

Refinements for All Forms

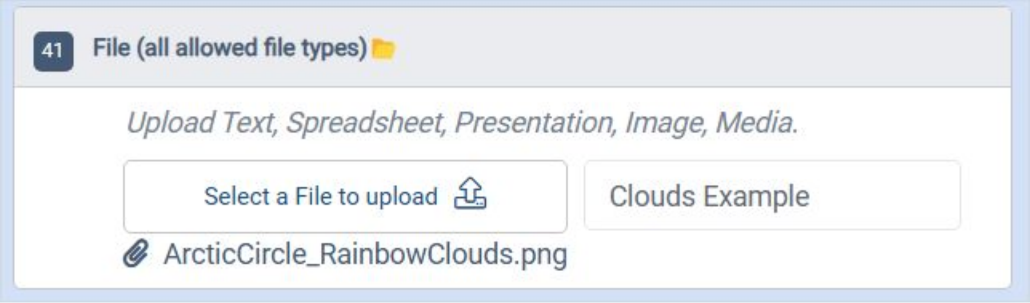
Decimal Fields

Now, Decimal Fields default to two places.



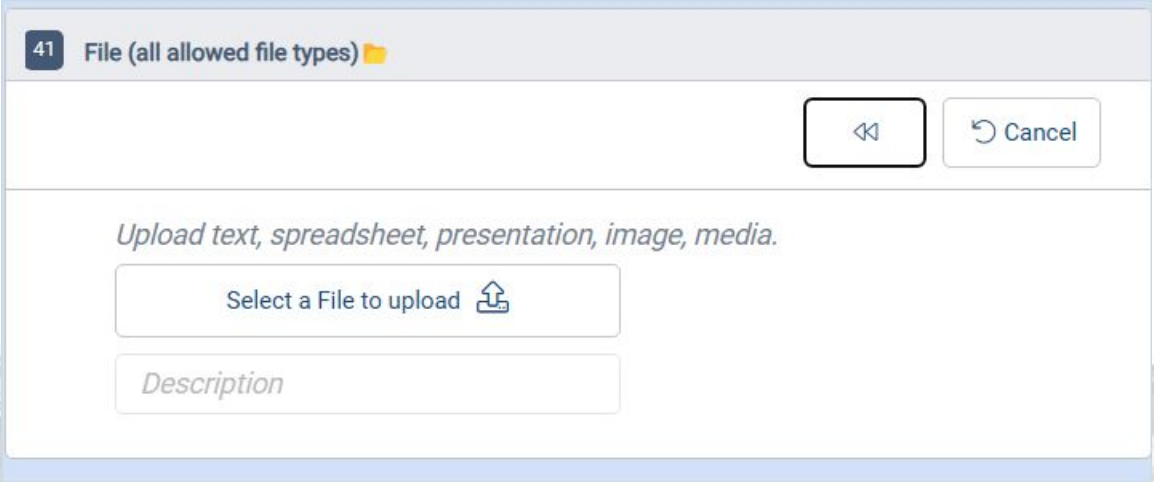
File Fields

No matter how many times the file is changed out, File Fields will correctly display the name and link for the file.



Preview Fields

In Edit Fields mode, the field preview works as expected for checkbox, file, and email type fields now.

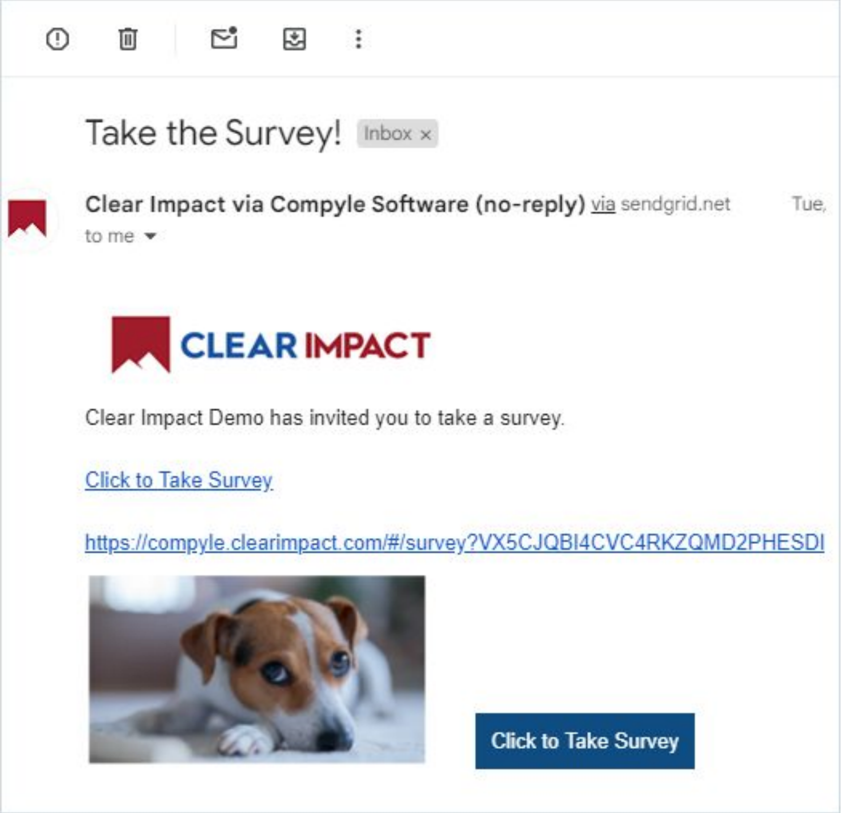


Survey Forms Fixes

Survey Reminder Emails & Submission Emails

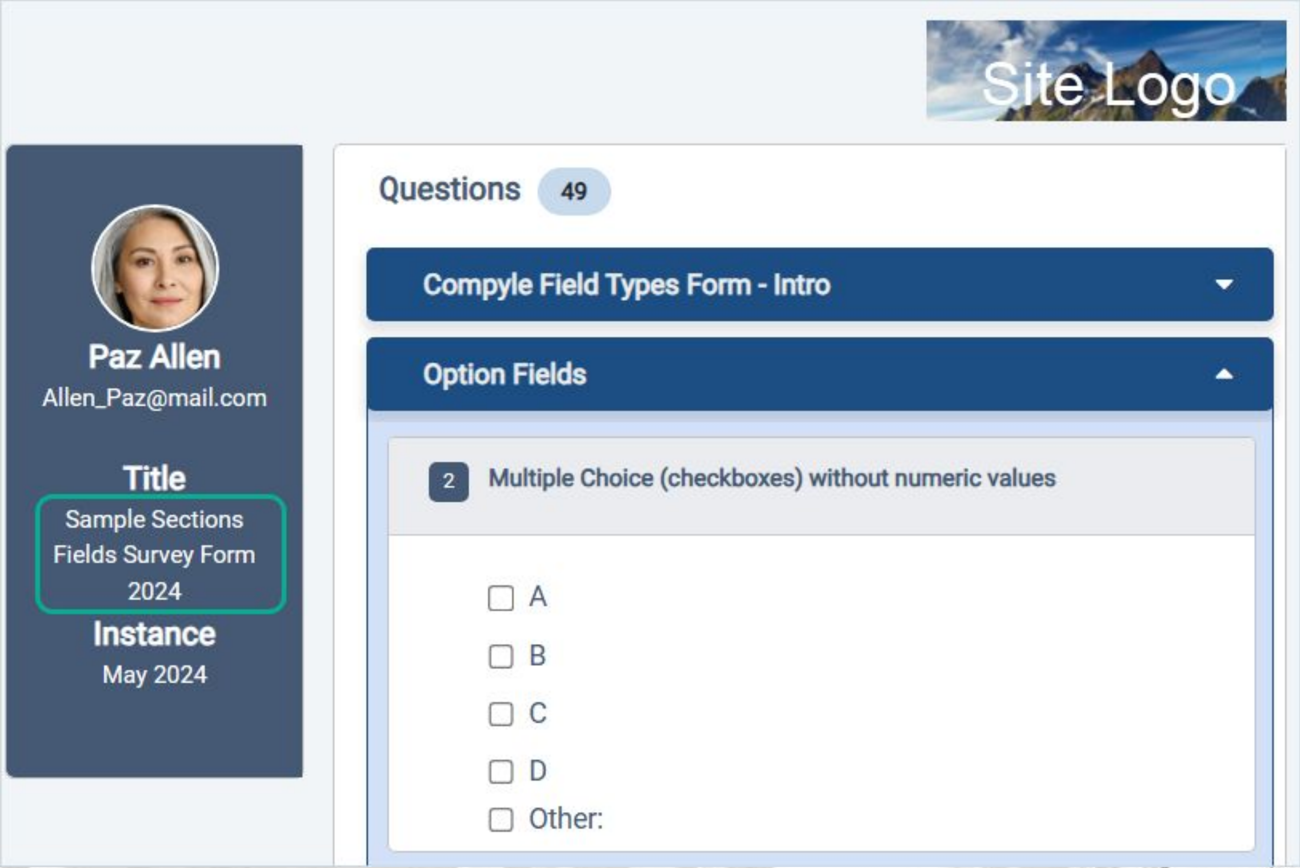
Survey responses completed through email reminder links will now:

- Send confirmation emails if participants opt in
- Send an email to the users selected in "notify users."



Survey Names & Survey Instance Names

Long names will wrap in the information panel to the left when external participants are completing surveys.



Public Forms Remedy

Public Forms

A Public Form is a custom version of the Participant form, Organization form, or Anonymous form. Compyle administrators choose which fields to display and which to require.

- Each public form has its own title, set of fields, and default group for participants/organizations.
- Many different public forms can be created for the same Participant or Anonymous form to meet different needs.

Public Forms 23 ACTIVE

Search Public Forms GO Add Form

Id	Name	Entity	Created By	Groups		
149	2024 Client Application	Participants	2023-11-08 by Rosie Marshall	New	Copy link QR Code	•••
44	After School Program Registration	Participants	2022-07-21 by Rosie Marshall	Coed Scouts Club	Copy link QR Code	•••
54	Anonymous Public Form	Anonymous	2022-12-05 by Rosie Marshall		Copy link QR Code	•••
55	Nonprofit Organization Registration	Organization	2022-12-05 by Rosie Marshall	Nonprofits	Copy link QR Code	•••

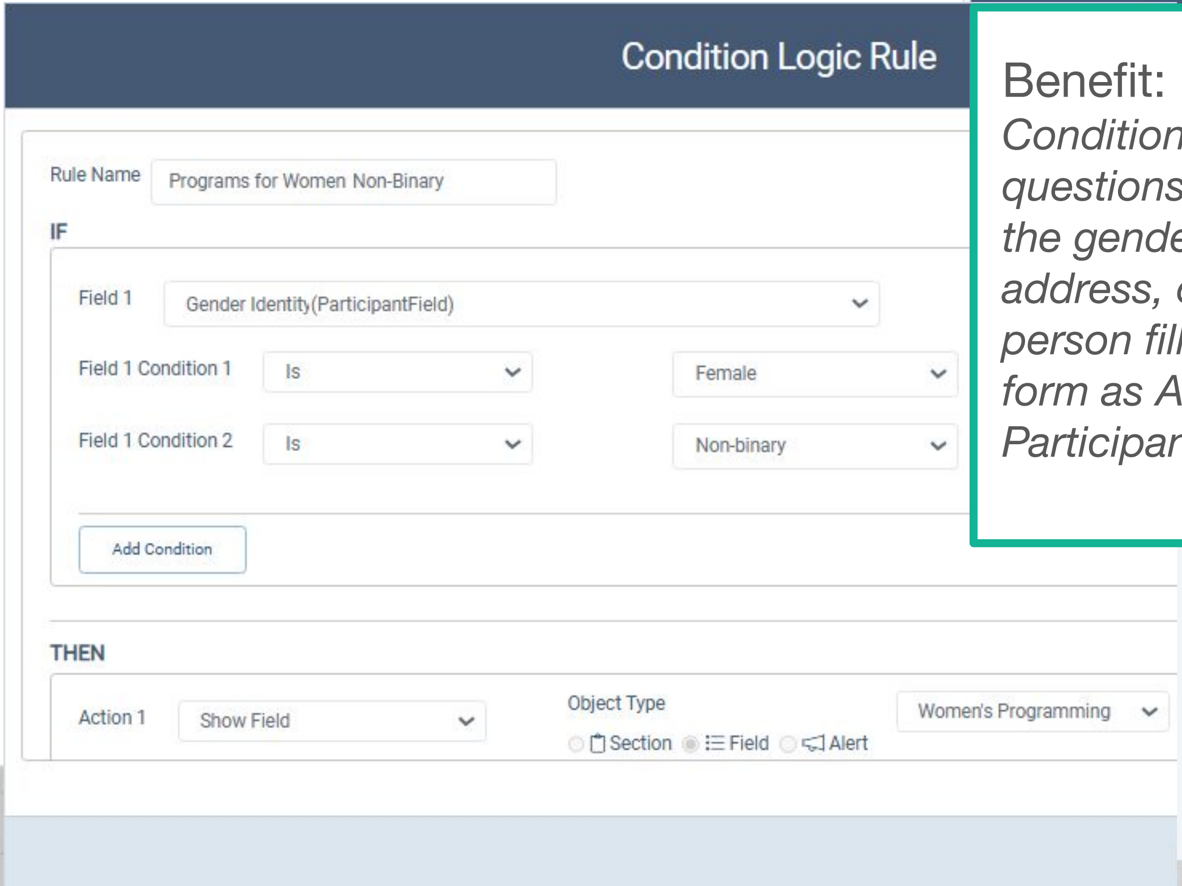
Remedy – Required Fields Warning

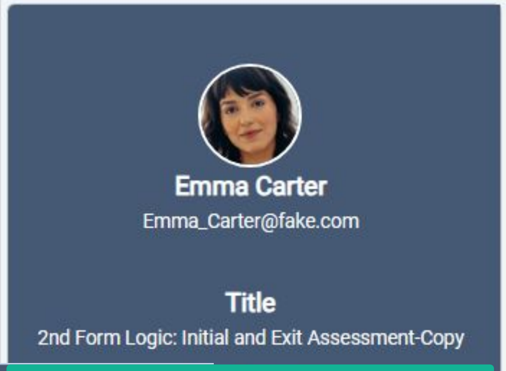
Prior to the release, hidden standard fields created confusion in the system about which fields were visible and created. This led to the required fields warning message listing the wrong fields. That is no longer the case. als,

Form Logic Fine Tuning

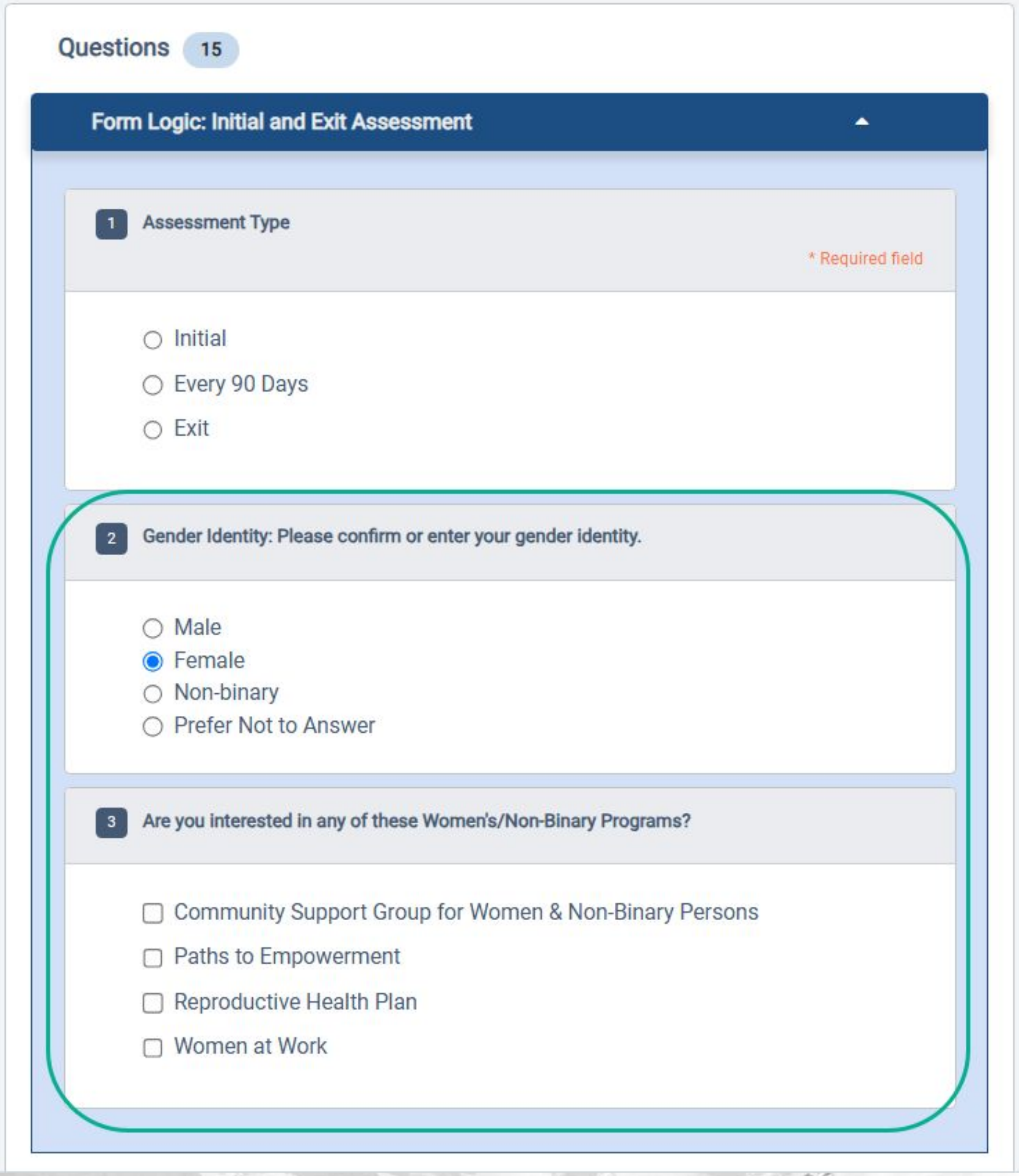
Rules for Responder Demographics

- Data Update fields for Gender, Race, and Zip Code fields can be used in rule IF conditions.
- For new participants/anonymous, data update field values will carry over to the survey form.





Benefit:
Conditionally ask questions based on the gender identity, address, or race of the person filling out the form as Anonymous or Participant.

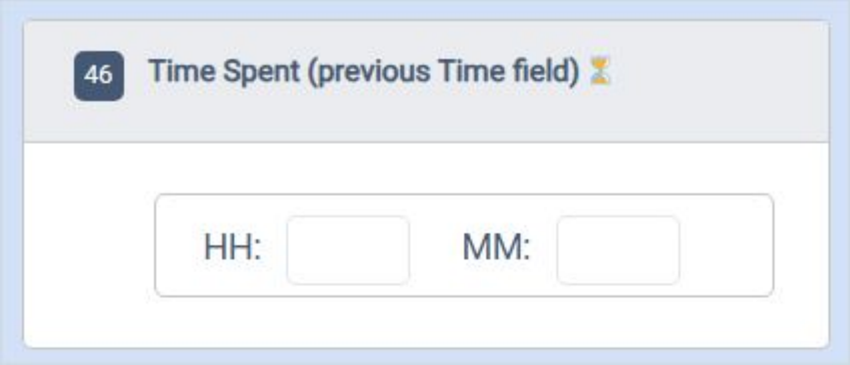


Compylations Changes

Time Spent Fields

Time Spent Fields

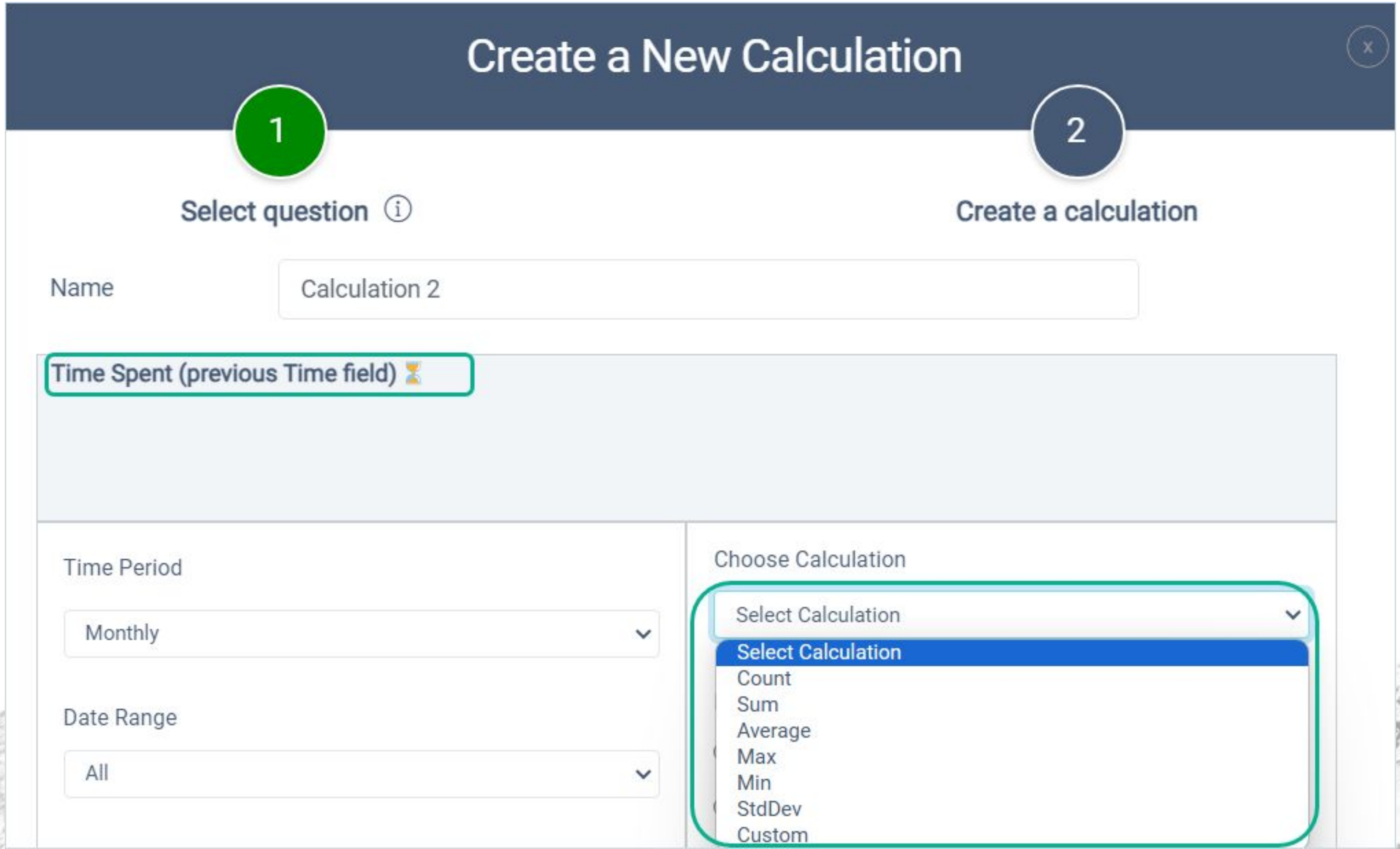
- Data entered as Hours and Minutes
- Now, data saves as total hours with two decimal places
- Existing values have been updated to be numeric values



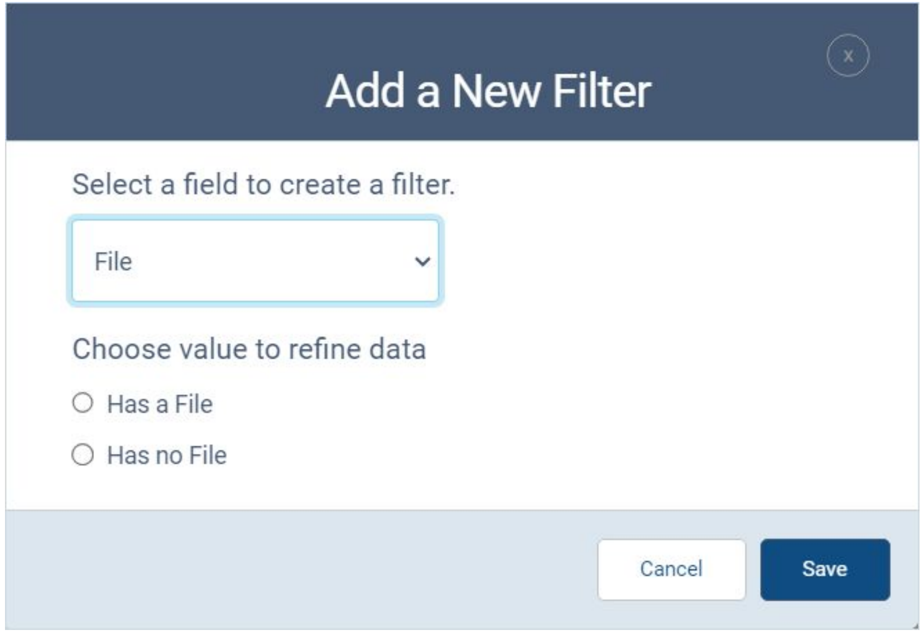
Calculations with Time Spent Fields

Numeric summaries apply to those fields:

- Count
- Sum
- Average
- Min /Max
- Standard Deviation
- Custom Calculation



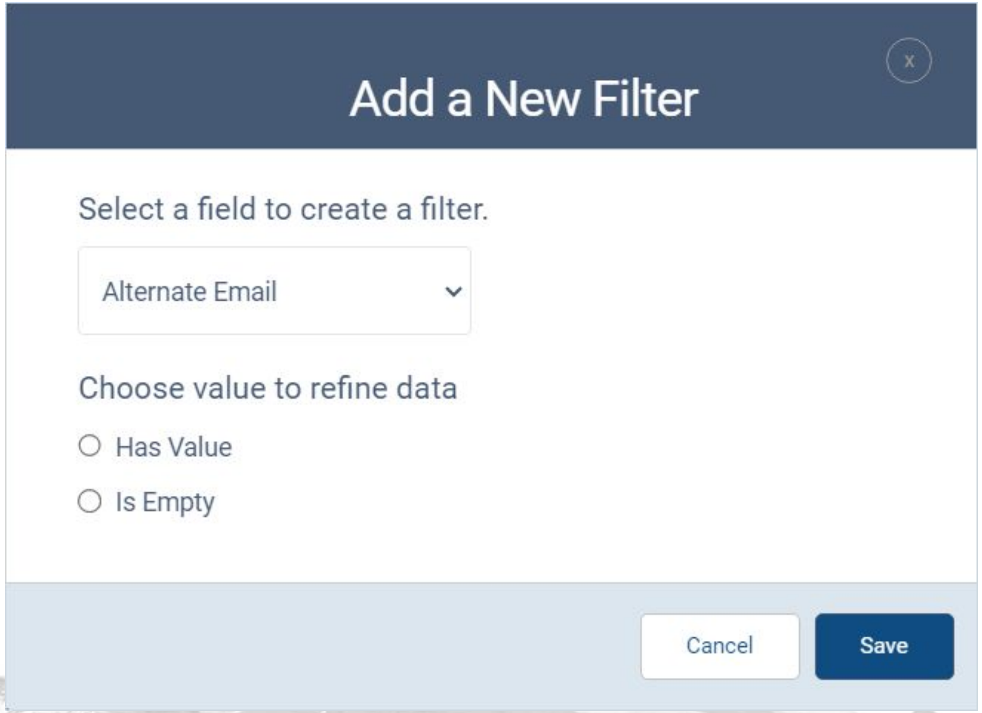
Filters by New Field Types



Filter by New Custom Field Types

Simple “Has Value” or “Is Empty” filter options are available for these field types:

- Email
- URL
- File fields



Segment by File Field Type

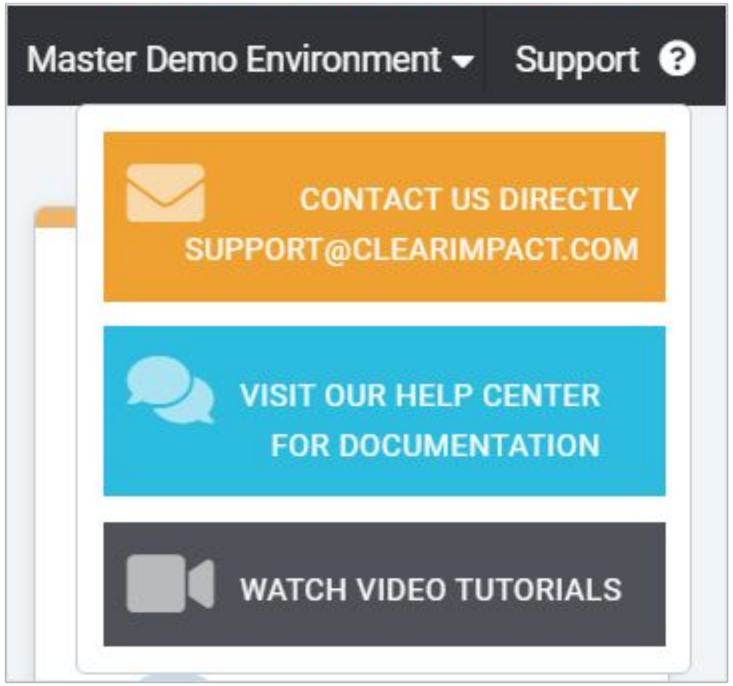
Segment By File in Calculations

- Calculations may be segmented by any of the custom File fields from the Participant, Organization, or Anonymous form.
- Disaggregate summaries by who does and who does not have a file uploaded to their record.

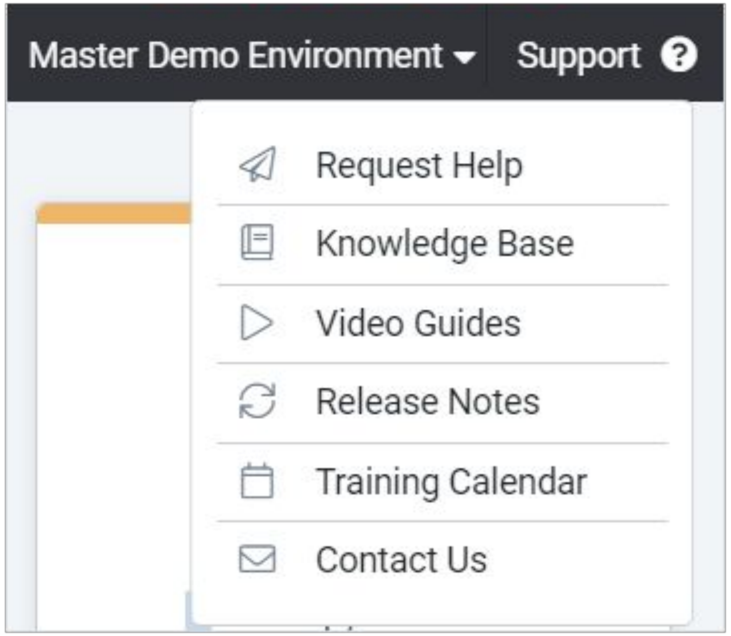
Support Menu Modernization

New & Improved Support Menu

Classic Menu



New Menu



Support Menu

The Support Menu includes twice as many options to get you where you need to go more quickly.

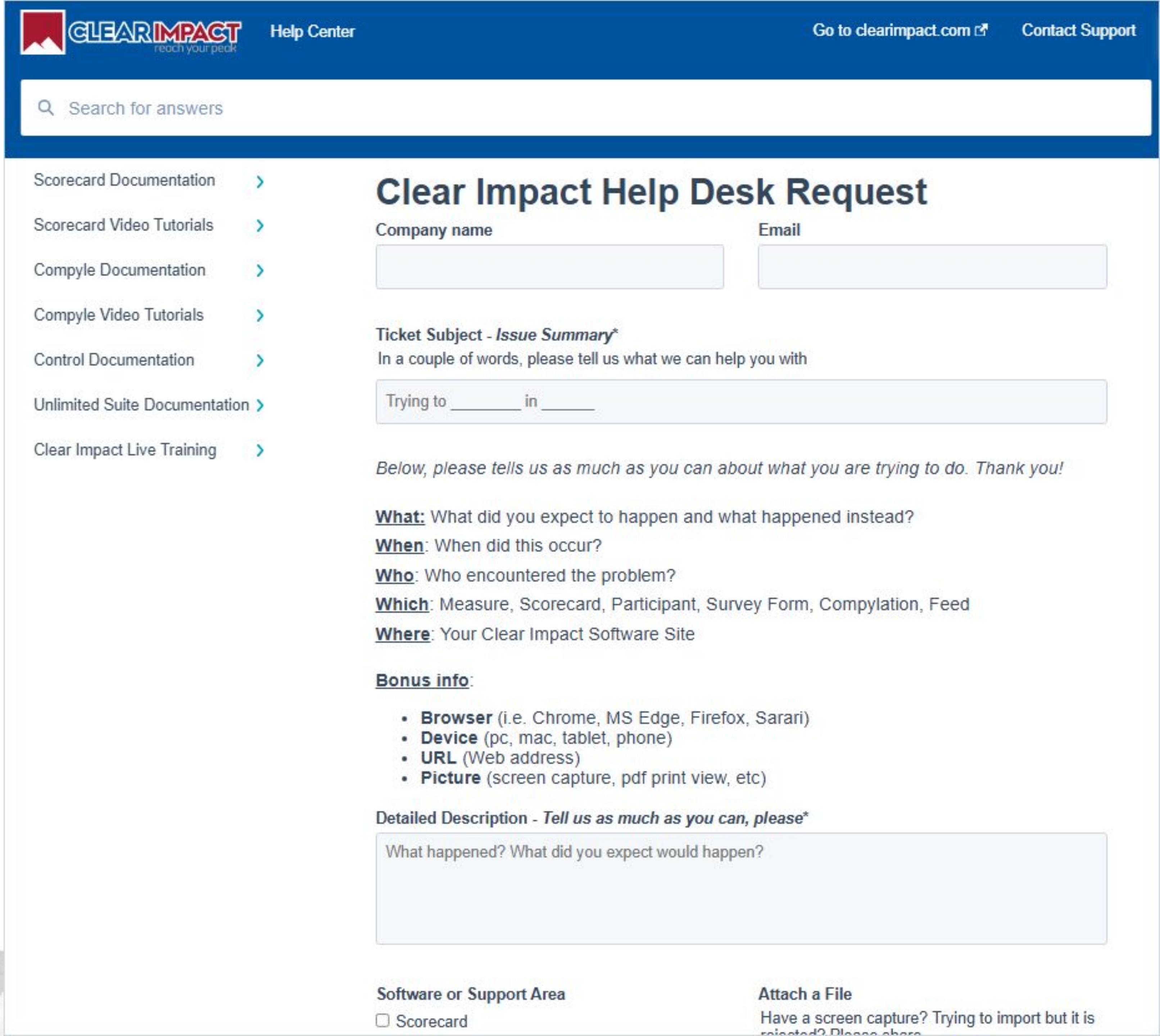
Request Help – Tech Support Form

Support Request Form

This is the best way to contact us when you:

- encounter unexpected results while working in the software
- have a question not answered by documentation
- would like to suggest new features

https://support.clearimpact.com/en/kb-tickets/new


CLEARIMPACT reach your peak Help Center

Go to clearimpact.com Contact Support

Search for answers

Scorecard Documentation
Scorecard Video Tutorials
Compyle Documentation
Compyle Video Tutorials
Control Documentation
Unlimited Suite Documentation
Clear Impact Live Training

Clear Impact Help Desk Request

Company name

Email

Ticket Subject - *Issue Summary**

In a couple of words, please tell us what we can help you with

Trying to ________ in ______

Below, please tells us as much as you can about what you are trying to do. Thank you!

What: What did you expect to happen and what happened instead?

When: When did this occur?

Who: Who encountered the problem?

Which: Measure, Scorecard, Participant, Survey Form, Compylation, Feed

Where: Your Clear Impact Software Site

Bonus info:

- **Browser** (i.e. Chrome, MS Edge, Firefox, Sarari)
- **Device** (pc, mac, tablet, phone)
- **URL** (Web address)
- **Picture** (screen capture, pdf print view, etc)

Detailed Description - *Tell us as much as you can, please**

What happened? What did you expect would happen?

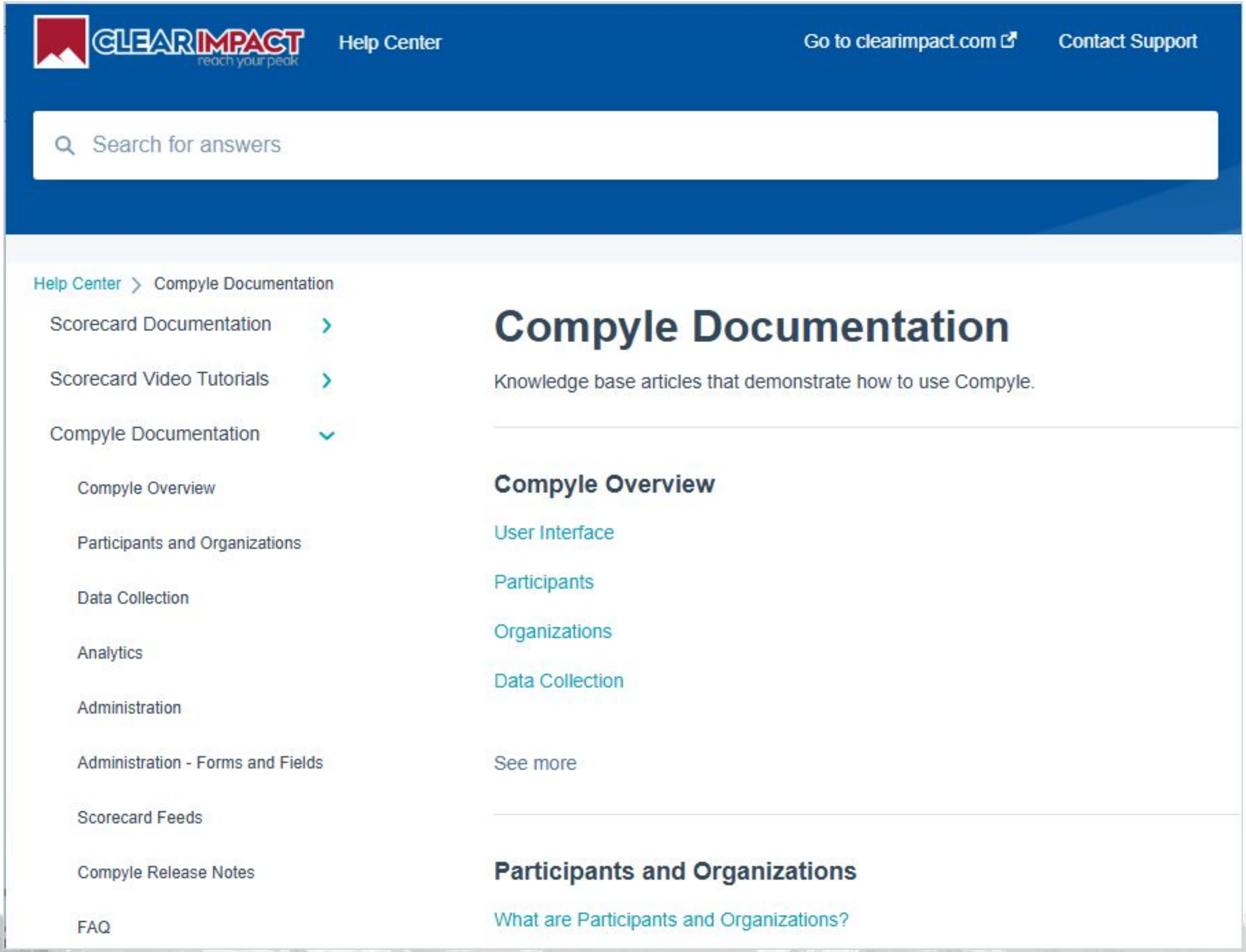
Software or Support Area

☐ Scorecard

Attach a File

Have a screen capture? Trying to import but it is

Knowledge Base

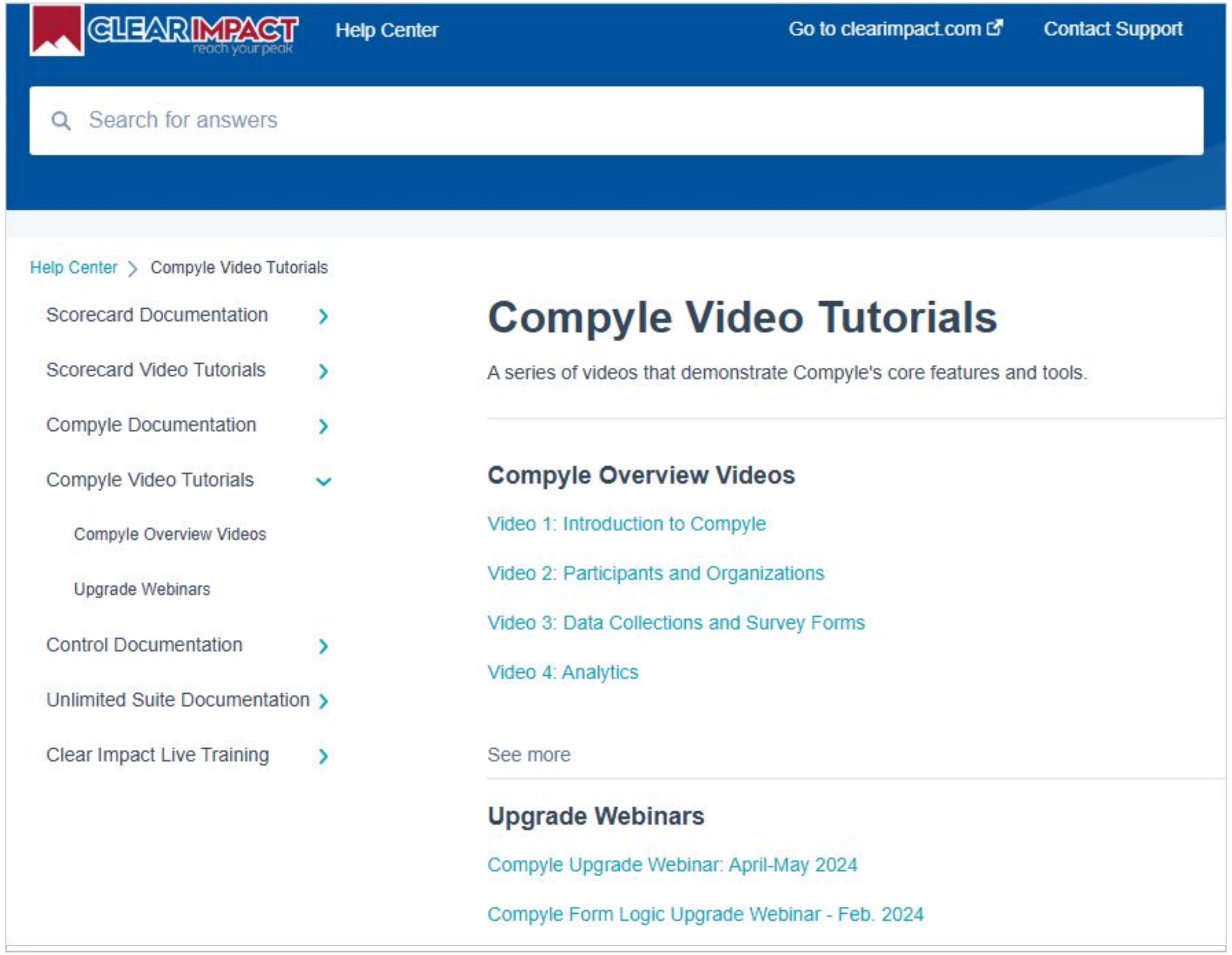


Support Menu

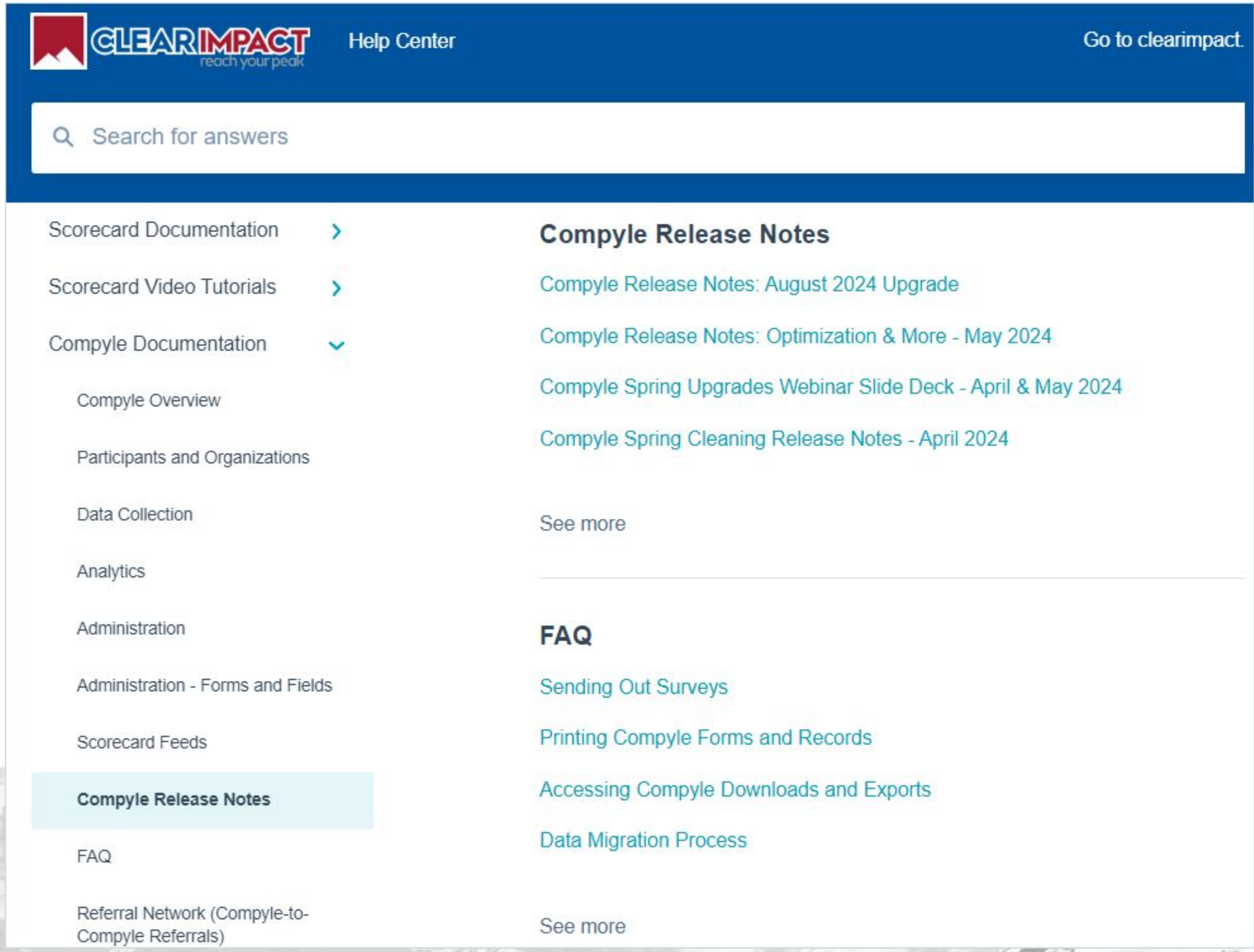
The Help Center can be found at https://support.clearimpact.com/en/compyle-documentation.

- Information is sorted into categories, and you can search by keywords.
- Use the Contact Us link at the top right to fill out a support request.
- You do not have to be logged in to access it.

Video Guides & Release Notes



These are two sections in the Help Center with specific kinds of information.



Training Calendar

The Clear Impact Live Training section of the Help Center is where you can:

- find info about weekly free training opportunities
- view a calendar of upcoming Scorecard, Compyle, and Suite webinars
- register for a training session
- suggest a topic for a weekly Learn With Us session

Clear Impact Customer Training

Group Training Opportunities open to All Clear Impact Software Administrators

Onboarding Welcome Webinars

Join our twice-weekly online webinars, free for all users and hosted by Clear Impact staff! Onboarding webinars are hosted at 2:30 EST every Tuesday and Thursday, and use the following format:

- **Tuesdays: Intro to Scorecard**
  - Learn the basic tools and resources available to get you started on the right foot with your Scorecard journey. Each Tuesday session follows the same format and will give a birds-eye view of the software.
- **Thursdays: “Learn With Us”**
  - On Thursdays, join our webinar for a more in-depth discussion of a specific topic within Clear Impact Suite. If you have suggestions or requests for a Learn With Us webinar topic, email support@clearimpact.com (or click “Contact Support” in product) with the subject line “LWU,” and we will consider your topic for a future session.

Register Now!

Free Clear Impact Suite Webinars

See our schedule of upcoming webinars covering Scorecard, Control, and Compyle upgrade training, software knowledge training and other learning opportunities.

Clear Impact Suite Customer Training Opportunities

Today | Wednesday, August 28 | Print | Week | Month | Agenda

Showing events after 8/20. *Look for earlier events*

Wednesday, August 28	
1:00pm	Compyle August Upgrade Webinar 1
Monday, September 2	
7:30am	Holiday - Labor Day
Thursday, September 5	
10:00am	Compyle Upgrade Webinar II
Monday, October 14	
7:30am	Holiday - Indigenous Peoples' Day
Monday, November 11	
7:30am	Holiday - Veterans' Day
Thursday, November 28	
7:30am	Holiday - Thanksgiving Day
Wednesday, December 25, 2024	
7:30am	Holiday - Christmas Day

Showing events until 12/31. *Look for more*

Events shown in time zone: Central Time - Chicago

+ Google Calendar

See Full Training Schedule Here

Conclusion & Future Endeavors

Resources & Reminders

Documentation

- Release Notes - August: https://support.clearimpact.com/en/compyle-release-notes

Resources

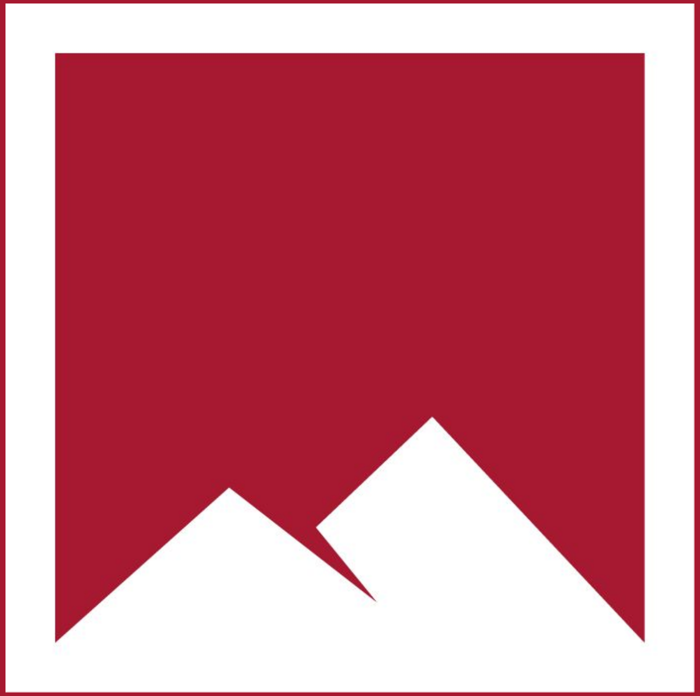
- Clear Impact Live Training: https://support.clearimpact.com/en/clear-impact-customer-training

- Support Request Form: https://support.clearimpact.com/en/kb-tickets/new

Volunteers Needed

- Try Out New Compyle Online Learning Courses: rosie@clearimpact.com

Q & A



- Any questions?