



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 Comply even better.

Please send future feature suggestions to the Comply, 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 Complye. That project has taken a few different directions 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 Comply & Built-In Reports
- ❖ Accessibility Improvements & Interface Updates
- ❖ Expanded Import Functions & API
- ❖ Notes Categories & Permissions Expansion

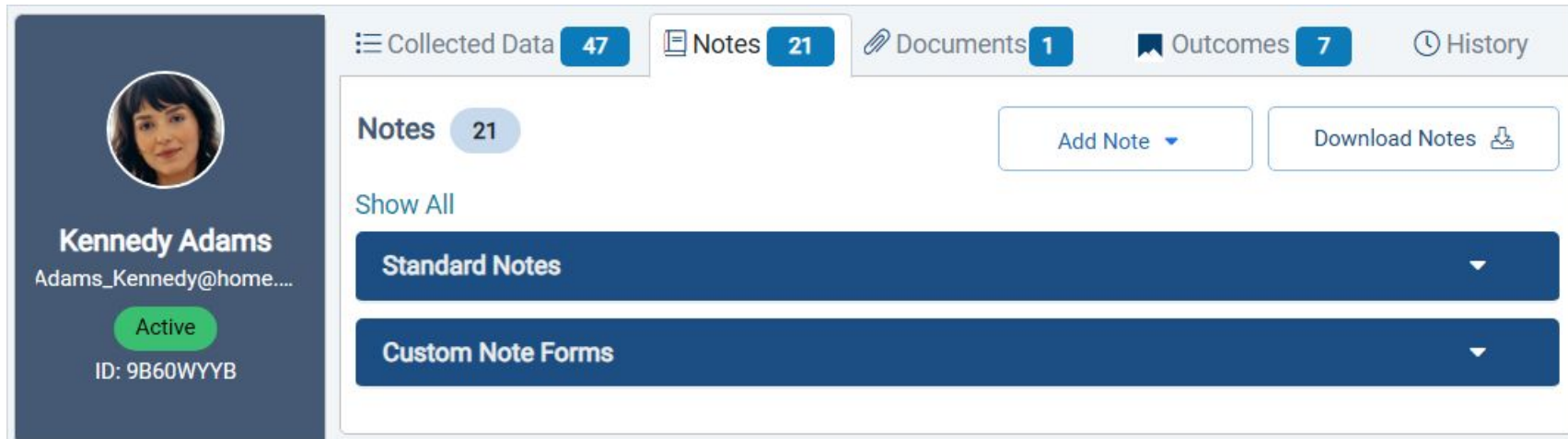




Folder Finesse: Notes tab



Notes Tab Enhancements



The screenshot displays a user profile for Kennedy Adams (ID: 9B60WYYB, Active) with a navigation bar containing tabs for Collected Data (47), Notes (21), Documents (1), Outcomes (7), and History. The Notes tab is selected, showing a 'Notes 21' header, an 'Add Note' button, and a 'Download Notes' button. Below the header, there are two sections: 'Standard Notes' and 'Custom Note Forms', each with a dropdown arrow. A 'Show All' link is also visible.

1) Notes are separated into two sections:

- Standard Notes
- Custom Note Forms

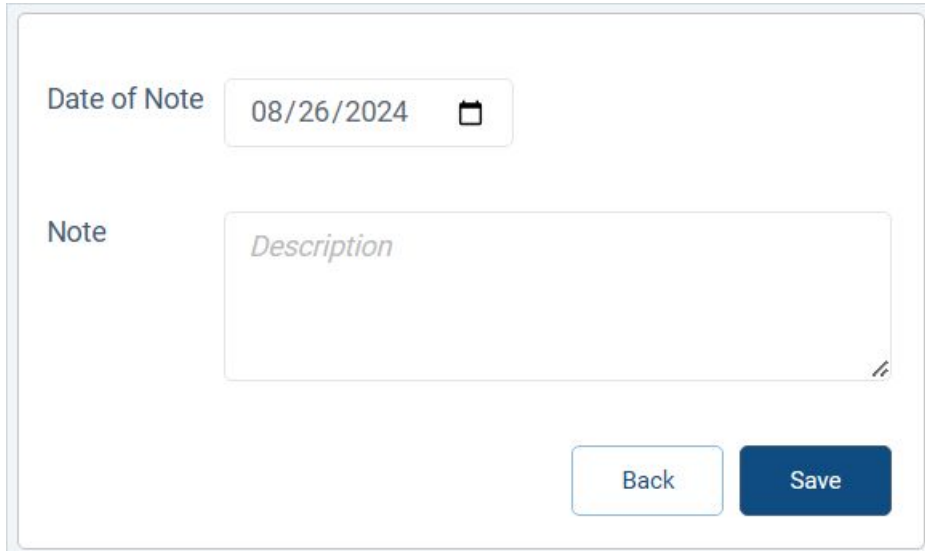
2) Save Action change: the Notes tab reopens after new notes are created and existing notes are edited.



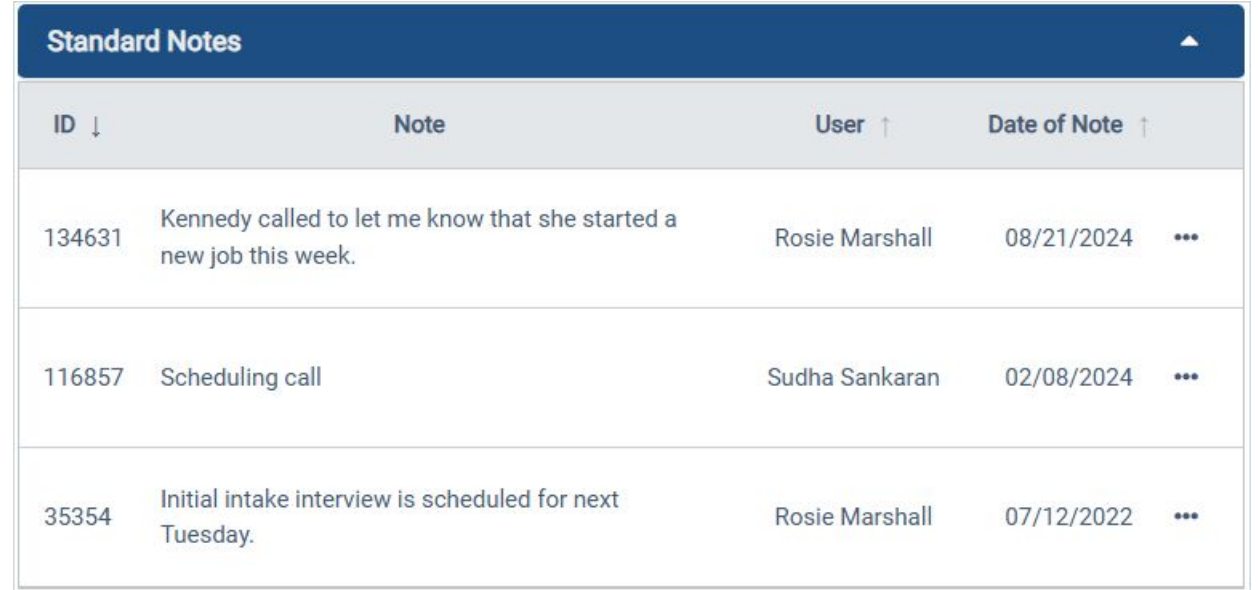
Standard Notes Section

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



The screenshot shows a form with two main sections. The first section is labeled 'Date of Note' and contains a date input field with the value '08/26/2024' and a calendar icon. The second section is labeled 'Note' and contains a large text area with the placeholder text 'Description'. At the bottom of the form, there are two buttons: 'Back' and 'Save'.



The screenshot shows a table titled 'Standard Notes' with a dark blue header. The table has four columns: 'ID ↓', 'Note', 'User ↑', and 'Date of Note ↑'. There are three rows of data, each with a three-dot menu icon to the right of the date.

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

ID	Note Type ↑	Questions
01444	Business Environment Daily Services <small>Modified 10/11/2022 @ 02:14 PM by Rosie Marshall</small>	6
00746	Consent for Services <small>Modified 09/12/2023 @ 12:03 AM by Sudha Sankaran</small>	6
03370	General Services Support <small>Modified 04/12/2024 @ 04:07 PM by System Admin</small>	11
03031	Note Created by user with Creator Role <small>Modified 01/22/2024 @ 11:51 PM by Betty Test</small>	1
00745	Units of Service <small>Modified 05/09/2024 @ 01:25 PM by Rosie Marshall2</small>	

(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.

Collected Data 1 | Notes 2 | Documents 0 | Outcomes 0 | History

Notes 2

Show All

Standard Notes

Custom Note Forms

Add Note ▾

- Standard Note
- Consent for Services ▾
- Likert Scale ▾
- Units of Service



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 1 st 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



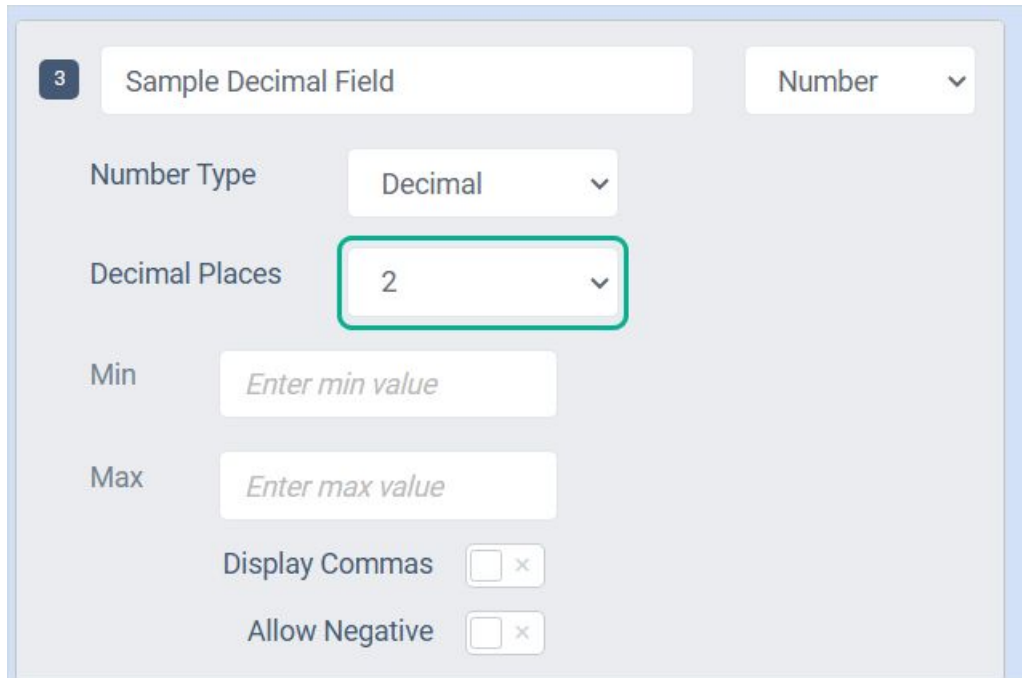
Forms Finesse



Refinements for All Forms

Decimal Fields

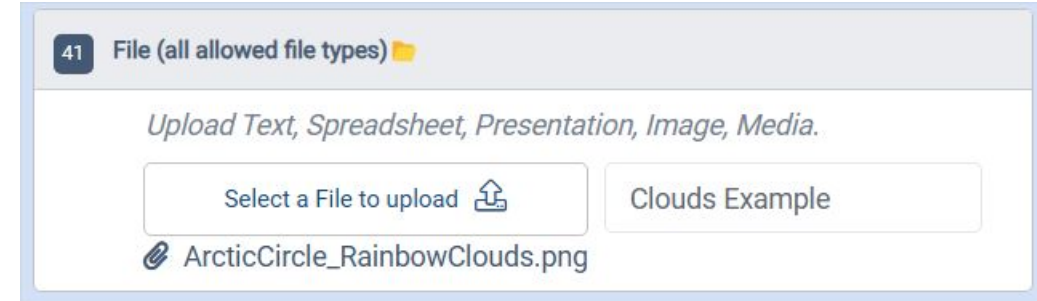
Now, Decimal Fields default to two places.



A screenshot of a form editor interface. At the top, there is a field labeled "Sample Decimal Field" with a "Number" dropdown menu. Below this, the "Number Type" is set to "Decimal". The "Decimal Places" is set to "2", which is highlighted with a red box. There are also input fields for "Min" (with placeholder "Enter min value") and "Max" (with placeholder "Enter max value"). At the bottom, there are two checkboxes: "Display Commas" and "Allow Negative", both of which are currently unchecked.

File Fields

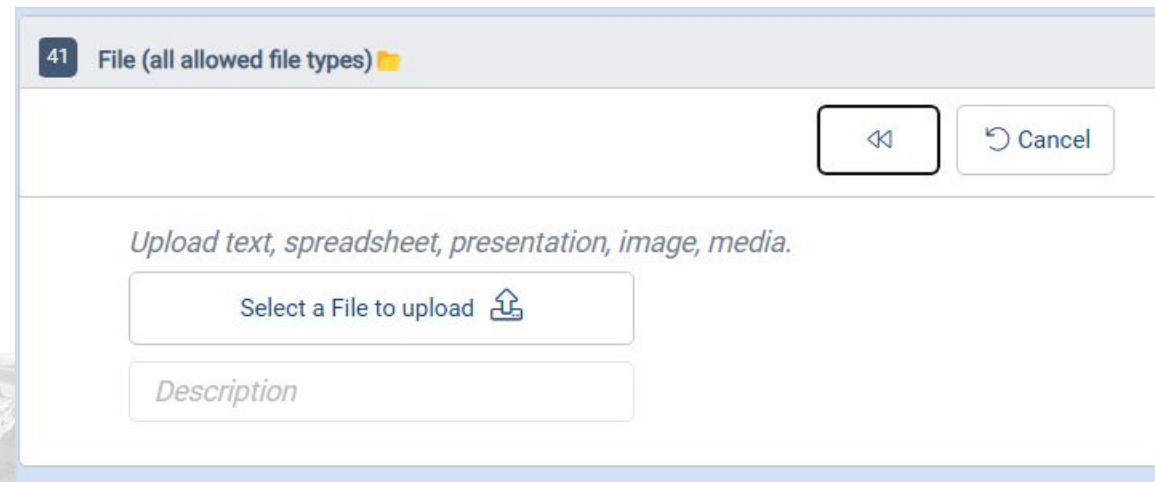
No matter how many times the file is changed out, File Fields will correctly display the name and link for the file.



A screenshot of a file field preview. The title is "41 File (all allowed file types)". Below the title, there is a text prompt: "Upload Text, Spreadsheet, Presentation, Image, Media." There is a button labeled "Select a File to upload" with a file icon. To the right of this button is a button labeled "Clouds Example". Below these buttons, there is a file icon and the text "ArcticCircle_RainbowClouds.png".

Preview Fields

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



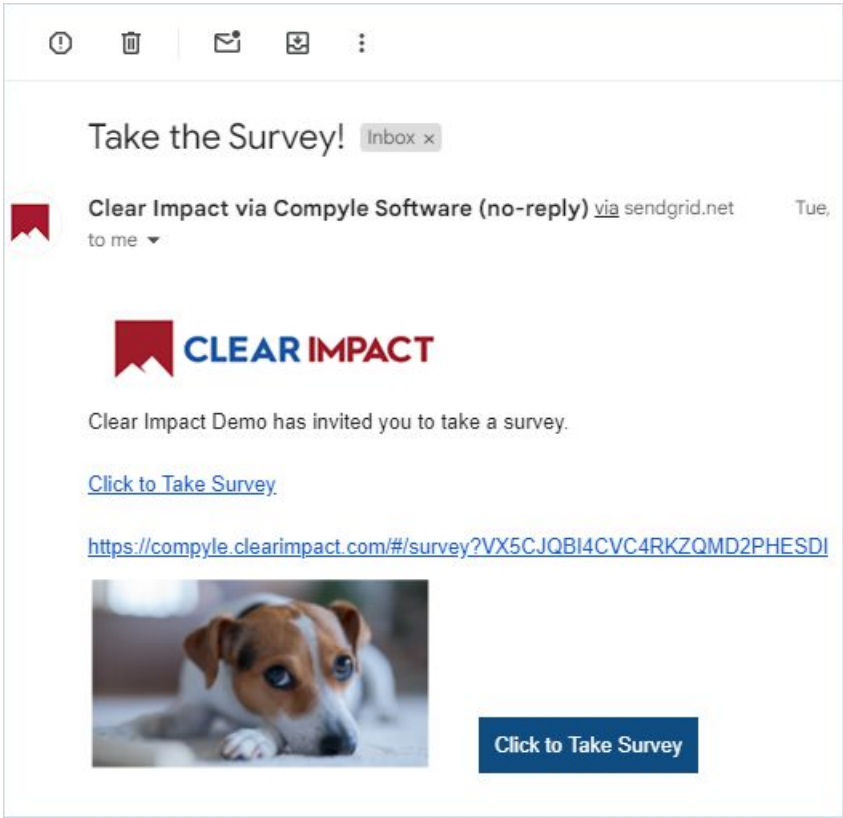
A screenshot of a file field preview in edit mode. The title is "41 File (all allowed file types)". At the top right, there are two buttons: a back arrow and a "Cancel" button. Below these buttons, there is a text prompt: "Upload text, spreadsheet, presentation, image, media." There is a button labeled "Select a File to upload" with a file icon. Below this button, there is a text input field with the placeholder "Description".



Survey Reminder Emails & Submission Emails

Survey responses completed through email reminder links will now:

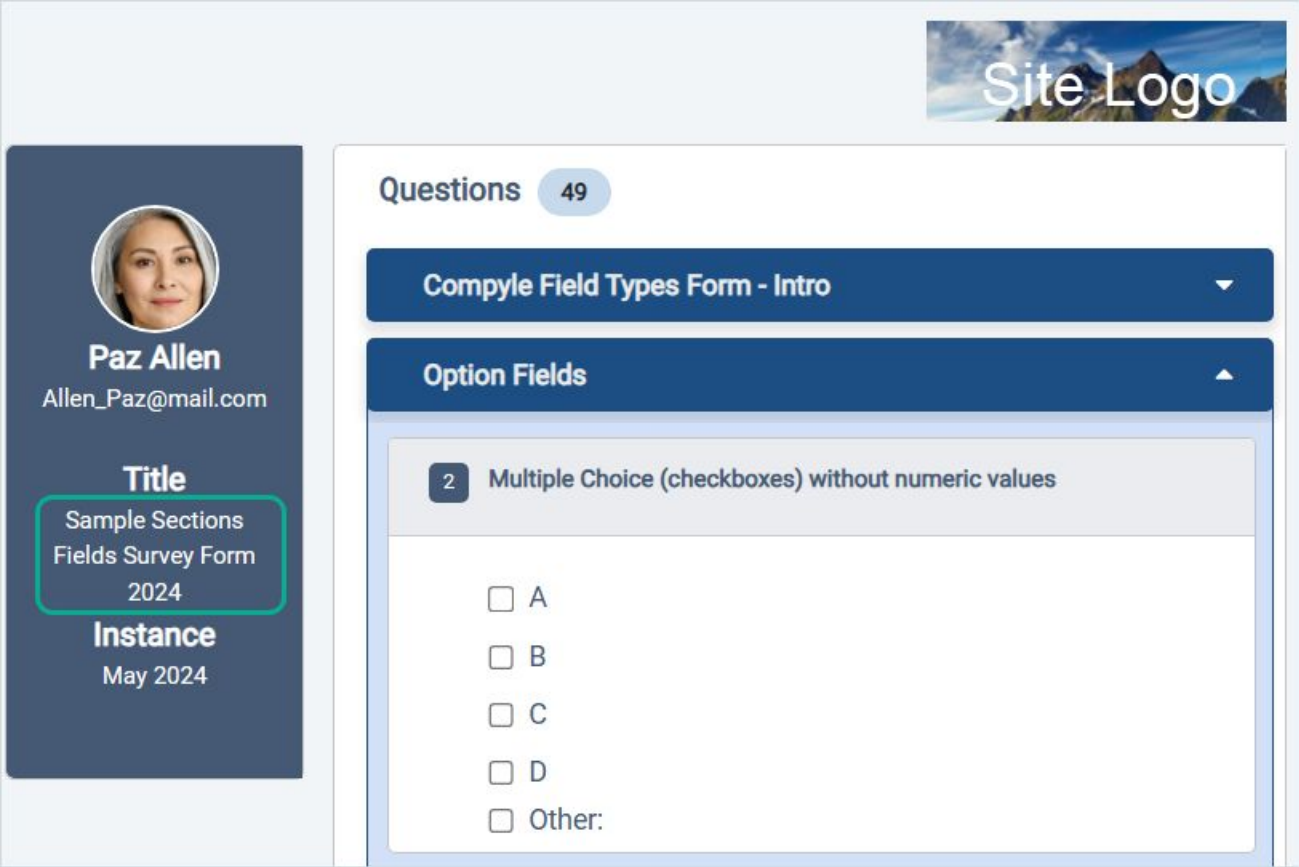
- Send confirmation emails if participants opt in
- Send an email to the users selected in "notify users."



Survey Forms Fixes

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. Comply 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.



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,

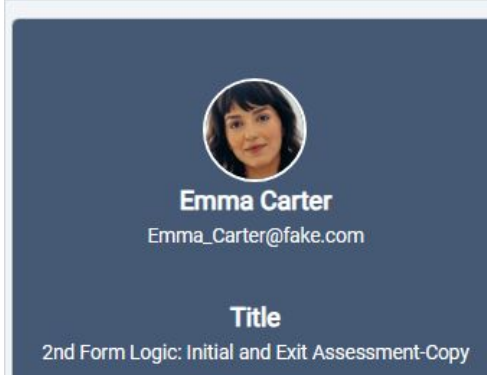
Id	Name ↑	Entity ↑	Created By ↑	Groups ↑		
149	2024 Client Application	Participants	2023-11-08 by Rosie Marshall	New	Copy link QR Code	...
44	After School Program Registration	Participants	2022-07-21 by Rosie Marshall	Coed Scouts Club	Copy link QR Code	...
54	Anonymous Public Form	Anonymous	2022-12-05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



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.



Emma Carter
Emma_Carter@fake.com

Title
2nd Form Logic: Initial and Exit Assessment-Copy

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

Condition Logic Rule

Rule Name Programs for Women Non-Binary

IF

Field 1 Gender Identity(ParticipantField)

Field 1 Condition 1 Is Female

Field 1 Condition 2 Is Non-binary

Add Condition

THEN

Action 1 Show Field

Object Type

Women's Programming

Section Field Alert

Questions 15

Form Logic: Initial and Exit Assessment

1 Assessment Type

* Required field

- Initial
- Every 90 Days
- Exit

2 Gender Identity: Please confirm or enter your gender identity.

- Male
- Female
- Non-binary
- Prefer Not to Answer

3 Are you interested in any of these Women's/Non-Binary Programs?

- Community Support Group for Women & Non-Binary Persons
- Paths to Empowerment
- Reproductive Health Plan
- Women at Work



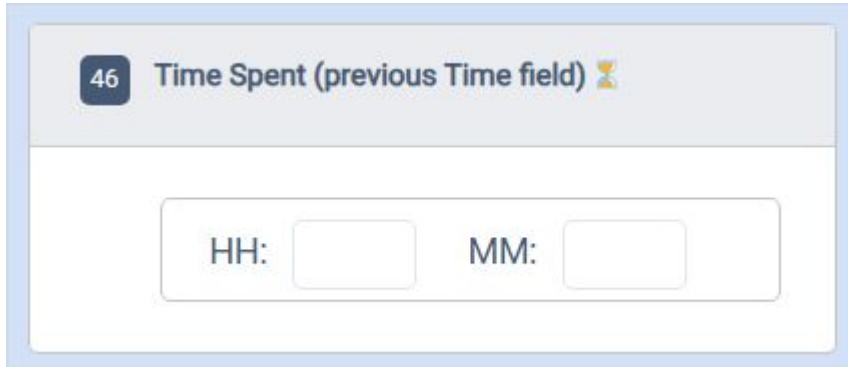
Compylations Changes



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



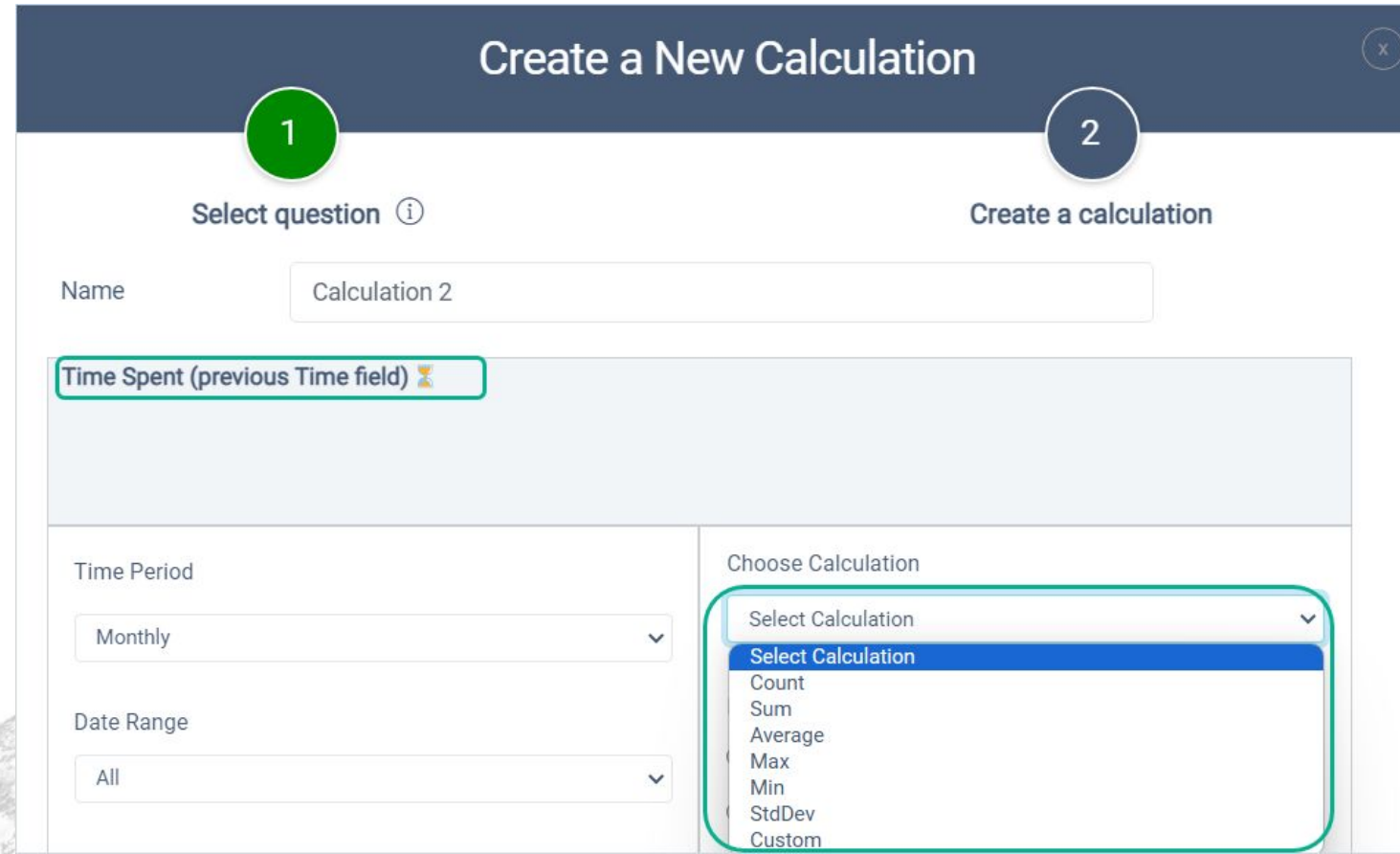
46 Time Spent (previous Time field) ⌚

HH: MM:

Calculations with Time Spent Fields

Numeric summaries apply to those fields:

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



Create a New Calculation

1 Select question ⓘ

2 Create a calculation

Name

Time Spent (previous Time field) ⌚

Time Period

Date Range

Choose Calculation

- Select Calculation
- Select Calculation
- Count
- Sum
- Average
- Max
- Min
- StdDev
- Custom



Filters by New Field Types

Add a New Filter

Select a field to create a filter.

File

Choose value to refine data

Has a File

Has no File

Cancel Save

Filter by New Custom Field Types

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

- Email
- URL
- File fields

Add a New Filter

Select a field to create a filter.

Alternate Email

Choose value to refine data

Has Value

Is Empty

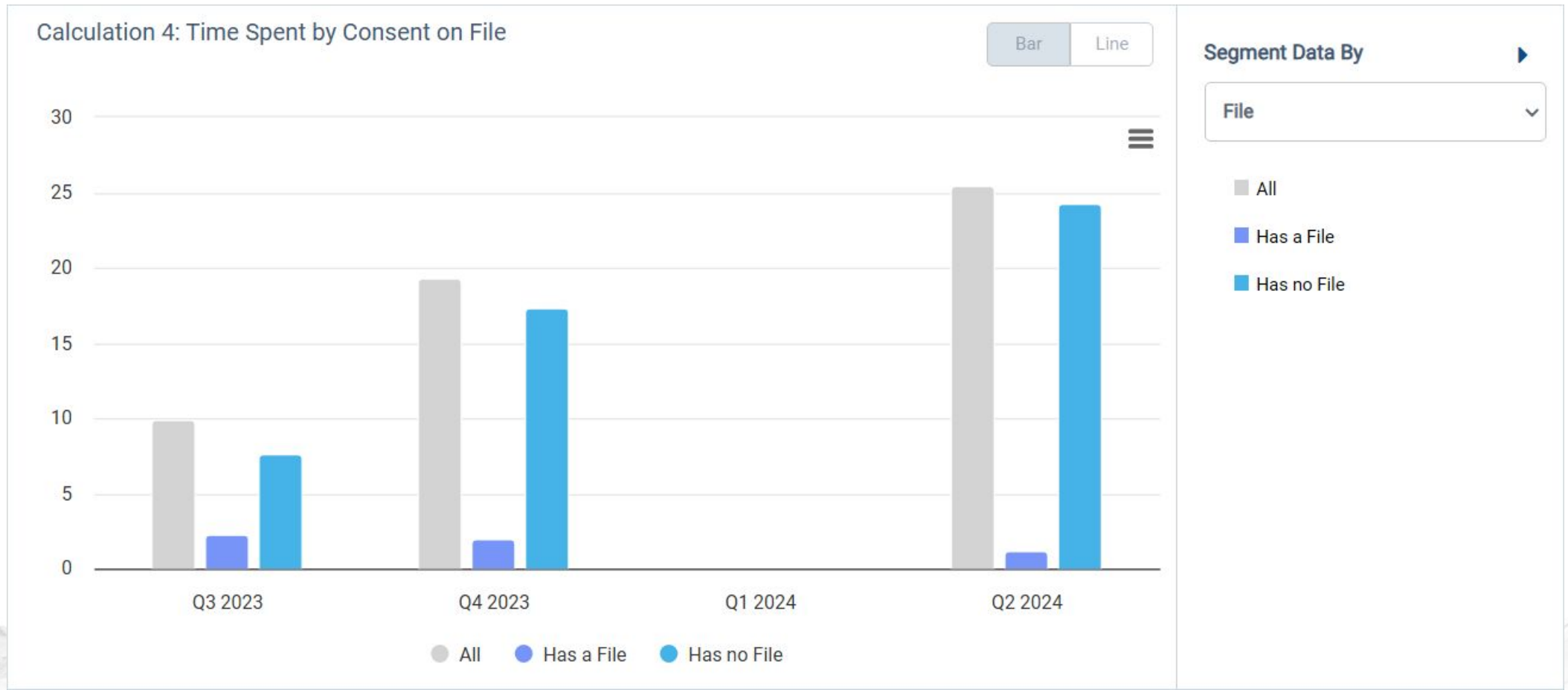
Cancel Save



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.



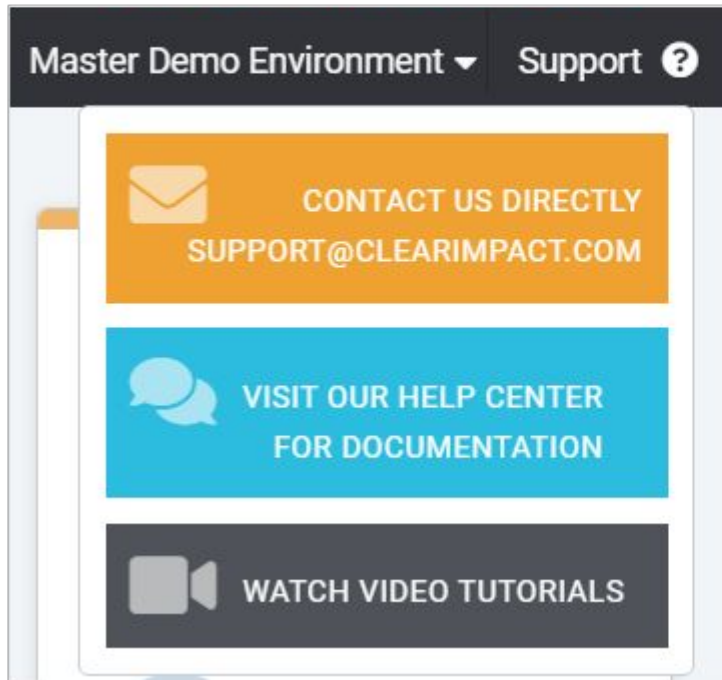


Support Menu Modernization

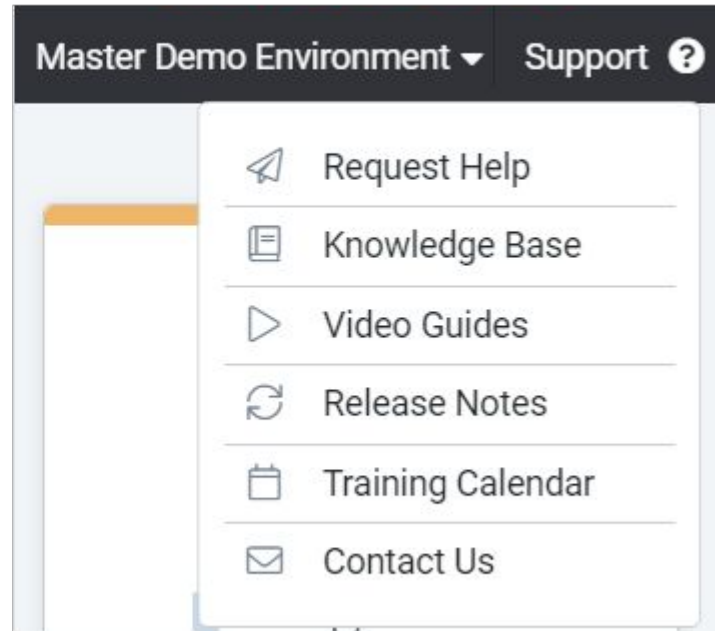


New & Improved Support Menu

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 >
- Complye Documentation >
- Complye 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 tell 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 rejected? Please share

Knowledge Base

The screenshot shows the CLEAR IMPACT Help Center interface. At the top left is the CLEAR IMPACT logo with the tagline 'reach your peak'. To its right are links for 'Help Center', 'Go to clearimpact.com', and 'Contact Support'. A search bar is located below the logo. The main content area is divided into a left sidebar and a main panel. The sidebar lists various help topics, with 'Complye Documentation' expanded to show sub-topics like 'Complye Overview', 'Participants and Organizations', 'Data Collection', 'Analytics', 'Administration', 'Administration - Forms and Fields', 'Scorecard Feeds', 'Complye Release Notes', and 'FAQ'. The main panel displays the 'Complye Documentation' page, which includes a sub-section for 'Complye Overview' with links to 'User Interface', 'Participants', 'Organizations', and 'Data Collection', and a 'See more' link. Below this is a section for 'Participants and Organizations' with a link to 'What are Participants and Organizations?'.

Support Menu

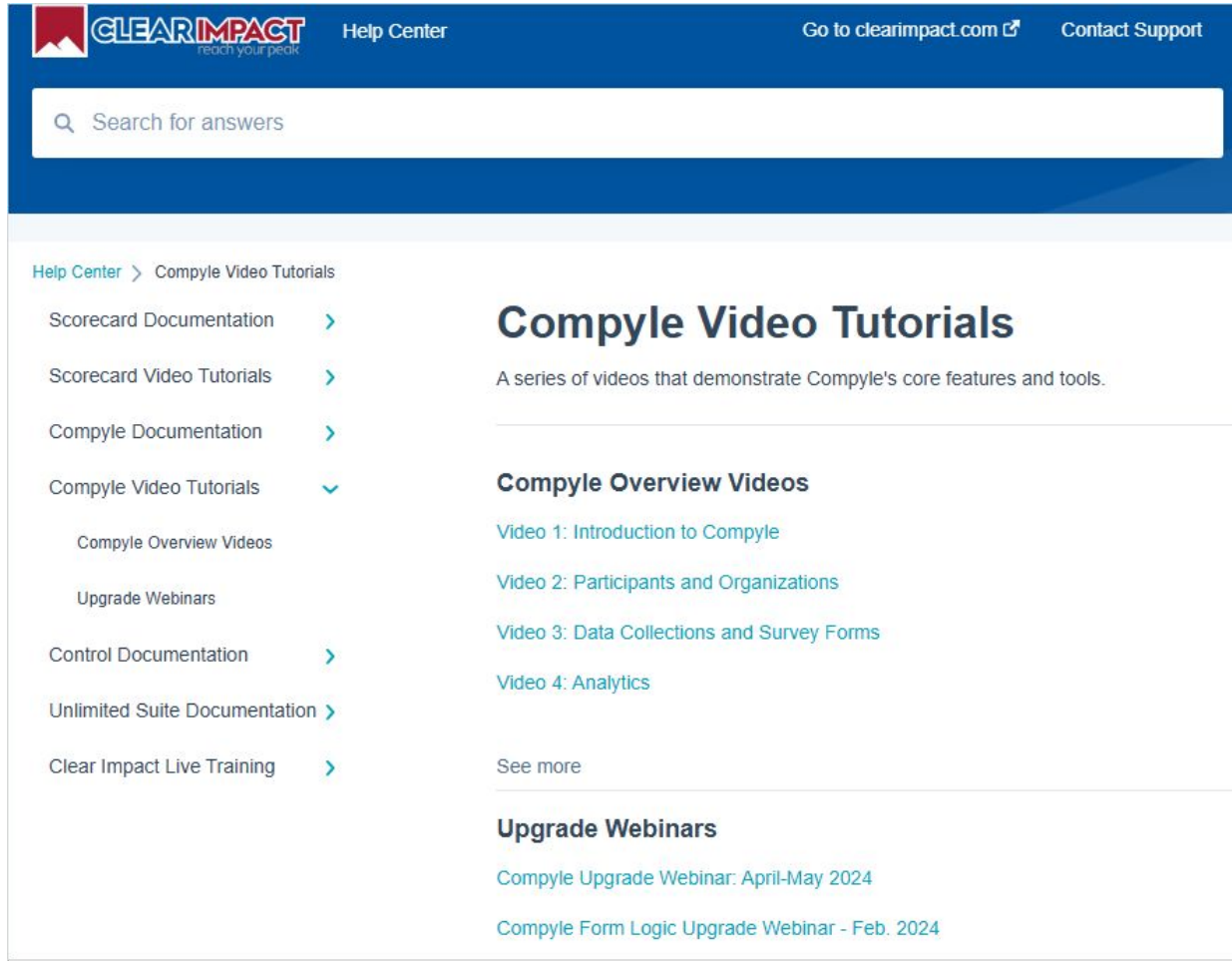
The Help Center can be found at <https://support.clearimpact.com/en/complye-documentation>.



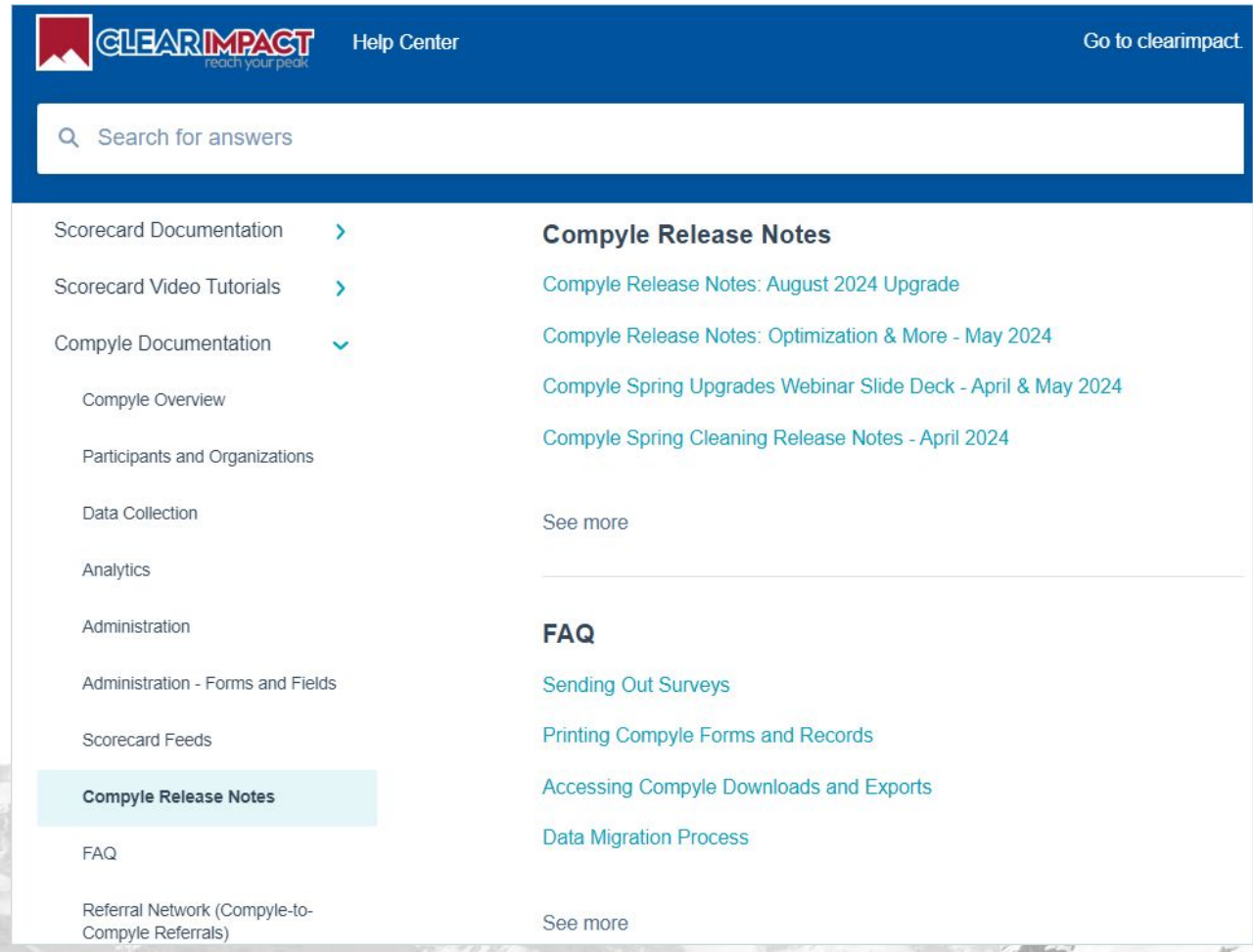
- Information is sorted into categories, and you can search by keywords.
- Use the Contact Us link at the top right to fill out a support request.
- You do not have to be logged in to access it.

Video Guides & Release Notes

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



The screenshot shows the CLEARIMPACT Help Center interface. The top navigation bar includes the logo, 'Help Center', a link to 'Go to clearimpact.com', and 'Contact Support'. A search bar is present below the navigation. The main content area is titled 'Compyle Video Tutorials' and includes a sub-header 'A series of videos that demonstrate Compyle's core features and tools.' Below this, there are two sections: 'Compyle Overview Videos' with links to 'Video 1: Introduction to Compyle', 'Video 2: Participants and Organizations', 'Video 3: Data Collections and Survey Forms', and 'Video 4: Analytics', followed by a 'See more' link; and 'Upgrade Webinars' with links to 'Compyle Upgrade Webinar: April-May 2024' and 'Compyle Form Logic Upgrade Webinar - Feb. 2024'. A left sidebar contains a list of navigation items: Scorecard Documentation, Scorecard Video Tutorials, Compyle Documentation, Compyle Video Tutorials (selected), Compyle Overview Videos, Upgrade Webinars, Control Documentation, Unlimited Suite Documentation, and Clear Impact Live Training.



The screenshot shows the CLEARIMPACT Help Center interface for 'Compyle Release Notes'. The top navigation bar includes the logo, 'Help Center', and a link to 'Go to clearimpact.'. A search bar is present below the navigation. The main content area is titled 'Compyle Release Notes' and lists several release notes: 'Compyle Release Notes: August 2024 Upgrade', 'Compyle Release Notes: Optimization & More - May 2024', 'Compyle Spring Upgrades Webinar Slide Deck - April & May 2024', and 'Compyle Spring Cleaning Release Notes - April 2024', followed by a 'See more' link. Below this, there is an 'FAQ' section with links to 'Sending Out Surveys', 'Printing Compyle Forms and Records', 'Accessing Compyle Downloads and Exports', and 'Data Migration Process', followed by another 'See more' link. A left sidebar contains a list of navigation items: Scorecard Documentation, Scorecard Video Tutorials, Compyle Documentation (selected), Compyle Overview, Participants and Organizations, Data Collection, Analytics, Administration, Administration - Forms and Fields, Scorecard Feeds, Compyle Release Notes (highlighted), and FAQ. At the bottom of the sidebar, there is a link for 'Referral Network (Compyle-to-Compyle Referrals)' and a 'See more' link.



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!](#)

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

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/complye-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 Complye Online Learning Courses: rosie@clearimpact.com



Q & A



- Any questions?