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What is Impact?

Impact helps institutions improve technology adoption and evaluate the impact of educational technology, while helping faculty and students seamlessly navigate new platforms.

Customized In-App Messaging

Customized in-app messaging and channels confirm that the hours spent trying to figure out new technology is a thing of the past. Reach students and faculty through targeted in-line messaging to communicate with your users and guide them through tasks.

Measure Technology Impact

Insightful dashboards and dynamic reporting provide a birds eye view of how well students and faculty are engaging with available edtech tools. When you pair Impact with your existing and future education technology suite, the return on your tech investment will be on brilliant display.

Support Users

Provide out-of-the-box self help content and easy access to support channels, empowering students and faculty to focus more on teaching and learning, and less on traversing technologies.

In-context support empowers students and faculty to focus more on teaching and learning, and less on navigating and learning new technologies.
What is an Impact instance?

An Impact instance is a dedicated Impact web application running on a single physical or virtual server. Generally, one Production and one Staging instance are provided to you by us at the time of Implementation.

You can access and manage your instance using the Impact Dashboard via app.eesysoft.com. You can view Reports, create and maintain Proactive messages, Help Items, and Campaigns using your instance.

View Impact Instance

You can request a new instance if you are migrating from one learning application to another or require integration into an additional test environment. Please submit a ticket if you would like to request a new Impact instance.
How do I access my Impact Dashboard?

You can access the Impact dashboard from any browser.

Log into Impact

To log into Impact, navigate to app.eesysoft.com.

Enter your email address [1] and password [2]. Click the Login button [3].
Open Impact Dashboard

To open the Impact dashboard, click the instance name [1]. You can switch to a different instance at any time using the Instance drop-down menu [2].
Switch Impact Instance

In the Instance drop-down menu [1], to search for a different instance, enter a search term in the Search instances field [2]. To open a different instance, click the name of the instance [3].
Open Old Impact Dashboard

To use the old Impact Dashboard, navigate to the dedicated URL for the instance you wish to connect to (<institution>.eesysoft.com).

Enter your username [1] and password [2]. Click the Log in button [3].

If you do not know your Impact username and/or password please submit a ticket.
How do I switch between instances in the Impact dashboard?

You can switch to a different instance in the Impact Dashboard.

Switch Impact Instances

In Global Navigation, click the **Instance** drop-down menu [1]. You can search for Impact instances using the **Search instances** field [2] or you can scroll until you locate the instance. To switch instances, click the name of the instance [3].
How do I reset my Impact dashboard password?

You can reset your Impact password.

Forgot Password

In a new browser window, open to your Impact login page. Click the Forgot Password? link.
Reset Password

Enter the login information associated with your Impact account and click the Reset Password button.
View Password Recovery Notification

Password Reset Sent

Check your inbox for an email from Impact which contains a link that will allow you to reset your password. Please, contact support if you have any questions.

Resend Email

A notification displays stating that Impact sent password recovery instructions to your email.

Check Email

Impact by Instructure - Impact Dashboard: Reset your password. You told us you forgot your password. If you really di...

1:16 PM

Return to your email account and sign in. Open the Impact Dashboard email. (If the email is not in your Inbox, check your Spam folder.)
Open Reset Password

Click the **Reset Password** button.

**Note:** Password reset emails expire after 24 hours.
Set New Password

Enter a new password [1]. Confirm that password by entering it again [2]. Click the Reset Password button [3].
Log into Impact

With your email address and new password, log in to Impact.

Note: If further assistance resetting password is needed, please submit a ticket.
How do I submit a support ticket in the Impact Help Center?

Follow the instructions below to submit a support ticket through our Impact Help Center.

Note: The steps in this lesson describe how to submit a support ticket related to Impact. To submit a ticket for Canvas, use the Help menu in the Global Navigation Menu.

Submit a Support Ticket for Impact

Enter https://eesysoft.atlassian.net/servicedesk/customer/portal/2/group/-1 in your web browser.

Note: This webpage is only for Impact support tickets and should not be used for support tickets for Canvas or any other Instructure products.

Choose Support Ticket Options for Impact

Choose the option that best describes your issue.
Complete the short questionnaire to help Impact Support better understand the actions you have already taken. To improve the quality and timeliness of the response to support tickets, please include the information below when possible:

- **Summary**: Briefly describe the issue.
- **Description**: Please provide a detailed description of the issue.
- **Severity**: How severely is this affecting your impact instance?
- **Environment**: Staging or Production?
- **User expected behavior**: I should be able to [user expected behavior].
- **Please include a screencast or screenshot of the problem.**

Submit the ticket. The support team will respond to your request as soon as they can.
How do I request a new Impact instance?

You can request a new Impact instance if you are migrating from one learning application to another or require integration into an additional test environment. Please contact your CSM or CSM Team to assist you in steps to request a new Impact instance.
How do I add a new language in the Impact Dashboard?

Your institution might require you to have different language options for all of your content.

Request to Add a New Language

With Impact, you can add different languages to your configurations depending on your LMS needs. Once you add a language you can create multiple versions of messages and articles to give your users the option to choose which language they prefer.

To add a new language to your Impact dashboard, please submit a ticket under Other questions.
How do I request a new Impact feature?

We are focused on building strong communication and collaboration with our customers. Our goal is to collect your feedback and feature suggestions so that we can help enhance your experience of using Impact at your institution. Your requests and suggestions are essential to our product development and to streamline all your feedback, we use our Impact Idea Conversations.

Open Impact Idea Conversations

Impact Resources

To open the Impact Idea Conversations space, visit the Impact space. Locate and click the Impact Idea Conversations button.
View Existing Idea Conversations

Before posting your idea, see if your idea or a version of your idea has been suggested.
Search Existing Idea Conversations

By default, the global search bar returns results for keywords in the entire community. To limit your search to the idea conversations space, click the All Community drop-down [1] and select the Idea Exchange option [2].

To search for ideas by keyword, enter keywords in the Search field [3].

To view an idea conversation, click the idea conversation title [4].
Comment, Rate, and Subscribe to an Idea

[Inline Editor] Provide an option to disable the Impact admin button in Canvas

Status: Open • Submitted by jenkienzie on 06-29-2022 11:51 AM

1

The Impact admin button in Canvas cannot be moved and must be disabled on the Impact dashboard. It would be far easier if Impact admins could more easily enable/disable the admin button while in Canvas without having to go to the Impact dashboard.

Labels: Inline Editor

Rate the idea

If the idea is in the Open for Conversation stage, you can rate the idea [1].

Add comments

If your idea is a slight variation of an existing conversation or you have additional thoughts, you may want to add comments to the existing conversation thread [2].

Share the idea

If you’d like to send the idea to others, you can share the idea [3].
Start a New Idea Conversation

To create a new idea, click the Suggest an idea button.

**Note:** You must be logged into the Instructure Community to suggest an idea.

Enter Title

Submit a New Idea

**Subject**

| new idea |

Enter the title of your new feature request in the **Subject** field. Then click the **Check Title** button.

The search determines whether other customers have already submitted a request on the same topic.
Review Related Ideas

If you don't see any other posts that relate to your topic, click the Continue and Post button.

On the next page, fill in all the fields that are relevant for your request. Click the Post button.

Your new feature request will be submitted to the community and will appear in the Impact Idea Conversations.
How do I see Impact's release information?

You can view the latest Impact release information in the Impact Release Notes.

Open Impact Release Notes

You can view Impact Release Notes and choose to view the current release notes or the archive.

Click the current release button [1] or release archive button [2] to view the release you want to view.
What are Impact’s capabilities when compared between different learning management systems?

View the tables to explore the capabilities that Impact has within the different Learning Management Systems.

- **Full functionality**
- **Limited functionality due to LMS itself or Impact scope of development. Contact your CSM for more details about these limitations.**
- **Unavailable functionality due to LMS or development scope.**

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</tbody>
</table>
Getting Started
How do I install Impact?

Impact integrates with learning applications using a Javascript plugin, building block, or LTI/REST API implementation depending on the type of application you wish to integrate with. Please refer to one of the guides below for specific instructions pertaining to your application.

Blackboard Learn Original
How do I install Impact in Blackboard Learn Original?

Blackboard Learn Ultra Experience
How do I install the Impact integration in the Blackboard Learn Ultra Experience?

Instructure Canvas
How do I install Impact in Instructure Canvas?

D2L Brightspace
How do I install Impact in D2L Brightspace?

Moodle
How do I install Impact in Moodle?
How do I install Impact in Instructure Canvas?

You can request to install Impact for your Instructure Canvas LMS. Please contact your Implementation Team to assist you in steps to install Impact.
How do I install Impact in Blackboard Learn Original?

You can install Impact in Blackboard Learn Original.

If you have already installed the Impact Building Block before, we recommend uninstalling the old version before installing the new version.

Download the latest version of the Impact Building Block [here](version 2.3.185).

Open System Admin

In Blackboard Learn, click the System Admin link.

Open Building Blocks

<table>
<thead>
<tr>
<th>Integrations</th>
</tr>
</thead>
<tbody>
<tr>
<td>Data Integration</td>
</tr>
<tr>
<td>Authentication</td>
</tr>
<tr>
<td><strong>Building Blocks</strong></td>
</tr>
<tr>
<td>Web Services</td>
</tr>
<tr>
<td>LTI Tool Providers</td>
</tr>
<tr>
<td>Respondus Proctoring Integration</td>
</tr>
<tr>
<td>REST API Integrations</td>
</tr>
</tbody>
</table>
In the Integrations section, click the Building Blocks link.

**Open Installed Tools**

Building Blocks

- **Installed Tools**
  Configure or Delete Building Blocks that are included in the system.

- **Proxy Tools**
  Manage and register Proxy Tools and define their Global Properties.

- **Featured Building Blocks**
  Manage and install Featured Building Blocks

Click the Installed Tools link.

**Upload Building Blocks**

Installed Tools

- **Upload Building Blocks**
  Global Settings

Click the Upload Building Blocks link.
Install Building Block

Click the **Browse** button [1] and locate the Building Block .war file on your computer.

Click the **Submit** button to upload the file to Blackboard Learn [2], and then select **OK** to go back to the Building Blocks page.

Approve Building Block

Click the **Approve** button.

To enable the building block, select **Available** in the Availability list for the building block. Blackboard Learn lists the permissions that the building block requires. This is a security feature to protect Blackboard Learn from dangerous content. If you are concerned about the permissions given to a building block, contact the vendor before approving the permissions.
Open Settings

Locate the Easysoft (Impact)Connector in the list of installed Building Blocks.

Click the Settings link.
Enter Base URL and Key

Enter the Base URL and Key provided by Impact.

Add Support for All Users

If you want to make the Impact Support Center available to ALL users, click the Support tab checkbox.

**Note:** Only enable this setting on staging and if Impact Support is included in your license. Do not enable on production until after the Impact Support Center has been configured with your implementation consultant.
Add Support for Certain Users

If you would like to make the Support Center visible for specific user roles only, you can add one or more roles (comma-separated) in this field.

**Note:** Make sure you deselect the Support tab checkbox.
Create Hierarchy Roles

If you would like to be able to use Institutional Hierarchy nodes to filter Impact reports or target messages, articles, and campaigns, enable Create hierarchy-based roles (if users are directly aligned with nodes) and/or Create course hierarchy-based roles (if courses are aligned with nodes).

Enable Anonymous Mode

* Anonymous mode

* ONLY TRANSFER NON PERSONAL INFORMATION(PK_ID)
If you would like to collect user activity data anonymously, turn on Anonymous mode. This will ensure that only the user's PK1_ID is transferred to the Impact server.

**Note:** If turned on, this will limit Impact functionality. This affects the user information sent with support ticket submissions from the Support Center and user information exported from the tool adoption reports from Insights.

### Enable Synchronization

![DATA SYNCHRONIZATION](image)

Turn Synchronization **ON** if you wish to enable Course Activity Reports. Note: Although the initial synchronization should not impact performance, we have added the option to perform the synchronization during night time (ON during off-hours).

### SaaS-Hosted

Submit a ticket with Blackboard requesting them to install the latest version of the Impact Building Block stated [here](#).
How do I install the Impact integration in the Blackboard Learn Ultra Experience?

You can configure the Impact integration in the Blackboard Learn Ultra Experience.

**Note:** Currently there is a two-part integration which requires the installation and configuration of the Impact Building Block.

Register LTI Provider

Log in to your Blackboard Learn Ultra account. Navigate to the **Administrator Panel** in Blackboard Learn Ultra and click the **LTI Tool Providers** tab [1].

The Impact integration works with LTI 1.1 Provider. Click the **Register LTI 1.1 Provider** link [2].
Enter Provider Domain

In the Provider Domain field, add your unique Impact URL (eg. university.eesysoft.com) [1]. Ensure that the Default Configuration is selected as Set separately for each link [2].
Enter Institution Policies

<table>
<thead>
<tr>
<th>INSTITUTION POLICIES</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
<tr>
<td>Choose whether you want to override the institution policies for this specific tool provider domain.</td>
</tr>
<tr>
<td></td>
</tr>
<tr>
<td>Send User Data</td>
</tr>
<tr>
<td>□ Never</td>
</tr>
<tr>
<td>□ Send user data only over SSL</td>
</tr>
<tr>
<td>□ Send user data over any connection</td>
</tr>
<tr>
<td>User Fields to Send</td>
</tr>
<tr>
<td>□ Role in Course</td>
</tr>
<tr>
<td>□ Name</td>
</tr>
<tr>
<td>□ Email Address</td>
</tr>
<tr>
<td>Allow Membership Service Access</td>
</tr>
<tr>
<td>□ Yes □ No</td>
</tr>
<tr>
<td>Show User Acknowledgment Message</td>
</tr>
<tr>
<td>□ Yes □ No</td>
</tr>
</tbody>
</table>

In Institution Policies, choose whether you want to override the existing policies for this specific tool provider domain.
Once saved, open the options for the provider you just created and select the **Manage Placements** option.
View Placement Information

For the placement you’ll need the following information:

- Handle and Label can be anything you’d like (e.g. Impact)
- Availability: Yes
- Type: Ultra extension
- Tool Provider URL is your specific provider's url (e.g. https://university.eesysoft.com/rest/bbultra/lti-launch)
- Tool Provider Key: some-key-from-provider
- Tool Provider Secret: some-secret-from-provider
- Tool Provider Custom Parameters is your specific provider's secret (e.g. eesy_key=thisIsMyKey

Impact Guide Updated 2022-11-21
Add Rest API Integrations

Go back to Admin Panel page and select Rest API Integrations.

Click Create Integration.

For the integration you'll need the following information:

- Application ID: ID provided by Impact
- Learn User: a user with a minimum set of privileges
- End User Access: Yes
- Authorized To Act As User: Yes
Create Configuration

Go back to the Admin Panel page and select Cross-Origin Resource Sharing.

Click the Create Configuration button.

Add these values:

- Origin: (e.g. https://university.eesysoft.com)
- Available: Yes

Submit changes.
How do I migrate to SaaS and prevent an interruption in my Impact data?

Follow these steps to ensure a successful Impact migration to your new SaaS environment(s).

Prior to the Blackboard SaaS Migration

Please communicate the following to your Impact Customer Success advocate so we can help you along the way:

1. When will you make the migration? Knowing the date(s) will help us know when to check that everything migrated correctly on our side.
2. Will your production and staging URLs change? If yes, please provide us with the new URLs.

Immediately Before the Blackboard SaaS Migration

Make a note of the URL and key in both environments as they will need to be entered the same way in the Impact settings in your new SaaS environment. It is very important to de-install the Impact Connector Building Block on the previous instance before you install and configure it on the new SaaS instance, regardless of whether the URLs will change or not.

1. In your old production and staging environments, remove/de-install the Impact Building Block. You can also select “Set Inactive” in the Impact Settings.
2. Install the latest Impact building block in the new SaaS production and staging environments. You can find the latest version of the building block here.
3. Enter the production URL and key and staging URL and key, respectively, from your old environment(s) into the Impact settings in your new SaaS-hosted environment(s).
4. Make sure the sync field is set to ON or ON during Off Hours.
5. Inform us immediately after you have done this so we can check that the configurations are correct and your Impact data is coming through and synced correctly.
What is the current Blackboard Building Block for Impact?

Please [click here to download the most current Blackboard Building Block for Impact](Blackboard Building Block 2.3.185).
Impact Glossary

This glossary contains definitions for commonly used terms you may find while working with Impact.

B

Building Block

Java web app that is deployed as a plug-in to the Blackboard Learn application.

C

Campaign

A campaign is essentially a container that allows you to bring together all of the Impact tools and features related to a specific use case you want to address in your LMS.

For example, a campaign to increase the use of discussion boards can include messages on the discussion page, support articles about FAQs surrounding discussions, and monitors on the discussion boards page. A campaign does not need all three elements but you can mix and match messages, support, and monitors as you see fit.

A campaign targets a particular audience (e.g. faculty or students) and has a specific time range (e.g. one month). A use case can consist of one or multiple campaigns.

Context

A set of conditions that determines where a message, support article, or monitor will trigger.

Custom User Group

A custom collection of users defined within Impact based on a set of conditions.

E

Expert User Account

Credentials used to log in to the Impact Dashboard.
I

**Inline Editor**

A flexible content management tool, which can be activated within the learning application.

**Instance**

A dedicated Impact environment hosted via Amazon Web Services.

M

**Monitor**

A user activity tracker placed on a page or element within the learning application.

**Monitor Category**

A sub-section of a Reporting Template, which can contain monitors and/or additional Monitor Sub-Categories.

P

**Plugin**

A small JavaScript code snippet used to inject Impact into Canvas, Moodle, and other web-based applications.

R

**Reporting Template**

A hierarchical structure used to organize monitors for reporting purposes.

S

**Support Button**

A floating button, which can be embedded on every page of a learning application for users to launch the Support Center.
Support Center

An in-application support environment, which is presented as an overlay on top of learning applications.

Tool Category

A grouping of out-of-the-box content items based on which functionality or tool they relate to, which is used to filter and manage the visibility of said content.

Use Case

A use case is a list of steps that illustrate how a process will be carried out in the Impact ecosystem to achieve your desired edtech outcome. By having a theme defined with set outcomes, a use case is aimed at helping you build a bridge from where you currently are, to where you would like to be. Through targeting a current challenge you are facing, a use case deploys best practices (through Impact campaigns, etc.) towards an effective end goal.

User Group

A collection of users based on the organizational structure of the learning application (e.g. roles, hierarchies, or accounts).

Walkthroughs

A step-by-step guide of a process that may span multiple pages.
Blackboard Learn Ultra Experience
How do I create messages on the institution page in the Blackboard Learn Ultra Experience using Impact?

Due to the way that the Blackboard's Ultra Extension Framework defines route IDs for your institution page, creating messages on this specific page is slightly different from other pages. If you go to the institution page as an administrator and open the inline editor, you will notice that your page is unable to be defined. This is not an error; it has been limited to ensure that your message is added correctly.

Open Institution Page

In your institution page, check if you are logged in as an administrator. If you are using an admin account, your inline editor says “This page cannot yet be recognized” when trying to define the page.
The page is not able to be defined because if you were to define and add a message to this page as an administrator, the Ultra Extension Framework would capture your Route ID as base.institution-page-admin. Only administrators would be able to see the message.

To create messages on the institution page, log in as a non-admin user and define the page with base.institution-page as the Route ID. This will be accessible to all of your target audience.
Log into Blackboard Ultra

Log in with a non-admin account and go back to the institution page.

Click the inline editor and select the page.

You can now add a message to the institution page, and it will be seen by the audience that you choose.
How do Impact contexts work differently in the Blackboard Learn Ultra Experience?

Blackboard Learn Ultra has a unique integration framework that presents some differences in the way Impact content, contexts, and monitors are experienced. Because the Blackboard Learn Ultra Experience is a locked-down system from Blackboard, Impact Building Block can’t be loaded in an Ultra environment. Due to this limitation, Impact has a slightly different integration compared to other LMS environments. If your LMS is the Blackboard Learn Ultra Experience, there are several differences in how you will experience Impact messages, support, and contexts. This article explains the key differences in context use within Ultra environments and how Impact has created a new framework to prevent any unwanted behavior with contexts.

To ensure proper setup, visit How do I install the Impact integration in the Blackboard Learn Ultra Experience?

You will also need to download the Impact Expert Tool plug-in from Google Chrome to activate the inline editor in your Ultra environment.

For instructions on how to download the plug-in, visit How do I activate the Impact Inline Editor within Blackboard Learn Ultra Experience?

How does Impact work with the Blackboard Learn Ultra Experience?

Due to the closed integration system which prevents the Impact Building Block from loading, Ultra does not let you scan pages for elements with the Impact inline editor. This changes the process of defining contexts.

To prevent the majority of limitations, Impact has collaborated with Blackboard to develop a framework for Ultra users, called the Ultra Extension Framework. There are several differences in this framework compared to other LMS environment frameworks. These differences are explained below.

Blackboard Learn Ultra Experience Page Definition

In the Blackboard Learn Ultra Experience, users are not able to use the free select mode to select page elements. The way Ultra is set up limits the amount of unique information Impact can use to classify pages and page elements. For example, a test button and an assignment button on an assessment page could appear the same to Impact due to the unique way Ultra Pages are defined with Route IDs and Analytics IDs. Given the complexities of Blackboard Learn Ultra Experience, All possible Ultra contexts have been created Out-of-the-Box in Impact.

How does Impact help?

Impact has defined all of the pages in Ultra as Out-of-the-Box pages using partial Route IDs to avoid any incorrect behavior or limitations that could occur with very specific Route IDs. This results in your Define button is hidden when you use your inline editor unless you are on an LTI page.
LTI pages are the only pages on which the Define button is visible and when you can actually define a context manually. To learn how to define LTI pages in Ultra, visit [How do I use Impact to define LTI pages in the Blackboard Learn Ultra Experience?](#)
How do I use Impact to define LTI pages in the Blackboard Learn Ultra Experience?

If your LMS is the Blackboard Learn Ultra Experience, there are several differences in how you will experience Impact messages, support, context and monitors compared to all the other LMS environments. This article shows you how to define LTI pages in the Blackboard Learn Ultra Experience.

Defining contexts for LTIs is currently only possible for LTIs with defined Placements in the Blackboard Admin Panel. We are working on the capability to define contexts for LTIs with no defined Placements in Blackboard, but that is not yet possible.

Note: If you use any other LMS, including other Blackboard versions, this article does not apply to you.

Define an LTI Page Manually

LTI pages are the only pages on Ultra environments where the Define button is visible from the inline editor and you can actually define a context manually.

Follow the steps outlined in this article to make sure you're using your chrome plug-in to activate the inline editor (double check which instance you are using to make sure it is the correct one).

Navigate to an LTI page that you would like to define.

Note: Defining a context for LTI is only possible if the “open in a new window” setting is disabled for the LTI.

Open Inline Editor

To open the inline editor, click the Impact (Eesysoft) icon [1] and then click the Add icon [2].
Enable Select Element

Make sure Select Element is enabled.

Define Page

Click the Define button. You cannot free-select specific elements on the page.
Customize Content

You can customize which route you want to use as your context. The best practice is to deselect all of the criteria and only leave the name of the LTI (states) selected [1]. This allows you to define your page with a partial Route ID that is as general and unspecified, thus making sure you don’t run into any incorrect behavior depending on a user’s navigation to the page.

Click the Continue button [2].

If you find a page in your Ultra LMS that isn't defined (including any LTI pages if you don't want to define it yourself), please submit a ticket.
How do Impact messages work differently in the Blackboard Learn Ultra Experience?

Blackboard Ultra has a unique integration framework that presents some differences in the way Impact messages, support, and contexts are experienced. Messages in the Ultra environment are presented and behave a little differently compared to other LMS's. This article will outline how messages work differently within Blackboard Learn Ultra Experience.

Please read How do I install the Impact integration in the Blackboard Learn Ultra Experience? to ensure you have the proper setup.

You will also need to download the Impact Expert Tool plug-in from Google Chrome to activate the inline editor in your Ultra environment. Please read this article for instructions on how to download the plug-in.

Don't forget that in addition to messages, contexts, and support are slightly different in the Ultra environment.

Messages are Presented Using Native Learn Ultra Components

All messages within the Ultra environment are classified as “native Learn Ultra components”. This classification applies for both Blackboard content (e.g. first-time user experience notifications) and Impact messages, they are both presented using the same native Learn Ultra components which have predetermined behaviors and presentation.

Message Presentations

There are three unique types of Impact messages which you can choose from. The sizes are predetermined (small, medium, and large) and the content customizable.

The three message types are:

- Hint messages - messages connected to a specific element on a page in your learning application
- Pop-Up messages - messages presented in a central modal that lays on top of your learning application and can only be connected to page-level contexts and not to a specific element.

Note: For more information on message types, see What are the types of Impact messages?
Systray Messages display immediately when the targeted user lands on the relevant page (on page load).
Hint Messages are connected to a specific element on a page in your learning application.
Pop-Up Messages are presented in a central modal that lays on top of your learning application and can only be connected to page-level contexts and not to a specific element.
Inner vs. Outer Content of a Message

Blackboard has full control over the outer shell of any messages (hint, systray, and pop-up). This outer shell includes the frame or borders of a message and it will be uniform across the whole LMS and cannot be customized from within Impact. However, all the inner content is populated via an iframe, meaning it can be styled and you can have full control over the contents with Impact. The borders for the outer shell of a message differ between message styles.

Behavior of Messages

No Proactive Hints

Impact can’t scan for elements on a page within Ultra Learn Experience. With this, proactive hint messages are not available. To read more about how element definition is different within an Ultra environment, please read this article. Currently, hint messages will only present on hover.
Impact Messages are Queued Alongside Native Blackboard Notifications

If Blackboard is going to serve some content to its users regarding any changes, updates or important information about the Learn Ultra Experience, those messages will be prioritized ahead of any Impact content in the queue. For example, if a user logs onto Blackboard Learn Ultra Experience for the first time, there will be a Blackboard native message with some onboarding information and that will be the only thing they see at that point in time until they return to that context the next time. It is important to remember this when creating campaigns and scheduling messages because they will be in the queue behind Blackboard content if there is any.
How is the Impact Support Center different in the Blackboard Learn Ultra Experience?

If your LMS is the Blackboard Learn Ultra Experience, there are several differences in how you will experience Impact messages, support, and contexts compared to all the other LMS environments. This article shows you how the Support Center is different in the Blackboard Learn Ultra Experience.

Native Ultra Support Button

The Impact Support Center is launched by clicking the **Native Support** button in Ultra Base Navigation and Courses [1]. Then select **Impact Support** [2].

**Note:** Impact doesn’t control the placement or availability of this native button, but on original courses, you can place the Impact Support button which can be customized. Both native and Impact Support buttons will give your user access to your Impact content with the only difference being customization of the button’s placement and availability.
Native Ultra Support Center Panel

The Support Center inner content is presented via an iframe in the Native Ultra Support Center panel.

Launch as Primary or Auxiliary Provider

Primary

Once you click on the support center button (native or Impact's button) you are taken to the Impact Support Center right away.

Auxiliary

If you have multiple providers for support, such as Blackboard's Beebee ChatBot, once you click the support button, you will be taken to a menu of the different support providers and from there you can select Impact Support.
Ultra Base Navigation with Original Courses

Blackboard Learn Ultra environments that offer Original Courses have two Support Center structures: one for Ultra Base Navigation and Ultra Courses, and another one for Original Courses.

View First Help Suggestion

The first help suggestion on most pages is programmed based on Blackboard’s recommendation. You cannot remove this item or change the way it looks and Impact cannot customize or remove this. The reason this item is present is to make sure that if a certain page does not have any help items from Impact or another support provider, that there is still something there for users to view as support.

Note: There is no usage information or feedback on these particular Blackboard suggestions.
How do I enable Institutional Hierarchy in Blackboard Learn Ultra?

Institutional Hierarchy is a hierarchy management interface which allows you to create groups to organize your institutions multiple schools, departments, academic programs, and courses.

Open Blackboard System Admin

In order to enable the Institutional Hierarchy, you need to be within an admin account on Blackboard.

Within Blackboard, navigate to and click the Admin link.
View Administrator Panel

View the Administrator Tools page.

Open System Roles
Scroll and navigate to Users.

Click the **System Roles** link.

### Create System Role

Click the **Create Role** link.
Add Role Properties

Enter the **Role Name** [1] and **Role ID** [2].

Click the **Submit** button [3].
Manage Privileges

Search for keyword 'Institutional Hierarchy' [1].

Select the checkbox for Administrator Panel (Communities) > Institutional Hierarchy [2] and Administrator Panel (Communities) > Institutional Hierarchy > Add users to node [3] privileges.
Hover over Privileges [1] and select Permit Privileges [2].
Open Users

Navigate to Administrator Panel. Click the **Users** link.
Search Users

Add new Institutional Hierarchy to user.

Note: The user is the same user as the Rest API Integration.
Campaigns
What are Impact campaign templates?

This article explains how campaign templates allow you to take advantage of premade content delivered by Impact's educational specialists and sourced from the global Impact user community.

Impact strives to help institutions maximize the value of their learning technology through just-in-time contextual communication. Our content team, consisting of educational technology experts, publishes helpful templated messages and articles around common themes. This premade content is delivered in the form of Campaign Templates. Campaign Templates are draft campaigns that contain messages, articles, and activity monitors, which can be imported with one click and customized to your liking.

Our content team is working hard to consistently release new campaign templates in order to help you keep up with system updates, new tool functionalities, and increase overall adoption.

It is important to note that the campaign templates are a draft campaign that needs to be customized and configured to your needs, and then started in your Impact dashboard. Just clicking Use as Draft from the templates tab will not automatically configure or start the campaign in your dashboard. To find out all the steps in using a campaign template in your dashboard please read this article.
Read [How do I use Campaign Templates?](#) to learn where to find campaign templates and how to use them.
How do I use campaign templates in the Impact Dashboard?

Impact strives to help institutions maximize the value of their learning technology through just-in-time contextual communication. Our content team, consisting of educational technology experts, publishes helpful templated messages and articles around common themes. This pre-made content is delivered in the form of Campaign Templates.

Campaign Templates contain messages, articles, and activity monitors, which can be added to your dashboard with one click. You can use these campaign templates as a draft, customize them to fit your institution's needs, and then go live with them on your LMS. This article will show you how to use campaign templates from your Impact dashboard.

Canvas and Blackboard release help items also have recurring campaign templates. You can find information about how to use those campaign templates in the following articles:

- How do I use Canvas Release campaign templates?
- How do I use Blackboard Release campaign templates?

View Campaigns

In the top navigation, click the Campaigns link [1]. Then click the Templates tab [2].
Open Template

Locate the release campaign template you are interested in using. Click the Use as Draft button.

Depending on the contents of the campaign template, there may be separate campaigns for students, instructors, or other user groups.
Review Campaign Content

Open the campaign and scroll down to see Help Items [1].

Click the preview button for each help item to see its contents [2].

View Preview

Title: New and updated features for Students
Description: Release of October 16th 2021

New Features

Sticky Navigation Menus
The Course and User Navigation Menus remain sticky and are always visible on their respective pages. When a long page is scrolled, the respective menu is retained in the sidebar. If the navigation menu is longer than the height of the screen, the menu can also be scrolled to view all menu links.

Updated Features

Course Notification Customization
Course notification preferences can be customized in the Notifications page.

Microsoft Immersive Reader
Microsoft Immersive Reader is available in User Settings and can be enabled by individual users. However, this feature may already be enabled for you by your institution. Additionally, the Microsoft Immersive Reader button is supported in Assignments, the Course Home Page, and the Syllabus. This change allows additional resources to be used with the Microsoft Immersive Reader.
You will see a modal with your help item preview.

Remove Content from Campaign

If any of the articles are not applicable to your institute, click the item name [1]. Click Remove from Campaign button [2].

Be sure to remove any links to this removed article from any of the included messages if needed. To learn more about links between messages and support articles please read this article.
Activate Campaign

Make sure you are happy with the content before you start or schedule the campaign. Once you're happy with the content of the campaign, navigate to Edit Properties button.
Edit Target Audience

A pop up modal will appear with your campaign details. Click the Target Audience button.
Select Target Audience

Select the user groups that you want to include in this campaign. To learn more about user groups please read this article. Click the Outcomes button.
Save Campaign

Click the Save button.

Note: For more information on adding Tool Adoption Statistics, visit [How do I add tool adoption statistics to a campaign in the Impact Dashboard?](#)
Schedule Campaign

Click the Schedule Campaign button.
Add Scheduled Dates

Assign a start and end dates from the pop up modal. Click the Ok button.

Share Campaign

Campaign Details

Basics
Name: Using Zoom to deliver lessons
Created by: Andy Adamovich
Created date: 2021, Dec 2
Start date:
End date:
Visibility: Private

Target audience
Label:
Active/Inactive: 🆘 Inactive users included
User count: 0 🆘

Intention
Provide support to your instructors on how to utilize Zoom for maximum student engagement in a virtual learning environment. Click here to preview the content of this campaign.
To make the campaign public, click the **Share Campaign** button.

**Start Campaign**

<table>
<thead>
<tr>
<th>Basics</th>
<th>Target audience</th>
<th>Intention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Using Zoom to deliver lessons</td>
<td>Label:</td>
<td>Provide support to your instructors on how to utilize Zoom for maximum student engagement in a virtual learning environment. Click <a href="#">here</a> to preview the content of this campaign.</td>
</tr>
<tr>
<td>Created by: Andy Adamovich</td>
<td>Active/Inactive: 🗓️ Inactive users included</td>
<td></td>
</tr>
<tr>
<td>Created date: 2021, Dec 2</td>
<td>User count: 0</td>
<td></td>
</tr>
<tr>
<td>Start date:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End date:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visibility: Private</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click **Start Campaign** button.

Your campaign content will appear on the LMS pages of your selected user groups during the scheduled dates you have selected.
Stop Campaign

If you wish to end the campaign, click the **Stop Campaign** button, which populates the end date with the current date and time.

While the campaign messages do not appear to your users anymore, the support articles remain in the support center unless you manually remove it or turn off the tool category to which it is associated.

Track User Engagement
Once your campaign is live, it's possible to track your user's engagement with the campaign report.

Navigate to the **Outcomes** section and click the **View More** link.

![Campaign Engagement](image)

You will be able to see for example, how many users viewed the message, and how many clicked through the article links, providing you with useful insights into the effectiveness of the campaign.

To learn more about campaign templates, please read [this article](#).
How do I use Blackboard Release campaign templates in the Impact Dashboard?

The Impact monthly release campaign templates allow you to easily inform your users about any updates or changes Blackboard has made, in a timely manner. This article shows you how to successfully use these campaign templates as a draft, customize them to your institution’s needs, and start the campaign.

Open Tool Categories

In Global Navigation, click the **Settings** icon [1]. Then click the **Tool Categories** link [2].
Enable Just Released Category

Make sure that the Just Released category is visible. This ensures that all of the related articles are available to the appropriate users in your Impact support center.

Open Campaigns

In the top navigation, click the Campaigns link [1]. Then click the Templates tab [2].
Locate the release you are interested in using and click the **Use as Draft** button.

The campaign is now visible on your list of campaigns in the All Campaigns tab.

**Notes:**

- Depending on the contents of the release, there may be separate campaigns for students and instructors.
- If the content of the release is the same for both user groups, or only applicable to one set of users, only one campaign will be available.

This does not mean that your campaign is active yet. You need to customize and start the campaign.
Review Campaign Content

Now that you have the campaign template in the list of your campaigns, you can use it as a draft. Tailor all the help items and configurations to fit your institution's needs before starting the campaign.

Open the campaign and scroll down to see Help Items. You may see Ultra and Original Items. Only the items that correspond with your LMS will be visible once the campaign starts.
Preview Content

<table>
<thead>
<tr>
<th>Assigned to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Observer role: K-5 Elementary (campaign)</td>
</tr>
<tr>
<td>Observer role: K-5 Elementary (campaign)</td>
</tr>
<tr>
<td>Observer role: K-5 Elementary (campaign)</td>
</tr>
<tr>
<td>Observer role: K-5 Elementary (campaign)</td>
</tr>
<tr>
<td>Observer role: K-5 Elementary (campaign)</td>
</tr>
</tbody>
</table>

To preview the help item contents, click the Preview icon.
View Preview Modal

Campaigns

[Image of a campaign preview window]

View the help item preview.
Remove from Campaign

If any of the articles are not applicable to your institution, click the item name [1]. Then click the Remove from Campaign button [2].

Be sure to remove any links to this removed article from any of the included messages if needed.
Activate Campaign

Once you have added the campaign template you can make sure you are happy with the content before you activate or schedule it.

Once you’re happy with the content of the campaign, click the **Edit Properties** button.
Edit Campaign Details

This campaign introduces students to the benefits of using New Quizzes, and shows them how to navigate through new and updated features.

A pop-up modal will appear with your campaign details. Click the Target Audience button.
Edit Target Audience

You can change the audience by picking any combination of roles [1], filters [2], user segments [3], or individual users [4] and click Outcomes button to continue [5].
Save Campaign

Click the Save button.
Schedule Campaign

Click the **Schedule Campaign** button.
Add Campaign Dates

Assign a start and end dates from the pop up modal and click the Ok button.

Share Campaign

Campaign Details

<table>
<thead>
<tr>
<th>Basics</th>
<th>Target audience</th>
<th>Intention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Introduction to New Quizzes: Students</td>
<td>Label:</td>
<td>This campaign introduces students to the benefits of using New Quizzes, and shows them how to navigate through new and updated features.</td>
</tr>
<tr>
<td>Created by: Andy Adamovich</td>
<td>Active/inactive:</td>
<td></td>
</tr>
<tr>
<td>Created date: 2022, Mar 4</td>
<td>User count:</td>
<td></td>
</tr>
<tr>
<td>Start date:</td>
<td>0</td>
<td></td>
</tr>
<tr>
<td>End date:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visibility: Private</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
To share the campaign, click the **Share Campaign** button.

**Start Campaign**

<table>
<thead>
<tr>
<th>Basics</th>
<th>Target audience</th>
<th>Intention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name: Introduction to New Quizzes: Students</td>
<td>Label:</td>
<td>This campaign introduces students to the benefits of using New Quizzes, and shows them how to navigate through new and updated features.</td>
</tr>
<tr>
<td>Created by: Andy Adamovich</td>
<td>Active/Inactive: 🔄 Inactive users included</td>
<td></td>
</tr>
<tr>
<td>Created date: 2022, Mar 4</td>
<td>User count: 0 🔄</td>
<td></td>
</tr>
<tr>
<td>Start date:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End date:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visibility: Private</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Click the **Start Campaign** button. Your campaign content will appear on the LMS pages of your selected user groups during the scheduled dates you have selected.
Stop Campaign

To end a Campaign, click the **Stop Campaign** button.
Track User Engagement

It is possible to track your users engagement with the campaign report.

Open the campaign, navigate to the Outcomes section and click the View More link.
View User Engagement

You will be able to see for example, how many users viewed the message, and how many clicked through the article links, providing you with useful insights into the effectiveness of the campaign.
How do I use Canvas Release campaign templates in the Impact Dashboard?

The Impact monthly release campaigns allow you to easily inform your users about any updates or changes Canvas has made, in a timely manner. This article shows you how to successfully use the campaign templates as a draft, customize it to fit your institution's needs, and activate these campaigns.

Open Tool Categories

In Global Navigation, click the Settings icon [1]. Then click the Tool Categories link [2].
Enable Just Released Category

Make sure that the Just Released category is visible. This ensures that all of the related articles are available to the appropriate users in your Impact support center.

Open Campaigns

In Global Navigation, click the Campaigns link [1]. Then click the Templates tab [2].
Open Template

Locate the release you are interested in using and click the **Use as Draft** button.

The campaign is now visible on your list of campaigns in the All Campaigns tab.

**Notes:**

- Depending on the contents of the release, there may be separate campaigns for students and instructors.
- If the content of the release is the same for both user groups, or only applicable to one set of users, only one campaign will be available.

This does not mean that your campaign is active yet. You need to customize and start the campaign.
Review Campaign Content

Now that you have the campaign template in the list of your campaigns, you can use it as a draft. Tailor all the help items and configurations to fit your institution's needs before starting the campaign.

Open the campaign and scroll down to see the Help Items section. Only the items that correspond with your LMS will be visible once the campaign starts.

<table>
<thead>
<tr>
<th>Title</th>
<th>Contexts</th>
<th>Author</th>
<th>Labels</th>
<th>Assigned to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monitor your child's subject progress</td>
<td></td>
<td>Andy Adamovich</td>
<td>Observer role: K-5 Elementary (campaign)</td>
<td></td>
</tr>
<tr>
<td>Explore your role as an observer</td>
<td></td>
<td>Andy Adamovich</td>
<td>Observer role: K-5 Elementary (campaign)</td>
<td></td>
</tr>
<tr>
<td>Assist your child with their school curriculum</td>
<td></td>
<td>Andy Adamovich</td>
<td>Observer role: K-5 Elementary (campaign)</td>
<td></td>
</tr>
<tr>
<td>Monitor your child's coursework</td>
<td></td>
<td>Andy Adamovich</td>
<td>Observer role: K-5 Elementary (campaign)</td>
<td></td>
</tr>
<tr>
<td>Track your child's performance</td>
<td></td>
<td>Andy Adamovich</td>
<td>Observer role: K-5 Elementary (campaign)</td>
<td></td>
</tr>
<tr>
<td>Contact your child's teachers</td>
<td></td>
<td>Andy Adamovich</td>
<td>Observer role: K-5 Elementary (campaign)</td>
<td></td>
</tr>
<tr>
<td>Compose your message</td>
<td></td>
<td>Andy Adamovich</td>
<td>Observer role: K-5 Elementary (campaign)</td>
<td></td>
</tr>
</tbody>
</table>
## Preview Content

To preview the help item contents, click the Preview icon.

### Assigned to

<table>
<thead>
<tr>
<th>Observer role: K-5 Elementary (campaign)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Observer role: K-5 Elementary (campaign)</td>
</tr>
<tr>
<td>Observer role: K-5 Elementary (campaign)</td>
</tr>
<tr>
<td>Observer role: K-5 Elementary (campaign)</td>
</tr>
<tr>
<td>Observer role: K-5 Elementary (campaign)</td>
</tr>
</tbody>
</table>
View the help item preview.

Hi {{user.first_name}},

This subject grades tab displays your child's progress in the current subject. You can access teacher's feedback to your child from here. Please note, if the teacher has hidden assignment scores, dashes will display instead of the grade.

If you have any concerns surrounding your child's academic performance, reach out to their teacher using the Inbox functionality.
Remove from Campaign

If any of the articles are not applicable to your institution, click the item name [1]. Then click the Remove from Campaign button [2].

Be sure to remove any links to this removed article from any of the included messages if needed.
Activate Campaign

Once you have added the campaign template you can make sure you are happy with the content before you activate or schedule it.

Once you’re happy with the content of the campaign, click the **Edit Properties** button.
Edit Campaign Details

![Edit Campaign - Details (Step 1 of 3)](image)

Name: Observer role: K-5 Elementary

Intention:

The purpose of this campaign is to engage observers in the activity of their respective student(s) in K-5 elementary education and inform them about grading, assignments, and communication with instructors.

In the dialog, click the Target Audience button.
Edit Target Audience

You can change the audience by picking any combination of roles [1], filters [2], user segments [3], or individual users [4] and click Outcomes button to continue [5].
Save Campaign

Click the **Save** button.

To learn more about Tool Adoption Statistics, please read [this article](#).
Schedule Campaign

Click the Schedule Campaign button.
Add Campaign Dates

Assign a start and end dates from the pop up modal and click the Ok button.
Share Campaign

To share the campaign, click the **Share Campaign** button.
Click the **Start Campaign** button. Your campaign content will appear on the LMS pages of your selected user groups during the scheduled dates you have selected.
End Campaign

To end the campaign before the scheduled date, click the **Stop Campaign** button.

**Hide Just Released Category**
While the campaign messages will not appear to your users anymore, the support articles will remain in the support center unless the Just Released tool category is hidden.

You can also manually remove the support articles.

**Track User Engagement**

It is possible to track your users engagement with the campaign report.

Open the campaign, navigate to the Outcomes section and click the View More link.

**View User Engagement**
You will be able to see for example, how many users viewed the message, and how many clicked through the article links, providing you with useful insights into the effectiveness of the campaign.
How do I create a campaign from a template in the Impact Dashboard?

You can import a campaign template and use it within your own environment. Templates use premade articles, messages, and reports offered by Impact's in-house education specialists.

Open Campaigns

In Global Navigation, click the Campaigns link [1] and then click the Templates tab [2].
Select Campaign Template

Review available campaign templates by examining the title and description [1].

To select a template, click the Use as Draft button [1].
View Campaign Details

On the Campaign Details page, review the campaign information, target audience, and outcomes [1]. To edit any campaign property, click the Edit Properties button [2].

In the Help Items section, you are able to preview all of the associated messages and articles [3], as well as add or remove campaign content [4]. Existing campaign content can be edited from the Message or Support page.

Once your campaign is ready, you can start it right away or schedule it for a later date [5].
How do I create a campaign from scratch in the Impact Dashboard?

You can create a new campaign, define the target audience, and set the success criteria from scratch.

Open Campaigns

In Global Navigation, click the Campaigns link.

Add Campaign

Click the Add Campaign button.
Add Campaign Details

Enter the name [1] and intention of the campaign [2].

To go to the next step, click the Target Audience button [3].
Add Target Audience

Define the Target audience for your campaign. You can choose any any combination of roles [1], filters [2], user groups [3], or individual users [4].

To go to the next step, click the Outcomes button [5]. To return to the details step, click the Details button [6].
Add Outcomes

In the Tools field [1], specify one or more monitor categories from any of the available Reporting Templates that measure the adoption resulting from your campaign.

You can set a percentage goal for the Adoption Level (usage of the selected tools) [2] and Content Engagement (article and/or message views) you are intending to achieve with the campaign [3].

Click the Save button [4].
On the Campaign Details page, you are able to review basic information as well as the campaign audience. Here, you are able to add the messages and/or articles you wish to publish to the campaign audience. You can then start the campaign immediately or schedule it for a later date. During or after the campaign you can return to the Campaign Details page to view the results.
How do I start, schedule, or end a campaign in the Impact Dashboard?

On the Campaign Details page, you can determine a campaign's start and end date.

Open Campaigns

In Global Navigation, click the Campaigns link [1]. In the All Campaigns tab [2], click the campaign you wish to launch [3].
Start Campaign

In the Campaign Details page, click the **Start Campaign** button to launch the campaign immediately. This sets the campaign start date to the current date and time and leaves the end date blank.
Stop Campaign

If you wish to end the campaign, click the **Stop Campaign** button, which populates the end date with the current date and time.
Schedule Campaign

To set a specific start and end date for the campaign, click the **Schedule Campaign** button.

**Enter Dates**

**Schedule**

1. **Schedule from (00:00):**
   - Thursday, 2021-12-02

2. **Schedule to (23:59):**

**Actions:**
- [ ] Edit Properties
- [ ] Share Campaign
- [ ] Restrict to active
- [ ] Schedule Campaign
- [ ] Start Campaign
- [ ] Stop Campaign
Enter the desired start date [1] and end date [2]. Then click the Ok button [3].

View Dates

The start date and end date are updated accordingly. The messages and articles assigned to the campaign are only shown to end-users once the campaign has started.
How do I use campaign help item icons in the Impact Dashboard?

When you start using Impact's campaigns, you might notice that there are some icons under your Help Items section. This article explains what those icons represent and what that means for your campaign.

View Help Item Icons

When you create campaigns, edit campaigns or use Impact's campaign templates, an overview of all the help items is included. This overview contains some icons that represent the type of Impact content that is included in your campaign.
<!-- Html Helpitem

- Hint
- Popup Message
- Systray Message
- File
- Link

View what each icon represents.

View Context Pins

<table>
<thead>
<tr>
<th>Help Items</th>
<th>Search</th>
<th>All authors</th>
<th>All modes</th>
<th>Show 25</th>
<th>Add Existing...</th>
<th>Create</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Title</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Keep Student Grades Together</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ensure Grading Accuracy</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Providing Feedback Effortlessly</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How do I set a default grade for an assignment in the Gradebook?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How do I create assignment columns for non-submission assignments in the Gradebook?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How do I use Chrome's speech recognition feature to leave a comment in SpeedGrader?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>How do I leave feedback comments for student submissions in SpeedGrader?</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SpeedGrader Overview: Instructors</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Save Time When Grading</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Contexts</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Author</strong></td>
<td>Andy Adamovich</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Labels</strong></td>
<td>Use the Gradebook features efficiently (campaign)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>Assigned to</strong></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Impact Guide Updated 2022-11-21
In the Contexts column, you can see green and red pins.

Below you can see what these pins mean:

<table>
<thead>
<tr>
<th>Pin</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Green Pin]</td>
<td>Normal Mode: When this pin is assigned under the context column it means that the content item is attached to a normal context. This means that the help item is visible to users, and while it will not be proactively shown, they will be able to find it in the support center.</td>
</tr>
<tr>
<td>![Red Pin]</td>
<td>Proactive Mode: When this pin is assigned under the context column it means that the content item is attached to a proactive context. These content items include hint, systray and pop-up messages. To learn more about message types, please read this article.</td>
</tr>
</tbody>
</table>

To learn more about how to add and edit campaign help items, please read this article.
How do I add events to a campaign in the Impact Dashboard?

You can add events to a campaign to gauge the effectiveness of your communication efforts.

Open Campaigns

In Global Navigation, click the Campaigns link [1].

In the All Campaigns tab [2], click the campaign you wish to analyze [3].
View Average Tool Adoption

Scroll down to the Outcomes section and click the View More link in the Average Tool Adoption section.

Add Event

On the Tool Adoption page, scroll down to the event overview and click the Add Event button.
Enter Event Details

Create Event

Title: Deploy Gradebook Message

Start date: Thursday, 2020-10-01

Information:

Launched a hint message to raise awareness about the potential of using advanced Gradebook features.

Enter a title, start date, and detailed information for the event. Click the Ok button.
View Event Details

The newly created event is now listed in the Event Overview.
Click the event to place a reference marker in the Tool Adoption chart allowing you to observe how the adoption level changes after the event took place.
You can add as many additional events as needed. Any intervention, communication effort, or date relevant to the campaign can be logged as an event.
How do I create a campaign from the Tool Adoption Report in the Impact Dashboard?

You can set up a targeted communication campaign based on tool usage statistics by using the Tool Adoption Report.

Open Insights

In Global Navigation, click Insights link [1]. Click the Tool Adoption tab [2].
View Tool Adoption

View the Tool Adoption Report.
### View Monitor Adoption

<table>
<thead>
<tr>
<th>Tool Group</th>
<th>Adoption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Assessment</td>
<td>79.2 %</td>
</tr>
<tr>
<td>Assignment</td>
<td>77.0 %</td>
</tr>
<tr>
<td>Graded Discussion</td>
<td>22.4 %</td>
</tr>
<tr>
<td>Peer review</td>
<td>3.9 %</td>
</tr>
<tr>
<td>Portfolio</td>
<td>3.2 %</td>
</tr>
<tr>
<td>Rubrics</td>
<td>68.7 %</td>
</tr>
<tr>
<td>Test</td>
<td>57.4 %</td>
</tr>
<tr>
<td>Collaboration and communication</td>
<td>82.0 %</td>
</tr>
<tr>
<td>Content</td>
<td>84.4 %</td>
</tr>
<tr>
<td>Course Management</td>
<td>74.7 %</td>
</tr>
</tbody>
</table>

Hover over the desired monitor category and click the arrows.
Click the Create campaign link [1]. You can choose to target users who have or have not been active within the selected monitor category [2].
View Campaign Details

In the dialog, enter the name and intention of your campaign and click the Target Audience button.
View Target Audience

Review the automatically selected target audience based on the selected monitor category and click the **Outcomes** button.
View Outcomes

Review the Tool Adoption statistics, which automatically includes the selected monitor category.

Click the Save button to be taken to your newly created campaign.
Add your messages and/or support content to the campaign and start your campaign or schedule a launch date.
How do I add a new content item to an existing Impact campaign from the Inline Editor?

You can add new content to an existing campaign using the Inline Editor within your learning management system.

Add Content with the Inline Editor

Follow the steps in How to create a message with the Inline Editor? or How to create a support article with the inline editor? to select a page or element and create your message or article content.

In Visibility Settings, select the relevant campaign in the “Who should see this?” section.

Click the Save button to finish creating the message or article and add it to the selected campaign.
How do I add or remove content within a campaign in the Impact Dashboard?

Campaigns allow you to deploy messages and articles over a specific period of time. You can add content to or remove content from a campaign.

View Campaigns

In Global Navigation, click the Campaigns link [1].

From the All Campaigns tab [2], select the desired campaign from the overview [3].
Add a Message or Article to a Campaign

On the Campaign Details page, scroll down to the Help Items section and click the Add Existing... link [1].

Use the dialog to search through all available content, select the desired message(s) or article(s), and click the Ok button [2].

Note: For more information about Help Item Icons, please read this article.
Remove a Message or Article from a Campaign

On the Campaign Details page, scroll down to the Help Items section and click to select the message or article you wish to remove from the campaign [1].

In the Basic Properties panel, click the Remove from campaign button [2].

After a message or article has been removed from a campaign, it will still be accessible in Messages > Manage Messages or Support > Manage Articles.
How do I add tool adoption statistics to a campaign in the Impact Dashboard?

You can add monitor categories from a Reporting Template to a campaign to track tool adoption.

View Campaigns

In Global Navigation, click the Campaigns link [1].

In the All Campaigns tab [2], click the campaign to which you wish to add tool adoption data [3].
Edit Properties

On the Campaign Details page, click the Edit Properties button.

<table>
<thead>
<tr>
<th>Basics</th>
<th>Target audience</th>
<th>Intention</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name:</td>
<td>Using Zoom to deliver lessons</td>
<td>Provide support to your instructors on how to utilize Zoom for maximum student engagement in a virtual learning environment. Click here to preview the content of this campaign.</td>
</tr>
<tr>
<td>Created by:</td>
<td>Andy Adamovich</td>
<td></td>
</tr>
<tr>
<td>Created date:</td>
<td>2021, Dec 2</td>
<td></td>
</tr>
<tr>
<td>Start date:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>End date:</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Visibility:</td>
<td>Private</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Edit Properties" /></td>
<td><img src="image" alt="Share Campaign" /></td>
<td><img src="image" alt="Restrict to active" /></td>
</tr>
</tbody>
</table>
Edit Campaign

In the dialog, click the Target Audience button to progress to the next step [1] and then click the Outcomes button [2].
Add Tools Categories

In the Tools field, add the desired monitor categories from any of the available Reporting Templates [1]. Click the Save button [2].
How do I edit the target audience of a campaign in the Impact Dashboard?

You access the campaign and edit the target audience assigned to it.

View Campaigns

In Global Navigation, click the Campaigns link [1].

In the All Campaigns tab [2], click on the campaign you for which you want to change the target audience [3].
Edit Properties

On the Campaign Details page, click the **Edit Properties** button.

Edit Campaign

Provide support to your instructors on how to utilize Zoom for maximum student engagement in a virtual learning environment. Click [here](#) to preview the content of this campaign.
In the dialog, click the **Target Audience** button.

**Edit Target Audience**

You can change the audience by picking any combination of roles [1], filters [2], user segments [3], or individual users [4] and click Outcomes button [5] to continue.
Save Campaign

Click the Outcomes button to proceed to the last step [1]. Then click the Save button [2].
How do I share a campaign with my team in the Impact Dashboard?

You can share an existing campaign with other users to view and edit in your Impact environment.

View Campaigns

In Global Navigation, click the Campaigns link [1].

In the All Campaigns tab [2], click the campaign to which you wish to share [3].
Share Campaign

On the Campaign Details page, click the Share Campaign button.
View Visibility

The visibility of the campaign is now set from private to public which means that anyone with access to this Impact instance can view and edit the campaign.

If you wish to make a public campaign private again, click the **Unshare Campaign** button.
How do I view campaign results in the Impact Dashboard?

You can access statistics related to how campaign messages and articles are being viewed and how tool usage among the campaign audience is impacted by your efforts.

Open Campaigns

In Global Navigation click the **Campaigns** link [1].

In the **All Campaigns** tab [2], click the campaign you wish to analyze [3].
View Outcomes

Scroll down to the Outcomes section.
Quick Insights

In the Campaign Engagement section, you are able to see which proportion of the campaign's messages and articles has been viewed by which proportion of the campaign audience. The overall engagement is broken down into message views (Initial Proactive Message Views) and support article views (Initial Knowledge Base Views).

Hover over the percentage for campaign engagement, proactive message views, or knowledge base views to see how the calculation was made (number of items viewed by each unique user/potential audience X number of items).
Example: There were 1219 users out of an audience of 3140 that viewed the one message assigned to the campaign. $\frac{1219}{3140} \times 1 = 0.39$.

The Average Tool Adoption shows which proportion of the campaign audience has been active in which proportion of the monitor categories assigned to the campaign. The adoption level for each individual monitor category is displayed underneath.

Hovering over the percentage for the average adoption or a monitor category will reveal the underlying calculation (number of monitor categories triggered by each unique user/potential audience X number of monitor categories).
Example: There were 1140 users out of an audience of 3140 that viewed the one monitor category assigned to the campaign. 
\[
\frac{1140}{3140} \times 1 = 0.36.
\]

The Goal indicator represents the percentage goal set in the campaign properties.

**Analyze Campaign Engagement**

In the Campaign Engagement section, click the view more link to view message and article statistics in more detail.
The Campaign Engagement page contains a chart and table showing how heavily the campaign audience is engaging with the assigned messages (in the Proactive Support section) and support articles (in the Knowledge Base section).

The charts in the Proactive Support and Knowledge Base sections represent the total unique users engaging with the messages or articles, the total number of views, up- and down-votes, and clicks on links within messages or articles.

The table underneath each chart has a row for each individual content item with columns for the number of users who viewed the item, total views, up- and down-votes, comments, and link clicks.
Upvotes for help item: TipTuesday: How to exempt an assignment in the Gradebook?

<table>
<thead>
<tr>
<th>Date</th>
<th>User</th>
<th>Voted</th>
<th>Reasons</th>
</tr>
</thead>
<tbody>
<tr>
<td>2018, Nov 27</td>
<td>George.Jegger</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Nov 27</td>
<td>Prince.Bonham</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Nov 27</td>
<td>Billy.Sumner</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Nov 27</td>
<td>Janis.Auerbach</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Nov 27</td>
<td>Jerry.Peart</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Nov 27</td>
<td>Dave.Taylor</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Nov 28</td>
<td>Billy.Burton</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Nov 29</td>
<td>Rod.King</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Dec 3</td>
<td>Zakk.Frusciante</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Dec 1</td>
<td>Graham.Hammett</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Nov 27</td>
<td>Roger.Iommi</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Dec 2</td>
<td>Angus.Curtis</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Nov 27</td>
<td>Roger.Reed</td>
<td>UP</td>
<td></td>
</tr>
<tr>
<td>2018, Nov 28</td>
<td>Ann.Daltrey</td>
<td>UP</td>
<td></td>
</tr>
</tbody>
</table>

Click the View button next to the number of votes and comments on an individual item to see when and by whom each vote and comment has been issued.
You can export the contents of the overview as a CSV-file by clicking the download icon.

Click the back button at the top of the Campaign Engagement page to return to the Campaign Details page.

**Analyze Tool Adoption**

In the Average Tool Adoption section, click the view more link to view message and article statistics in more detail.
The Campaign Tool Adoption page contains a chart and table presenting the campaign audience's activity level within the monitor categories assigned to the campaign. This allows you to measure the impact of the communication you perform through Impact messaging and support articles and other means on tool adoption.

The Tool Adoption section consists of an expandable list of all monitor categories that are assigned to the campaign with a consolidated adoption percentage for each monitor (sub-)category.
The adoption level is calculated based on the unique campaign users that have logged in to the learning application over the selected time period and how many of them have triggered at least one monitor that lives underneath each monitor category or one of its child categories.

In the above example 1830 campaign users have logged into the system over the selected period. Across the sub-categories that live under the Gradebook monitor category, 1141 unique users have triggered at least one of the underlying monitors. This means that the adoption level for Gradebook is 62.3%.

In the chart, the adoption level is calculated for each unit of time, based on the number of active users within that timespan.
Filter the Data

You can adjust the visualization in both the Campaign Engagement and Tool Adoption sections using the filters and presentation in the global filter bar.

Presentation
This setting determines how the chart data is scaled and whether the adoption level, views, votes, or clicks are expressed as a percentage of the campaign audience or an absolute number.

Fixed % (default) presents the percentage of users assigned to the campaign who used the monitor category (Tool Adoption page) or viewed, voted on, and clicked any of the campaign items (Campaign Engagement page) with the Y-axis of the chart ranging from 0% to 100%. Scaled % shows the same metric as Fixed %, but narrows the Y-axis of the chart in order to focus on the statistics shown.

The Actual numbers option changes the metric shown in the chart from a percentage of campaign users to an absolute number of unique users who used the monitor category (Tool Adoption page) or the absolute number of views, votes, and link clicks on the campaign items (Campaign Engagement page).

**Graph Type**

![Graph Type](image)

This option allows you to toggle between two chart presentation styles.

With Trend Line enabled, the charts show separate adoption levels (Tool Adoption page), views, votes, and clicks (Campaign Engagement page) for each unit of time. When set to the Cumulative Graph Type, the chart presents the growth curve from the first unit of time to the last unit of time. Each point in the graph shows the total adoption, views, votes, and clicks from the start date of the chart until the date associated with that point.

**Start Date and End Date**

<table>
<thead>
<tr>
<th>Start Date:</th>
<th>End Date:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wednesday, 2020-07-22</td>
<td>Thursday, 2020-10-22</td>
</tr>
</tbody>
</table>
These filters allow you to filter the adoption data (Tool Adoption page) views, votes, and clicks (Campaign Engagement page) based on a specific date range. By default, the date range is set to a Start Date of three months before the current date or one month before the earliest campaign event and an End Date of today. The selected date range also determines which unit of time is presented on the X-axis of the chart.

Learn more about campaign events in How do I add events to a campaign?
How do I use the Impact integration in Canvas Studio?

Impact integrates fully with Canvas Studio. Users who have access to both Canvas Studio and Impact can access the Impact integration in Canvas Studio.

The Impact integration allows users to customize in-app messaging, measure Canvas Studio adoption, and support Canvas Studio users.

Notes:
- By default, the Canvas Studio Impact integration is enabled for accounts that have access to both Canvas Studio and Impact.
- You can view additional Canvas Studio resources such as campaigns and adoption reports in the Impact Dashboard.

Open Inline Editor

To open the Inline Editor in Canvas Studio, click the Inline Editor icon.
View Inline Editor Options

To launch the Inline Editor, click the Inline Editor icon [1].

To view the Content Library, click the Content Library icon [2].

To launch the Impact Dashboard, click the Impact Dashboard icon [3].

To view and manage Walkthroughs, click the Walkthroughs icon [4].

To close the Inline Editor, click the Close icon [5].

Note: You can select a Canvas Studio context using the Inline Editor. To select a Canvas Studio context displaying within Canvas, you must first select the Studio frame.
Open Support Center

To view the Support Center for Canvas Studio, click the Support button.
In the Support Center, suggested help articles and resources display for Canvas Studio.
How do I select a Canvas Studio frame in Canvas using the Impact Inline Editor?

When viewing Canvas Studio within Canvas, users must select the frame in which they need to use the Inline Editor.

Select Inline Editor Frame

When viewing Canvas Studio in Canvas, Canvas Studio displays in an iframe.

To select a context in the Canvas Studio iframe using the Inline Editor, click the Select a Frame dropdown [1]. Then click the Third Party Tool Frame option [2].
How do I view the Canvas Studio tool adoption report in the Impact Dashboard?

The Tool Adoption Report is used to analyze usage data across your entire institution at a glance. You can view the tool adoption report to view Canvas Studio usage.

Open Insights

In Global Navigation, click the Insights link.

Open Tool Adoption Report

Click the Tool Adoption link.
Filter Tool Adoption Data

The data presented in the Tool Adoption Report can be filtered using the global filter bar at the top of the page. In addition, the way in which the data is visualized can be controlled using the presentation options in the filter bar.

To view data for Canvas Studio usage, click the Reporting Template drop-down menu and select the Integrated Tools option [1].

To filter the adoption data by role category, click the Role Category drop-down menu [2].

To filter by user role, click the Role drop-down menu [3].

To select how the chart data is scaled and whether the adoption level for each monitor category is expressed in percentages or actual numbers, click the Presentation drop-down menu [4].

To toggle between Trend Line and Cumulative chart presentation, click the Graph Type drop-down menu [5].

To modify the Start Date [6] or End Date [7], click the Calendar icon. By default, the date range is set to a Start Date of three months before the current date and an End Date of today.

To apply filters, click the Apply button [8].
View Canvas Studio Adoption Data

The Integrated Tools Adoption Report displays [1].

To view the Canvas Studio adoption report, click the Studio option [2].
### View Data by Reporting Template

<table>
<thead>
<tr>
<th>Tool Group</th>
<th>Adoption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Integrated Tools</td>
<td></td>
</tr>
<tr>
<td>Studio</td>
<td>20.8 %</td>
</tr>
<tr>
<td>Embedded Studio Media</td>
<td>4.2 %</td>
</tr>
<tr>
<td>Individual Studio Media</td>
<td>8.3 %</td>
</tr>
<tr>
<td>Add media</td>
<td>0.0 %</td>
</tr>
<tr>
<td>Delete media</td>
<td>0.0 %</td>
</tr>
<tr>
<td>Media captions</td>
<td>0.0 %</td>
</tr>
<tr>
<td><strong>Media comments</strong></td>
<td><strong>8.3 %</strong></td>
</tr>
<tr>
<td>Add comment</td>
<td>0.0 %</td>
</tr>
<tr>
<td>View comments</td>
<td>8.3 %</td>
</tr>
<tr>
<td>Media details</td>
<td>4.2 %</td>
</tr>
</tbody>
</table>

To view data by a specific Canvas Studio reporting template, click the reporting template name.
Contexts
What is an Impact Context?

Contexts are a set of placement and positioning rules used to recognize and remember a specific area you want to track or add a message to.

View Context Settings

Contexts settings can be customized to:

- Show message on every page where this element appears
- Show message only on this specific page
- Show when hovering over this element
- Show when clicking on this element

If you connect a message to a context that only a specific user with specific permissions can view (for example an instructor in your LMS), then only those users with access to that page/element can see the message.
How do I change the behavior of a context in the Impact Dashboard?

Contexts in Impact determine how messages and support articles are displayed in your learning environment. The way your context is triggered can be either on a page load or click/hover depending on your need. This trigger determines how your context behaves. This article explains how to change the behavior of a context.

Open Contexts

In Global Navigation, click the Settings icon [1] and then click the Contexts link [2].
Open Context

### Context Overview
Contexts manage the positioning rules of messages, help articles and activity monitors.

<table>
<thead>
<tr>
<th>Name</th>
<th>Messages</th>
<th>Help Articles</th>
<th>Monitors</th>
<th>Created by</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose home page button</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>3</td>
</tr>
<tr>
<td>Course home Page</td>
<td>-</td>
<td>-</td>
<td>4</td>
<td>Out of the box</td>
</tr>
<tr>
<td>Course Home page</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>3</td>
</tr>
<tr>
<td>Course home page: publish course button (Courses Home)</td>
<td>-</td>
<td>-</td>
<td>4</td>
<td>Out of the box</td>
</tr>
<tr>
<td>Course home page: view course notifications button</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
<tr>
<td>ePortfolio home page: share ePortfolio link (Home Page Portfolio)</td>
<td>-</td>
<td>-</td>
<td>4</td>
<td>Out of the box</td>
</tr>
<tr>
<td>ePortfolios home page: allow comments checkbox (Edit a portfolio page)</td>
<td>-</td>
<td>-</td>
<td>4</td>
<td>Out of the box</td>
</tr>
</tbody>
</table>

Click the name of a context.
Edit Context

Click the **Edit** button.
Change Behavior

To manage the behavior of your context, click the Trigger drop-down menu [1].

You can choose between on click/hover and on page load. To learn more, read this article.

To save changes made to your context, click the Save button [2].
How do I connect a monitor, article, or message to a context in the Impact Dashboard?

With Impact, you can create monitors, articles, and messages and connect them to contexts within your LMS. You can also connect a message or article to a context when creating or editing one. To learn more about how to connect a message to a context please read this article. To learn more about how to connect an article to a context, please read this article.

Open Contexts

In Global Navigation, click the Settings icon [1] and then click the Contexts link [2].
### Open Context

#### Context Overview

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<td>Choose home page button</td>
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<td>-</td>
<td>3</td>
</tr>
<tr>
<td>Course home page</td>
<td>-</td>
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<td>-</td>
<td>Out of the box</td>
</tr>
<tr>
<td>Course Home page</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>3</td>
</tr>
<tr>
<td>Course home page: publish course button (Courses Home)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
<tr>
<td>Course home page: view course notifications button</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
<tr>
<td>ePortfolio home page: share ePortfolio link (Home/ePortfolio)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
<tr>
<td>ePortfolios home page: allow comments checkbox (Edit a portfolio page)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
</tbody>
</table>

Click the name of a context.
Edit Context

Click the Edit button.

**Note:** Local contexts are able to be edited. You will not be able to edit Out of the Box contexts.
Connect Existing Monitor

Click the Connect Existing Monitor button.
Locate the monitor(s) you want to connect. To connect monitors, click the checkbox next to the name [1].

Click the Connect Monitors button [2].

**Connect Support Articles**

<table>
<thead>
<tr>
<th>Title</th>
<th>Assigned to</th>
<th>Created by</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Starting a class</td>
<td>Using Zoom to deliver lessons (campaign)</td>
<td>Andy Adamovich</td>
<td>Disconnect</td>
</tr>
</tbody>
</table>

Click the Connect Existing Article button.

---

Impact Guide Updated 2022-11-21
Locate the article(s) you want to connect. To connect articles, click the checkbox next to the name [1].

Click the Connect Articles button [2].

Connect Messages

<table>
<thead>
<tr>
<th>Title</th>
<th>Type</th>
<th>Assigned to</th>
<th>Created by</th>
<th>Edit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Need help with Canvas?</td>
<td>Systray</td>
<td>ALL (user category)</td>
<td>Andy Adamovich</td>
<td>Disconnect</td>
</tr>
</tbody>
</table>

Click the Connect Existing Message button.
Locate the message(s) you want to connect. To connect messages, click the checkbox next to the name [1].

Click the **Connect Messages** button [2].

**Connect Support Center Category**

<table>
<thead>
<tr>
<th>Category Name</th>
<th>Assigned to</th>
<th>Edit</th>
</tr>
</thead>
</table>

Click the **Connect Existing Category** button.
To connect a category, click the name of the category [1].

Click the **Link Category** button [2].
How do I view all existing contexts in the Impact Dashboard?

Contexts in Impact determine how messages and support articles are displayed in your learning environment. They also serve as the backbone of how data is tracked with Impact activity monitors.

Open Contexts

In Global Navigation, click the Settings icon [1] and then click the Contexts link [2].
# View Contexts

## Settings

### Context Overview

Contexts manage the positioning rules of messages, help articles and activity monitors.

<table>
<thead>
<tr>
<th>Name</th>
<th>Messages</th>
<th>Help Articles</th>
<th>Monitors</th>
<th>Created by</th>
</tr>
</thead>
<tbody>
<tr>
<td>+ Add collaboration button</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
<tr>
<td>+ Add rubric button</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
<tr>
<td>+ Discussion button</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>3</td>
</tr>
<tr>
<td>+ Discussion button</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
<tr>
<td>+ Outcome button</td>
<td>-</td>
<td>-</td>
<td>🔫</td>
<td>Out of the box</td>
</tr>
<tr>
<td>+ page button</td>
<td>-</td>
<td>-</td>
<td>🔫</td>
<td>Out of the box</td>
</tr>
<tr>
<td>Account files folder page</td>
<td>-</td>
<td>-</td>
<td>🔫</td>
<td>Out of the box</td>
</tr>
<tr>
<td>Account files page (Upload File)</td>
<td>-</td>
<td>-</td>
<td>🔫</td>
<td>Out of the box</td>
</tr>
</tbody>
</table>

View all your contexts.

Hover over items in the table to see which monitors, messages, support articles and screenshots are associated with each context.
View Fields

To select the fields to display, click the Fields drop-down menu [1]. You can enable and disable different fields to view [2].
View Filters

To add filters, click the Filters drop-down menu [1] and select the filters you want to use [2].
How do I view which monitors, articles, and messages are connected to a context in the Impact Dashboard?

You can view which monitors, articles and messages are connected to a context.

Open Contexts

In Global Navigation, click the Settings icon [1] and then click the Contexts link [2].
Open Context

<table>
<thead>
<tr>
<th>Name</th>
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<td>-</td>
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<td></td>
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<td>Out of the box</td>
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<tr>
<td>Course Home page</td>
<td></td>
<td></td>
<td></td>
<td>3</td>
</tr>
<tr>
<td>Course home page: publish course button</td>
<td>-</td>
<td>-</td>
<td>4</td>
<td>Out of the box</td>
</tr>
<tr>
<td>Course home page: view course</td>
<td></td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
<tr>
<td>ePortfolio home page: share ePortfolio</td>
<td>-</td>
<td>-</td>
<td>4</td>
<td>Out of the box</td>
</tr>
<tr>
<td>ePortfolios home page: allow comments</td>
<td>-</td>
<td>-</td>
<td>4</td>
<td>Out of the box</td>
</tr>
</tbody>
</table>

Click the name of a context.
View Context

For more information about how to manage your context view please read this article.

You can now view which messages, articles, and monitors are connected to this context.

To change the configurations of your selected context, you can click the Edit button.

For more information about how to connect a monitor, message or article to a context please read this article.
How do I view the trigger conditions of an existing context in the Impact Dashboard?

Your context is triggered either on a page load or click/hover depending on your need. This trigger determines how your context behaves. This article explains how you can see the trigger conditions of an existing context.

Open Contexts

In Global Navigation, click the **Settings** icon [1] and then click the **Contexts** link [2].
Open Context

### Context Overview

Contexts manage the positioning rules of messages, help articles and activity monitors.

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<tr>
<td>Course home page</td>
<td></td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
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<tr>
<td>Course Home page</td>
<td></td>
<td>-</td>
<td>-</td>
<td>3</td>
</tr>
<tr>
<td>Course home page: publish course button (Courses Home)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
<tr>
<td>Course home page: view course notifications button</td>
<td></td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
<tr>
<td>ePortfolio home page: share ePortfolio link (HomePortfolio)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
<tr>
<td>ePortfolios home page: allow comments checkbox (Edit a portfolio page)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>Out of the box</td>
</tr>
</tbody>
</table>

Click the name of a context.
Enable Behavior Filter

Enable the **Behavior** filter.
View Behavior Conditions

<table>
<thead>
<tr>
<th>Context Overview</th>
<th></th>
<th></th>
<th></th>
<th></th>
<th>Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Messages</td>
<td>Help Articles</td>
<td>Monitors</td>
<td>Created by</td>
<td>Triggered on click/hover</td>
</tr>
<tr>
<td>Home Page</td>
<td></td>
<td>-</td>
<td>-</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Home page</td>
<td></td>
<td>-</td>
<td>-</td>
<td>3</td>
<td></td>
</tr>
<tr>
<td>Home page publish course (Courses Home)</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

View the trigger conditions of each context.
What do the conditions of a context mean in the Impact Dashboard?

Conditions are rules for which element/page will trigger the context.

Open Contexts

In Global Navigation, click the **Settings** icon [1] and then click the **Contexts** link [2].
Open Context

Click the name of a context.
Open Conditions

To display all of the conditions that are associated with your context, click the *Conditions* link.
View Conditions

These conditions are rules for which element/page will trigger the context.
When the Conditions filter is enabled, you can view conditions in the Context Overview.

Hover over the column to see the detailed list of conditions that are included in the context.

### Context Conditions

This chart can help you understand what your conditions mean to get a deep look into how your context is operating. Your conditions can include any of the following:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Explanation</th>
<th>Examples</th>
</tr>
</thead>
<tbody>
<tr>
<td>Matches css selector</td>
<td>The selected element fulfills the criteria determined in the css selector</td>
<td>.someclass</td>
</tr>
<tr>
<td></td>
<td></td>
<td>#someid</td>
</tr>
<tr>
<td></td>
<td></td>
<td>input[&quot;type&quot;=&quot;button&quot;]</td>
</tr>
<tr>
<td>Tag name matches</td>
<td>The element has a specific tag</td>
<td>A</td>
</tr>
<tr>
<td></td>
<td></td>
<td>P</td>
</tr>
<tr>
<td></td>
<td></td>
<td>INPUT</td>
</tr>
<tr>
<td></td>
<td></td>
<td>DIV</td>
</tr>
<tr>
<td>Css selector</td>
<td>There is no element on the page</td>
<td>.someclass</td>
</tr>
<tr>
<td>Description</td>
<td>Example</td>
<td></td>
</tr>
<tr>
<td>--------------------------------------------------</td>
<td>-------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Not matching anything on page</td>
<td>#someid input[&quot;type&quot;=&quot;button&quot;]</td>
<td></td>
</tr>
<tr>
<td>Css selector matching something on page</td>
<td>.someclass #someid input[&quot;type&quot;=&quot;button&quot;]</td>
<td></td>
</tr>
<tr>
<td>Parent matches css selector</td>
<td>.someclass #someid input[&quot;type&quot;=&quot;button&quot;]</td>
<td></td>
</tr>
<tr>
<td>Child matches css selector</td>
<td>.someclass #someid input[&quot;type&quot;=&quot;button&quot;]</td>
<td></td>
</tr>
<tr>
<td>Text contains</td>
<td>&quot;Create&quot;</td>
<td></td>
</tr>
<tr>
<td>Text equals</td>
<td>&quot;Create Assignment&quot;</td>
<td></td>
</tr>
<tr>
<td>Url contains</td>
<td>/app/content/</td>
<td></td>
</tr>
<tr>
<td>Url do not contain</td>
<td>/app/content/</td>
<td></td>
</tr>
<tr>
<td>Path matches</td>
<td>^/webapps/blackboard/content/contentWrapper.jsp$</td>
<td></td>
</tr>
<tr>
<td>UEF</td>
<td>eesyState.analyticsId=recentActivity.base.navigation.handleBase.link</td>
<td></td>
</tr>
</tbody>
</table>
How can I use Out of the Box contexts in my dashboard?

Out of the Box contexts are visible to you and can be used from your Impact Dashboard. Out of the Box contexts can place messages in your Learning Management System, customize your Support Center Categories, and in your Inline Editor.

There are a few different workflows that you can use inside the dashboard to add contexts to items.

**Note:** Out of the Box contexts are created using global recognition rules and will appear across all courses. To generate a more specific context, you need to create a local context via the Inline Editor.

---

**Context Overview**

To navigate to Context Overview page, click the **Settings** icon [1] and then click the **Contexts** link [2].
From the Context Overview, it is easy to see which contexts are Out of the Box and which are locally created contexts, using the "Created by" column of the overview table.

To add a specific Out of the Box context to a message, click on the context and on the Create Message button next to the item you would like to add. This context will automatically be added to the message or step.
Messages

You can add Out of the Box contexts within a message using the Connect to Context drop-down menu. Both Out of the Box and your locally created contexts will be listed here.
Support Center Category

Out of the Box context visibility also means you can customize the contextualization of your Support Center easily. Within the Edit Category section of the Support Center, all Out of the Box and local context will be listed in the Connected Context drop-down menu, with the currently attached contexts at the top of the list and checked.
You can have multiple contexts connected to the same Support Category resulting in a category that will open on different pages.

It is not recommended to have more than one context attached to Support Center Category as this can cause unwanted conflict within your Learning Management System.

**Inline Editor**

Contexts are generated in the dashboard when an action, such as adding a monitor or message is taken, on either the page or element level context.
If you have implemented no restrictions to the template from the Inline Editor, such as locking to a specific page, the Out of the Box context will be reused and the message will be added to the existing context in the dashboard.
After implementing no restrictions to the template from the Inline Editor, you can see the message added to the existing context in the Context Overview.
If you implement restrictions, the recognition rules will no longer match that of the Out of the Box context and a new local context will be generated with the new recognition rules.

Note: The new recognition rule is locked to course 5 only.
Your new local context will adopt the name of the template presented in the Inline Editor. We highly recommend that you change the name of the new local context in your dashboard to avoid confusion in the future. If the name of the new local context isn't changed, it will match the name of the pre-defined Out of the Box context and lead to confusion when attempting to implement any of the other workflows.
Course Reports LTI
How do I configure and install the Impact Course Reports LTI in Canvas?

You can configure and install the Impact Course Reports LTI in Canvas.

**Notes:**
- You need to know your Canvas sub-domain. If you do not know your Canvas sub-domain, contact the Impact Support Team.
- You need to create a developer key for your account.
- Take a note of the application key and secret. The key and secret need to be provided to the Impact Support team and added to the Impact server before the Course Reports LTI will work in Canvas.

Create Developer Key

Follow the instructions to create and add a developer key for your account.

Add Developer Key Information
In the Key Settings page, enter the following information:

- **Key Name [1]**: Impact Course Reports
- **Owner Email [2]**: optional
- **Redirect URIs [3]**: not in use
- **Redirect URI (Legacy) [4]**: https://[yourinstitution].eesysoft.com/rest/lti/course-report/authorization-complete
- **Vendor Code (LTI 2) [5]**: not in use
- **Icon URL [6]**: optional https://[yourinstitution].eesysoft.com/resources/images/logo-eesysoft.png
- **Notes [7]**: optional
- **Test Cluster Only [8]**: leave unchecked

To enforce scopes, click the **Enforce Scopes** toggle button [9]. Locate and click the OAuth 2 checkbox [10]. Ensure the /auth/userinfo checkbox is selected [11].

Click the **Save** button [12].

**View Developer Key and Secret**

Take a note of the application key and secret. The key and secret need to be provided to the Impact Support team and added to the Impact server before the Course Report LTI will work in Canvas.

View and copy the application key [1]. To view and copy the application secret, click the **Show Key** button [2].

Ensure that the developer key state is turned ON [3].
Install Course Reports LTI

Open Account Settings

In Account Navigation, click the Settings link.

Open Apps

Click the Apps tab.

Open View App Configurations
Click the **View App Configurations** button.

**Add App**

Click the **Add App** button.

**Enter App Information**

Enter the following information:

- **Configuration Type** [1]: By URL
- **Name** [2]: Impact Course Reports
- **Consumer Key** [3]: Application key
- **Shared Secret** [4]: Application secret
- **Config URL** [5]: https://[yourinstitution].eesysoft.com/rest/lti/course-report/config

Example: https://example.com/config.xml

[Submit]
Click the Submit button [6].
How do I configure and install the Impact Course Reports LTI in Blackboard?

You can configure and install the Impact Course Reports LTI in Blackboard.

Notes:

- You need to know your provider domain.
- In the Admin Panel, in the Customize User Information section, ensure the Username checkbox is selected.
- To install the Impact Course Reports LTI in Blackboard, please contact Impact Support to request a key and secret.

Configure Course Reports LTI in Blackboard

Open Admin

In Blackboard, click the System Admin link.

Open Customize User Information

In the Users section [1], click the Customize User Information link [2].
Select Display Username Checkbox

<table>
<thead>
<tr>
<th>Field</th>
<th>Display</th>
<th>Editable</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student ID</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Username</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Password</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Ensure the Username checkbox is selected.

Open Admin

In Blackboard, click the System Admin link.
Open LTI Tool Providers

In the Integrations section [1], click the LTI Tool Providers link [2].

Open Register LTI 1.1 Provider

Click the Register LTI 1.1 Provider link.
Register Provider Domain

In the Provider Domain field [1], enter your Provider Domain URL, if not already added (e.g. [yourinstitution].eesysoft.com). In the Default Configuration section, ensure the Set separately for each link radio button is selected [2].

Save LTI Provider

Click the Submit button.
Manage Placements

Locate the LTI Provider [1] and click the Manage Placements link [2].

Create Placement

Click the Create Placement link.
Enter Placement Information

For the placement you'll need the following information:

- **Label [1] and Handle [2]:** Add a name (e.g. impact-course-reports)
- **Availability [3]:** Yes
- **Type [4]:** Course tool
- **Tool Provider URL [5]:** your specific provider’s url (e.g. https://[yourinstitution].eesysoft.com/rest/lti/course-report/launch)
- **Tool Provider Key and Secret [6]:** Submit an Impact support ticket to request these credentials
Install Course Reports LTI in Blackboard

Open REST API Integrations

In the Admin Panel, in the Integrations section, click the REST API Integrations link.

Create Integration

Click the Create Integration link.
Enter Integration Information

Enter the following information:

- **Application ID** [1]: 78ab1b55-6547-4e2f-a88d-06e2541c512b
- **Learn User** [2]: this should be a user with a minimum set of privileges.
- **End User Access** [3]: Yes
- **Authorized To Act As User** [4]: Yes

Click the **Submit** button [5].

**Note:** If you get an error when launching the LTI tool, as an admin, navigate to Course Settings, click Course Tools, and turn tool LTI ON.
How do I use the Impact Course Reports LTI?

The Impact Course Reports tool allows instructors to view activity and tool adoption reports for specific courses in real-time. When installed, the Impact Course Reports tool is accessible via Course Navigation.

To install the Impact Course Reports LTI in Canvas, please provide a key and secret for your Canvas account to Impact Support. To install the Impact Course Reports LTI in Blackboard, please contact Impact Support to request a key and secret.

View Course Activity

<table>
<thead>
<tr>
<th>Key Figures</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrolled students</td>
<td>4</td>
</tr>
<tr>
<td>Student Participation Level</td>
<td>0%</td>
</tr>
<tr>
<td>Days since last student access</td>
<td>1</td>
</tr>
<tr>
<td>Days since last instructor access</td>
<td>1</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Instructor</th>
<th>Course Role</th>
<th>Last Access</th>
</tr>
</thead>
<tbody>
<tr>
<td>Daniel Jatto</td>
<td>TeacherEnrollment</td>
<td>2022-03-07 17:11:13 UTC</td>
</tr>
<tr>
<td>Doug Roberts</td>
<td>TeacherEnrollment</td>
<td>2022-03-07 17:20:44 UTC</td>
</tr>
</tbody>
</table>

In the Course Activity section, you can view key figures for your course such as the number of enrolled students, student participation percentage, the number of days since the course was accessed by an instructor or student, and instructor(s) most recent course access date(s).
View Tool Adoption

In the Tool Adoption section, you can generate a report to view adoption data. You can specify information and formatting in which data is displayed by applying report settings such as the reporting template, role category, presentation, graph type, and start and end dates.

In the Tool Group table, you can view tool adoption data and an accompanying graph for a specific tool group or tool.

**Note:** For more information on Tool Adoption filters, visit [What are the Course Activity Reports Tool Adoption filters?](#)
View User Activity

In the User Activity section, you can view data by course user such as the user name, user ID, last access date, and total clicks in tool groups. User activity data can be downloaded as a CSV.
### Tool Adoption Filters

**Insights**

**Tool Adoption**

<table>
<thead>
<tr>
<th>Reporting Template</th>
<th>Role Category</th>
<th>Presentation</th>
<th>Graph Type</th>
<th>Start Date</th>
<th>End Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Campaign monitors</td>
<td>Instructors</td>
<td>Fixed %</td>
<td>Trend Line</td>
<td>Thursday, 2022-06-02</td>
<td>Friday, 2022-09-02</td>
</tr>
</tbody>
</table>

The data presented in the Course Activity Report can be filtered using the global filter bar at the top of the page. In addition, the way in which the data is visualized can be controlled using the presentation options and the graph type options in the filter bar.

To determine the structure shown in the chart and monitor category breakdown, click the **Reporting Template** drop-down menu and select the template you want to use [1].

To limit the adoption data to users who belong to the certain role category, click the **Role Category** drop-down menu [2].

To determine how the chart data is scaled and whether the adoption level for each monitor category is expressed in percentages or actual numbers, click the **Presentation** drop-down menu [3].

To toggle between Trend Line and Cumulative chart presentation, click the **Graph Type** drop-down menu [4].

To modify the **Start Date** [5] or **End Date** [6], click the Calendar icon. By default, the date range is set to a Start Date of three months before the current date and an End Date of today.
Presentation Filter

There are three Presentation styles to define how the calculation result is presented:

Fixed %

Fixed % is the default presentation style which shows the calculation as a percentage of the total active users for the selected time period.
Scaled %

Scaled % is the presentation style only has an effect on the presentation of the graph. The data shown is the same as the Fixed % but the presentation will zoom into the graph taking usage peaks into consideration.
Actual Numbers is the presentation style that provides the data as the actual number of users to see a precise value for level of adoption in each Tool Group and Sub-Segment. In this graph, the y-axis will adjust to cover the maximum number of unique users active in a particular week (or x-axis segment).

In the tool adoption report, the denominator will be the total number of unique users who have logged into the LMS over the selected time period and the numerator will be the number of those unique users who used that tool.

Graph Type

There are two Graph Types to display:
Trend Line

When Trend Line is enabled, the chart shows the number of unique users who trigger the tool during each unit of time set.
Cumulative Graph

The Cumulative Graph gives you an idea of how many users in total have used the tool over time. If a user who has already triggered the tool does so again, the line will not display a new trigger.
Inline Editor
What is the Impact Inline Editor?

The Impact Inline Editor is an in-application content management tool. To ensure optimal control over the content that your learning application users interact with, the Inline Editor offers the possibility to create messages, support articles, and monitors from within the learning application. Using the tool's live preview feature, you can easily see how your messages and articles look in terms of content, size, and placement before publishing them.

View Inline Editor

You can also edit a previously created item to update its contents, change visibility and presentation settings, and change where the item is placed within the learning application.

The Inline Editor is only available to users who have their learning application user connected to their Impact account, meaning no other learning application users can create or edit content.
How do I activate the Impact Inline Editor?

You can use the Impact Inline Editor to create monitors, messages, and support articles from within your learning application.

Open Impact Dashboard

In your Impact dashboard, click the **Global Settings** icon [1] and then click the **Connect your LMS User** button [2].
Connect Your LMS User

Find your LMS user by searching for your username, email address, or name [1].

Click your LMS user account [2] and click the Save button [3].
View Inline Editor

After signing in to your LMS with the connected user account, click the Impact icon.

Add Content with Inline Editor

To open the Inline Editor, click the Add icon.
How do I activate the Impact Inline Editor within the Blackboard Learn Ultra Experience?

You can create monitors, messages and articles directly in the Blackboard Learn Ultra Experience. You need to install and use the Impact Expert Tool for Google Chrome to launch the Inline Editor in Blackboard Learn Ultra.

Note: You must enable third-party cookies to use this feature.

Install the Impact Expert Tool for Google Chrome

Make sure you have Google Chrome installed on your computer.

In Chrome, locate the Impact Expert Tool in the Chrome Web Store.

Click the Add to Chrome button.
Add Extension

Add "Impact Expert Tool"?

It can:
Read and change your data on all eesysoft.com sites

Click the **Add extension** button.

Verify Extension

Impact Expert Tool has been added to Chrome

This icon will be visible when the extension can act on the current page.

Manage your extensions by clicking Extensions in the Window menu.

The Impact Expert Tool is now available in the Extensions section.
Launch the Inline Editor

Using Google Chrome, log in to your Blackboard Learn Ultra environment.

To activate the Export Tool extension, click the Impact icon.

**Note:** Depending on your Chrome browser you may need to open the Extension menu and then click the Impact Expert Tool extension.
Log in to Impact

Email:

Password:

Login

Log in using your email address and Impact password.
Connect to Impact Instance

Click the Impact instance which is connected to the Blackboard Learn Ultra environment.

This means with Ultra you no longer connect your expert user and forget about it. With every use of the inline editor in Ultra you connect an LMS to an Impact system.

**Note:** Using the Chrome plugin you can create contexts on an Impact system different from the one connected to that LMS. You can connect the plugin to any instance you have access to, regardless of the LMS you are logged into. Be careful which instance you are logged into, especially when defining any contexts.
Open Inline Editor

After the page has reloaded, click the Impact icon [1] and then click the Add icon [2].
How do I create a monitor with the Impact Inline Editor?

You can use the Inline Editor to create a custom monitor and attach it to a page or element in your learning application.

Open Inline Editor

Navigate to the area of the learning application where you wish to place the monitor.

To open the Inline Editor, click the Impact icon [1] and then click the Add icon [2].

Select Element

To select the element to which to attach the monitor, click the element [1] or click the Select Page button [2] on the current page.
Select LTI Element

If using an Impact-supported LTI, you can select the frame in which you want to use the Inline Editor.

To select a frame for an Impact-supported LTI, click the Select a Frame dropdown menu [1], then click the Third Party Tool Frame option [2].

Select Monitor

In the side panel, click the Monitor button.
Add Monitor Details

Enter a name and description for your monitor [1].

If you are attaching the monitor to an element, determine the triggering behavior (when the user sees the element or when the user interacts with the element) and whether the monitor should trigger on every page where the element occurs or only on the current page [2].

Review the automatically rendered screenshot of the page/element. Upload a custom screenshot if needed [3].

Click the Create Monitor button [4].

You can now view and organize your monitor in the Monitor Overview.

If you cannot select the element you wish to monitor, please read How to define a custom element or page with the inline editor?
How do I create a message with the Impact Inline Editor?

You can use the Inline Editor to create and deploy a message within your learning management system.

Open Inline Editor

Navigate to the area of the learning application where you intend to place the message.

To open the Inline Editor, click the Impact icon [1] and then click the Add icon [2].

Select Element

To select the element to which to attach the monitor, click the element [1] or click the Select Page button [2] on the current page.
Select LTI Element

If using an Impact-supported LTI, you can select the frame in which you want to use the Inline Editor.

To select a frame for an Impact-supported LTI, click the Select a Frame dropdown menu [1], then click the Third Party Tool Frame option [2].

Add Message

In the side panel, click the Hint button.
Create Message

Enter a title and description for the hint [1] and write the message body using the rich content editor [2].

Determine the size of the message using the width and height fields [3].

Click the Arrow icon [4].
Set Visibility Settings

In the Visibility Settings, determine who should see the hint [1] and when it should be presented (optional) [2].

Choose how the hint should be triggered: when the user sees the element or interacts with the element [3].

Determine whether the monitor should trigger on every page where the element occurs or only on the current page [4].

Choose whether you would like to collect user feedback on the message [5].

Review the automatically rendered screenshot of the page and element. Upload a custom screenshot if needed [6].

Click the Create button [7].
Add a Systray or Popup Message

To add a systray or popup message on the current page, click the Select Page button [1].

In the side panel, click the Message button [2] and then choose either Systray Message or Popup Message [3].
Add Content

Enter a title [1] and description [2].

Determine the size of the message using the width and height fields [3].

For popups, you can select a Message Type, which determines the icon that appears in the message body [4].

Click the Arrow icon [5].
Set Visibility Settings

In the Visibility Settings, determine who should see the hint [1] and when it should be presented (optional) [2].

Choose whether you would like to collect user feedback on the message [3].

Review the automatically rendered screenshot of the page and element. Upload a custom screenshot if needed [4].

Click the **Create** button [5].
How do I define a custom element or page with the Impact Inline Editor?

You can use Free select mode to define a custom element to attach a message or monitor. Once you have defined an element, you can select it using the Inline Editor even if Free select mode is not enabled.

Open Inline Editor

Navigate to the area of the learning application where you intend to place the message.

To open the Inline Editor, click the Impact icon [1] and then click the Add icon [2].

Enable Free Select Mode

To select any element on the page, click the Enable free select mode checkbox.
Locate Element

Locate and click the element on the page. The selected element is highlighted and displays a border.
Open Advanced Settings

Impact Guide Updated 2022-11-21
Identify Page Element

Select from the list of possible definition criteria, which is based on the attributes belonging to the selected element [1].

**Note:** If you would only like to use part of an attribute for your definition criteria, click the **Edit** button next to the attribute [2].
Select one of the options from the drop-down menu [1] and change the value in the text field to the desired partial criteria [2]. Click the Ok button [3].

Once you have defined the criteria, click the Continue button [4].
Save Template

Enter a template name [1] and click the Save button [2].
You can add a message or monitor using the newly defined element. Once you have defined an element, you can select it using the Inline Editor even if Free select mode is not enabled.
How do I create a support article with the Impact Inline Editor?

You can create a context-sensitive article from within your learning application using the Inline Editor.

Open Inline Editor

Navigate to the area of the learning application where you intend to place the message.

To open the Inline Editor, click the Impact icon [1] and then click the Add icon [2].

Select Page

To select a page, click the Select Page button.
Open Support Article

Take action!
Add a message, support article or activity monitor to your selected element.

Element: "Course Home page"

Message  Support Article  Monitor

In the side panel, click the Support Article button.
Add Support Article

To create an article from scratch, click the Item button [1]. To upload a document or image, click the File Helpitem button [2].
Add New Item

Enter a title [1], add your content [2], and add a description for the article [3].

To choose from existing content, click the **Load Existing** button [4]. You can choose from already made content to add to your article.

To set visibility settings, click the **Arrow** icon [5].
Set Visibility Settings

In the Visibility Settings, determine who should see the hint [1] and when it should be presented (optional) [2].

Choose whether you would like to collect user feedback on the message [3].

Review the automatically rendered screenshot of the page and element. Upload a custom screenshot if needed [4].

Click the Save button [5].
Add New File

1. Enter a title [1] and add a description for the article [2]. To upload a file, click the Browse button [3].

2. To choose from existing content, click the Load Existing button [4]. You can choose from already made content to add to your article.

3. To set visibility settings, click the Arrow icon [5].
Set Visibility Settings

In the Visibility Settings, determine who should see the hint [1] and when it should be presented (optional) [2].

Choose whether you would like to collect user feedback on the message [3].

Review the automatically rendered screenshot of the page and element. Upload a custom screenshot if needed [4].

Click the Save button [5].
How do I change the placement of an existing message with the Impact Inline Editor?

You can change the existing placement of a message using the Inline Editor.

Open Inline Editor

Navigate to the area of the learning application where you intend to place the message.

To open the Inline Editor, click the **Impact** icon [1] and then click the **Add** icon [2].

Select Page

For hints, select the element to which you would like to attach it. To update popups and systrays messages, click the **Select Page** button.
Open Message

In the side panel, click the Message button [1] and then choose either Systray Message or Popup Message [2].
Load Existing

To edit an existing message, click the Load Existing button.
## Filter Help Items

<table>
<thead>
<tr>
<th>Title</th>
<th>Author</th>
</tr>
</thead>
<tbody>
<tr>
<td>Build your New Quiz!</td>
<td>Dani Mc Callion</td>
</tr>
<tr>
<td>New Quiz workflow</td>
<td>Dani Mc Callion</td>
</tr>
<tr>
<td>What's new in October?</td>
<td>Andy Adamovich</td>
</tr>
<tr>
<td>Presenting Course Content Efficiently</td>
<td>Debra Hansen</td>
</tr>
<tr>
<td>Moving your Learning Online</td>
<td>Debra Hansen</td>
</tr>
<tr>
<td>Communicating with your students</td>
<td>Debra Hansen</td>
</tr>
<tr>
<td>Adding value to tasks</td>
<td>Debra Hansen</td>
</tr>
<tr>
<td>Possibilities for providing feedback</td>
<td>Debra Hansen</td>
</tr>
<tr>
<td>Preparing for an online session: Big Blue Button</td>
<td>Debra Hansen</td>
</tr>
<tr>
<td>Facilitating Office Hours Sessions</td>
<td>Debra Hansen</td>
</tr>
</tbody>
</table>

To search and filter existing items, enter search terms in the **filter** field. You can use the live preview to verify whether you have selected the correct message.
Open Help Item

Click the item name [1] and then click the Arrow icon [2].
Edit Help Item

Edit the help item and click the **Arrow** icon.
Set Visibility Settings

In the Visibility Settings, determine who should see the message [1] and when it should be presented (optional) [2].

Choose whether you would like to collect user feedback on the message [3].

Disable Override previous placement(s) in order to keep all currently connected contexts [4].

Review the automatically rendered screenshot of the page and element. Upload a custom screenshot if needed [5].

Click the Save button [6].
How do I reuse existing messages or articles in the Impact Inline Editor?

You can take an existing message or article and attach it to an additional element or page in your learning application by using existing content using the Inline Editor.

Open Inline Editor

Navigate to the area of the learning application where you intend to place the message.

To open the Inline Editor, click the **Impact** icon [1] and then click the **Add** icon [2].

Select Page

For hints, select the element to which you would like to attach it. To update popups and systrays messages, click the **Select Page** button.
Open Message

In the side panel, click the **Message** button [1] and then choose either **Systray Message** or **Popup Message** [2].
Load Existing

To edit an existing message, click the Load Existing button.
Filter Help Items

To search and filter existing items, enter search terms in the **filter** field. You can use the live preview to verify whether you have selected the correct message.
Open Help Item

Click the item name [1] and then click the Arrow icon [2].
Edit Help Item

Edit the help item and click the Arrow icon.
Set Visibility Settings

In the Visibility Settings, determine who should see the message [1] and when it should be presented (optional) [2]. Choose whether you would like to collect user feedback on the message [3]. Make sure you disable Override previous placement(s) in order to keep all currently connected contexts [4]. Review the automatically rendered screenshot of the page and element. Upload a custom screenshot if needed [5]. Click the Save button [6].
How do I edit existing messages, support articles, or monitors in the Impact Inline Content Library?

You can edit a message, article, or monitor from your learning application using the Impact Inline Content Library.

Open Inline Content Library

To open the Inline Editor, click the Impact icon [1] and then click the Content Library icon [2].
View Content Library

To edit existing messages, support articles, and monitors, click either the Messages, Support Articles, or Monitors tab.
Search Content Library

Find existing, edit or delete messages, support articles and monitors.

Messages  Support Articles  Monitors

Search messages

New Quiz workflow
Sydney
Last edited: 2 hours ago

Unpublished!
Hint
Last edited: 2 hours ago

Create a New Quiz now!
Hint
Last edited: 2 hours ago

Try out New Quizzes!

To search for a message, enter search terms in the Search field. Click the help item to view a preview.
Edit Message or Support Article

You can edit the title [1] and description [2].

To review the current placements of the item, click the Preview icon [3]. To remove incorrect or irrelevant placements, click the Delete icon [4].

Edit the audience by adding and/or removing user groups [5].

Edit the scheduled visibility of the item by entering a first and/or last active day [6]. If left empty, the item will be available indefinitely.

For a message, edit the size by changing the width and height [7].

To collect feedback, click the Collect feedback toggle [8].

Once you are done editing, click the Save button [9].

If you would like to remove the item, click the Delete link [10].
You can edit the name [1] and notes [2].

To review or edit the screenshot, click the View screenshot link [3].

Once you are done editing, click the Save button [4].

If you would like to remove the item, click the Delete link [5].
What is the Impact Inline Editor Content Library?

The inline content library provides an easy way to view and edit all of the messages, monitors, and support articles that have ever been created on your Impact instance. You can access the library from within your learning application if you are logged in with a user that is connected to your Impact account.

Open Content Library

Sign in to your learning application with a user that is connected to your Impact account.

To open the Inline Editor Content Library, click the Impact icon [1] and then click the Content Library icon [2].
View Content Library

The library has three tabs, one for each type of content: Messages, Support Articles, and Monitors. You can use the search bar to find your desired content. You can also scroll through the list and find it manually. You are able to edit each item straight from the library.
How do I preview messages in my learning application using the Impact Inline Content Library?

You can always preview messages while using the Inline Editor. Simply create a brand new message or load pre-existing content from the inline content library to see whether the message looks right within your learning application.

Preview Message

You can easily adjust the width and height while the live preview refreshes instantly. Click the Save button.
How do I view the User Activity Report in the Impact Dashboard?

The User Activity Report analyzes how much time students and instructors spend using Impact and how they affect the load on the system.

Open Insights

In Global Navigation, click the Insights link.

View User Activity Report

The User Activity Report contains four charts: Active Users, Total Session Time (Hours), Average Session Time (Minutes), and Page Views. These charts are related to overall activity within the learning application.
View Active Users

The **Active Users** chart shows the number of unique users that have accessed the learning application.
The **Total Session Time (Hours)** chart displays the total number of hours that were spent in the learning application based on session time.

**Note:** The Total Session Time (Hours) chart does not account for the time spent idle on a page in the learning application.
View Average Session Time (Minutes)

The **Average Session Time (Minutes)** chart displays the total time spent in the learning application divided by the number of active users, expressed in minutes per user per day.

**Note**: The Average Session Time (Minutes) chart does not account for the time spent idle on a page in the learning application.
View Page Views

The **Page Views** chart shows the total page loads were performed to indicate how heavily the application has been used.

View and Export Data

You can filter the data using the date range filter [1] and user group association filter [2]. Then click the **Apply Filter** button [3]. Each chart has the option bar that allows you to update the appearance and export the information.

To filter time range, click the **Unit of Time** drop-down menu [4]. You can select auto, day, week, month, or year options.

To change the chart to show a line or bar chart, click **Chart** drop-down menu [5].

To export the data, click the **Export** drop-down menu [6]. You can choose between data as a csv, chart as a pdf, or data as pdf.
How do I view the Tool Adoption Report in the Impact Dashboard?

The Tool Adoption Report is used to analyze usage data across your entire institution at a glance.

Open Insights

In Global Navigation, click the Insights link.

Open Tool Adoption Report

Click the Tool Adoption link.
View Tool Adoption Data

The Tool Adoption Report allows you to group monitoring data together with the help of Reporting Templates. These provide a hierarchical structure to roll up the detailed data derived from many individual monitors into manageable categories.

The adoption level is calculated based on the number of unique active users that have logged in to the learning application over the selected time period and how many of them have triggered at least one monitor that lives underneath each monitor category or one of its child categories.

For example, 1000 unique users have logged into the system over the selected period. Across the three sub-categories that live under the Calendar monitor category, 750 unique users have triggered at least one of the underlying monitors. This means that the adoption level for Calendar is 75%.
The data presented in the Tool Adoption Report can be filtered using the global filter bar at the top of the page. In addition, the way in which the data is visualized can be controlled using the presentation options in the filter bar.

To determine the structure shown in the chart and monitor category breakdown, click the **Reporting Template** drop-down menu and select the template you want to use[1].

To limits the adoption data to users who belong to the selected, click the **Role Category** drop-down menu [2].

To filter on users belonging to individual roles and groupings that were registered from the learning application, click the **Role** drop-down menu [3].

To determine how the chart data is scaled and whether the adoption level for each monitor category is expressed in percentages or actual numbers, click the **Presentation** drop-down menu[4].

To toggle between Trend Line and Cumulative chart presentation, click the **Graph Type** drop-down menu [5]. With Trend Line enabled, the chart shows separate adoption levels for each unit of time. When set to the Cumulative Graph Type, the chart presents the growth curve of adoption from the first unit of time to the last unit of time.

To modify the **Start Date** [6] or **End Date** [7], click the **Calendar** icon. By default, the date range is set to a Start Date of three months before the current date and an End Date of today.
How do I target audiences from tool adoption data using the Tool Adoption Report in the Impact Dashboard?

You can use tool adoption data to enable targeted communication with users based on their activity using the Tool Adoption Report.

The Tool Adoption Report allows you to use the presented data to set up targeted communication efforts through both traditional methods of outreach (e.g. email) and Impact’s built-in messaging and support functionalities. You can create segments of users based on individuals who have been active or inactive within a specific monitor category in any of the available Reporting Templates.

There are two ways to set up and use a target audience; downloading a CSV-file and creating an Impact Campaign.

Open Insights

In Global Navigation, click the Insights link.
Open Tool Adoption Report

Click the Tool Adoption link.
Target Users Based on CSV Export

<table>
<thead>
<tr>
<th>Tool Group</th>
<th>Adoption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor</td>
<td></td>
</tr>
<tr>
<td>Assessments</td>
<td>33.3 %</td>
</tr>
<tr>
<td>Canvas set-up</td>
<td>55.6 %</td>
</tr>
<tr>
<td>Collaborations</td>
<td>33.3 %</td>
</tr>
<tr>
<td>Communication</td>
<td>44.4 %</td>
</tr>
<tr>
<td>Course content</td>
<td>88.9 %</td>
</tr>
<tr>
<td>ePortfolios</td>
<td>0.0 %</td>
</tr>
<tr>
<td>Grades</td>
<td>44.4 %</td>
</tr>
</tbody>
</table>

If you want to reach out to a segment of users through traditional communication channels such as a mass email, hover over the desired monitor category and click the **Arrows** icon.
Click the Download CSV-file link [1] and then click either the Download active users as CSV link or Download non-active users as CSV link [2].

Save the CSV file to your computer.

4. Open the CSV file, which contains a list of users based on the previously selected criteria, including their username, full name, and email address.
Create an Impact Campaign

<table>
<thead>
<tr>
<th>Tool Group</th>
<th>Adoption</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor</td>
<td>33.3 %</td>
</tr>
<tr>
<td>Assessments</td>
<td>33.3 %</td>
</tr>
<tr>
<td>Canvas set-up</td>
<td>55.6 %</td>
</tr>
<tr>
<td>Collaborations</td>
<td>33.3 %</td>
</tr>
<tr>
<td>Communication</td>
<td>44.4 %</td>
</tr>
<tr>
<td>Course content</td>
<td>88.9 %</td>
</tr>
<tr>
<td>ePortfolios</td>
<td>0.0 %</td>
</tr>
<tr>
<td>Grades</td>
<td>44.4 %</td>
</tr>
</tbody>
</table>

If you are looking to communicate with a segment of users using Impact’s in-application messaging and support capabilities, set up a Campaign. This allows you to not only target your communication through Impact, but also measure the impact of your efforts on user behavior.

Hover over the desired monitor category and click the **Arrows** icon.
Click the Create campaign link [1] and then click either the Active users between link or Non-active users link [2].

Learn how to create a campaign.
How do I view the Course Activity Report in the Impact Dashboard?

The Course Activity Report compares the usage of specific tools for courses based on your search criteria.

Open Insights

In Global Navigation, click the Insights link.

Open Canvas Course Activity

Click the Canvas Course Activity link.
Filter Data

To switch between Canvas instances, click the **Instance** drop-down menu [1].

To filter by term, click the **Terms** drop-down menu [2].

To filter by Courses or Teacher, click the **Course** drop-down menu [3].

To search and filter by a course, click the **Search courses** search bar [4].

To hide students from showing, click the **Hide courses without students** checkbox [5].

To show only blueprint courses, click the **Show only blueprint courses** checkbox [6].

To show only published courses, click the **Show only published courses** checkbox [7].

To display the filtered search, click the **Search** button [8].
Open Course

Locate and click the course name you would like to view the Course Activity in.

<table>
<thead>
<tr>
<th>Published</th>
<th>Course</th>
<th>SIS ID</th>
<th>Term</th>
<th>Teacher</th>
<th>Sub-Account</th>
<th>Students</th>
</tr>
</thead>
<tbody>
<tr>
<td>✔️</td>
<td>Pre K</td>
<td>2021-2022</td>
<td></td>
<td></td>
<td>Finster Elementary</td>
<td>0</td>
</tr>
<tr>
<td>✔️</td>
<td>Second Grade Language Arts</td>
<td>2021-2022</td>
<td>Carla Gunderson</td>
<td>Second Grade Classes</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>✔️</td>
<td>Second Grade Math</td>
<td>2021-2022</td>
<td>Carla Gunderson</td>
<td>Second Grade Classes</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>✔️</td>
<td>Second Grade Science</td>
<td>2021-2022</td>
<td>Carla Gunderson</td>
<td>Second Grade Classes</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>✔️</td>
<td>Second Grade Social Studies</td>
<td>2021-2022</td>
<td>Carla Gunderson</td>
<td>Second Grade Classes</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>✔️</td>
<td>History 101</td>
<td>2021-2022</td>
<td>Doug Roberts</td>
<td>History</td>
<td>14</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Art Course</td>
<td>2021-2022</td>
<td></td>
<td></td>
<td>Arts and Humanities</td>
<td>0</td>
</tr>
</tbody>
</table>
Tool Group

Click the plus sign next to each Tool Group to view all of the monitors in each category.

User Activity

For each student, the table displays the following data:

- **Name [1]**: name of the student
- **User ID [2]**: their user ID
• **Last Access** [3]: date users last accessed the course
• **Tool Groups** [4]: dynamic groups based on the selection in the Reporting Template; these stats are relative to the dates selected in the Tool Adoption section
• **Total Clicks** [5]: the number of clicks reflects the number of clicks on a monitor in the grades category

**Export Report**

![User Activity Table]

To export the data, click the Export button.
How do I view tool usage from courses with the same instructor in Blackboard Learn in the Impact Dashboard?

If you are using Blackboard Learn, you can use the Course Activity Report to look up an instructor’s courses and append tool adoption data.

Open Insights

In Global Navigation, click the Insights link.

Open Course Activity

Click the Course Activity link.
Search for Instructors

Look up the courses you would like to examine by entering the instructor’s user name into the search bar [1] and clicking the Search button [2].

The result list includes the course ID, course name, creation date, student enrollment count, instructors, and participation level (percentage of enrolled students who have accessed the course) of each course.

**Note:** You can append any monitor category from any available Reporting Template to the result list by selecting it in the Tools field and clicking Search.

Select Monitor Category
Each selected monitor category adds an additional column to the result list, which displays the percentage of active users enrolled in the course that has triggered at least one of the monitors underneath the category since the course's creation date.

**View Filtered Search**

<table>
<thead>
<tr>
<th>Course ID</th>
<th>Course Name</th>
<th>Instructor(s)</th>
<th>Participation Level</th>
<th>Enter a learning module</th>
<th>Use Course Home Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coles_playground</td>
<td>Coles Playground</td>
<td>cole, lacG, cole_instructor</td>
<td>100%</td>
<td>90%</td>
<td>100%</td>
</tr>
<tr>
<td>demo</td>
<td>EasySoft Demo Course</td>
<td>[25 instructors]</td>
<td>67%</td>
<td>90%</td>
<td>90%</td>
</tr>
<tr>
<td>Easy_Academy</td>
<td>Easy Academy</td>
<td>n/a</td>
<td>n/a</td>
<td>90%</td>
<td>93%</td>
</tr>
<tr>
<td>Watching_Birds</td>
<td>Bird Watching</td>
<td>[29 instructors]</td>
<td>100%</td>
<td>90%</td>
<td>90%</td>
</tr>
</tbody>
</table>
### View Adoption Level

<table>
<thead>
<tr>
<th>Course ID</th>
<th>Course Name</th>
<th>Created Date</th>
<th># Students</th>
<th>Instructor(s)</th>
<th>Participation Level</th>
<th>Enter a learning module</th>
<th>Use Course Home Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coles_playground</td>
<td>Coles Playground</td>
<td>2020, May 6</td>
<td>1</td>
<td>cole, lka02, toshiro, cole_instructor</td>
<td>100%</td>
<td>0%</td>
<td>100%</td>
</tr>
<tr>
<td>demo</td>
<td>EesySoft Demo Course</td>
<td>2020, May 6</td>
<td>9</td>
<td>(25 instructors)</td>
<td>67%</td>
<td>0%</td>
<td>96%</td>
</tr>
<tr>
<td>Eesy_Academy</td>
<td>Eesy Academy</td>
<td>2020, May 6</td>
<td>0</td>
<td>(6 instructors)</td>
<td>n/a</td>
<td>0%</td>
<td>94%</td>
</tr>
<tr>
<td>Watching_Birds</td>
<td>Bird Watching</td>
<td>2020, May 6</td>
<td>5</td>
<td>(29)</td>
<td>100%</td>
<td>0%</td>
<td>100%</td>
</tr>
</tbody>
</table>

The adoption level is automatically filtered on the [Role Category](#) associated with the [Reporting Template](#) that each selected monitor category comes from (e.g. any category from the Student template is filtered on the Student Role Category). If you want to bypass the default filtering, you can select a specific Role Category in the filter bar instead of Template Default.
Export Data

To export the current results from the course search including the appended adoption data as a CSV-file, click the Download icon.
How do I create custom reports in the Impact Dashboard?

Reports can be created within Users Groups vs. Monitors, Monitor Trends, User Trends, and Champions.

Open Insights

In Global Navigation, click the Insights link.

Select Report Type

To compare the data from multiple monitors across multiple User Groups click, the Users vs. Monitors link [1].

To get data from a single monitor across several User Groups over time click, the Monitor Trends link [2].

To visualize the usage of several monitors for a single User Group over time click, the User Trends link [3].

To identify users who have triggered a specific monitor most often, click the Champions link [4].

View Report Options

Impact Guide Updated 2022-11-21
To represent the data for a single User Group or a single monitor, click the Legend drop-down menu [1].

To change the visualization from a line graph to a bar chart, click the Graph Style drop-down menu [2].

To limit the data presented in the charts to a predefined relative time period or a manually selected date range using the Start Date and End Date fields, click the Time Period drop-down [3].

To select a start date for your report, click the Start Date field and enter a start date [4].

To select an end for your report, click the End Date field and enter an end date [5].

To select one or multiple monitors, click the Monitors field [6].

To combine multiple groupings using Logical User Groups, click the Restrict to User Groups field [7].

To run the report, click the Apply button [8].

To keep the current filters and presentation options for future reference click, the Save Report icon [9].

**View Monitor Trend and User Trends Report Options**

![Report Options](image)

For Monitor Trends and User Trends reports, to automatically determine based on the selected time, click the Unit of Time drop-down menu.
View Champions Report Options

To select between the number of sessions triggered or total times triggered, click the Based On drop-down menu [1].

To limit the data presented in the charts to a predefined relative time period or a manually selected date range using the Start Date and End Date fields, click the Time Period drop-down [2].

To select the number of champions, click the Number of Champions drop-down menu [3].

To select a start date and end date for your report, click the Start Date field and End Date field and enter a date [4].

To restrict the report to certain user groups, click the Restrict the User Groups field and select the user groups [5].

To select monitors, enter the monitors in the Monitors field [6].

Click the Apply button [7].

Save Report

To keep the current filters and presentation options for future reference, click the Save Report icon.
Save as New Report

Enter a name [1] and description [2]. Then click the **Save** button [3]. The saved report is now available under the My Reports tab.
Print or Export the Data

To print the report, click the Print icon [1].

To export the report, click the Download icon [2].
How do I enable Impact course reports for instructors in Blackboard Learn Original?

The Impact Course Activity Reports can be made available to instructors within the courses they teach. The report shows in which parts of the course students have been most engaged and allows instructors to identify at-risk students.

Notes:
- Make sure you have latest version of Impact of the Impact Building Block installed.
- Ensure that you have the Data Synchronization turned on in the Building Block Settings.

Open Tools

In the System Admin page, navigate to the Tools and Utilities section [1] and click the Tools link [2].
In the list of tools, locate the Eesysoft (Impact) Connector.

Set the Availability of the Impact Course Reports to ON and determine whether you would like this tool enabled for new courses only or for all courses.

Click Submit.

If you have any questions or feedback, please submit a ticket.
How do I view Message Insights in the Impact Dashboard?

Message Insights reports on message performance and feedback in the dashboard in order to analyze the quality and impact of communication efforts. It enables you to analyze how users rate the Popup, Hint, and Systray messages you are adding to your learning application. When one of these message types has the Voting option enabled, the results are found here.

Notes:

- You can see the message Insight tab under Messages from the top navigation bar.
- You can view the Message Performance section as a table or as a chart.

Open Messages

In Global Navigation, click the Messages link.

Open Insights

![My Messages](image-url)
Click the Insights link.

**View Filters**

![Image of filters with numbered icons]

To filter to a specific date range, click the Calendar icon [1].

To sort by a certain role category, click the Any Role Category drop-down menu [2].

To sort by a role, click the Any role drop-down menu [3].

To sort by status, click the Any status drop-down menu [4].

When you are ready to search, click the Apply Filter button [5].

**Message Performance**

![Message Performance table]

For each message, the table displays the following data:
• **Title** [1]: name of the message.
• **Views** [2]: current view count of the message.
• **Users** [3]: how many users.
• **Clicks** [4]: how many clicks a message has.
• **Comments** [5]: how many comments a message has.
• **Upvotes** [6]: how many upvotes a message has.
• **Downvotes** [7]: how many interactions made with an assignment.
• **Rating** [8]: shows the overall rating for a message.

### View Message Ratings

![Message Ratings](image)

You can view how many votes a message has [1], many upvotes a message has [2], and how many downvotes a message has [3].
For each message, the table displays the following data:

- **Date** [1]: when the feedback was given.
- **Content** [2]: shows the comment on their feedback.
- **Vote** [3]: shows if they upvoted or downvote a message.
- **Author** [4]: who is giving the feedback.
- **Added for** [5]: which message the feedback is for.
How do I view insights for a specific message in the Impact Dashboard?

Impact provides you with several key insights about how your messages are being viewed, clicked, voted or commented on. This article will show you how to find these insights and get a list of users that interacted with your message from the Impact dashboard.

Open Messages

In Global Navigation, click the Messages link.

Open Message

<table>
<thead>
<tr>
<th>My Messages</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Image of My Messages section" /></td>
</tr>
</tbody>
</table>

Click the name of the message you would like to view.
Message Insights

To filter to a specific date range, click the Calendar icon [1].

To sort by a certain role category, click the Any Role Category drop-down menu [2].

To sort by a role, click the Any role drop-down menu [3].

When you are ready to search, click Apply Filter button [4].
View Feedback

Feedback
How happy are your users with your message?

1 2 votes
2 ✔ 100.00%
3 ✖ 0.00%

You can view how many votes a message has [1], many upvotes a message has [2], and how many downvotes a message has [3].

View Comments

Comments
What did users have to say about your message?

<table>
<thead>
<tr>
<th>Date</th>
<th>Content</th>
<th>Vote</th>
<th>Author</th>
</tr>
</thead>
</table>

For each message, the table displays the following data:

- **Date** [1]: when the feedback was given.
- **Content** [2]: shows the comment on their feedback.
- **Vote** [3]: shows if they upvoted or downvoted a message.
- **Author** [4]: who is giving the feedback.
How do I add Canvas Course Reports to my Impact Dashboard?

To view Canvas Course Reports in your Impact Dashboard please submit a ticket. Include corresponding Impact instances, where you would like the Canvas Course Reports activated and Canvas production URL and Canvas beta URL.
What are Impact messages?

Impact messages are customizable messages that can be placed on-demand, anywhere within your learning application - targeted at any specific group of users. Messages can be filled with text, images, and rich content like videos or embedded iframes. **Types of Impact messages** include Hint Messages, Pop-up Messages and Systray Messages. Get started by creating your first message from the Impact dashboard or using the Inline Editor.

You can find more customer and Impact built team messaging examples on the [Impact Universe](https://impact.universe).

Impact Message Examples

Blackboard LMS

A pop-up message about 3rd party tools in the Blackboard Learn learning management system
Canvas LMS

A Pop-Up message displayed in the Canvas learning management system
What are the types of Impact messages?

With Impact you are able to create context and role-based messages and place them throughout your LMS. There are three unique types of Impact messages which you can choose from. This article will explain the difference between each message type and when to use them.

Hint Messages

Hint messages are messages that are connected to a specific element on a page in your learning application.

When and how does a hint message get displayed?

Hint messages can be displayed:

- When the relevant page loads
- When the user clicks on the specific element (context)
- When the user hovers over the specific element (context)

Hint messages are displayed in relation to a specific element that you can also customize by changing the orientation of the message.
When should I use a hint message?

Hint messages are the perfect vehicle for extremely contextual proactive support and can be used to help guide a user through any specific task without interrupting their workflow too much. For example, if you want to message users review their work before pressing a submit button, you can attach a hint message directly to that button.

Note: Hint messages can only be connected to element-level contexts

Pop-Up Messages

Pop-Up messages are presented in a central modal that lays on top of your learning application. Pop-up modal can only be connected to page-level contexts and not to a specific element.

When and how does a Pop-Up message get displayed?

Pop-up messages are displayed immediately when the targeted user lands on the relevant page (on page load).

When should I use a Pop-Up message?

Because Pop-Up messages take over the entire screen of the user and force them to close the message before proceeding, they should be reserved for important communication that users must take action on or know about. For example, if you want to
communicate to users that there is a significant error impacting the learning application, you can make sure that all users are notified about this error as soon as they log in.

**Note:** Pop-Up messages can only be connected to page-level contexts.

### Systray Messages

Systray messages are messages displayed in the bottom right corner of your learning environment.

**When and how does a Systray message get displayed?**

Systray messages are displayed immediately when the targeted user lands on the relevant page (on page load).

**When should I use a Systray message?**

Systray messages are displayed in the bottom right corner of your learning application, which is the perfect place to present important but non-critical communication. For example, if you want to show users a video that explains how to complete a task on a page, embedding and displaying that video in the bottom right corner makes this content easily accessible to the users who need it.

**Note:** Systray messages can only be connected to page-level contexts.
Which Impact message type should I use?

Impact comes with three different message types that you can choose from: Hint Messages, Pop-Up Messages, and Systray Messages. This article will help you decide which message type is the best fit for your content and goals.

For a full overview of message types, visit [What are the types of Impact messages?](#)

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<tr>
<th></th>
<th>Hint Messages</th>
<th>Pop-Up Messages</th>
<th>Systray Messages</th>
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<tr>
<td><strong>Positioning</strong></td>
<td>Connected and displayed next to one or more specific elements (like a button).</td>
<td>Connected to one or more pages and displayed as a full-page modal layover, greying out the background.</td>
<td>Connected to one or more pages and is displayed in the bottom right corner of the page.</td>
</tr>
<tr>
<td><strong>Trigger</strong></td>
<td>• On hover&lt;br&gt;• On click&lt;br&gt;• On page load</td>
<td>• On page load</td>
<td>• On page load</td>
</tr>
<tr>
<td><strong>When to use it?</strong></td>
<td>Hint messages are the perfect vehicle for extremely contextual proactive support and can be used to help guide a user through any specific task without interrupting their workflow too much. For example, if you want to message users review their work before pressing a submit button, you can attach a hint message directly to that button.</td>
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<tr>
<td></td>
<td>make sure that all users are notified about this error as soon as they log in.</td>
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How do I create a message from the Impact Dashboard?

With Impact, you can create messages via the inline editor directly within your learning application or via the Impact admin dashboard. This article focuses on how you can create a new message from the Impact dashboard.

Open Messages

In Global Navigation, click the Messages link.

Create New Message

Click the New message button.
Enter Title

To add a title to your message, click the **Untitled message** text box [1]. Then enter your message in the **Title** field [2].

**Edit Your Message Content**

Messages must have a title and any type of content in the body before you can publish it. Follow the steps below to edit your message content. You can customize the message body content in three ways:

Add text and highlight it to customize the design.
Press Enter on your keyboard while editing the message body to view the insert options.

You can also switch on Rich Edit Mode if you want to focus on the content of the message.

You can insert the following content types:

- Ordered list (numbers)
- Unordered list (bullet points)
- Table
- Image
- External Media (youtube links or iframes)
- Documents (PDF, Word, Powerpoint)
- Links to other messages or support articles
- Personalization tokens

## Edit Your Message Settings

In the sidebar of the create message page, you can view several drop-down menu items that allow you to manage your message settings.

<table>
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<th>Setting Row</th>
<th>Explanation</th>
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</thead>
</table>
| **Status & Visibility** | This tab always stays open and shows you the current state of your message. This area shows you:  
  - Message **Status**, which can be draft or published.  
  - Message **Visibility** shows you if your message is visible to users. If Hidden, you also see the reason why the message is hidden. |
| **Assign to Users** | This tab allows you to manage which users your message is targeted at. You can target your message to any specific user, user group, or previously created campaign.  
  **Note:** You must assign a user before publishing a message. |
| **Message Type**   | The message type setting allows you to change how your message is displayed in your learning application. Impact allows you to present your messages in three ways:  
  1. Hint message (connected to an element in your learning application)  
  2. Popup message (a modal in the center of the learning application)  
  3. Systray message (displayed in the bottom right corner of your learning application) |
| **Connect to Context** | Connecting your message to a context defines where in your learning application the message is presented. Contexts can be specific pages or specific elements on pages. You can connect your message to multiple contexts.  
  **Note:** You must connect your message to a context before publishing the message. |
| **Presentation**   | The Presentation tab allows you to adjust the styling of your message. You can adjust:  
  1. The height and width of your message (in pixels)  
  2. The orientation of your message (only for Hint message types)  
  3. The visibility of proactive feedback buttons (upvote / downvote) on your message  
  4. Message icon (only for Popup messages types) |
<table>
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<th>Schedule Visibility</th>
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<tr>
<td>Scheduling the visibility of your message enables you to select a start date/time and end date/time during which your message is displayed in your learning application. When the end date and time is reached, the message is automatically hidden.</td>
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<tr>
<td>Note: You still need to assign a user and a connect context for messages to be visible in your learning environment.</td>
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<tr>
<th>Advanced Settings</th>
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<tr>
<td>This tab enables you to modify the following additional fields that can help you with message categorization and bulk actions:</td>
</tr>
<tr>
<td>• Tags allow you to categorize messages based on any term. This makes it easy to find and filter messages on the Manage Messages page.</td>
</tr>
<tr>
<td>• Keywords allow you to associate specific terms with your messages, making them easier to find while searching in the Manage Messages page.</td>
</tr>
<tr>
<td>• Tool Categories allow you to associate a message with one or more tool categories so that you can hide/show all messages associated with a tool category in a single bulk action.</td>
</tr>
</tbody>
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<tr>
<th>Translations</th>
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<tbody>
<tr>
<td>In the Manage Translations tab, you can create multiple versions of your messages in different languages. If the language is marked with an X icon, the translation for that language has not yet been created. Simple toggle between languages by clicking on the names of the languages shown.</td>
</tr>
</tbody>
</table>

**Publish Your Message**

![Create Message](image)
Now that your message content and settings are all set up, you can continue by:

- **Publishing your message**: using the Publish button.
- **Saving your message as a draft**: using the Save as Draft button allows you to publish the message another time but save your current changes.
- **Canceling**: using the Cancel button to delete your message content and settings or any unsaved changes.
How do I add or edit message translations in the Impact Dashboard?

With Impact, you can add different languages to your dashboard so that you can provide multiple versions of your messages and articles depending on your LMS needs. Once you have added a new language, you can toggle between translations within the message and article editors. This article shows you how to add or edit message translations.

Open Messages

In Global Navigation, click the Messages link.

Manage Messages

Click the Manage Messages tab [1].
To edit an existing message, click the name of the message [2].

To create a new item, click the New message button [3].

**Edit Message**

In the View Message page, click the **Edit Message** button.

**Note**: If you are creating a new message, the Edit Message button does not display.

**Manage Translations**

In the sidebar, click the **Manage Translations** section.
You can see all of your different languages. To request the addition of a new language please read How do I add a new language in the Impact Dashboard?

Add or Edit Translation

Click the language in which you want to add or edit the message [1].

Use the editor to write your translated message [2].

Publish or save your message as a draft.

For more information about how to create a message, visit How do I create a message from the Impact Dashboard? or How to create a message with the Impact Inline Editor?
How do I customize the design of my messages in the Impact Dashboard?

Impact messages designs can be customized in two major ways: Presentation Settings and Messaging Style.

If you’re looking for help in relation to message types, view the following article instead: What are the types of Impact messages?

Open Messages

In Global Navigation, click the Messages link.

Manage Messages

Click the Manage Messages tab [1].
To edit an existing message, click the name of the message [2].

To create a new item, click the **New message** button [3].

**Edit Message**

In the View Message page, click the **Edit Message** button.

**Note:** If you are creating a new message, the Edit Message button does not display.

**Presentation Settings**
In the sidebar, locate and open the **Presentation** section. Presentation settings allow you to modify the following design settings for your message:

- Message Icon (only for popup messages)
- Height
- Width
- Orientation (only for hint messages)
- Feedback (like/unlike buttons)

These settings can be adjusted while editing or creating a message in the Impact Dashboard or via the Inline Editor.

If you’re looking for help about message types (hint, popup, systray), view the following article: [What are the types of Impact messages?](#)

**Note:** The height and width need to be 100 and above. If it is set below 100, a warning icon displays at the top of the presentation box.

**Messaging Style**

Impact offers several messaging styles for you to work with that feature custom colors, fonts and more. These style changes are available only by request. Please reach out to your CSM to learn more about the different message styles that are available.

Once you have selected a style, [submit a ticket to request the change](#).
How do I add metadata to a message in the Impact Dashboard?

Impact enables you to add several different metadata points to your messages to make them easier to find, sort or filter. You can customize the following data points:

- **Tags** - consistent terms that can be used to find and group messages with filters
- **Keywords** - terms associated with your message to make it easy to find your message via search

Open Messages

In Global Navigation, click the **Messages** link.

Manage Messages
Click the **Manage Messages** tab [1].

To edit an existing message, click the name of the message [2].

To create a new item, click the **New message** button [3].

**Edit Message**

In the View Message page, click the **Edit Message** button.

**Note:** If you are creating a new message, the Edit Message button does not display.

**Update Metadata Settings**
In the sidebar, locate and open the Advanced Settings section [1].

Enter tags and/or keywords to add meta data to your messages [2].
How do I show a hint message only on hover using the Impact Inline Editor?

Since hint messages are connected to specific elements on your page(s), sometimes you want to control when that message is actually displayed, to make sure it is the most relevant time for the user. Impact messages have several display conditions that allow you to display your message only when a user interacts (clicks/hovers) with your message.

These display conditions are connected to the contexts that define the positioning of your messages. Since your messages can be connected to multiple contexts, your message could be displayed on page load in one location and when the user hovers over a button in another location.

Inline Editor

When creating a hint message via the Inline Editor, you can select between the following two options for the When should this show? drop-down menu [1]:

- When the user sees the element (on page load) [2]
- When the user interacts with the element (on hover/click) [3]
How do I reset message views from the Impact Dashboard?

Messages created in Impact display in your Learning Management System. Upon viewing those messages, users can select to not view the message again. However, you can choose to reset message views so the message displays to users that have previously hidden the message.

Notes:
- Campaigns that have been disabled and re-enabled do not reset message views.
- Messages that have been unpublished and re-published do not reset message views.

Open Reset Views

In Global Navigation, click the Settings icon [1] and then click the Reset Views button [2].
Find Users

User names display in the Reset Message Views list.

To locate a user, type the user's name in the Search field.
Reset Message Views

To reset message views for a single user, click the **Reset** button for that user [1].

To reset views for multiple users, click the checkboxes for the users [2]. Then click the **Reset Selected** button [3].
How do I change the element or page on which the message is displayed using the Impact Dashboard?

Connecting your message to a context defines where in your learning application the message is presented. Contexts can be specific pages or specific elements on pages. Messages can be connected to multiple contexts.

You can control message contexts when creating a message using the inline editor and when editing a message from the Impact dashboard.

Open Messages

In Global Navigation, click the Messages link.
Manage Messages

Click the **Manage Messages** tab [1].

To edit an existing message, click the name of the message [2].

To create a new item, click the **New message** button [3].

**Edit Message**

In the View Message page, click the **Edit Message** button.

**Note:** If you are creating a new message, the Edit Message button does not display.
In the sidebar, locate and open the **Connect to Context** section [1]. Use the drop-down menu to change the element or page on which the message is displayed [2].
How do I assign a message to specific groups of users in the Impact Dashboard?

Impact messages can be assigned to various groups of users in your learning application. By assigning users to a message, you control which users, groups, or campaign audiences see your message.

Open Messages

In Global Navigation, click the Messages link.

Manage Messages

Click the Manage Messages tab [1].

To edit an existing message, click the name of the message [2].
To create a new item, click the **New message** button [3].

**Edit Message**

In the View Message page, click the **Edit Message** button.

**Note:** If you are creating a new message, the Edit Message button does not display.

**Assign to Users**

In the sidebar, locate and open the **Assign to Users** section [1]. Use the drop-down menu to select among the following types of users [2]:

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**Impact Guide Updated 2022-11-21**

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• Individual users groups (like user roles)
• A predefined User Segment
• A group of users targeted by campaign rules
• A user filter created from the tool adoption reports

**Note:** Assigning a user to a message is one of the factors that determines Impact message visibility.
How do I change the orientation of hint messages in the Impact Dashboard?

Impact allows you to select from a variety of hint message orientation options.

Note: Message orientation settings are only available for Hint Message types.

What orientation options are available?

You can select from the following orientation options:

- **Automatic** orientation will move the position of the hint message around the selected element (context) based on the scroll position of the user. This is the default option as your message will always be displayed where it fits best.
- **Right** orientation displays your hint message on the right side of the selected element (context).
- **Left** orientation displays your hint message on the left side of the selected element (context).
- **Top** orientation displays your hint message above of the selected element (context).
- **Bottom** orientation displays your hint message on the below the selected element (context).
- **Bottom Left** orientation displays your hint message below the selected element (context) on the left side.
- **Bottom Right** orientation displays your hint message below the selected element (context) on the right side.
- **Top Left** orientation displays your hint message above the selected element (context) on the left side.
- **Top Right** orientation displays your hint message above the selected element (context) on the right side.

Note: Message orientation settings are only available for Hint Message types.

Open Messages

In Global Navigation, click the Messages link.
Manage Messages

Click the Manage Messages tab [1].

To edit an existing message, click the name of the message [2].

To create a new item, click the New message button [3].

Edit Message

In the View Message page, click the Edit Message button.

Note: If you are creating a new message, the Edit Message button does not display.
View Orientation Settings

In the sidebar, locate and open the **Presentation** section [1].

To select an orientation setting, click the **Orientation** drop-down menu [2]. Your choice will be previewed in the message content area.
How do I change the size of my message in the Impact Dashboard?

Impact allows you to customize the height and width in pixels for any message type.

Open Messages

In Global Navigation, click the Messages link.

Manage Messages

Click the Manage Messages tab [1].

To edit an existing message, click the name of the message [2].
To create a new item, click the **New message** button [3].

**Edit Message**

In the View Message page, click the **Edit Message** button.

**Note:** If you are creating a new message, the Edit Message button does not display.

**View Presentation Options**

In the sidebar, locate and open the **Presentation** section [1].

Adjust the **Height** and **Width** fields [2]. Preview the size changes in the message content area.
Note: If you are adding a message to a Blackboard Learn Ultra Environment, your message size settings are automatically transformed into one of three preset sizes (small, medium, large).
How do I schedule message visibility in the Impact Dashboard?

With message visibility scheduling you can select exactly when your messages will be visible to your users.

With message visibility scheduling you can:

- Schedule from which date/time the message will be visible
- Schedule on which date/time the message will no longer be visible
- Schedule a specific date/time range of visibility (for example 1 semester period)

Note: There are multiple factors that impact message visibility.

Open Messages

In Global Navigation, click the Messages link.
Manage Messages

Click the **Manage Messages** tab [1].

Click an existing message to edit [2] and then click the **Edit Message** button.

To create a new message, click the **New message** button [3].

**Edit Message**

In the **View Message** page, click the **Edit Message** button.

**Note**: If you are creating a new message, the **Edit Message** button does not display.
Schedule Visibility

To schedule message visibility, in the sidebar, locate and open the Schedule Visibility section [1].

In the Visible From section, select the relevant:

- Start date
- Start time

In the Visible Until section, select the relevant:

- End date
- End time

Ensure that no other settings are blocking your message visibility.

Notes:

- Make sure you have assigned users
- Make sure you have connected a context

Publish your message or save it as a draft.
What factors determine Impact message visibility?

Impact messages are displayed to users within your learning application based on several targeting rules and visibility settings. This article will help you understand all the factors that determine the visibility of a message.

Factors that Impact Message Visibility

There are five major factors that can impact who sees your messages in the learning application.

- Message Status
- Assigned Users
- Connected Context
- Scheduled Visibility
- Tool Categories

Message Status

If your message is still in draft mode or has been changed to draft mode, it will not be visible to any users.

- To publish a new message, follow the steps in the How do I create a message from the Impact dashboard?
- To publish an existing message (that is saved as a draft), make sure the required settings are completed and then click the Publish button.
Assigned Users

By assigning users to a message, you control for which users, groups, or campaign audiences will see your message. Users can be assigned by:

- Selecting individual users groups like user roles
- Selecting a predefined User Segment
- Selecting a group of users targeted by campaign rules
- Selecting a user filter created from the tool adoption reports

Note: Assigned users are often based on dynamic conditions. Meaning that the users who see this message can change over time depending on the criteria selected.
Connected Context

Connecting a message to a context defines which pages or elements within the learning application message will display a message. This means if you connect a message to a context that only a specific user with specific permissions can view (for example an instructor in your LMS), then only those users with access to that page/element can see the message.

Please note that a context also has several display conditions like:

- Show message on every page where this element appears
- Show message only on this specific page
- Show when hovering over this element
- Show when clicking on this element

You can adjust the connected context of your message in the edit message sidebar.
Scheduled Visibility

Scheduling the visibility of your message enables you to select a start date/time and end date/time during which your message will be displayed in your learning application.

If all other required settings are completed and the message is published, then

- The message will automatically become visible in the learning application at the scheduled **Start Date** and **Time**
- The message will automatically disappear from the learning application at the scheduled **End Date** and **Time**

**Tool Categories**

Is your message associated with a specific tool category? This is often the case with out-of-the-box messages. If your message is associated with a specific tool category and you have set that tool category to hidden, then your message will not be visible.

- You can view the associated tool categories via the **Edit Message** under the **Advanced Settings** tab.
- You can manage tool category visibility via the **Global Settings Menu → Tool Categories**
How do I see if a message is visible or not?

To find out if a message is currently visible, locate the message on your Impact dashboard and look for the Visibility indicator in the top of the sidebar.

To find out if a message is currently visible, locate the message on your Impact dashboard and look for the Visibility indicator in the top of the sidebar.
# How can I debug message visibility?

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<th>Visibility states</th>
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Are you having trouble understanding why your message is not visible? The **Status & Visibility** tab on the **View Message** page provides you a quick summary of one or more reasons why your message may not be visible to users.

Here’s what you can do for each hidden by indicator:

- **Hidden by draft state**: Publish your message!
- **Hidden by unpublished campaign**: Check the "Assigned to Users" tab to see which campaign this message is connected to, then locate the relevant campaign on My Campaigns and publish it.
- **Hidden by tool category**: Check the "Advanced Settings" tab to see which tool category is associated with this message. Then, via the global settings menu go to the Tool Categories page, find the relevant category, and toggle on the visibility.
- **Hidden by date range**: Check the "Schedule Visibility" tab and review the start and end date/time selections.
How do I view and filter messages in the Impact Dashboard?

You can view and filter messages in the Impact Dashboard.

Open Messages

In Global Navigation, click the Messages link.

View Messages

View messages.

You can filter this list based on Assign to, Created by, Context, Title, or Dates.
Filter Messages

You can filter this list based on Assign to, Created by, Context, Title, or Dates.
How do I link a message to another message in the Impact Dashboard?

Creating links between the messages you create using Impact is a great way to present users information at different places in your learning application. This help article shows you how to link a new message to an existing message via the Impact dashboard.

Open Messages

In Global Navigation, click the Messages link.

Manage Messages

Click the Manage Messages tab [1].
To edit an existing message, click the name of the message [2].

To create a new item, click the **New message** button [3].

**Edit Message**

In the View Message page, click the **Edit Message** button.

**Note:** If you are creating a new message, the Edit Message button does not display.

**Insert Message**

Click into the body of the message or press enter if editing text to see the in-line insert options.
Click the Add icon [1] and click the Insert message option [2].

**Search for Message**

Use the Search field to find the message [1]. Click the message you want to link one message to another one [2]. Click the Continue button [3].
Preview Message

Insert a link to an existing message

🔗 Back to all messages

Link Title:

View Modules

Message preview:

View Modules

Modules are a great way to organize a course.

Cancel  Continue

You can now preview the message and adjust the wording of the link title.

Click the Continue button.
Now that you have linked one message to another, you are ready to continue to edit this message or publish it to your learning environment.
How do I personalize messages or support articles in the Impact Dashboard?

Adding personalization tokens (like First Name or Course ID) to your Impact messages and support articles is a fantastic way to engage users in a more direct, personal way which can improve the user's experience with the messages and articles targeted to them.

Here is a full list of personalization options currently available:

- First Name
- Full Name
- User Name
- Course Name (Only available for Blackboard)
- Course ID (Only available for Blackboard)
- Course PK1 ID (Only available for Blackboard)

Open Messages

In Global Navigation, click the **Messages** link.

**Note:** To personalize support articles, click the **Support** link.
Manage Messages

Click the Manage Messages tab [1]. To personalize support articles, click the Manage Articles tab.

To edit an existing message, click the name of the message [2].

To create a new item, click the New message button [3] or New Article button.

Edit Message

Click the Edit Message or Edit Article button.

Note: If you are creating a new message or article, the Edit Message or Edit Article button does not display.
Add Personalization

If editing text, click the body of the message or article and press enter view the in-line insert options.

Click the User icon [1] and then select from the personalization options [2].
Home Page Helps

The home page helps users know the course.

First Name
Full Name
User Name
Course Name (Bb only)
Course ID (Bb only)
Course PK1 ID (Bb only)

You can also access the User icon from the Rich Edit Mode.
Now that you have successfully added a personalization token to your message or article you can continue to edit your content, targeting assignments, settings, or publish it to your learning environment. When your message or article is published, the personalization token will be replaced with the value associated with the viewer of the content, so if you chose First Name as a personalization token, the user will see their own first name - ex. John Doe - instead of the First Name tag.

**Remove Personalization Token**

To remove a personalization token, move your cursor next to the personalization tag and press backspace or delete on your keyboard to remove it.
How do I embed media or an iFrame into a message or support article in the Impact Dashboard?

You can embed media and add custom code to your messages and support articles.

Examples of media and custom code:

- Any iFrame
- External forms (Google forms, Typeform and more!)
- External videos (if your video is hosted on youtube or is downloaded locally you can also insert it via the youtube URL or upload it directly to Impact)
- Kaltura Videos
- Panopto Videos
- HP5 content (https://h5p.org/) like interactive videos, course presentations, charts quizzes, and more!

Open Messages

In Global Navigation, click the Messages link.
Manage Messages

Click the **Manage Messages** tab [1]. To add media to support articles, click the **Manage Articles** tab.

To edit an existing message, click the name of the message [2].

To create a new item, click the **New message** button [3] or **New Article** button.

**Edit Message**

Click the **Edit Message** or **Edit Article** button.

**Note:** If you are creating a new message or article, the Edit Message or Edit Article button does not display.
Insert Media

Click into the body of the message or press enter if editing text to see the in-line insert options.

Click the Media icon.
In the Rich Editor Mode, you can also click the Media icon.
Embed Media

In the modal, click the **Embed** tab.
Paste Embed Code

In the code field, paste your iFrame code.

Click Insert Media button.
View Embedded Media

How do I embed media or an iframe into a message or support article?

To embed external media or an iframe into your messages and support articles edit a message and click into the body (or press enter if you are already editing the content to view the inline editing options. Then select the Insert Media icon.

You have successfully added an embedded an external iFrame into your message or article you can continue to edit your content, targeting assignments, settings, or publish it to your learning environment.
How do I edit multiple messages at the same time in the Impact Dashboard?

You can edit multiple messages using bulk editing actions in the Impact Dashboard.

Open Messages

Login to your Impact dashboard via [app.esyssoft.com](http://app.esyssoft.com) and select the relevant instance.

In Global Navigation, click the **Messages** link.

Manage Messages

Click the **Manage Messages** tab [1].
Click the checkboxes next to the messages you want to bulk edit. [2].

You can bulk edit the following:

- Edit User Assignments
- Edit Connected Context
- Edit Tags
- Edit Status
- Delete

**View Edit Options**

For User Assignments, Contexts, and Tags you have the options to Add, Remove, or Override the user assignments of a message in bulk.

For Status, you have the option to Publish or Hide (mark as a draft) messages in bulk.

**Note:** Publishing messages in bulk is not always possible as messages must have certain settings configured to allow publishing.
For Delete, you need to confirm that you want to delete the selected messages.
How do I add a message to an existing campaign in the Impact Dashboard?

Impact allows you to assign a message to an existing campaign to apply the user targeting rules (as defined for the campaign) to your message. This means that if your campaign audience is “Instructors not active with a tool for 30 days” and you connect a message to this campaign, the message will also be targeted at that audience.

Open Messages

In Global Navigation, click the Messages link.

Manage Messages

Click the Manage Messages tab [1].
To associate a message to an existing campaign, locate and click the message you want to use.

To create a new message, click the New message button.

**Edit Message**

In the View Message page, click the Edit Message button.

**Note:** If you are creating a new message, the Edit Message button does not display.
Edit Message Details

Edit your message details.
Assign to Users

In the sidebar, click the Assign to Users section.
Assign to Campaign

To add a message to an existing campaign, enter the terms in the Filter field [1]. Click the checkbox next to the name for the relevant campaign [2]. You can also select multiple campaigns at the same time.

Update Message

Once you have selected the relevant campaign, you can continue to edit the existing message and click the Update button. If you created a new message, you will click the Publish button.
How do I enable predefined comment options for messages and support articles in the Impact Dashboard?

Impact allows you to give your users the choice of several predefined comment options to choose from when leaving feedback on a support article or message. Users can always add more feedback to any predefined comment in their own words.

Predefined comment options reduce the threshold for users to give you additional feedback. It’s much fast for a user to select a comment they agree with versus writing something unique. This means more feedback for your team.

Predefined comments allow you to more easily analyze, group, and draw conclusions from user comments.

To turn on predefined comment options, create a ticket for the Impact support team to enable predefined comments for your instance.

Enable Predefined Comment Options
Click the **Collect feedback** checkbox on each message. This is automatically turned on for support articles.

**Notes:**

- For messages, this Collect Feedback checkbox is located in the Presentation section.
- For support articles, you do not need to check any box, as feedback collection is always turned on for support articles by default.

**View Predefined Comment Options**

Predefined comment options are displayed to users after they vote on your message or article. The predefined feedback options displayed change based on if the user Upvoted or Downvoted the message/article.

**Upvotes Message or Support Article**

- This was helpful because it has useful information
- This was helpful because it is easy to understand
- This was helpful because it was provided at the right time

More feedback

- This was helpful because it has useful information
- This was not helpful because it is easy to understand
- This was not helpful because it was provided at the right time
Downvotes Message or Support Article

Helpful? 👍 🙅‍♂️

🫑 This was not helpful because it...

☐ Is not clear enough
☐ Is not relevant
☐ Has incorrect information

More feedback

Submit

- This was not helpful because it is not clear enough
- This was not helpful because it is not relevant
- This was not helpful because it has incorrect information
How do I enable or disable feedback on a message in the Impact Dashboard?

You can enable or disable feedback options on any particular message.

Open Messages

Login to your Impact dashboard via app.eesysoft.com and select the relevant instance.

In Global Navigation, click the Messages link.

Manage Messages

Click the Manage Messages tab [1].
Click an existing message to edit [2].

**Edit Message**

Click the **Edit Message** button [1].

**Collect Feedback**

In the sidebar, in the Presentation section [1], click the **Collect feedback on this message** checkbox [2].

To disable collecting feedback, deselect the **Collect feedback on this message** checkbox.

To save your changes, click the **Update** button [3].
View Feedback Options on Messages

- Don't show this again
- Helpful? 🌟
- This was helpful because it...
  - Has useful information
  - Is easy to understand
  - Was provided at the right time

Message feedback is displayed as **Thumbs Up** and **Thumbs Down** icons. When a upvote or downvote is made, the message expands downwards and allows users to leave comments with their vote.
How do I change message types in the Impact Dashboard?

You can change the message type in the Impact Dashboard.

Open Messages

Login to your Impact dashboard via [app.eesysoft.com](http://app.eesysoft.com) and select the relevant instance.

In Global Navigation, click the Messages link.

Manage Messages

Click the Manage Messages tab [1].
Click an existing message to edit [2] and then click the Edit Message button.

**Change Message Type**

To change message types, locate and click the Message Types section [1]. Click the message type [2].

**Note:** The relationship between Message Type and Connected Context means that not all message types work for all context types.
Monitors
Where do I find all of my activity monitors in the Impact Dashboard?

Activity monitors allow you to overview custom created monitors.

Open Activity Monitors

In Global Navigation, click the Settings icon [1]. Then click the Activity Monitors link [2].
View Activity Monitor Overview

By default, monitors are listed with their name [1], creator [2], by whom and when the monitor was last triggered [3], when the monitor was first triggered [4], and the total number of triggers [5].

Filter Activity Monitor

To show or hide certain fields, click the Fields drop-down menu [1].

To search based on a combination of criteria, click the Filters drop-down menu [2].

To search for specific monitors, enter a term in the Search field [3].
How do I move a monitor to another monitor category in the Impact Dashboard?

You can manage your activity monitors by assigning them to monitor categories that are within your reporting templates. Once you add an activity monitor to a monitor category, you can move it to another category.

Open Reporting Templates

In Global Navigation, click the Settings icon [1]. Then click the Reporting Templates link [2].

Move Template
Locate the reporting template. Click the **Options** menu [1] and then click the **Move To** link [2].

**Add to Reporting Template**

![Add this monitor to a reporting template]

Once you select the monitor category to move your monitor to, click the **Add To Reporting Template** button.
How do I connect Monitors in Campaigns?

You can add locally created monitors and existing monitors inside campaigns.

Viewing Monitors in Campaigns

To view Monitors in Campaigns, you need to add monitors to Reporting Templates. The two ways to add Monitors through Reporting Templates is by creating a new template, or add the monitor to an existing reporting template. The steps of each of these is outlined below.

Open Reporting Template Monitors

To add an activity monitor, click the reporting template name link [1] or create a new template [2].
Create Monitor Category or Add Existing Monitors

Modify Reporting Templates
Category active monitors into reporting templates to customize how data is presented in your tool adoption reports.

Reporting Templates  Student  Exit

Monitor Categories (8)
- Communication
  3 categories  0 monitors
- Collaboration
  4 categories  0 monitors
- Course management
  3 categories  0 monitors
- Course content
  6 categories  0 monitors
- Assessment
  3 categories  0 monitors
- Grades
  3 categories  0 monitors
- ePortfolio
  10 categories  0 monitors
- Canvas set-up
  3 categories  0 monitors

Monitors (0)

To create monitor categories, click the Create Monitor Category link [1].

To add existing monitors, click the Add Existing Monitors link [2].
Create Existing Monitor

To search for an existing monitor, enter a search term in the **Search** field [1].

To add an existing monitor, click the monitor checkbox [2]. Click the **Insert** button [3].
Once you have set your Monitors inside the desired Reporting Templates, click the **Campaigns** link [1] and select the Campaign you want your Monitor [2].
Edit Properties

To edit the campaign property, click the **Edit Properties** button.
Edit Campaign

To add your Monitors in your Campaign, navigate to Edit Campaign - Outcomes [1]. In the Tools field, add the desired Monitor Category you created [2]. Click the Save button [3].
Permissions and Teams
How do I invite new users to the Impact Dashboard?

You can invite users to your Impact Dashboard.

Open Users and Permissions

In your Impact dashboard, click the **Global Settings** icon [1] and then click the **Users & Permissions** link [2].
View Users

In the Account page, click the Users tab. You can view all your users, user permissions, feature permissions, and teams.
Add Users

Account

Users
Create new users, customize user permissions, and remove users from your account.

<table>
<thead>
<tr>
<th>Full Name</th>
<th>Feature Permission Groups</th>
</tr>
</thead>
<tbody>
<tr>
<td>Andrew Adams</td>
<td>Administrator (instance: documentation.eesysoft.com)</td>
</tr>
<tr>
<td>Andy Adamovich</td>
<td>Administrator (instance: documentation.eesysoft.com)</td>
</tr>
<tr>
<td>Doug Roberts</td>
<td>Administrator (instance: documentation.eesysoft.com)</td>
</tr>
</tbody>
</table>

To invite a user, click the Invite New User button.
Invite User

Invite New User

Name

Email address

Feature Permissions - Instance: documentation.eesysoft.com

None selected

Cancel

Invite New User

Add the user’s name [1], email address [2], and select feature permission settings for the user [3].

To add a user, click the Invite New User button [4].
How do I edit a user in the Impact Dashboard?

After you have invited users to your Impact dashboard, you can edit the information and permission settings for these users.

Open Users and Permissions

In your Impact dashboard, click the **Global Settings** icon [1] and then click the **Users & Permissions** link [2].
View Users and Permissions

In the Account page, click the Users tab. You can view all your users, user permissions, feature permissions, and teams.
Edit Users and Permissions

Account

Users
Create new users, customize user permissions, and remove users from your account.

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<tr>
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<td>Administrator (instance: documentation.eesyssoft.com)</td>
</tr>
</tbody>
</table>

To edit a user, click the Options menu [1] and click the Edit User link [2].
Edit User

You can change the name [1] and feature permission settings for the user [2]. You are not able to change the user’s email. To add a new email please follow the directions to invite a new user.

To save your changes, click the Save User button [3].
How do I resend an invitation to a user in the Impact Dashboard?

You can resend an invitation to a user in the Impact Dashboard.

Open Users and Permissions

In your Impact dashboard, click the **Global Settings** icon [1] and then click the **Users & Permissions** button [2].
View Users and Permissions

In the Account page, click the Users tab. You can view all your users, user permissions, feature permissions, and teams.
Resend Invite

Account

Users

Create new users, customize user permissions, and remove users from your account.

<table>
<thead>
<tr>
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<tbody>
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<td>Administrator (instance: documentation.eesysoft.com)</td>
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<td>Andy Adamovich</td>
<td>Administrator (instance: documentation.eesysoft.com)</td>
</tr>
<tr>
<td>Doug Roberts</td>
<td>Administrator (instance: documentation.eesysoft.com)</td>
</tr>
</tbody>
</table>

To resend an invitation to a user, click the **Options** menu [1] and click the **Resend Invite** link [2].

View Resend Invite Confirmation

⚠️ Resend invitation email?

Do you want to resend invitation email?

[Cancel] [Resend]

Click the **Resend** button [3].
How do I revoke a user's access in the Impact dashboard?

After you invite users to your Impact dashboard, you can revoke a user's access.

Open Users and Permissions

In your Impact dashboard, click the Global Settings icon [1] and then click the Users & Permissions link [2].
View Users and Permissions

In the Account page, click the Users tab. You can view all your users, user permissions, feature permissions, and teams.
Revoke Access

To revoke a user’s access, click the Options menu [1] and click the Revoke Access link [2].

View Revoke Access Confirmation

⚠️ Revoke access for user "Andrew Adams"?

Do you want to revoke access for user "Andrew Adams"?

- [ ] Cancel
- [ ] Revoke Access

Click the Revoke Access button [3].
How do I create feature permission groups in the Impact Dashboard?

With Impact by Instructure, you can create custom feature permission groups based on the needs of your institution. Once you invite users to your dashboard, you can use feature permission groups to organize your user roles, institutional hierarchies, or sub-accounts.

Open Users and Permissions

In your Impact dashboard, click the **Global Settings** icon [1] and then click the **Users & Permissions** link [2].
View Users and Permissions

In the Account page, click the Feature Permissions tab.
View Feature Permissions

You can view all of your feature permission groups. Your Impact dashboard has some out-of-the-box groups such as Administrator and Support Manager but you can also create your own custom groups.

To create a feature permission group, click the Create Group button.
Create Permissions Group

Create Feature Permission Group

Name:
1. Custom Group

Owner:
2. Instance: documentation.eesysoft.com

Permissions

Campaigns  Messages  Support  Insights  Settings

☐ Campaigns
  ☐ View Campaigns
  ☐ Create/Edit Campaigns

To create a custom feature permission group, enter a name [1] and select an owner [2].

You can switch between Campaigns, Messages, Support, Insights, and Settings permissions [3]. To customize the permissions more, you can select specific functions of the feature category.

Campaigns
View Campaigns
Create/Edit Campaigns

Messages
View Messages
Create/Edit Messages
View Message Insights

Support
Articles (View Articles, Create/Edit Articles, View Articles Insights, Arrange Articles)
Design
Routing
Once you have finished creating a feature permission group, click the Create Group button [4].

View Permission Group
View your custom permission group with the configurations and access levels of the feature permissions group [1].

To see more details, click the arrow next to each feature [2].

### View Permission Icons

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Green Check" /></td>
<td>User has access to this category</td>
</tr>
<tr>
<td><img src="image" alt="Red X" /></td>
<td>User does not have access to this category</td>
</tr>
<tr>
<td><img src="image" alt="Blue Bar" /></td>
<td>Some features in this category are disabled</td>
</tr>
</tbody>
</table>

The icons next to each category represent the access status.
How do I edit feature permission groups in the Impact Dashboard?

With Impact by Instructure, you can create custom feature permission groups based on the needs of your institution and edit them. Once you invite users to your dashboard, you can use feature permission groups to organize your user roles, institutional hierarchies, or sub-accounts.

Open Users and Permissions

In your Impact dashboard, click the Global Settings icon [1] and then click the Users & Permissions link [2].
View Users and Permissions

In the Account page, click the Feature Permissions tab.
Edit Custom Feature Permissions

To edit a custom permission group, click the **Options** menu [1] and click the **Edit Group** link [2].

To delete a custom permission group, click the **Delete Group** link [3].
Edit Permissions Group

To edit a custom feature permission group, change the name [1] or change an owner [2].

You can switch between Campaigns, Messages, Support, Insights, and Settings permissions [3]. To customize the permissions more, you can select specific functions of the feature category.

Once you have finished creating a feature permission group, click the Save Changes button [4].

If you want to delete the custom group, click the Delete Group link [5].
**View Permission Group**

View your edited custom permission group with the configurations and access levels of the feature permissions group.
Reporting Templates
What are Reporting Templates in the Impact Dashboard?

Impact user activity data is gathered using hundreds of out-of-the-box and custom created data monitors. Each monitor is responsible for registering a single user action (e.g. clicking a submit button or visiting a discussion board). In order to visualize the immense amount of data from these monitors in a single consolidated report, monitors are categorized into reporting templates.

Where are reporting templates used?

There are several reports in the Impact dashboard that use reporting templates to collate data from a multitude of monitors:

- The Tool Adoption Report
- The Course Activity Report
- Campaigns

Although these reports are structured differently, the way in which reporting templates function within them is generally the same. Below are the different ways in which (parts of) reporting templates are implemented across these reports.
Tool Adoption Reports

The Tool Adoption Report contains a chart based on a reporting template. The Tool Adoption Report is used to analyze usage data across your entire institution at a glance and allows you to group monitoring data together with the help of Reporting Templates. These provide a hierarchical structure to roll up the detailed data derived from many individual monitors into manageable categories. Two or more monitors inside one category leads to accumulation of data.

To view the Tool Adoption Report, click the Insights link [1]. Then, click the Tool Adoption link [2].

For more information on the Tool Adoption Report, visit How do I view the Tool Adoption Report in the Impact Dashboard?

How do I view the Tool Adoption Report in the Impact Dashboard?
The Course Activity Report contains a chart based on a reporting template and compares the usage of specific tools for courses based on your search criteria. The reporting template in Course Activity Report displays all first-level Monitor Categories belonging to the selected reporting template, including a consolidated adoption percentage. The adoption percentage is the percentage of active users who triggered at least one monitor within each category. The connected graph presents the adoption level over time for each of these categories.

To view the Course Activity Report, click the Insights link [1]. Then, click the Course Activity link [2].

For more information on the Course Activity Report, visit How do I view the Course Activity Report in the Impact Dashboard?
Monitor Categories in Campaigns

Campaigns allow you to combine deploy messages and support content to a specific target audience and measure the resulting impact on user activity. In order to focus on the campaign's desired outcome metrics, you can assign any combination of Monitor Categories to a campaign. The selected Monitor Categories feed into the overall adoption score that is presented on the Campaign Details page.

**Note:** Monitors cannot be added to Campaigns, they must be housed inside a category within a reporting template.

For more information on Campaigns, visit [How do I view campaign results in the Impact Dashboard?](#).
How do I create a new reporting template in the Impact Dashboard?

Reporting templates help you visualize how data is feeding into your reports. You can add activity monitors and assign specific configurations to each reporting template.

Open Reporting Templates

In Global Navigation, click the **Settings** icon [1]. Then click the **Reporting Templates** link [2].
Create Reporting Template

In the Reporting Templates page, click the Create Template link.
Save Reporting Template

Create Reporting Template

1. Name:

2. Role Categories:
   - Any Role Category

3. Make this the default template for the course activity report
4. Make this the default template for the tool adoption report

Enter a template name [1] and select the Role Categories for the template [2].

To make the template the default for the course activity report, click the Make this the default template for the course activity report checkbox [3].

To make the template the default for the tool adoption report, click the Make this the default template for the tool adoption report checkbox [4].

Click the Save button [5].
How do I edit an existing reporting template in the Impact Dashboard?

You can edit reporting templates. After you [create a reporting template](#) you can [add activity monitors](#) and assign specific configurations to each reporting template.

Open Reporting Templates

In Global Navigation, click the **Settings** icon [1]. Then click the **Reporting Templates** link [2].
Open Edit Reporting Template

In the Modify Reporting Templates page, locate the template in the list and click the Options icon [1]. Then click the Edit template link [2].
You can edit the template name [1] and select the role categories for the template [2].

To make the template the default for the course activity report, click the **Make this the default template for the course activity report** checkbox [3].

To make the template the default for the tool adoption report, click the **Make this the default template for the tool adoption report** checkbox [4].

Click the **Update** button [5].

**Note:** You cannot delete a default reporting template being used for tool adoption or course activity report. If you wish to delete a default reporting template, you must first assign another template as default.
Modify Reporting Template Monitors

You can also edit the Monitor Categories and Monitors for the template.

To edit the monitor categories and associated monitors, click the name of the reporting template you want to update.
Update Reporting Template Monitors

To create monitor categories, click the Create Monitor Category link [1].

To edit monitor categories, click the Options icon [2] and then click the Edit category link [3].

To add existing monitors, click the Add Existing Monitors link [4].
How do I add an activity monitor to a reporting template in the Impact Dashboard?

Activity monitors are at the core of how Impact helps you measure tool usage and adoption throughout your learning application. You can categorize activity monitors into reporting templates in order to customize how data is presented in your tool adoption reports.

Open Reporting Templates

In Global Navigation, click the Settings icon [1]. Then click the Reporting Templates link [2].
Open Reporting Template Monitors

Modify Reporting Templates

Categorize activity monitors into reporting templates to customize how data is presented in your tool adaption reports.

Reporting Templates (6)

- **Student (legacy report)**
  - 6 categories | 0 monitors

- **Instructor (legacy report)**
  - 4 categories | 0 monitors

- **Campaign monitors**
  - 6 categories | 0 monitors

To add an activity monitor, click the reporting template name link.
Add Activity Monitors

<table>
<thead>
<tr>
<th>Monitor Categories (6)</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>SpeedGrader link: Gradebook assignment menu</td>
<td>0 categories</td>
</tr>
<tr>
<td>Ally accessibility report</td>
<td>0 categories</td>
</tr>
<tr>
<td>Canvas Studio Page</td>
<td>0 categories</td>
</tr>
<tr>
<td>Kaltura</td>
<td>4 categories</td>
</tr>
<tr>
<td>Navigation tab inside course settings page</td>
<td>0 categories</td>
</tr>
<tr>
<td>Save button on course settings page</td>
<td>0 categories</td>
</tr>
</tbody>
</table>

Click the Add Existing Monitors link.
Add Activity Monitor

To search for an existing monitor, enter a search term in the Search field [1].

To add an existing monitor, click the monitor checkbox [2]. Click the Insert button [3].

**Note:** If you are mapping LTI Tools as activity monitors, be sure to create a monitor category within the Tool Adoption report template with an appropriate name as the monitor category.
Settings
How do I check that my Impact service is running correctly?

By using the System Status page, you can monitor the health of Impact processes and services.

Open Impact Dashboard

In Global Navigation, click the Settings icon [1]. Then click the System Status link [2].
View System Status

The Status page displays the overall health of all services and the AWS region of the instance.

View Service Interruption

In case of a service interruption, a red indicator displays [1] with an overview of the affected services [2]. If an unexpected disruption occurs, please submit a support ticket.
View Status Overview

**Status Overview**
Check the status of individual Impact system components.

<table>
<thead>
<tr>
<th>Status</th>
<th>Name</th>
<th>Comment</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>✅ Ok</td>
<td>CAAS Items Synchronization</td>
<td>Synchronized: local=76343, master=76343.</td>
<td>a minute ago</td>
</tr>
<tr>
<td>✅ Ok</td>
<td>CAAS Monitors Synchronization</td>
<td>Synchronized: local=76343, master=76343.</td>
<td>a minute ago</td>
</tr>
<tr>
<td>N/A</td>
<td>LMS Data Synchronization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td>LMS Course information synchronization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td>LMS Course User information synchronization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>N/A</td>
<td>LMS User information synchronization</td>
<td></td>
<td></td>
</tr>
<tr>
<td>✅ Ok</td>
<td>Content visibility evaluation</td>
<td>Done...Compared to time 2022, Jan 31, 20:42</td>
<td>a minute ago</td>
</tr>
<tr>
<td>✅ Ok</td>
<td>Resource caching</td>
<td>Current cache key: 530</td>
<td>31 minutes ago</td>
</tr>
<tr>
<td>✅ Ok</td>
<td>Custom style version</td>
<td>2022-01-19T16:30:50+01:00</td>
<td>12 days ago</td>
</tr>
</tbody>
</table>

Status Overview displays detailed information on the status of each service or service component.

View Instance Settings

**Instance Settings**

<table>
<thead>
<tr>
<th>Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>LMS Data Synchronization</td>
<td>off</td>
</tr>
<tr>
<td>Local Timezone for Impact Application</td>
<td>UTC</td>
</tr>
</tbody>
</table>

Instance Settings displays information about instance-wide settings.
How do I check that my Impact data is being synced?

By using the System Status page, you can check that the course information from your LMS is being synchronized properly with your Impact instance.

Open Impact Dashboard

In Global Navigation, click the Settings menu [1]. Then click the System Status link [2].
View System Status

The Status page displays the overall health of all services and the AWS region of the instance.

View Status Overview

If there are no disruption warnings at the top of the page and all individual statuses are listed as OK, the LMS data synchronization is running correctly.
View Service Interruption

If a service disruption notice is shown related to LMS Data Synchronization, this could mean that the synchronization process has been interrupted or that discrepancies have been detected between the LMS and Impact databases.

View Status Overview

<table>
<thead>
<tr>
<th>Status</th>
<th>Name</th>
<th>Comment</th>
<th>Last Updated</th>
</tr>
</thead>
<tbody>
<tr>
<td>NA</td>
<td>CAAS Items Synchronization</td>
<td>No content master connected.</td>
<td>a minute ago</td>
</tr>
<tr>
<td>Ok</td>
<td>CAAS Monitors Synchronization</td>
<td>Synchronized: local=64450, master=64450.</td>
<td>a minute ago</td>
</tr>
<tr>
<td>Error</td>
<td>LMS Data Synchronization</td>
<td>Halted. Connector Instruction Count &gt; 5000 while not in off ...</td>
<td>14 days ago</td>
</tr>
<tr>
<td>Error</td>
<td>LMS Course information synchronization</td>
<td>localCount (6776) &lt; remoteCount (6786)</td>
<td>14 days ago</td>
</tr>
<tr>
<td>Ok</td>
<td>LMS Course User information synchronization</td>
<td>Synchronized: local=1, remote=1.</td>
<td>14 days ago</td>
</tr>
<tr>
<td>Error</td>
<td>LMS User information synchronization</td>
<td>localCount (40932) &lt; remoteCount (41786)</td>
<td>14 days ago</td>
</tr>
<tr>
<td>Ok</td>
<td>Content visibility evaluation</td>
<td>Done...Compared to time 2020, Sep 11, 13:18</td>
<td>a minute ago</td>
</tr>
<tr>
<td>Ok</td>
<td>Resource caching</td>
<td>Current cache key: 307</td>
<td>20 hours ago</td>
</tr>
</tbody>
</table>

The individual statuses in Status Overview provide clarification on the nature of the disruption.

If you encounter an unexpected disruption in your LMS Data Synchronization, please submit a support ticket.
How do I make sure that I am using the latest Blackboard building block for Impact?

To take advantage of Impact's latest improvements and updates, verify that you are running the latest version of the Impact Building Block in your Blackboard Learn environment.

Instructions

- Download the latest version of the Impact building block [here](#).
- Log in to your Blackboard Learn environment as an administrator.
- Navigate to System Admin > Building Blocks > Installed Tools.
- In the list of installed tools, locate the Impact Connector, and verify that the stated version number matches the version number on the release information page.
How do I show or hide content and reports related to a specific tool category in the Impact Dashboard?

You can use Tool Categories to toggle the visibility of tool-specific content and reports.

Open Impact Dashboard

In Global Navigation, click the **Settings** menu [1]. Then click the **Tool Categories** link [2].
View Tool Categories

The Tool Category Visibility list displays all tool categories that have out-of-the-box content or reports [1]. You can also view the category visibility status [2].

To view additional categories, use the page navigation icons [3]. To manage the number of categories that display on the page, click the Rows per page drop-down menu [4].
View Tool Categories Visibility

Tool Categories can be searched and filtered by visibility status.

To show or hide content and reports related to an individual tool category, click the Visibility toggle.

Manage Category Visibility

To manage the content and reports for multiple tool categories, select the checkbox next to multiple category names [1].

To make all content and reports visible, click the Make All Visible link [2].

To hide all content and reports, click the Hide All link [3].
How do I add the Impact Support Center to the Canvas Help menu?

You can create a custom link in the Canvas Help menu for the Impact Support Center.

Open Canvas Help Menu

In Global Navigation, click the Help button.

Add the following JS script in the root of the system:

```javascript
$(document).on('click', '#help_tray a:contains(LinkName)', function(event) {
  window.dispatchEvent(new Event('eesy_launchSupportTab'));
  event.preventDefault();
});
```
Customize Menu

Help

Little lost? Try here first!
Search the Canvas Guides
Find answers to common questions

OTHER RESOURCES
- Ask the Community
- Get help from a Canvas expert
- Training Services Portal
- Access Canvas training videos and courses
- COVID-19 Canvas Resources
- Tips for teaching and learning online
- Video Conferencing Guides for Remote Classrooms
- Get help on how to use and configure conferences in canvas.
- Report a Problem
- If Canvas doesn't behave, tell us about it
- Submit a Feature Idea
- Have an idea to improve Canvas?

Customize this menu
Add Link

1. Add the link name in the **Link name** field [1].
2. Add a description in the **Link description** field [2].
3. Add the Impact Support Center URL in the **Link URL** field [3].
4. You can set which Canvas user roles are allowed to see the customized link in the Help menu by selecting the applicable checkboxes in the **Available to** section [4].
5. To save your changes, click the **Add link** button [5].

Save Custom Link

To add the customized link to the Canvas Help menu, click the **Update Settings** button.
How do I enable the Advanced Ally integration in Blackboard to access expanded Impact capabilities?

In order for Impact to have full access to all usage data collected by Ally and give you the most accurate reports, you need to enable Ally data integration into Impact. This article shows you how to enable the advanced Ally integration to activate Impact's expanded capabilities.

Open Blackboard

In order to enable advanced Ally integration, you need to be within an admin account on Blackboard.

Within Blackboard, navigate to and click the Admin link.
View Administrator Tools

Open Ally Configuration
Scroll and navigate to Tools and Utilities.

Click the Ally Configuration link.

Open Features

Click the Features tab.
Open Ally Data Integration into Impact

Navigate to and click the Ally data integration into Impact section.
Enable Data Integration

Make sure that this configuration is enabled. If it is not, click **Enable**.

By enabling this data integration, you give Impact permission to capture usage data inside Ally and report on it.
How do I enable the Impact integration in Qwickly?

Qwickly offers an integration with Impact by Instructure (formerly EesySoft) for clients who are licensed to both platforms.

Open Qwickly Dashboard

In order to set up the integration, go to the Qwickly Dashboard (www.qwickly.tools)

Navigate to your test or production system, and click the Attendance Settings button or, if licensed, Launch Attendance Pro button.
Open Preferences

Open Manage Instances and locate your instance's Attendance Settings.

Within your Instance's Attendance Settings, click the Preferences tab.

Enter Institution's Host Value

Scroll to the bottom of the Preferences tab to find the options for Impact by Instructure Integration (formerly EesySoft).

Once you've entered your Institution's host value, click the Save Settings button.
View Integration

You can now open Attendance from your Institution’s LMS and see the Impact by Instructure interface open within Attendance.
How do I view LTI launches using the LTI Tools feature in the Impact Dashboard?

As an Impact admin, you can view and map LTI launches with associated LTI tools.

When an LTI tool launch has been mapped to the LTI tool, LTI data points can be accessed in the monitor-based reports such as: Tool Adoption Report, Course Activity Report, Campaign Reports, Comparison Reports (Monitor Trend, Champions Report, etc.).

If an event is only connected to a context, the context is mapped to the monitor. When that happens, no monitor visits are recorded.

**Note:** When an LTI launch has been associated with an LTI tool, available out-of-the-box LTI messages display to users when viewing the LTI tool.

Open LTI Tools

In Global Navigation, click the **Settings** icon [1]. Then click the **LTI Tools** link [2].
View LTI Tool Launches

The LTI Tool Launches page displays a list of LTIs that have been opened from the Learning Management System.

Filter LTI Tool Launches

By default, the LTI Tool Launches page includes the following fields: Associated LTI Tool, ID, Name, Launch Type, and URL [1].

You can manage displayed fields using the Fields drop-down menu [2]. You can also filter items using the Filters drop-down menu [3]. To search for an LTI tool, type a keyword in the Search field [4].

Note: An LTI tool must be mapped in order for LTI launches to be visible in monitor-based reports. In the LTI Tool Launches page, users can filter results to view unmapped LTI tool launches. The name visible in the Associated LTI Tool column corresponds to the monitor name used in monitor-based reports.
Add Associated LTI Tools

Many LTI launches are automatically mapped to an LTI tool. To manually map an LTI launch to a tool, click the **Associated LTI Tool** drop-down menu.
Search Associated LTI Tools

To search for an LTI, enter a keyword in the Search field [1]. To associate a launch to an LTI tool, click the LTI tool name [2]. Click the Save changes button [3].

When an LTI tool launch has been mapped to the LTI tool, LTI data points can be accessed in the monitor-based reports such as: Tool Adoption Report, Course Activity Report, Campaign Reports, Comparison Reports (Monitor Trend, Champions Report, etc.).

If an event is only connected to a context, the context is mapped to the monitor. When that happens, no monitor visits are recorded.
Add Custom Associated LTI Tools

To add a custom LTI, enter the name of the LTI in the **Search** field [1]. The name you create will be the name used for the monitor to be used in monitor-based reports.

To create your own mapping, enter the complete name in the search field, click the **Create new LTI** link [2].

Click the **Save changes** button [3].

When an LTI tool launch has been mapped to the LTI tool, LTI data points can be accessed in the monitor-based reports such as: Tool Adoption Report, Course Activity Report, Campaign Reports, Comparison Reports (Monitor Trend, Champions Report, etc.).

If an event is only connected to a context, the context is mapped to the monitor. When that happens, no monitor visits are recorded.

**Note:** Custom LTIs display at the top of the list.
Support Articles
How do I find my support articles in the Impact Dashboard?

Open Support

In Global Navigation, click the Support link.

Manage Articles

Articles are listed with their title, assignments, associated contexts, creator, and last updated date.

To show or hide any field, click the Fields drop-down menu [1].

To add a filter for specific messages, click the Filters drop-down menu [2].

Specific articles can be found entering terms in the Search field [3].
How do I add a support article to an existing campaign in the Impact Dashboard?

Impact allows you to assign a support article to an existing campaign to apply the user targeting rules (as defined for the campaign) to your support article.

**Note:** Out of the box articles will display Publish or Unpublish button rather than Edit Article.

Open Support

In Global Navigation, click the Support link.

Manage Articles

<table>
<thead>
<tr>
<th>Title</th>
<th>Assignment</th>
<th>Context</th>
<th>Tags</th>
<th>Created by</th>
<th>Last updated...</th>
</tr>
</thead>
<tbody>
<tr>
<td>RCE: Accessibility Checker Indic...</td>
<td>Release of January 15th 2022: Instructors (campaign)</td>
<td>-</td>
<td>Just released</td>
<td>Andy Adamovich</td>
<td>Updated 2/1/22...</td>
</tr>
<tr>
<td>Gradebook: Missing status Rem...</td>
<td>Release of January 15th 2022: Instructors (campaign)</td>
<td>-</td>
<td>Just released</td>
<td>Andy Adamovich</td>
<td>Updated 2/1/22...</td>
</tr>
<tr>
<td>Modules Link State</td>
<td>Release of January 15th 2022: Instructors (campaign)</td>
<td>-</td>
<td>Just released</td>
<td>Andy Adamovich</td>
<td>Updated 2/1/22...</td>
</tr>
<tr>
<td>Screencast RCE: Accessibility Ch...</td>
<td>Release of January 15th 2022: Instructors (campaign)</td>
<td>-</td>
<td>Video</td>
<td>Just released</td>
<td>Andy Adamovich</td>
</tr>
</tbody>
</table>
Click the **Manage Articles** tab [1].

To add a support article to an existing campaign, locate and click the support article you want use [2].

To create a new article, click the **Create New** button [3].

**Note:** For more information about how to create a new article, visit [How do I create support articles in the Impact Dashboard?](#).

**Edit Support Article**

**View Support Article**

In the **View Support Article** page, click the **Edit Article** button.

**Note:** If you are creating a new support article, the Edit Article button does not display.
Edit Support Article Details

Edit your support article details.
Assign to Users

In the sidebar, click the Assign to Users section.
Assign to Campaign

To add a support article to an existing campaign, enter the terms in the Filter field [1]. Click the checkbox next to the name for the relevant campaign [2]. You can also select multiple campaigns at the same time.

Note: Adding Out of the box articles to a campaign can only be added through the Campaigns link.

Update Article

Once you have selected the relevant campaign, you can continue to edit the existing support article and click the Update button. If you created a new support article, you will click the Publish button.
How do I create support articles in the Impact Dashboard?

You can create support articles in Impact.

Open Support

In Global Navigation, click the Support link.

Manage Articles

To create a new support article, click the Create New drop-down menu [1]. There are different ways to create a support article, creating from new [2], creating from an external site [3] and importing from Blackboard [3] (only available for Blackboard users).

Note: You can also create support articles using the Inline Editor.
How do I schedule support article visibility in the Impact Dashboard?

With article visibility scheduling you can:

- Schedule from which date/time the article will be visible
- Schedule on which date/time the article will no longer be visible
- Schedule a specific date/time range of visibility (for example 1 semester period)

Note: There are multiple factors that impact article visibility. Please review our article about What factors determine support article visibility? if you are unsure.

Open Support

In Global Navigation, click the Support link.

Create or Edit Article

Select an article by clicking the title [1]. To create a new support article click the Create New drop-down menu and select the type of article you would like to create [2].
Edit Article

If you are editing an article, click the **Edit Article** button.

Select Date

To schedule date visibility, click the **Visible from** and **Visible until** drop-down menus and enter dates.
Select Time

To select time visibility, click the Clock icon to set the time.

**Note:** The date fields must have dates before the Time fields display.

Save Changes

If you are creating a new support article, the Save as Draft button will create a draft of your support article so you can publish it later [1]. If you would like to make it visible, click the Publish button [2].

If you are editing a support article, click the Update button [3].
Note: A set of users must be selected in order to be published.
How do I display a support article to specific groups of users in the Impact Dashboard?

By assigning users to an article, you control for which users, groups, or campaign audiences will see your article.

Please note that there are multiple factors that impact article visibility. Please review our article on What factors determine support article visibility? if you are unsure.

Open Support

In Global Navigation, click the Support link.

Create or Edit Article

Select an article by clicking the title [1]. To create a new support article, click the Create New drop-down menu and select the type of article you would like to create [2].
Edit Article

If you are editing an article, click the Edit Article button.

Assign Users

In the sidebar, locate and click the Add Assignment drop-down menu to select individual users groups, a predefined User Segment, a group of users targeted by campaign rules, and a user filter created from the tool adoption reports.
Save Changes

If you are creating a new support article, the **Save as Draft** button will create a draft of your support article so you can publish it later [1]. If you would like to make it visible, click the **Publish** button [2].

If you are editing a support article, click the **Update** button [3].

**Note:** A set of users must be selected in order to be published.
How do I embed a support article from an external web page in the Impact Dashboard?

With Impact, you can create support articles by embedding external web pages. This article will focus on how you can create a support article using an embedded external webpage.

This type of article creation can be an easy method of providing support for your users with content that is already published on an external web page (minimizing the amount of time of manual rewriting or copying the information).

Open Support

In Global Navigation, click the Support link.

Manage Articles

To add a new support article, click the Create New drop-down menu [1] and click the Import external option [2].
Create Support Article

In the **title** field [1], enter a title for the support article and add content in the **Write an introductory paragraph** field [2].

Import External Content

Enter the URL for your external site in the **Article URL** field [1].
Enter Class tags in the **Class(es) you'd like to select** field [2].

Enter Class tag in the **Class(es) you'd like to ignore** field [3].

Enter ID tags in the **ID(s) you'd like to select** field [4].

Enter ID tags in the **ID(s) you'd like to ignore** field [5].

**Inspect Content**

In order to correctly embed the content from the external web page, you need to select which the class(es) or ID(s) you want to include or ignore.

When you are viewing the external web page, right-click anywhere on the webpage, and at the very bottom of the pop up menu, click the **Inspect** link.
Finding the Class(es) or ID(s)

A side pop-out window appears and now see the web page’s source code, images, CSS, etc.

Click the cursor in the inspector window and hover over the different elements of the webpage. Once you locate which element your want to include or exclude, click it and the information will be highlighted in the inspector. Then copy the class or ID from the inspector and paste it into your support article.
Preview Article

How do I add or edit details in an assignment?

When you create an assignment, you'll add details for the assignment such as the description, file submission types, and point value. If you create an assignment shell, you must edit the assignment to add the assignment details. Assignment settings are persistent to always remember and display the settings created or edited in the previous assignment in the course. Please note that this feature only applies to settings; it does not include assignment due dates.

Notes:
- When Multiple Grading Periods are enabled in a course, assignments are also respected against closed grading periods. Some attributes may not be available to editing.
- You may be able to edit due and availability dates for multiple assignments at one time from the Assignments index page.

Open Assignments

Home
Modules
Assignments
Announcements
Discussions
Grades
People

In Course Navigation, click the Assignments link.

The preview shows what information it is embedding.
Assign to Users

Using the Add Assignment field to specify who will see the support article. For more information on this please read the What factors determine support article visibility?

A set of users must be selected in order to be published.

Publish Article

The Save as Draft button will create a draft of your support article so you can publish it later [1]. If you would like to make it visible, click the Publish button [2].
How do I embed an Impact support article from help.blackboard.com?

With Impact, you can create support articles by embedding content from help.blackboard.com. This article will focus on how you can create a support article using an embedded help.blackboard.com web page.

This type of article creation can be an easy method of providing support for your users with content that is already published on an help.blackboard.com (minimizing the amount of time of manual rewriting or copying the information).

Access Support

In Global Navigation, click the Support link.

Manage Articles

To add a new support article, click the Create New drop-down menu [1] and click the Import from Blackboard option [2].
Create Support Article

In the title field [1], enter a title for the support article and add content in the Write an introductory paragraph field [2].

Import Blackboard article

In the Article Path field [1], add the website URL for the Blackboard article.

To select what parts of the external web page you want displayed in your support article use the Section ID drop-down menu [2]. If you prefer to have the whole web page displayed, keep the Section ID at None Selected.
Create an assignment

Assignments are always available to instructors in the Ultra Course View. You can create assignments alongside other content. Students can access their work next to the content they need, right when they need it. You can also create a group assignment and release it to one or more groups in your course.

More on creating assignments for groups of students

Feel free to experiment! Students can't see what you add until you make your assignments visible.

The preview shows what information it is embedding.
Assign to Users

Using the Add Assignment field to specify who will see the support article. For more information on this please read the [What factors determine support article visibility?](#) article.

A set of users must be selected in order to be published.

Publish Article

The **Save as Draft** button will create a draft of your support article so you can publish it later [1]. If you would like to make it visible, click the **Publish** button [2].
How do I add a support article to a message in the Impact Dashboard?

With Impact, you can add rich content to your messages, this includes links to support articles. Including such links will allow users to view support articles that are related to the content of your message. This article will focus on how you can link to support articles from a message.

Open Messages

In Global Navigation, click the Messages link.

Select Message

To open an existing message, click the name of the message [1]. To create a new message, click the New Messages drop-down menu [2].
Edit Message

If you are editing a message, click the Edit Message button.

Rich Edit Mode Off

In the editor of the selected message, click into the body of the message or press enter if editing text to see the in-line insert options. In the menu, click the Add icon [1] and then select the Insert Article option [2].
In the menu, click the **Add** icon [1] and then select the **Insert Article** option [2].
Select Articles

Type the article title or select an article. To add it to the message, click the Continue button.
Preview Content

You can preview the article in your message before adding the resource into your message.

To confirm the change, click the **Continue** button.

Publish Message

The **Save as Draft** button will create a draft of your support article so you can publish it later [1]. If you would like to make it visible, click the **Publish** button [2].
How do I add rich content to a support article in the Impact Dashboard?

With Impact, you can add rich content to your messages and support articles, such as images, videos and documents.

Open Support

In Global Navigation, click the Support link.

Manage Articles

To add a new support article, click the Create New drop-down menu [1] and click the Create new link [2].
Add Article Content

To add a title, introductory paragraph, and content, start typing in the article content box [1]. In the sidebar, you can edit article settings [2].
Enable Rich Edit Mode

To add rich content, click the Rich Edit Mode On toggle button.

You can insert the following content types:

- Ordered list (numbers)
- Unordered list (bullet points)
- Table
- Image
- External Media (youtube links or iframes)
- Documents (PDF, Word, Powerpoint)
- Links to other messages or support articles
- Personalization tokens
Assign to Users

Using the Add Assignment field to specify who sees the support article. For more information on this please read the What factors determine support article visibility?

A set of users must be selected in order to be published.

Publish Article

The Save as Draft button will create a draft of your support article so you can publish it later [1]. If you would like to make it visible, click the Publish button [2].
How do I add metadata to a support article in the Impact Dashboard?

Impact enables you to add several different metadata points to your support articles to make them easier to find, sort or filter. You can customize the following data points:

- **Tags** - consistent terms that can be used to find and group articles with filters
- **Keywords** - terms associated with your articles to make it easy to find your article via search.

Open Support

In Global Navigation, click the Support link.

Create or Edit Article

Select an article by clicking the title [1]. To create a new support article, click the Create New drop-down menu and select the type of article you would like to create [2].
Edit Article

If you are editing an article, click the **Edit Article** button.

Open Advanced Settings

In the sidebar, locate and click the **Advanced Settings** section [1].

To add searchable tags, click the **Tags** field [2], for Keywords, use the **Keywords** field [3].
Save Changes

If you are creating a new support article, the **Save as Draft** button will create a draft of your support article so you can publish it later [1]. If you would like to make it visible, click the **Publish** button [2].

If you are editing a support article, click the **Update** button [3].

**Note:** A set of users must be selected in order to be published.
How do I link one support article to another support article in the Impact Dashboard?

Creating links between the support articles you create using Impact is a great way to present users' information at different places in your learning application. This help article will show you how to link a new support article to an existing support article via the Impact dashboard.

Open Support

In Global Navigation, click the Support link.

Create or Edit Article

Select an article by clicking the title [1]. To create a new support article, click the Create New drop-down menu and select the type of article you would like to create [2].
Edit Article

If you are editing an article, click the **Edit Article** button.

Link Article with Rich Edit Mode Off

In the editor of the selected message, click into the body of the article or press enter if editing text to see the in-line insert options.

To link an article to another article, click the **Add** icon from the menu [1] and then click the **Insert Article** option [2].
Link Article with Rich content On

To link an article to another article, click the Add icon from the menu [1] and then click the Insert Article option [2].
Select Article

Search for the article title or select an article. To add it to the message, click the Continue button.
Preview Article

You can preview the article in your message before adding the resource into your message.

To confirm the change, click the Continue button.

Save Changes

1. Cancel
2. Save as Draft
3. Publish
4. Cancel
5. Save & Unpublish
6. Update
If you are creating a new support article, the **Save as Draft** button will create a draft of your support article so you can publish it later [1]. If you would like to make it visible, click the **Publish** button [2].

If you are editing a support article, click the **Update** button [3].

**Note:** A set of users must be selected in order to be published.
How do I unpublish a support article in the Impact Dashboard?

With Impact you can use out of the box support articles. However, you may decide that you don't need to display some of these articles and choose to hide them.

Open Support

In Global Navigation, click the Support link.

Open Article

Click the article title.
Unpublish Article

Click the **Unpublish** button.

**Confirm Unpublish**

⚠️ Are you sure you want to unpublish this article?

Switching this article status to “Hidden” will hide the article in your support center until it is republished.

[No] [Yes]

To confirm unpublishing the article, click the **Yes** button.
What factors determine Impact support article visibility?

Impact support articles are displayed to users within your learning application based on several targeting rules and visibility settings.

Factors that Impact Support Article Visibility

There are five major factors that can impact who sees your support articles in the learning application.

- Article Status
- Assigned Users
- Connected Context
- Scheduled Visibility
- Tool Categories

Article Status

If your article is still in draft mode or has been changed to draft mode, it will not be visible to any users.
• To publish a new article, follow the steps in How do I create a support article in the Impact Dashboard?
• To publish an existing article (that is saved as a draft), make sure the required settings are completed and then click the Publish button in the top right corner of the edit article page.

Assigned Users

![Create Support Article](image)

By assigning users to an article, you control for which users, groups, or campaign audiences will see your article. Users can be assigned by:

• Selecting individual users groups like user roles
• Selecting a predefined User Segment
• Selecting a group of users targeted by campaign rules
• Selecting a user filter created from the tool adoption reports

Note: Assigned users are often based on dynamic conditions. Meaning that the users who see this article can change over time depending on the criteria selected.
Connected Context

Connecting an article to a context defines which pages or elements within the learning application will display a message. This means if you connect an article to a context that only a specific user with specific permissions can view (for example an instructor in your LMS), then only those users with access to that page/element can see the article.

Please note that a context also has several display conditions like:

- Show article on every page where this element appears
- Show article only on this specific page
- Show when hovering over this element
- Show when clicking on this element

You can adjust the connected context of your article in the edit article sidebar.
Scheduled Visibility

Scheduling the visibility of your article enables you to select a start date/time and end date/time during which your article will be displayed in your learning application.

If all other required settings are completed and the article is published, then

- The article will automatically become visible in the learning application at the scheduled Start Date and Time
- The article will automatically disappear from the learning application at the scheduled End Date and Time

Tool Categories

Is your article associated with a specific tool category? This is often the case with out-of-the-box articles. If your article is associated with a specific tool category and you have set that tool category to hidden, then your article will not be visible.

- You can view the associated tool categories via the Edit Article under the Advanced Settings tab.
- You can manage tool category visibility via the Global Settings Menu → Tool Categories
How do I see if an article is visible or not?

To find out if an article is currently visible, locate the article on your Impact dashboard and look for the Visibility indicator in the top of the sidebar.

To find out if an article is currently visible, locate the article on your Impact dashboard and look for the Visibility indicator in the top of the sidebar.
How can I debug article visibility?

<table>
<thead>
<tr>
<th>Visibility states</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visible</td>
</tr>
<tr>
<td>Hidden by draft state</td>
</tr>
<tr>
<td>Hidden by unpublished campaign</td>
</tr>
<tr>
<td>Hidden by tool category</td>
</tr>
<tr>
<td>Hidden by date range</td>
</tr>
</tbody>
</table>

Are you having trouble understanding why your article is not visible? The **Status & Visibility** tab on the **View Article** page provides you a quick summary of one or more reasons why your article may not be visible to users.

Here’s what you can do for each hidden by indicator:

- **Hidden by draft state**: Publish your article.
- **Hidden by unpublished campaign**: Check the Assigned to Users tab to see which campaign this article is connected to, then locate the relevant campaign on My Campaigns and publish it.
- **Hidden by tool category**: Check the Advanced Settings tab to see which tool category is associated with this article. Then, via the global settings menu go to the Tool Categories page, find the relevant category, and toggle on the visibility.
- **Hidden by date range**: Check the Schedule Visibility tab and review the start and end date/time selections.
How do I add or edit support article translations in the Impact Dashboard?

Access Support

In Global Navigation, click the Support link.

Create or Select Article

Select an article by clicking on the title [1]. To create a new support article, click the Create New drop-down menu [2] and select the type of article you would like to create.

Edit Article

If you edit an article, to update translations, click the Edit Article button.
Manage Translations

In the sidebar, click the Manage Translations section.

You can see all of your different languages. To request the addition of a new language please read [How do I add a new language in the Impact Dashboard?](#)
Add or Edit Translation

Click the language in which you want the translation to the article [1].

Use the editor to write your translated article [2].

Publish or save your message as a draft.
How can I control visibility of Local Articles through the Impact Dashboard?

Locally created articles are displayed to users within your learning application based on several targeting rules and visibility settings.

**Note:** You cannot add a tool category to a locally created article. Tool categories allow you to control the visibility of Out of the Box articles.

Factors that Impact Local Article Visibility

There are four major factors that can impact who sees your local articles in the learning application.

- Article Status
- Assigned Users
- Connected Context
- Scheduled Visibility

Article Status

![Create Support Article](image)
If your article is still in draft mode or has been changed to draft mode, it will not be visible to any users [1].

- To publish a new article, follow the steps in [How do I create a support article in the Impact Dashboard?](#).
- To publish an existing article (that is saved as a draft), make sure the required settings are completed and then click the [Publish] button [2].

### Assigned Users

By assigning users to an article, you control for which users, groups, or campaign audiences will see your article. Users can be assigned by:

- Selecting individual users groups like user roles
- Selecting a predefined User Segment
- Selecting an existing campaign
- Selecting a user filter created from the tool adoption reports

**Note:** Assigned users are often based on dynamic conditions. Meaning that the users who see this article can change over time depending on the criteria selected.
You can connect a context within your LMS to an article. Locate the context you want to connect to your article and click the checkbox next to the name.
Scheduled Visibility

Scheduling your visibility of your article enables you to select a start date/time and end date/time during which your article will be displayed in your learning application.

If all other required settings are completed and the article is published, then:

- The article will automatically become visible in the learning application at the scheduled Start Date and Time
- The article will automatically disappear from the learning application at the scheduled End Date and Time
How can I control visibility of Out of the Box Articles through the Impact Dashboard?

Visibility with Out of the Box Articles are limited but can be controlled through different settings:

- Unpublish Article
- Edit Tool Category
- Removing the article from the Support Center.

Unpublish Article

View Support Article

How do I create a Canvas assignment from an existing Mastery Connect assessment?

URL of article:

Class(es) you would like to select (comma separated):
lia-message-body-content

In View Support Article, click the Unpublish button. After you unpublish the article, the new status will be set to hidden.
Edit Tool Category

In Tool Categories settings, locate the Tool Category attached to the article [1] and toggle off the visibility [2].

Notes:

- Toggling off a Tool Category will hide all articles that are related to it.
- For more information on Tool Categories, visit What are Impact Tool Categories?
Remove Article from Support Center Category

Locate the article within My Support Center [1]. Click the Settings icon [2] and select Remove from category [3].
Support Categories
How do I create or edit a Support Center category in the Impact Dashboard?

With Impact, you can create support articles for your support center with your learning application. You can use support center categories to organize your articles for efficiency and structure.

Open Support

In Global Navigation, click the Support link [1]. Then click the Arrange Articles tab [2].

Open Support Center

Click the support center name link.
Create Category

To create a Support Center category, click the Create Category link [1].

To edit an existing support center category, locate the category. Then click the Options icon [2] and click the Edit Category link [3].
Add Category Details

In the Create Category window, you can add category details.

Enter a name for the category in the **Name** field [1]. To specify a language other than your account language, click the **Language** drop-down menu [2].

Enter a subtitle in the **Subtitle** field [3].

Enter a suggestions title in the **Suggestions title** field [4].

To specify the way options are presented in the support center, click the **Child option presentation** drop-down menu [5]. You can select buttons or drop-downs.

To manage which users your category is targeting, click the **Assigned to** drop-down menu [6]. You can target your category to any specific user, user group, or previously created campaign.

To define where in your learning application the category links, click the **Connected Context** drop-down menu [7]. Contexts can be specific pages or specific elements on pages. You can connect your category to multiple contexts.

To save the category and not publish it, click the **Save as Draft** button [8].
To publish the category, click the **Publish** button [9].

### Edit Category Details

<table>
<thead>
<tr>
<th>Name:</th>
<th>1. Get started</th>
<th>2. English</th>
</tr>
</thead>
<tbody>
<tr>
<td>Subtitle:</td>
<td>Find out more about:</td>
<td></td>
</tr>
<tr>
<td>Suggestions title:</td>
<td>Suggested help for: Get started</td>
<td></td>
</tr>
<tr>
<td>Child option presentation:</td>
<td>Buttons</td>
<td></td>
</tr>
</tbody>
</table>

**Assigned To:**

- All (user category)

**Connected Context:**

- None selected

To delete the category, click the **Delete Category** link [8].

To update the category, click the **Update** button [9].
How do I add an article to a Support Center category in the Impact Dashboard?

With Impact you can create support articles and assign them to categories to structure your support center. You can also associate and add a support article to a support center category.

Open Support

In Global Navigation, click the Support link [1]. Then click the Manage Articles tab [2].

Create New Article

To create a new article, click the Create New drop-down menu [1]. Then click the Create new link [2].
Add to Support Center Category

In the Create Support Article page, click the Add to Support Center Category drop-down menu [1].

Click the Add to a category drop-down menu [2].

To add the article to a category, click the checkbox next to the name of the category [3]. You can select multiple categories.

Publish Support Article

To save the article, click the Save as Draft button [1].

To publish the article, click the Publish button [2].
How do I associate an article to a Support Center category in the Impact Dashboard?

With Impact, you can associate existing support articles and assign them to categories to structure your support center. You can also add a support article to a support center category when creating a new article or editing an existing one.

Open Support

In Global Navigation, click the Support link [1]. Then click the Arrange Articles tab [2].

Open Support Center

Click the support center name link.
Open Support Center Category

Add Existing Support Center Articles
Click the Add Existing Articles link.

**Add Existing Articles**

To search for specific articles to add to the support center, enter the article name in the **Search** field [1]. Alternatively, locate the article or articles in the Existing Articles list and click the article checkbox [2].

Click the **Insert** button [3].
Drag and Drop Existing Articles

You can also use the drag and drop option to move a category or article in your Support Center. Click and drag the category drag handle to the desired location.
How do I remove an article from a Support Center category in the Impact Dashboard?

With Impact you can create support articles and assign them to categories to structure your support center.

Open Support

In Global Navigation, click the Support link [1]. Then click the Arrange Articles tab [2].

Open Support Center

Click the support center name link.
Open Support Center Category

Click the category name link.

Remove Support Center Article

To remove an article, click the article's Options icon [1]. Then click the Remove from category link [2].
How do I filter Support Center articles and categories in the Impact Dashboard?

With Impact, you can use categories and subcategories to create a structure for your support center. There are several ways in which you can order the articles and categories in your support center depending on your needs. You can also arrange the articles and categories using filters to create a desired view.

Open Support

In Global Navigation, click the Support link [1]. Then click the Arrange Articles tab [2].

View Filters

View the available filter menus to filter articles and categories.
View Any Status Filter

The **Any status** drop-down menu allows you to view articles with either a published or draft status.

View Any Role Filter

The **Any role** drop-down menu allows you to choose between all the role categories you create.
The Language drop-down menu allows you to choose to view all the articles and support center categories with a specific language.
How do I move an Impact Support Center article to another category?

You can move an Impact support article to a different category.

Open Support

In Global Navigation, click the Support tab [1]. Then click the Arrange Articles tab [2].

Open Support Center

Click the support center name link.
Open Support Center Category

Click the name of the category.

Open Category

Click the category name link.
To move an article, click the article's **Options** icon [1]. Then click the **Move to** option [2].
Select Category

Move article to

- Back

Global navigation

Course navigation

Profile

Canvas roles

[1] Click the category name where you want to move the article.
[2] Then click the Move article button.

Click the category name where you want to move the article [1]. Then click the Move article button [2].
How do I reorder Support Center categories or articles in the Impact Dashboard?

After you have created your categories and added articles to them, you can reorder them to fit your desired layout.

Open Support

1. In Global Navigation, click the Support link [1]. Then click the Arrange Articles tab [2].

Open Support Center

Click the support center name link.
Open Support Center Category

Click the category name link.

Move Categories Up and Down

To move a category, click the category’s Options icon [1]. Then click the Move Up or Move Down option [2]. To drag and drop a category, click and drag the Arrows icon to the desired location [3].
Drag and Drop Categories or Articles

Use the drag and drop option to move a category or article in your Support Center. Click and drag the category drag handle to the desired location.
How do I move an existing Support Center category into a different category in the Impact Dashboard?

You can move a category from one category to another.

**Note:** Top level categories cannot be moved into other categories. In order to learn how to arrange your support center categories to create subcategories please read [this article](#).

Open Support

In Global Navigation, click the Support link [1] and then click the Arrange Articles tab [2].

Open Support Center

Click the name of the Support Center.
Move Support Center Category

To move an article, locate the category you want to move, click the **Options** icon [1] and then click the **Move to** link [2].
Move Category

Move category to

1. Get started
2. Course set-up
3. Course Content
4. Assignments
5. Quizzes

[Move category button]

Click the name of the category [1] and then click the Move category button [2].
How do I link an existing Support Center category to a different category in the Impact Dashboard?

You can link support categories to other categories in order to make sure that all relevant support resources are grouped together.

Linking support categories allows you to reuse categories and the articles they contain in multiple places.

Open Support

In Global Navigation, click the Support link [1]. Then click the Arrange Articles tab [2].

Open Support Center

Click the support center name link.
Open Support Center Category

Arrange Support Articles
Make your content easier to find with categories.

Home > Support Center   Edit

Categories (16) + Link Existing Category + Create Category

- Get started
  4 subcategories | 37 articles

- Course set-up
  7 subcategories | 14 articles

Click the category name link.

Link Existing Category

Arrange Support Articles
Make your content easier to find with categories.

Home > Support Center   Edit

Categories (16) + Link Existing Category + Create Category

- Get started
  4 subcategories | 37 articles

- Course set-up
  7 subcategories | 14 articles

Click the Link Existing Category link.
Link Category

Select a category to link to

1. Get started
2. Course set-up
3. Course Content
4. Assignments
5. Quizzes

Click the category name [1]. Then click the Link Category button [2].
How do I create a new Support Center category structure in the Impact Dashboard?

You can create a new support center category structure.

The category structure contains a home level of categories of your Support Center. This is where you can view the big categories that contain multiple subcategory levels that control how your support center is organized. You can alter the visibility of each category and subcategory by assigning them to different user roles, contexts, and tool categories. To begin creating your structure, you need to create categories on your home level.

Open Support

In Global Navigation, click the Support link [1]. Then click the Arrange Articles tab [2].

Open Support Center
Click the Create Support Center link.

Add Category Details

In the Create Support Center window, you can add support center details.

Enter a name for the support center in the Name field [1]. To specify a language other than your account language, click the Language drop-down menu [2].

Enter a title in the Title field [3], and a subtitle in the Subtitle field [4].

Enter a suggestions title in the Suggestions title field [5].

To specify the way options are presented in the support center, click the Child option presentation drop-down menu [6]. You can select buttons or drop-downs.

To manage which users your category is targeting, click the Assigned to drop-down menu [7]. You can target your category to any specific user, user group, or previously created campaign.

To define where in your learning application the category links, click the Connected Context drop-down menu [8]. Contexts can be specific pages or specific elements on pages. You can connect your category to multiple contexts.

To select the learning application where the category displays, click the Learning Application drop-down menu [9].
To save the category and not publish it, click the **Save as Draft** button [10].

To publish the category, click the **Publish** button [11].

### Add Categories

You can add category details: category name [1], language [2], title [3], subtitle [4], suggestions title [5], child option presentation (buttons or drop-downs) [6], assigned to [7], connected context [8], and learning application [9].

The **Assigned To** drop-down menu allows you to manage which users your category is targeting. You can target your category to any specific user, user group, or previously created campaign.

The **Connected Context** drop-down menu defines where in your learning application the category is linked to. Contexts can be specific pages or specific elements on pages. You can connect your category to multiple contexts.

To save the category and not publish it, click the **Save as Draft** button [10].

To publish the category, click the **Publish** button [11].
To add a Support Center category, click the [Link Existing Category] link [1] or the [Create Category] link [2].
How can I control what categories of the Out of the Box Support Center my end user sees?

The Out of the Box Support Center is a resource that allows you to provide contextualized default LMS support to your end users instantly.

You may not want to utilize all of the Out of the Box help that is available and there are several ways to control visibility to users.

All of the following options can be applied at the top level and sub-level categories of the Support Center.

**Note:** The Support Center follows a hierarchal logic, therefore anything applied to a category will also be applied to any sub-categories housed inside.

### Unpublish Categories

To hide the category itself and all content inside from end users, **Unpublish** the category.
When a category is unpublished, the **Published** label will no longer be visible on the category in the dashboard.
User Categories

You can decide which users see which help categories by assigning/unassigning user categories.

**Note:** If all user categories are unassigned, the category will not be visible to any end users but if published, will include the published label in the dashboard.
Deleting Categories

You can choose to permanently delete categories from the Support Center by clicking the **Delete Category** link.

All of the Out of the Box support articles will still be available in the Manage Articles section of your Dashboard but without a Support Center category, but will not be immediately visible to your end users. They may show up when users search keywords through the Support Center if the word is in the title of the article.
Unavailable Articles

To make articles completely unavailable to your users, use the Fields drop-down menu [1] to select Categories [2].
Use the Filters [1], select Categories [2], and filter on the Support Center categories [3] you want to remove.

**Note:** Use a separate filter to capture all the sub-categories.
To hide articles, click the **Edit Status** link.

To make the article unavailable to users, click the **Hide/Mark as draft** button.
What is the Impact Support Center?

The Impact Support Center allows institutions to provide end user support for select learning applications. By default, the Support Center includes articles for Canvas, Blackboard Learn, Blackboard Ally, and Moodle and can be supplemented with custom resources. Help articles may be triggered by context or user role.

The Support Center can also be used to reach out to Support via email, phone, or chat.

Open the Support Center

The Impact Support button displays on your learning application.

To open the Support Center, click the Impact Support button.
By default, the Support Center displays help article categories based on the user's context in the learning application [1]. Additional topic categories display in the Find out more about section [2]. To view other category's help articles, click the category button.

### Suggested help for: Assignments

<table>
<thead>
<tr>
<th>Title</th>
<th>Rating</th>
</tr>
</thead>
<tbody>
<tr>
<td>What are Assignments?</td>
<td>0</td>
</tr>
<tr>
<td>Assignments Overview (Instructors)</td>
<td>0</td>
</tr>
<tr>
<td>How do I use the Assignments Index Page?</td>
<td>0</td>
</tr>
</tbody>
</table>

Users can view suggested help articles for categories.
Search Support Articles

How can we help you?

Select an option below:
- Get started
- Course set-up
- Elements of a course
- Assignments
- Quizzes
- Peer review
- Rich Content Editor
- ePortfolios
- Grades
- Communication
- Calendar
- Files
- Analytics
- External apps (LTI)
- Mobile App
- Canvas Studio
- Release updates

Users can search for articles by selecting the search field.

Suggestions

- How do I create a discussion in a group?  
- How do I create a collection in Canvas Studio?  

Use keywords in the search field to find articles related to your question.
After reading an article, users can leave feedback in the form of a vote [1]. Once you vote, you can leave an optional comment [2].

**View Dynamic Routing**

Multiple routes (email addresses, phone numbers, chat URLs) can be defined for each channel and made available to specific learning application roles, on specific days of the week, and during specific times.
Note: Call option is set up by institutions.
How do I customize the design of the Impact Support Center?

Admins can manage the Support Center design using the default theme, a custom theme, or their Canvas theme.

Open Support

In Global Navigation, click the Support link.

Open Design

In the My Support Center page, click the Design link.

Open Themes

To manage your theme, click the Expand icon [1].
To view the Support Center in the default theme, click the Default option [2].

To use your Canvas theme for the Support Center, click the Canvas Theme option [3].

To create a custom theme, click the Custom Theme option [4].

**Note:** If Canvas Theme and Custom Theme are not present, please [submit a ticket](#) to request customization.

**Manage Custom Theme**

<p>| | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Header background</td>
<td>#494C86</td>
</tr>
<tr>
<td>2</td>
<td>Header font color</td>
<td>#FFFFFF</td>
</tr>
<tr>
<td>3</td>
<td>Topics buttons</td>
<td>#FFFFFF</td>
</tr>
<tr>
<td>4</td>
<td>Main area background</td>
<td>#FFFFFF</td>
</tr>
<tr>
<td>5</td>
<td>Main area font color</td>
<td>#4FAF4F</td>
</tr>
<tr>
<td>6</td>
<td>Links</td>
<td>#EDEDEE</td>
</tr>
<tr>
<td>7</td>
<td>Contact area background</td>
<td>#F2F3F2</td>
</tr>
<tr>
<td>8</td>
<td>Contact area font color</td>
<td>#EDEDEE</td>
</tr>
<tr>
<td>9</td>
<td>Contact buttons</td>
<td>#D7E1EA</td>
</tr>
<tr>
<td>10</td>
<td>Footer background</td>
<td>#4FAF4F</td>
</tr>
<tr>
<td>11</td>
<td>Footer font color</td>
<td>#EDEDEE</td>
</tr>
</tbody>
</table>

In your theme design, you can use the following custom fields:

- **Header Background** [1]: A background color for the header.
- **Header font color** [2]: A color for the header text.
- **Top button** [3]: A color of the buttons in the header.
- **Main area background** [4]: A background color for the main area.
- **Main area font color** [5]: A color for the main area text.
- **Links** [6]: A color for links.
- **Content area background** [7]: A background color for the content area.
- **Contact area font color** [8]: A color for the contact area text.
- **Contact buttons** [9]: A color for the contact buttons.
• **Footer background [10]:** A background color for the footer.
• **Footer font color [11]:** A color for the footer text.

**Note:** To see a style guide of what the button will look like with different designs, visit the [Impact Support Center Button Style Guide](https://www.example.com).

### Save Changes

Click the **Save changes** button.
How do I manage Impact Support button visibility?

Support button visibility in a learning application can be managed in the Impact Dashboard. Admins can choose from the following visibility options: Visible for all users, Hidden for all users, and Custom access.

Open Access

In Global Navigation, click the Support link [1]. Then click the Access tab [2].

Edit Access
To edit visibility, click the Edit button.

**Edit Visibility**

### Access to the Support Center

Control which user groups should have access to the Impact support center inside the learning application.

1. Custom access
2. Visible for all users
3. Hidden for all users
4. Custom access

In the **Access** dropdown [1], you can select to make the Support button visible to all users in a learning application [2], hidden for all users [3], or select a customized list of users who may view the Support button [4].
Assign User Custom Access

If you selected to assign custom access, an Assign to User dropdown displays.

To assign Support button visibility to certain groups of users, click the Assign to User dropdown [1] and select the checkboxes of applicable roles [2].

Save Changes

To update visibility, click the Save changes button.
Launch Impact in Canvas Help Menu

To launch the Impact Support Center, click the **Impact Support Center** link in your Canvas Help Menu.
How do I customize the email form in the Impact Support Center?

You can customize the Support Center email with a variety of field types.

When an end user submits a support ticket, Impact collects the following information: first name, last name, username, email, course ID, course name, courses, system information, product location where message was triggered, and selected category.

Open Support

In Global Navigation, click the Support link [1]. Then click the Design tab [2].
By default, the Design tab displays the Email Contact Form Fields options [1] and the current email form [2].
View Custom Field Types

In your email design, you can use the following custom fields:

- **Single line text** [1]: A one-line free text field.
- **Multi line text** [2]: A free text field that supports multiple lines.
- **Date select** [3]: A date field allowing users to pick a date from a calendar.
- **Date/Time select** [4]: A combined date and time field.
- **File Upload** [5]: A file picker allowing users to attach an image or document to their request.
- **Drop down select** [6]: A single selection drop-down list.
- **Checkbox** [7]: A single checkbox accompanied by a caption.
- **Phone Number** [8]: A single line text field allowing users to enter their contact details.

**Note:** The email design Subject field is mandatory and cannot be removed from the email design.
Add Custom Field

To add a field to the email, click and drag **Fields** option into the form.
Edit Email Fields

To edit a field's properties, click the Edit icon [1]. You can determine whether it is optional or mandatory.

To remove a field, click the Delete icon [2].

To reorder the fields, use the Drag and Drop handle [3].
Save Changes

Click the **Save changes** button.
How do I view Impact support button clicks?

The Support Button Usage Report displays the number of times users have clicked the support button embedded into your learning application at any given time. You can use the Support Button Usage Report to view the number of users clicking the support button.

Where can I find the support button usage report?

In Global Navigation, click the Support link [1]. Then click the Insights tab [2].

Scroll to view the Support Button Usage chart.
How can I filter the results of this report?

Filter displayed results using the Support Center filters. You can filter by Date Range [1], Role Category [2], User Role [3], and status [4].

Filters Explained

<table>
<thead>
<tr>
<th>Filter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date Range</td>
<td>Select any start and end date to see how frequently the support button was clicked during that date range.</td>
</tr>
<tr>
<td>Role Category</td>
<td>Select any role category, like Students or Instructors, to view the number of support button clicks made only by users in that role category.</td>
</tr>
<tr>
<td>User Role</td>
<td>Select any specific user role, to only view the number of support button clicks made by users that have the selected role.</td>
</tr>
</tbody>
</table>

How can I change the presentation of the support button usage report?

Changing the presentation settings of your support button usage report determines how the chart data is scaled and whether the adoption level for each monitor category and is expressed in percentages or actual numbers.

Impact allows you to change how the support button click data is presented within the chart using the Trend [1] and Actual [2] drop-down menu options.
**Presentation Options Explained**

<table>
<thead>
<tr>
<th>Trend/ Cumulative</th>
<th>With <strong>Trend</strong> enabled, the chart shows separate adoption levels for each unit of time. When set to <strong>Cumulative</strong>, the chart presents the growth curve of usage from the first unit of time to the last unit of time. Each point in the graph shows the usage level from the start date of the chart until the date associated with that point.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Actual / Fixed / Scaled</td>
<td>When <strong>Actual</strong> is enabled, the metric shown in the chart changes from a percentage of active users to an <strong>absolute number</strong>. This chart is based on the <strong>absolute number of users</strong> who have triggered one of the support button divided by the <strong>number of active users</strong>. The <strong>Fixed</strong> chart will present the adoption level as a <strong>percentage of unique active users</strong> with the Y-axis of the chart ranging from 0% to 100%. The <strong>Scaled</strong> chart shows the same metric as <strong>Fixed %</strong>, but narrows the Y-axis of the chart in order to focus in on the adoption levels shown.</td>
</tr>
</tbody>
</table>
What Impact support insights are available?

Support Insights report on support performance and feedback in the dashboard in order to analyze the quality and impact of communication and support efforts.

Open Insights

In Global Navigation, click the **Support** link [1]. Then click the **Insights** tab [2].
View Support Insights

From your support center insights tab, you can view information about how users rate the support articles you add to your learning application and support center. You can also view article voting results when the Voting option is turned on.

Filter Insights

By default, Insights displays all data available from the most recent three-month range. However, you can filter displayed results by date [1], role category [2], user role [3], and status [4].

To apply selected filters, click the Apply Filter button [5]. Filters affect all data displayed on the page.

Note: The Insights filter is static and displays at the top of the page even when you scroll to view additional data.
View Article Performance

Insights displays an Article Health table [1], and charts for Support Button Usage [2], Support Escalation Routes [3], and Pages With Most Support Requests [4].

Learn more about Article Health insights.

View Chart Options

To export an Insights chart, click the Export drop-down menu [1]. You can export the data as a CSV [2] or as a PDF [3].
To view Insight chart data based on adoption over time, click the Trend drop-down menu [4]. You can select from the following options:

- **Cumulative** [5]: View the chart as a growth curve of usage from the first unit of time to the last unit of time. Each point in the graph shows the usage level from the start date of the chart until the date associated with that point.
- **Trend** [6]: View the separate adoption levels for each unit of time in the chart.

To view insight chart data based on users and views, click the Actual drop-down menu [7]. You can select from the following options:

- **Actual** [8]: View the active users chart metric as an absolute number. This chart displays the absolute number of users who triggered the support button or escalation route divided by the number of active users.
- **Fixed** [9]: View the adoption level as a percentage of unique active users with the Y-axis of the chart ranging from 0% to 100%.
- **Scaled** [10]: View the adoption level as a percentage of unique active users with a narrowed Y-axis to focus in on the displayed adoption levels.

Learn more about the Support Button Usage insights and presentation options.
How do I view article performance in the Impact Dashboard?

You can review Impact article performance via the Impact Dashboard. You can select to view performance in a table or as a chart.

Open Insights

In Global Navigation, click the **Support** link [1]. Then click the **Insights** tab [2].

View Article Performance Table
On the Support Insights page, the **Article Health** table displays key statistics about your recent messages [1]. Impact article performance is based on unique user views [2], views [3], comments [4], and ratings [5].

**View Article Performance Chart**

To view article performance data as a chart, click the **View as** drop-down menu [1] and select the **View as chart** option [2]. View the Article Health chart [3].
What can I expect when new Out of the Box Support Articles are added to the Support Center?

While Impact provides you with a contextualized Out of the Box Support Center that is ready to use, you have the ability to customize this to meet the needs of your institution. It is essential to understand the implications of the customizations you make, as it could potentially affect how up-to-date the content within your Support Center is.

The Impact Content Team is constantly updating and maintaining the OOTB Support Center.

Are you using the Out of the Box Support Center as is?

If you have made no changes to your Out of the Box Support, you will receive all updates to existing articles and any new articles that are added to that category by the Impact Content Team.

Category Updates

Interested in what updates have been made to which categories? Here you will find how to filter Out of the Box content in categories by dates.
Click the Manage Articles tab [1]. Then click the Fields drop-down menu [2] and select the Categories field [3].
Filter Date

Click the Filters drop-down menu [1]. Then filter on Last updated on filter [2] and select the date you are interested in [3].

Have you made changes to your Out of the Box Support Center?

Changes such as user assignment, changing the name of a category or the suggested title, or adding/removing a context of a category will deem that category of your Support Center as local rather than Out of the Box. This essentially gives you full ownership over that particular category.

Since existing articles within that category are dynamic, you will receive any updates to the content of those articles. However, new articles added to the categories you have made changes to will not be reflected as the software respects local changes over Out of the Box changes. Please note that adding articles to a category will still remain Out of the Box.
Modified Categories

You can recognize categories you have made changes to by the red icon presented next to the blue icon on the category. Those that have not been modified will only display the blue icon.

**Note:** The Support Center is not structured in a hierarchal fashion when it comes to converting categories to local rather than Out of the Box, meaning that sub-categories can still be deemed Out of the Box despite the over-arching category being local. Moving articles out of a category or adding new articles will not localize the category, therefore you will still receive all of OOTB updates there (if no other changes have been applied)
How do I enable the Impact Support Center?

You can enable the Support button in Blackboard Learn, Canvas, and Moodle.

Note: For more information on Support Center visibility, visit How do I manage Impact Support button visibility?

Blackboard Learn Original

Once the Impact Building Blocks is installed in your LMS environment, you can enable the Impact Support button.

Log into Learn as an administrator and navigate to System Admin → Building Blocks → Installed Tools.

Locate the Impact Connector and click the Settings option.

If you want to make the Impact Support Center available to ALL users, click the Support tab checkbox.
If you would like to make the Support Center visible for specific user roles only, you can add one or more roles, separated with a comma, in this field.

**Note:** To make the Support Center visible for specific user roles, you must uncheck the Support tab checkbox.

**Blackboard Learn Ultra**

If you have installed the [Impact LTI/REST Integration for Blackboard Learn Ultra](#) and the Support Center is not enabled, please [submit a ticket](#) requesting this feature to be enabled.

**Instructure Canvas**

If you are not using the theme editor, please see the [Impact Support button visibility](#) to edit your support center visibility. If you are unsure of your Impact configuration, please [submit a support ticket](#) or contact your implementation team.
Support Request Routing and Availability
How do I update the contact options in the Impact Support Center?

As an Impact admin, you can manage the support channels and routes available based on a user’s role, the time of day, and the day of the week.

Open Support

In the Navigation menu, click the Support link.

Open Routing and Availability

In the My Support Center page, click the Routing & Availability link.
Expand Contact Option

Available contact options are listed in the Contact Options sidebar [1]. To view management options for a contact option, click the option Expand icon [2].
View Management Options

The **Publish/Unpublish** icon indicates the option's Support Center visibility [1].

To duplicate the contact option, click the **Duplicate** icon [2].

To delete the contact option, click the **Delete** icon [3].

To view and edit the contact option details, click the option **Expand** icon [4].
Edit Contact Option

You can edit the contact information [1] and availability options [2].

To reset the option and remove your edits, click the Reset option [3].

To save and unpublish the option, click the Save & Unpublish button [4].

To save any changes, click the Update button [5].
View Unpublished Contact Option

When a contact option is unpublished, it displays an **Unpublished** icon [1].

To update a contact option without publishing it, click the **Save as Draft** button [2].

To publish the option and make it visible in the Support Center, click the **Publish** button [3].
How do I set up contact options in the Impact Support Center?

The Impact Support Center allows users to be funneled to the appropriate help desk channel depending on their role and the time of day.

Open Support

In the Navigation menu, click the Support link.

My Support Center

In the My support Center page, click the Routing & Availability link.

Create Routing Option
The Contact Options section displays the available routing options: Email, Call, and Chat.

Click the option's Expand icon [1], then click the Create Routing Option button [2].

**Enter Email Routing Details**

To create an email routing option, enter the contact title in the Title field [1].

Enter the contact email in the Email Address field [2].

To choose who the contact option is for, click the Assign to field [3].

To set the contact hours, click the Add available time link [4].

To have set unavailable hours, click Add unavailable date link [5].

To save this for later and leave it unpublished, click Save as Draft [6].

To save the changes made, click the Publish button [7].
Enter Call Routing Details

To create a phone call routing option, enter the contact title in the Title field [1].

Enter the contact phone number in the Phone Number field [2].

Enter the receiver email address in the Email Address field [3].

To assign the help option to a specific audience, click the Assign to drop-down menu [4]. Then select the applicable options.

To set the contact hours, click the Add available time link [5].

To have set unavailable hours, click Add unavailable date link [6].

To save this for later and leave it unpublished, click Save as Draft [7].

To save the changes made, click the Publish button [8].
Enter Chat Routing Details

To create a chat routing option, enter the contact title in the **Title** field [1].

To select the chat type, click the **Chat Client Type** drop-down menu [2]. Select either an HTML Embed or a URL client type.

Enter the embed code in the **Paste your embedded code below** field [3]. If you selected the URL type, you can enter the URL and select to open the link in a new window.

To assign the help option to a specific audience, click the **Assign to** drop-down menu [4]. Then select the applicable options.

To set the contact hours, click the **Add available time** link [5].

To have set unavailable hours, click **Add unavailable date** link [6].

To save this for later and leave it unpublished, click **Save as Draft** [7].

To save the changes made, click the **Publish** button [8].
How do I view contact options in the Impact Support Center?

When a user opens the Support Center they are first presented with context-sensitive help suggestions relevant to their role. If they cannot find the right help they need to resolve their query or need to escalate their request, they can reach out to your institution’s help desk using the contact options at the bottom of the Support Center via email, phone, and/or live chat.

These options can be made available dependent on the user's role (e.g. student- or faculty-specific help desk) and day of the week/time of day (e.g. in-house support during office hours, external support outside of office hours). Based on these settings, the user is routed to a specific email address/phone number/chat.

Open Impact Support

In the Impact Dashboard, click the **Support** icon.
View Help Window

View the Impact Dashboard help window.

You can search help resources [1], select help topics [2], view suggested help documents [3], and submit a help request [4].

You can also view additional resources [5] and your help tickets [6].

Open Email Form

To submit a help request email, click the Email button.
Fill out email template

In the Email form, enter a summary in the Summary field [1].

To select a help topic, click the Topic drop-down menu [2].

If you have a file to attach, you can add your file in the Attachment field [3].

Enter a description of the issue in the Description field [4].

Indicate the severity of the issue using the Severity drop-down menu [5]. You can choose Blocker, Major, Minor, and Enhancement.

Specify the instance where you see the issue using the Environment drop-down menu [6]. You can choose Staging, Production, or both.

To send the email, click the Send email button [7].
Open Contact Call Window

**Couldn't find your answer?**

We can help you personally, how would you like to contact us?

- Email
- Call
- Suggest a feature

To view the phone number and call Impact Support, click the **Call** button.

**View Contact Call Information**

1. **Reveal phone number and reference**

2. **Call this number for the support department:**

3. **Your reference:**

   Please keep this number available as the support representative will ask for it.

To view the phone and reference numbers, click the **Reveal phone number and reference** button [1].

When you click the button, Impact support receives an email with the same contextual and system information included in email-based requests. Additionally, you can view the help desk phone number [2] and your reference number [3].
Open Suggest A Feature Window

To initiate a conversation about a desired Impact improvement or enhancement, click the Submit a feature button.

Suggest an Idea

To create a new idea, click the Suggest an idea button.

Note:

- You must be logged into the Instructure Community to suggest an idea.
- For more information on submitting an idea, visit this guide, How do I create a new idea conversation in the Instructure Community?
Tool Categories
What are Impact Tool Categories?

Tool categories provide you with the ability to show or hide out-of-the-box content related to specific functionalities or tools that are or are not relevant to your institution and can be managed from your Dashboard.

Note: If a tool category is hidden, any contexts assigned to that particular tool category are not visible in the overview.

Where are tool categories applied and how do they behave?

Tool categories are applied to out-of-the-box contexts, monitors, support center categories, individual support articles, reporting templates, and reporting template categories. The behavior of each of these is outlined below.

Contexts

In Global Navigation, click the Settings icon [1] and then click the Contexts link [2].

The table displays the Tool category column [3]

Notes:
• Contexts that are related to a specific tool have a tool category assigned to them.
• If a context that has an assigned tool category is attached to an article, message or support center category, the tool category must be toggled On to make use of any of the content to which the context is attached.

Monitors

In Global Navigation, click the Settings icon [1] and then click the Activity Monitors link [2].

The table displays the Tool category column [3].

Note: Monitors that are related to a specific tool have a tool category assigned to them. If a monitor lives inside a reporting template and the visibility of the tool category is toggled hidden, the monitor is not visible in your reporting template or in your insights.
Messages

In Global Navigation, click the Messages link [1].

The table displays the Tool category column [2].

Note: Messages that are related to a specific tool may have a tool category assigned. If the assigned tool category is toggled to hidden, the visibility of your message is also considered hidden. A tooltip inside your Dashboard explains why your message isn’t visible.
Support Center Categories

In Global Navigation, click the **Support** link [1].

The table displays the **Tool category** column [2].

**Notes:** If a tool category is applied to a support center category, and the tool category is toggled to hidden, the support center category is not visible to you inside your dashboard or to the end user inside the LMS.
Reporting Templates

In Global Navigation, click the **Settings** icon [1] and then click the **Reporting Templates** link [2].

**Notes:**

- Some reporting templates have a tool category attached at the top level, which provides you with the ability to completely hide the whole report for a cleaner dashboard both inside the reporting templates page and within your insights.
- When two tool categories are applied to the same item, then both Tool Categories need to be toggled to visible in order for this item to be visible.
- If a tool category is applied to a sub-category inside a reporting template and that tool category is toggled to hidden this subcategory will not be visible in reporting template nor in your insights.
User Groups
What are the User Groups fields?

You can use the User Groups page to view all relevant roles and groupings that Impact has registered from your learning application.

Open User Groups

In Global Navigation, click the Settings icon [1]. Then click the User Groups link [2].

The User Groups tab displays a list of all of the roles registered within the Impact system.
User groups are listed with fields:

- **ID [1]**: a sequential number associated with the User Group for identification on the back end of Impact and can be used to reference a long User Group title quickly and easily
- **Role ID [2]**: the Canvas ID of the role and/or subaccount of the specified User Group
- **Role Name [3]**: the name or breadcrumbs containing the location of the specified User Group in order to best identify it
- **User Count [4]**: the number of users in the specified User Group
- **Category [5]**: a drop-down menu allowing selection of a core account role that can be assigned to the entire User Group if desired
- **Visibility [6]**: whether this User Group is able to be seen and used for targeting in messages, campaigns, walkthroughs, support center routing, etc
Filter User Groups

To search based on a combination of criteria, click the **Filters** drop-down menu [1].

To search for specific user groups, enter a term in the **Search** field [2].
How do I organize user roles from the application in the Impact Dashboard?

You can use the User Groups overview to view information and user counts for all roles, manage their visibility, and organize them into categories.

Open User Groups

Click the Settings icon [1], then click the Custom User Groups link [2].

The User Groups tab presents all of the roles registered within the Impact system including their unique Impact ID, Name, a live user count, current categorization, and visibility status.
Edit User Groups

To give a custom name to a user group, click the Edit icon next to the role name.
Categorize Individual Roles

To categorize individual roles, click the Category drop-down menu and select a role.
Categorize Multiple Roles

To bulk-assign multiple roles, click the checkbox next to the Role ID [1] and click the **Assign To Role Category** link [2].

Use the **Category** drop-down menu to select a category [1] and then click the **Assign category** button [2].
How do I view my defined target audience in the Impact Dashboard?

When you are assigning a piece of content, a campaign, or a report to a target audience you will see options like User Roles, Profiles, User Groups, Categories, Filters, and Campaigns. All these different ways of classifying users give you the opportunity to really narrow down certain characteristics and customize the visibility of your Impact content.

View User Roles

User roles are the role(s) any user has within your LMS. When a user logs into your LMS, Impact replicates their LMS Role(s) in our system.

User Roles are defined by your institution and how it is broken down within your LMS. This can be on a course basis, department basis, or however else you’ve structured your institution. Your institution might use course roles, hierarchy roles, subaccounts, or custom roles to categorize users by departments, schools, faculty groups, and more. This is then reflected within your Impact dashboard.

The reflection of these Roles in your Impact dashboard also allows you to group, categorize, compare, examine and target specific user types within your institution. With the alignment between your LMS and Impact user roles, you can confidently assign campaigns, Impact content, and reporting to the correct users.
If you have Impact connected to an application running on public pages, the Role Category of Public can be used to target all visitors to the page.

View Profiles

When you see the word Profile in your target audience options, this is another way of referring to the User Roles imported from your LMS (this includes institutional hierarchy roles, subaccounts, course roles, and any other custom roles that you create from your LMS). These profiles are solely dependent on the way your LMS has organized specific roles within your institution.

Profiles can differ on an institution and LMS basis. For example, you could have roles such as CourseRole_Instructors, CourseRole_Students, as well as some custom Roles you've created for specific user types.
View User Groups

You can think of User Groups as containers for User Roles that are collected by Impact from your LMS. Having User Groups is particularly useful when you want to assign campaigns or Impact content to a specific group of LMS users.

User Groups are automatically generated and added to your Impact dashboard depending on your collected User Roles. In the User Groups page of your Impact dashboard, you can see all of the roles registered within the Impact system, including their unique Impact ID, name, live user count, current categorization, and visibility status.

You can see and organize all your User Groups from this User Groups page. To learn about organizing User Roles and Groups, read this article.

With Impact, you can also create **Custom User Groups**. This Impact feature allows you to create a User Group right from within the Impact Dashboard and tailor these groups to contain custom characteristics that you are interested in targeting.

**View Role Categories**

Role Categories are a way of organizing your User Roles and Groups with Impact. You can assign your User Roles and Groups to Categories based on your institution’s needs. This is especially useful when you want to target a larger audience (such as ALL...
students or ALL instructors). Example categories can be Instructors, Students, and Staff. The User Roles and Groups that go into these categories are completely dependent on your institution, and you can categorize them as you wish.

Overall, Role Categories are an easy way to assign multiple User Groups in an efficient manner and capture larger audiences.

View Filters

Filters are another way of choosing your target audience for a specific piece of content or report. Filters are created as a result of Tool Adoption Reports and refer to users that have or have not been using a tool over a specified timeframe. With these filters, you can really isolate users based on their behaviors or usage within the LMS.
View Campaigns

<table>
<thead>
<tr>
<th>By role:</th>
<th>Public</th>
</tr>
</thead>
<tbody>
<tr>
<td>By filter:</td>
<td>/Documentation Canvas</td>
</tr>
<tr>
<td></td>
<td>/Documentation Canvas/Business</td>
</tr>
<tr>
<td>By custom user groups:</td>
<td>/Documentation Canvas/English</td>
</tr>
<tr>
<td></td>
<td>/Documentation Canvas/History</td>
</tr>
<tr>
<td>Individuals:</td>
<td>/Documentation Canvas/Impact</td>
</tr>
</tbody>
</table>

By now, you are probably familiar with the way Impact allows you to create campaigns. Once you create a campaign and assign it to a target audience, you can select that campaign as a target audience from other places within your Impact dashboard. For example, if you create a new message, and you want to add it to an existing campaign, you can select that campaign as your target audience. The same goes for all Impact content. In addition, if you want to view reports specific to a campaign, you can select that campaign as a filter within your Insights page.

If you are assigning a message or support article to a campaign, once you select a campaign as an audience, this help item is added to that campaign's help item overview.

Where do I use target audiences?

The majority of your Impact features allow or require you to assign specific audiences. User Roles, Profiles User Groups, Categories, Filters, and Campaigns make up these audiences and allow you feel confident that the correct users see your Impact content and appear on reports. You’ll see these audience options in the following places:

- **Reporting Templates** are assigned to a target audience.
- The following Reports in your Impact dashboard have filters related to target audiences:
  - Tool Adoption Report
  - Course Activity Report
  - Support Button Usage Report
  - Support Escalation Route Report
- **Support Routing** options can be assigned to a target audience.
- **Support articles** and **Messages** can be assigned to a target audience.
- **Campaigns** can be assigned to a target audience.
• Support Center Categories can be assigned to a target audience.
How do I create custom user groups for messages and support articles in the Impact Dashboard?

You can create custom user groups based on a combination of criteria.

Open Custom User Groups

Click the Settings icon [1], then click the Custom User Groups link [2].
Create New Custom Group

Settings

Custom User Groups
Create custom user groups and reuse them in your campaigns, messages or articles.

<table>
<thead>
<tr>
<th>ID</th>
<th>Name</th>
<th>Created by</th>
<th>Size</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Custom Group</td>
<td>Andy Adamovich</td>
<td>0</td>
</tr>
<tr>
<td>2</td>
<td>K12 Instructors</td>
<td>Andy Adamovich</td>
<td>7</td>
</tr>
</tbody>
</table>

Click the **Create New** button.

Add Custom Group Information

Enter a custom user group name [1] and description [2]. You can create the group list automatically using conditions [3], or you can import a group list [4].
Add First Condition

To create a list using conditions, click the **Add the first condition** link [1].

Create Condition
Conditions are statements that specify the types of users included in the group. To specify the users to whom the formula should apply click the Application drop-down menu and select your condition. The available conditions are for roles, user logins, and tools used.

Create Role Condition

The role condition type allows you to create a list of users based upon their role [1]. In the Role drop-down menu [2] you can select from the list of user roles identified in your account.

Create Logged In Condition

The logged in condition type allows you to create a list of users based upon log in activity [1]. Enter a value in the number field [2]. Then select a time frame from the duration drop-down menu [3]. You can select from the day, week, month, and year options.
Create Used Tool Condition

The used the tool condition type allows you to create a list of users based upon their use of Impact [1].

Select a report type in the Reports drop-down menu [2]. Enter a value in the number field [3]. Then select a time frame from the duration drop-down menu [4]. You can select from the day, week, month, and year options.

Add or Remove Conditions

To add a condition, click the Add an "and" condition link [1].

To remove a condition, click the Remove icon [2].
Preview Group List

**Custom User Group Preview: 4 users**

Users that have not yet been registered in the Impact system will not appear in the preview.

<table>
<thead>
<tr>
<th>User Name</th>
<th>Full Name</th>
<th>Email Address</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Canvas Teacher</td>
<td><a href="mailto:canvassteacher@institution-name.edu">canvassteacher@institution-name.edu</a></td>
</tr>
<tr>
<td>17</td>
<td>Caroline Jones</td>
<td><a href="mailto:carolinejones@instructure.com">carolinejones@instructure.com</a></td>
</tr>
<tr>
<td>20</td>
<td>Emily Boone</td>
<td><a href="mailto:emilyboone@instructure.com">emilyboone@instructure.com</a></td>
</tr>
<tr>
<td>21</td>
<td>Max Johnson</td>
<td><a href="mailto:maxjohnson@instructure.com">maxjohnson@instructure.com</a></td>
</tr>
</tbody>
</table>

Based on your added conditions, you can view the list of users included in the group [1].

To download the group list, click the **Download CSV** button [2].

To search for a specific user in the list, use the **Search** field [3].

Save Group

**K12 Instructors**

Description...

**Edit conditions**

- User has used one of the tools
- Instructor (legacy report) in the last 1 day
- User has one of the roles
- English

Click the **Save changes** button.
View User Group

Custom User Groups
Create custom user groups and reuse them in your campaigns, messages or articles.

<table>
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<th>ID</th>
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</tr>
<tr>
<td>2</td>
<td>K12 Instructors</td>
<td>Andy Adamovich</td>
<td>4</td>
</tr>
</tbody>
</table>

View the group in the Custom User Groups list.
How do I upload a custom user group list in Impact?

You can target communication and support to a certain group of users by creating a custom user group. You can upload a list of users to include in the custom user group on the Impact Dashboard.

Open Custom User Groups

Click the Settings icon [1], then click the Custom User Groups link [2].
Create New Group

View the Custom User Groups page.

To create a new user group, click the Create New button.

Import User Group List

Click the Import list link.
Upload User List

Import A List Of Users
Upload any CSV, XLS, or XLSX files with user name, email address or PK1 ID: [Download sample spreadsheet]

To download a sample spreadsheet, click the Download sample spreadsheet link [1].

To upload a custom user group list file from your computer, click the Choose File button [2]. You can upload CSV, XLS, and XLSX file types.

Note: Your spreadsheet must identify users by one of three user ID header types: user_email, PK1_ID, or username. (PK1_ID only applies to Blackboard users.)
Choose File

Select your file [1], then click the Open button [2].
Map File Columns

To transfer your data into the Impact database, you must map the file's user ID header to an Impact user property.

Click the item's Impact User Property drop-down menu [1].

To choose not to map the column header, click the Do not map column option [2].

To map the column header to email address data, click the Email address option [3].

To map the column header to PK1 ID data, click the PK1 ID option [4]. This option only applies to Blackboard users.

To map the column header to username data, click the Username option [5].
**View Mapped Column Status**

**Map File Columns To User Properties**

At least one column header should be mapped to an Impact user property.

<table>
<thead>
<tr>
<th>Matched</th>
<th>Column Header From File</th>
<th>Preview Data</th>
<th>Impact User Property</th>
</tr>
</thead>
<tbody>
<tr>
<td>True 1</td>
<td>Email Address</td>
<td><a href="mailto:andy.ad.canvas@gmail.com">andy.ad.canvas@gmail.com</a></td>
<td>Email address</td>
</tr>
<tr>
<td>True 2</td>
<td>Email Address</td>
<td><a href="mailto:maxjohnson@instructure.com">maxjohnson@instructure.com</a></td>
<td>Email address</td>
</tr>
<tr>
<td>True 3</td>
<td>Username</td>
<td>maxjohnson</td>
<td>Username</td>
</tr>
</tbody>
</table>

The **Matched** column displays the mapped column header status [1].

If all users from the uploaded file were located in the Impact database, a **Matched** icon displays [2].

If only some of your users were located in the Impact database, a **Partial Match** icon displays [3].

If no users were located in the Impact database, a **No Match** icon displays [4].

**Import User Group**

To import your user list, click the **Import** button.
Save User Group

Type your custom user group name in the Custom user group name field [1].

To add a group description, type the description in the Custom user group description input field [2].

To save your changes, click the Save Changes button [3].

Note: A custom user group name must be added to save your user group [4].
View Custom User Group

**Settings**

**Custom User Groups**
Create custom user groups and reuse them in your campaigns, messages or articles.

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<tbody>
<tr>
<td>23</td>
<td>New User Group</td>
<td>Andrew Adams</td>
<td>2</td>
</tr>
<tr>
<td>9</td>
<td>Student No Grades</td>
<td>Melissa McClelland</td>
<td>48</td>
</tr>
<tr>
<td>19</td>
<td>Students at risk</td>
<td>Cole Groom</td>
<td>45</td>
</tr>
<tr>
<td>21</td>
<td>Students not engaged</td>
<td>Cole Groom</td>
<td>45</td>
</tr>
</tbody>
</table>

View your custom user group in the Custom User Groups page.
Walkthroughs
What are Impact Walkthroughs?

The Walkthroughs feature allows Impact admins to create step-by-step guidance of a process in Canvas or Blackboard Learn Original. A walkthrough consists of multiple steps that may span multiple pages.

When creating walkthrough steps, admins can select from the following step types: hints, pop-ups, and systrays. Hints can be used to direct users to another page in their LMS. Pop-up and systray messages can be used to provide information.

If enabled, users may submit walkthrough feedback upon closing or completing a walkthrough.

Notes:

- Walkthrough steps must include a context which triggers the step, such as an action or navigating to a page. Free Select Mode is not available when selecting a context.
- Buttons can be added to allow users to navigate between steps or close the walkthrough.
- The Walkthroughs feature preview is in active development.

View Walkthroughs
Walkthrough steps can be created using the Inline Editor or Impact Dashboard.

View Hint Walkthroughs

Hint messages are messages that are connected to a specific element on a page in your learning application.

Note: Hint messages are not available in the Inline Editor Walkthrough as a message type.
View Pop-Up Walkthroughs

Pop-up messages are presented in a central modal that lays on top of your learning application.

**Note:** Pop-up messages can only be connected to page-level contexts and not to a specific element.
View Systray Walkthroughs

Systray messages are messages displayed in the bottom right corner of your learning environment.

**Note:** Systray messages can only be connected to page-level contexts.
View End Walkthrough Confirmation

To end a walkthrough before reaching the last step, users can click the Close icon at any time [1].

To end a walkthrough, users can click the Exit button [2].

To confirm ending the walkthrough, users can click the Yes, end walkthrough button [3].
How do I create a Walkthrough in the Impact Dashboard?

When creating walkthrough steps, admins can select from the following step types: hints, pop-ups, and systrays. Hints can be used to direct users to another page in their LMS. Pop-up and systray messages can be used to provide information.

Notes:
- Walkthrough steps must include a context which triggers the step, such as an action or navigating to a page. Free Select Mode is not available when selecting a context.
- Buttons can be added to allow users to navigate between steps or close the walkthrough.
- The Walkthroughs feature preview is in active development.

Open Walkthroughs

In Global Navigation, click the Walkthroughs link.

Create Walkthrough
Click the New walkthrough button.

**Add Walkthrough Details**

1. Untitled walkthrough
2. Add your walkthrough description here

In the **Untitled Walkthrough** field [1], enter a title for your walkthrough. In the **Add your walkthrough description here** field [2], add description text.

**Create Walkthrough Steps**

1. Untitled 1
2. Type
   - Hint
3. Orientation
   - Automatic
4. Connect to context
   - None selected
5. Height
   - 300
6. Width
   - 400
In the **Untitled 1** field [1], view the title.

In the **Type** drop-down menu [2], select the message type you would like to display. You can select between hint, pop-up, or systray messages.

In the **Orientation** drop-down menu [3], select where you would like to display your step.

In the **Connect to context** drop-down menu [4], select where you want the step to display. Connected contexts displays where the step is displayed.

If you would like to modify the size of your message, enter a number the **Height** field [5] and **Width** field [6].

**Add Buttons**

To add a button, click **Add button** button [1].

In the **Caption** field [2], type the button name.

To change the action of the button, click the **Action** drop-down menu [3]. Depending on the order of the button’s action, you can select between next, previous, and exit.
Add Step Details

To enable the rich content editor, click the Rich Edit Mode toggle button [1].

In the Untitled field [1], enter a step title. In the Nothing to see here just yet field [2], type the step description.

If you have added a button to the step, it will display in the step description [4].

View Additional Step Options

To duplicate and reuse a step, click the Clone step link [1]. To delete a step, click the Delete step link [2].
Add Additional Steps

To add additional steps to your Walkthrough, click the Add Step button.

Manage Translation

In the Manage Translations section, click the Manage Translations drop-down menu [1].

Click the language in which you want to add or edit the message [2].

You can see all of your different languages for your account. To request the addition of a new language please read How do I add a new language in the Impact Dashboard?
**Edit Settings**

In the **Settings** tab, you can edit different settings [1].

To select who is assigned the Walkthrough, click the **Assign to Users** drop-down menu [2].

To immediately begin the Walkthrough when a user opens the page, open the **Triggers** section and ensure the **Trigger proactively from first walkthrough step** checkbox is selected [3].

To schedule message visibility, in the sidebar, locate and open the **Schedule Visibility** section [4].

In the **Visible From** section, select the relevant:

- Start date
- Start time

In the **Visible Until** section, select the relevant:

- End date
- End time
To collect feedback from the Walkthrough, open the Advanced Settings section and click the **Collect feedback at the end of the walkthrough** checkbox [5].

To search or create tags to add to your Walkthrough, add tags in the **Tags** field [6].

**Note:** You must assign users to be able to publish the Walkthrough.

**Publish Walkthrough**

![Publish Walkthrough interface](image)

To create a draft of your walkthrough steps to publish later, click the **Save as Draft** button [1]. To publish and make your walkthrough steps visible, click the **Publish** button [2].
How do I edit a Walkthrough in the Impact Dashboard?

You can edit existing walkthroughs in the Impact Dashboard. Walkthroughs consists of multiple steps that may span multiple pages.

Open Walkthroughs

In the Global Navigation, click Walkthroughs link.

Open Walkthrough

To edit an existing walkthrough, click the name of the walkthrough.
Delete or Edit Walkthrough

To delete a walkthrough, click the **Delete** button [1].
To modify the walkthrough, click the **Edit** button [2].

**Edit Walkthrough Steps**

To update a walkthrough step, click the **Options** icon [1].
To add an additional step, click the **Add Step** button [2].
Edit Walkthrough Settings

In the **Settings** tab, you can edit different settings [1].

To update who is assigned the Walkthrough, click the **Assign to Users** drop-down menu [2].

To immediately begin the Walkthrough when a user opens the page, open the **Triggers** section and ensure the **Trigger proactively from first walkthrough step** checkbox is selected [3].

To update the schedule message visibility, in the sidebar, locate and open the **Schedule Visibility** section [4].

To collect feedback from the Walkthrough, open the **Advanced Settings** section and click the **Collect feedback at the end of the walkthrough** checkbox [5].

In the **Manage Translations** section, click the **Manage Translations** drop-down menu [6].
Update Walkthrough

To unpublish your walkthrough and save your current changes, click the **Save & Unpublished** button [1].

To publish your updated walkthrough, click the **Update** button [2].
How do I create a Walkthrough in the Impact Inline Editor?

When creating walkthrough steps, admins can select from the following step types: hints, pop-ups, and systrays. Hints can be used to direct users to another page in their LMS. Pop-up and systray messages can be used to provide information.

Notes:

- Walkthrough steps must include a context which triggers the step, such as an action or navigating to a page.
- Buttons can be added to allow users to navigate between steps or close the walkthrough.
- The Walkthroughs feature preview is in active development.

Open Walkthroughs

To open Walkthroughs, click the **Impact** icon [1] and then click the **Walkthroughs** icon [2].

Create New Walkthrough

To create a new Walkthrough, click the **Create Walkthrough** button.
Add Walkthrough Details

In the Title field [1], enter a title for your walkthrough. In the Description field [2], add description text. In the Assigned to field [3], select the users you want to view the walkthrough steps.

Then click the Start Creating button [4].

Create Step

No steps here yet.

Create a step
To add a new step, click the **Create a step** button.

**Select Page**

If you would like to change the Walkthrough page or element, click the **Select Element (Shift)** toggle button [1]. To confirm the page or element selected for the step, click the **Select Page** button [2].

To cancel creating the step page or element, click the **Exit** button [3].

**Note:** Free Select Mode is not available when selecting a context.

**Add Step Details**

In the **Step Title** field [1], add a step title.

In the **Step Body** field [2], add a description of the step.

To add a message type, click the **Systray Step** button or **Popup Step** button [3].
Note: Hint messages are not available in the Inline Editor Walkthrough as a message type.

Add Buttons

To add a button, click Add button button [1].

In the Caption field [2], type the button name.

To change the action of the button, click the Action drop-down menu [3]. Depending on the order of the button's action, you can select between next, previous, and exit.

Edit Connected Context

To change the page placement of what page the connected context is being displayed, click the Change placement link.
Edit Presentation

To modify the size of your message, enter a number in the **Width** field [1] and a number in the **Height** field [2].

View Walkthrough Steps

Once you have added all the steps to your walkthrough, click **Save and proceed** button.
Edit Settings

In the Settings tab, you can edit different settings [1].

To select who is assigned the Walkthrough, click the Assigned to drop-down menu [2].

To immediately begin the Walkthrough when a user opens the page, open the Triggers section and ensure the Trigger proactively from first walkthrough step checkbox is selected [3].

To schedule message visibility, in the sidebar, locate and open the Schedule Visibility section [4].

In the Visible From section, select the relevant:

- Start date
- Start time

In the Visible Until section, select the relevant:

- End date
- End time
To collect feedback from the Walkthrough, open the Advanced Settings section and click the **Collect feedback at the end of the walkthrough** checkbox [5].

To search or create tags to add to your Walkthrough, add tags in the Tags field [6].

To link your Walkthrough with a Tool Categories, select the **Tool Categories** drop-down menu [7].

To save without publishing, click the **Save draft** button [8].

To continue and publish, click the **Save and proceed** button [9].

**Note:** You must assign users to be able to publish the Walkthroughs.

### Publish Walkthrough

To publish the Walkthrough, click the **Publish** button.
View Walkthrough

This feature is in beta. We heard some of our customers are experiencing challenges with the walkthroughs feature. We appreciate your patience while we improve walkthroughs.

Your walkthroughs

Using Student View
4 steps | Edited 1 month ago

Home Page (Pop-Up)
3 steps | Edited 1 month ago

People Page Overview
3 steps | Edited 1 month ago

Create Announcement
8 steps | Edited 1 month ago

All Walkthroughs are visible within your Impact Library.
How do I edit a Walkthrough in the Impact Inline Editor?

You can edit existing walkthroughs in the Impact Inline Editor. Walkthroughs consist of multiple steps that may span multiple pages.

Open Walkthroughs

To open Walkthroughs, click the Impact icon [1] and then click the Walkthrough icon [2].
Open Walkthrough

Your walkthroughs

Step 1
2 steps | Edited 3 days ago

Create Announcement
8 steps | Edited 3 days ago

To edit an existing walkthrough, click the name of the walkthrough.

Edit Walkthrough

To edit the walkthrough, click the Edit button.
Edit Walkthrough Steps

To edit or delete a step, click the **Step** drop-down menu [1].

To edit the step, click the **Edit** link [2]. To delete the step, click the **Delete** link [3].

To add an additional step, click the **Add another step** button [4].
Edit Walkthrough Settings

<table>
<thead>
<tr>
<th>Steps</th>
<th>Settings</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Translations</td>
</tr>
<tr>
<td>3</td>
<td>Title*</td>
</tr>
<tr>
<td></td>
<td>Create Announcement</td>
</tr>
<tr>
<td>4</td>
<td>Description</td>
</tr>
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<td></td>
<td>Learn how to create a course announcement</td>
</tr>
<tr>
<td>5</td>
<td>Assigned to</td>
</tr>
<tr>
<td>6</td>
<td>Triggers</td>
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<tr>
<td>7</td>
<td>Schedule Visibility</td>
</tr>
<tr>
<td>8</td>
<td>Advanced Settings</td>
</tr>
</tbody>
</table>

In the Settings tab, you can edit different settings [1].

In the Manage Translations section, click the Translations drop-down menu [2].

Use the Title field [3], to update the name of the walkthrough.

To update the description, click in the Description field. [4]

To update who is assigned the Walkthrough, click the Assigned to drop-down menu [5].

To immediately begin the Walkthrough when a user opens the page, click the Triggers section [6].

To update the schedule message visibility, click the Schedule Visibility section [7].

To collect feedback from the Walkthrough, click the Advanced Settings section [8].
Save Walkthrough

To unpublish your walkthrough and save your current changes, click the **Save & Unpublished** button [1].

To save your walkthrough, click **Save and proceed** button [2].

Update Walkthrough

To publish your walkthrough changes, click the **Update** button.
How do I view Walkthrough ratings in the Impact Dashboard?

If enabled, a user may submit a rating for a walkthrough when a walkthrough is closed or completed. Walkthrough ratings display the percentage of upvotes, downvotes, and number of total votes associated with a walkthrough. You can view walkthrough ratings in the Impact Dashboard.

Open Walkthroughs

In Global Navigation, click the **Walkthroughs** link.

Open Walkthrough

To view ratings associated with a walkthrough, click the walkthrough name.
View Walkthrough Ratings

The Feedback section displays walkthrough ratings.

Walkthrough ratings display the percentage of upvotes [1], downvotes [2], and the number of total votes submitted for the walkthrough [3].