

Automatically Update Demographic Information in Live Projects

Explorance Learning Webinar

Krimo Bouaou, Director Learning Center

PRESENTED BY:

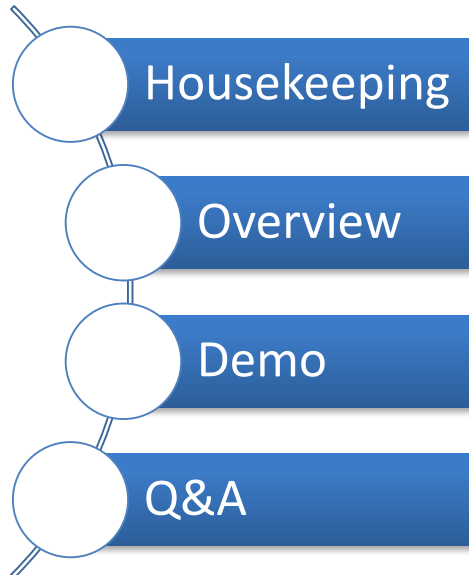
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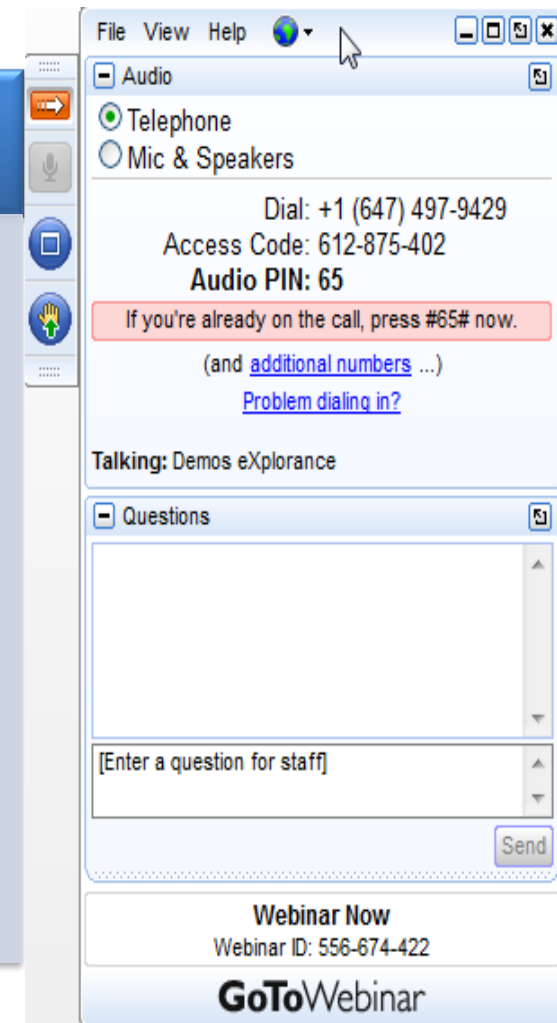


Agenda



Housekeeping

- Asking Questions:
 - Use the little hand on the side panel
 - This alerts us there is a question
 - Type question into the chat dialogue box
 - The question will appear in the question pane



Today's agenda

Automatically updating demographic information in live projects is the eagerly anticipated functionality that allows specific course and student demographic data to be updated daily after the project has been published.

Increasingly, institutions are launching course evaluation projects at the beginning of the term which allows them to capture feedback for shorter term and online courses.

This has put an extra burden on the SIS/Blue data admin to ensure that course data is accurate before the evaluation project is published in Blue.

In this webinar, we will walk through the process of setting up this functionality, configuring it, and examining some important use cases and the impact that this functionality will have on these projects.

Today's agenda

Regular projects

- Impact of the new Task option “Update dates for open tasks based on current task settings”
- Impact of “Enable Automatic Sync” of fields on a published project

DIG Projects

- Impact of “Enable Automatic Sync” of fields on a published project

Where it applies

This feature supports the following definitions:

- Typical survey
- Subjects
- Primary/Secondary Subject Pairings
- Primary/Secondary Subject Pairings - Multiple Secondary, including Secondary Subject Optional
- DIG projects

Note: The nightly data update process should be finished before the project automation process kicks in.

Where it applies

- Automatic field synchronization is available for any fields belonging to the following datasources, *but the important new behavior is the ability to change dates*:
 - Subject demographics (e.g., course or evaluation start/end dates)
 - Secondary Subject demographics (e.g., Hire Date)
 - Secondary Subject relational demographics (e.g., Teaching Role)
 - Rater demographics (e.g., Email)
 - Rater relational demographics (e.g., Program Name)

Automatic Sync Stop Setup



Automatic Sync is set to stop when the project is expired so that system resources are saved for other activities.



The project manager can manually extend the synchronization date beyond the project expiry date by using the new **Stop synchronizing fields on** located in the **Configuration** Sub-Tab under the **Field Management** Tab.

Task Management

Subject Management

Field Management

Response Management

Synchronize Subject Field

Synchronize Rater Field

Configuration

Field Management Configuration

Stop synchronizing fields on

Apply

Note: Project End Date: 2019-12-31

Functional Description: Project Dates

Update Matrix

- One of the key functions of Automatic Field Synchronization is the ability to change dates.
- Functions/settings that can change the default task date:

Functions/Setting	Description
Subject View Management (SVM Task)	Used to change the default task date by the end user
Project Advanced Settings (PAS)	Used to automatically overwrite the default task date
Live Demographic Sync (LDS)	Used to update the task date automatically if the demographic is used for task date setting

How is the default task date impacted?

Matrix of the impact of different functions/settings that can change the default task date:

Subject View Management (SVM)	Evaluation Timing Condition (ETC)	Live Demographic Sync (LDS)	Result
Off	Off	Off	Old Blue behavior
Off	Off	On	LDS
On	Off	On	SVM
Off	On	On	ETC
On	On	On	SVM (Until ETC conditions are met)

“Update dates for open tasks based on current task settings”

2020-01-31

Impact of the new option “Update dates for open tasks based on current task settings”:

Not Selected

General Settings

- ☐ Require authentication
- ☐ Include sign out link
- ☐ Allow rater to opt out of this task from the homepage
- ☐ Allow rater to opt out of this task from the questionnaire
- ☐ Update dates for open tasks based on current task settings

Start Date

2019-07-02
00:00

Start Date

Changing the dates for open tasks can only be performed manually through “Task Management”.

Selected

General Settings

- ☐ Require authentication
- ☐ Include sign out link
- ☒ Allow rater to opt out of this task from the homepage
- ☐ Allow rater to opt out of this task from the questionnaire
- ☒ Update dates for open tasks based on current task settings

Start Date

2019-07-02
00:00

Start Date

Changing the dates for open tasks is done automatically every time the project is saved. Any date changes that are made in “Task Management” will be overwritten.

Demo

Impact of: “Update dates for open tasks based on current task settings”

Setting up a project with Automatic Field Synchronization

2020-01-31

Task Management Subject Management **Field Management** Response Management Text Analytics Report Management

Synchronize Subject Field Synchronize Rater Field Configuration

Synchronize Subject Field

Select Source Courses

Subject
Datasource



Course-Teacher
Datasource



Project Fields

Results: 11 - 20 of 20 Item(s)

1 2

<input type="checkbox"/>	Field Name	Automatic Sync	Added Date	Last Updated
<input type="checkbox"/>	EvalEnd	Yes	12/11/2019 10:45:52 AM	12/24/2019 2:01:26 AM(Automatic)
<input type="checkbox"/>	CourseStartDate	No	12/11/2019 10:45:52 AM	
<input type="checkbox"/>	CourseEndDate	No	12/11/2019 10:45:52 AM	
<input type="checkbox"/>	Evaluate	Yes	12/11/2019 10:45:52 AM	
<input type="checkbox"/>	Multi	No	12/11/2019 10:45:52 AM	

Project Fields

Results: 1 - 4 of 4 Item(s)

<input type="checkbox"/>	Field Name	Automatic Sync	Added Date	Last Updated
<input type="checkbox"/>	TeachingRole	Yes	12/11/2019 10:45:54 AM	12/24/2019 2:01:26 AM(Automatic)
<input type="checkbox"/>	Position	No	12/11/2019 10:45:54 AM	
<input type="checkbox"/>	Contact_Hours	No	12/11/2019 10:45:54 AM	
<input type="checkbox"/>	Program	No	12/11/2019 10:45:54 AM	

Demo

Impact of Field Synchronization

Impact of SVM and the Project Advanced Settings in project date synchronization

Evaluation Timing Condition

Evaluation timing condition

☒ **Deadline setting**

If the number of completed fill out tasks is less than in

By the following date

☒ 2019-11-05 13:39

☐ + days from

then set the evaluation to launch automatically within the following time frame:

Fill out start date

☐ Project default

☒ Start date: 2019-11-05

☐ Start date is + days from

☐ + days from

Start time

Fill out end date

☐ Project default

☒ End date: 2019-12-31

☐ End date is + days from

☐ +

Subject View Management (SVM)	Evaluation Timing Condition (ETC)	Live Demographic Sync (LDS)	Result
Off	Off	Off	Old Blue behavior
On	Off	On	LDS
On	Off	On	SVM
Off	On	On	ETC
On	On	On	ETC

SVM Condition

when You give instructors the option to change course start/end dates in SVM or through SFO, the instructors' dates are used regardless of initial task settings until the Evaluation Timing date condition is met. Only once the Evaluation Timing date is met, the SVM or SFO selected dates will be overwritten by Evaluation Timing. *(Applies to Form Fillout tasks only.)*

Evaluation timing

☒ Delegate evaluation timing

Default timing

☒ Delegate scheduled evaluation date range

Demo

Impact of SVM/Task Setting/Evaluation Timing

Setting up the reminder date based on the task end date

- With this new setup, Survey Administrators who change course start/end dates using the Task Management, SVM or Subject Management (or Faculty using SVM) can see that the reminder dates adjust accordingly.
- In addition, these new settings may be preferable to using Dynamic Days configuration when the project has variable evaluation periods

1st Reminder
Not Set 00:00

2nd Reminder
Not Set

Day Setting

☐ days from start date

☒ 3 days before end date

Demo

Reminder based on task end date

Field Synchronization and DIG Projects

- Automatic Field Synchronization also addresses some of the limitations currently faced when using DIG projects: it now enables DIG to synchronize with the datasources at the field level, **AND**
- to recognize and use newly added fields after publishing the project.

Field Synchronization and DIG Projects

State of the course...	... Impact
If current course tasks are in progress or published ...	field synchronization impacts all fields except those that are set to be Editable
If current course tasks are not completed (without in progress and published) ...	field synchronization impacts all fields including Displayable and Editable
For split courses...	field synchronization follows the first rule above
For merged courses	field synchronization does not impact the newly created course

Field Synchronization and DIG Projects

Prior Blue versions

Management
Managing: DIG for Summer 2019 Evaluation

Task Management **No Field Management**

Tasks

Task List

Field

Filters:

Task Actions

Data preparation task for 402603 Human Origins

SENT Diggers: Domingo Chavez (Started)

STARTED Start Date: 2019-06-18 00:00 End Date: 2019-12-31 23:59

100.0%

Completed 0.0% (0)

Expired 100.0% (22)

Blue 7.13.1.x

Management
Managing: DIG - Data Preparation for Summer 2020

Task Management **Field Management**

Tasks

Task List

Field

Filtered Tasks: 1

Filters: Courses, Name Contains canada x

Task Actions

Data preparation task for 101815 Cultures of Modern Canada

NOT SENT DIG Task Owners: Domingo Chavez (Started)

STARTED Start Date: 2020-01-15 00:00 End Date: 2020-12-31 23:59

100.0%

Completed 0.0% (0)

Expired 0.0% (0)

Setting up a DIG project with Automatic Field Synchronization

2020-01-31

Management
Managing: DIG - Data Preparation for Summer 2020

Task Management **Field Management**

Synchronize Subject Field Configuration

Synchronize Subject Field

Select Source Courses

Available Fields Project Fields

Subject
Datasource



Course-Teacher
Datasource



Project Fields

Results: 11 - 20 of 20 Item(s)

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<input type="checkbox"/>	Program	No	12/11/2019 10:45:54 AM	

Field Synchronization and DIG Projects

Info **Data** Definition Subjects Members Access Tasks

Data Structure **Field Selection** Data Rules Options

Field Selection

Courses

Field	<input type="checkbox"/> Displayed	<input type="checkbox"/> Allow Edits	<input type="checkbox"/> Required
Object ID	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Name	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Course_Number	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Class_Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Division_Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Course_Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Term	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
School	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Dept	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
EvalStart	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
EvalEnd	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
CourseStartDate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
CourseEndDate	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Evaluate	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Demo

DIG and Demographic Sync

Upcoming Blue Events

Bluenotes APAC 2020 Conference

Building a Culture of Feedback: Engaging Students and Staff to Transform the Student Experience

📍 The University of Newcastle, Newcastle, AUS 📅 February 13-14, 2020

Join **The University of Newcastle** as they host Bluenotes APAC 2020 where Blue enthusiasts will gather together for a two-day conference to connect, share expertise, and learn from best practices. Come a couple of days early and get certified! A Blue Administrator Certification (BAC) training camp will be held on Tuesday, February 11th through Wednesday, February 12th, 2020, immediately prior to the Bluenotes APAC conference. Early bird special rates end on December 20, 2019.

Bluenotes EUROPE 2020 Conference

📍 Glasgow, UK 📅 March 25-26, 2020

Explorance is hosting the 3rd annual Bluenotes European Conference in Glasgow, where leaders and practitioners in institutional effectiveness, institutional research, teaching and learning, quality enhancement and student experience are coming together. Join your Bluenotes community colleagues to connect and share your experiences in using data and analytics to harness the power of feedback. Discuss your challenges, opportunities, solutions and lessons learned, to innovate and advance student learning and development together. Expand your network of like-minded peers and sharpen your Blue skills and expertise for your professional development.

Upcoming Blue Events

Bluenotes GLOBAL 2020 Conference

Harnessing the power of feedback to advance transformation in teaching and learning

📍 Chicago, IL, USA 📅 Aug 2nd - Aug 5th

In collaboration with the University of Louisville, Explorance is hosting the 7th annual Bluenotes GLOBAL Conference in Chicago, Illinois, USA, where leaders and practitioners in institutional effectiveness, institutional research, teaching and learning, technology, and faculty are coming together. Join your Bluenotes community colleagues to connect and share your experiences in using data and analytics to harness the power of feedback. Discuss your challenges, opportunities, solutions and lessons learned, to innovate and advance student learning and development together. Expand your network of like-minded peers, and sharpen your Blue skills and expertise for your professional development. Come a few days earlier to participate in a BAC, BEC or BRMC training camp and become a certified Blue Administrator, Expert, or Report Master.

Register today to indicate your selections and preferences: you can pay later. **You will not want to miss this!** Early bird discount ends May 1, 2020.

[Register Here Today!](#)

Upcoming Blue Certification Camps



Upcoming Blue Expert Certification Camps

Blue Expert Certificate Training Program

📍 In-person Training Camp 📅 Upcoming 2020 Sessions: Montreal, Feb 10-12 | BN GLOBAL 2020, August

The Blue Expert Certification (BEC) Training is an expert level training designed to further deepen your Blue knowledge and expertise so that you will be able to implement any feedback process at varying degrees of complexity and optimize your Blue implementations to best address your own institution's needs.

Select Your Session and Register Here



Upcoming Blue Report Master Certification Camps

Blue Report Master Certification Training Program

📍 In-person Training Camp 📅 Upcoming 2020 Sessions: Montreal, Feb 5-7 | BN GLOBAL 2020, August

Become a certified Blue Report Master! Join the Blue Report Master Certification (BRMC) Training Camp, for a 3-day in-person training workshop. Elevate your skills and knowledge on Blue's report building blocks and functionalities for deeper analysis of data collected, allowing for better informed data-driven decision making. Upon completion of the camp, the Blue Report Master Certificate will be issued.

Select Your Session and Register Here

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- Online Help Center:
 - Register to access the Online Help Center here:
<https://support.explorance.com>
- Blue Release Notes:
 - <https://support.explorance.com/hc/en-us/categories/115000564663>
- In order to further discuss this topic, we invite you to join the Community-Led Webinar community forum here:
<https://support.explorance.com/hc/en-us/community/topics/360000805631-Community-led-Webinar-Discussions>

Q&A