PRESENTED BY:

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Changing/Updating Task dates in Published Projects in Blue

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Agenda

- ❖ **How to change/automate task dates when a project is published**

- ❖ **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**

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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

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

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Where it applies

- Automatic field synchronization is available for any fields belonging to the all 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)

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❖ How to Change Task Dates when a Project is Published

1st Step:

Manage the project and Update the date fields (or Enable Automatic Sync)

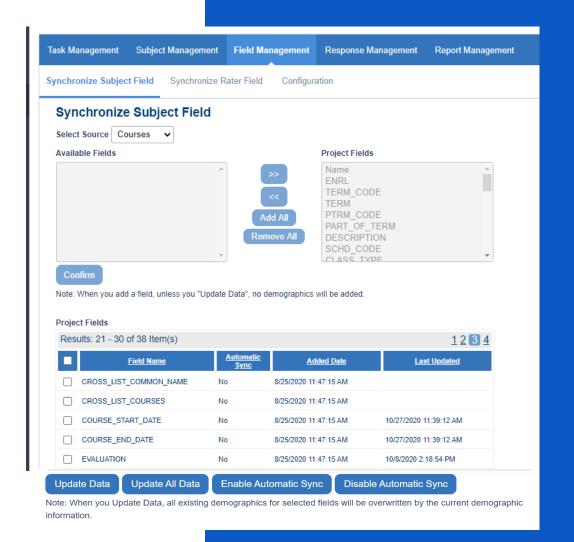explorance.

Manage the project

Field Management

- If this is a one-time change:

Find the Start/End Date fields > Update Data

- If this can be automatic:

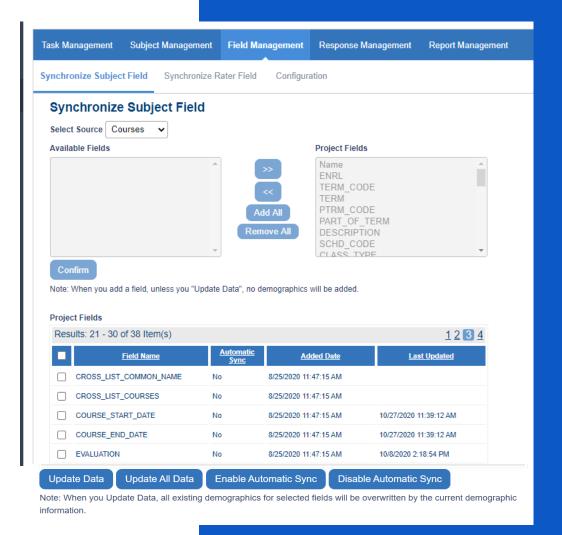Select the Start/End Date fields and "Enable Automatic Sync"

  - If the active project is not set for automatic update, task date/time adjustments can be manually triggered using the project's save action
  - If the active project is set with automatic update, the task date/time adjustment will occur during the daily automatic update time for projects.

Task Management   Subject Management   Field Management   Response Management   Report Management

Synchronize Subject Field   Synchronize Rater Field   Configuration

Synchronize Subject Field

Select Source | Courses ▼

Available Fields

Project Fields
Name
ENRL
TERM_CODE
TERM
PTRM_CODE
PART_OF_TERM
DESCRIPTION
SCHD_CODE
CLASS_TYPE

>>
<<
Add All
Remove All

Confirm

Note: When you add a field, unless you "Update Data", no demographics will be added.

Project Fields

Results: 21 - 30 of 38 Item(s)   1 2 3 4

	Field Name	Automatic Sync	Added Date	Last Updated
☐	CROSS_LIST_COMMON_NAME	No	8/25/2020 11:47:15 AM	
☐	CROSS_LIST_COURSES	No	8/25/2020 11:47:15 AM	
☐	COURSE_START_DATE	No	8/25/2020 11:47:15 AM	10/27/2020 11:39:12 AM
☐	COURSE_END_DATE	No	8/25/2020 11:47:15 AM	10/27/2020 11:39:12 AM
☐	EVALUATION	No	8/25/2020 11:47:15 AM	10/8/2020 2:18:54 PM

Update Data   Update All Data   Enable Automatic Sync   Disable Automatic Sync

Note: When you Update Data, all existing demographics for selected fields will be overwritten by the current demographic information.

Manage the project

Field Management

- We have to keep in mind - if automatic synchronization is enabled and a recent datasource update contains <u>empty data</u> or <u>an invalid date format</u>, the task dates will be updated overnight and will either stop, interrupt or expire the tasks.
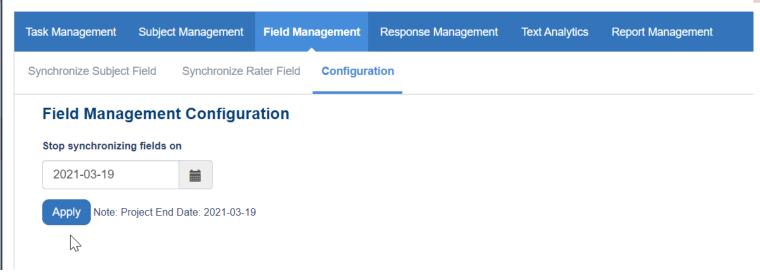
Automatic Sync Stop Setup

Automatic Sync is set to stop when the project is expired so that system resources are saved for other activities.
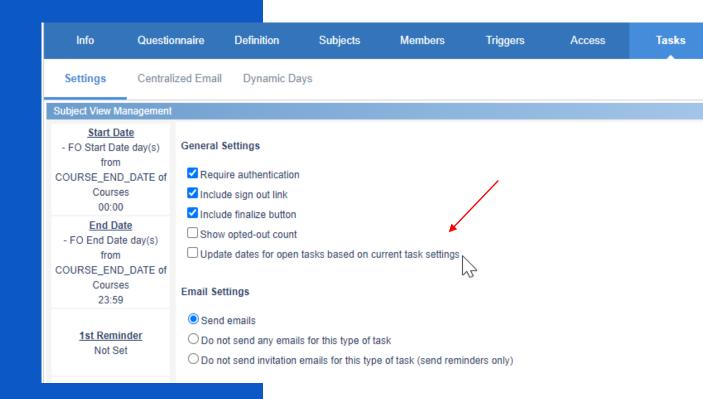
The project manager can manually extend the synchronization date beyond the project expiry date by using the new **Stop synchronizing fields on** located in the **Configuration** Sub-Tab under the **Field Management** Tab.

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

Synchronize Subject Field   Synchronize Rater Field   **Configuration**

Field Management Configuration

Stop synchronizing fields on

2021-03-19

Apply   Note: Project End Date: 2021-03-19

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2ⁿᵈ Step: Enable- Update dates for open tasks based on current task settings

SVM, QP or FO

Save Project

- Saving the project will recalculate all the start/end dates of our tasks that are based on date field from the courses datasource.
  - Example: Dynamic Days

- Tasks might expire, or become not-ready depending on the new dates coming in.
  - Note- You can disable the option after seeing the new task dates when managing the project, if automation is not needed.
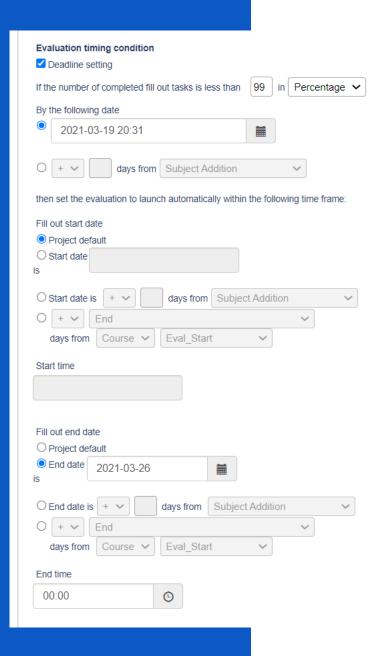
Demo

For FO- Option 2

Through Advanced Settings

- **Project > Info > Advanced Settings**

- **Enable 'Evaluation Timing Condition' (ETC)**

Evaluation timing condition

☑ Deadline setting

If the number of completed fill out tasks is less than [99] in [Percentage ▾]

By the following date

◉ [2021-03-19 20:31] [📅]

○ [+ ▾] [ ] days from [Subject Addition ▾]

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

Fill out start date

◉ Project default

○ Start date [   ]

is

○ Start date is [+ ▾] [ ] days from [Subject Addition ▾]

○ [+ ▾] [End ▾]

days from [Course ▾] [Eval_Start ▾]

Start time

[   ]

Fill out end date

○ Project default

◉ End date [2021-03-26] [📅]

is

○ End date is [+ ▾] [ ] days from [Subject Addition ▾]

○ [+ ▾] [End ▾]

days from [Course ▾] [Eval_Start ▾]

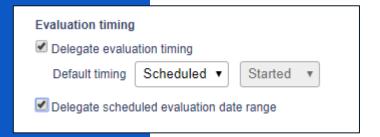End time

[00:00] [🕐]

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For FO- Option 3

Through SVM Task-end users

1. **Project > Info > Advanced Settings**

   • **Enable 'Evaluation Timing'**

2. **Task Options > Delegate fill out start and end dates.**

Evaluation timing

☑ Delegate evaluation timing

Default timing [Scheduled ▼] [Started ▼]

☑ Delegate scheduled evaluation date range

Task Options

Impact of Owner Removal

⦿ No Effect
◯ Stop Task
◯ Delete Task

Delegate scheduled evaluation date range

⦿ Delegate fill out start and end dates.
◯ Delegate fill out start and end dates using different date ranges.

☐ Define date range validity

◯ Between

◯ Between   [ ] days from subject addition
             [ ] days from subject addition

◯ Between   [ ] days from [ ] [ ]
             [ ] days from [ ] [ ]

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Demo

Project Dates Update Matrix-Summary

- 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 (ETC)	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

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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)

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Thank you

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