

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**

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.

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)

❖ How to Change Task Dates when a Project is Published

1st Step:
Manage the
project and
Update the date
fields (or Enable
Automatic Sync)

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.

The screenshot shows the 'Field Management' tab with the 'Synchronize Subject Field' sub-tab selected. The 'Select Source' dropdown is set to 'Courses'. The 'Available Fields' list is empty. The 'Project Fields' list contains: Name, ENRL, TERM_CODE, TERM, PTRM_CODE, PART_OF_TERM, DESCRIPTION, SCHD_CODE, and CLASS TYPE. Between the lists are buttons for '>>', '<<', 'Add All', and 'Remove All'. A 'Confirm' button is at the bottom left of the field lists. Below the field lists is a note: 'Note: When you add a field, unless you "Update Data", no demographics will be added.'

Below the note is a table titled 'Project Fields' showing results 21 - 30 of 38 items. The table has columns for a checkbox, Field Name, Automatic Sync, Added Date, and Last Updated.

<input type="checkbox"/>	Field Name	Automatic Sync	Added Date	Last Updated
<input type="checkbox"/>	CROSS_LIST_COMMON_NAME	No	8/25/2020 11:47:15 AM	
<input type="checkbox"/>	CROSS_LIST_COURSES	No	8/25/2020 11:47:15 AM	
<input type="checkbox"/>	COURSE_START_DATE	No	8/25/2020 11:47:15 AM	10/27/2020 11:39:12 AM
<input type="checkbox"/>	COURSE_END_DATE	No	8/25/2020 11:47:15 AM	10/27/2020 11:39:12 AM
<input type="checkbox"/>	EVALUATION	No	8/25/2020 11:47:15 AM	10/8/2020 2:18:54 PM

At the bottom of the interface are four buttons: 'Update Data', 'Update All Data', 'Enable Automatic Sync', and 'Disable Automatic Sync'. A final note states: '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 empty data or an invalid date format, the task dates will be updated overnight and will either stop, interrupt or expire the tasks.

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

>>

<<

Add All

Remove All

Project Fields

Name

ENRL

TERM_CODE

TERM

PTRM_CODE

PART_OF_TERM

DESCRIPTION

SCHD_CODE

CLASS TYPE

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)

1234

	Field Name	Automatic Sync	Added Date	Last Updated
<input type="checkbox"/>	CROSS_LIST_COMMON_NAME	No	8/25/2020 11:47:15 AM	
<input type="checkbox"/>	CROSS_LIST_COURSES	No	8/25/2020 11:47:15 AM	
<input type="checkbox"/>	COURSE_START_DATE	No	8/25/2020 11:47:15 AM	10/27/2020 11:39:12 AM
<input type="checkbox"/>	COURSE_END_DATE	No	8/25/2020 11:47:15 AM	10/27/2020 11:39:12 AM
<input type="checkbox"/>	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.

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

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

The screenshot shows the 'Tasks' configuration page in the Explorance system. The top navigation bar includes 'Info', 'Questionnaire', 'Definition', 'Subjects', 'Members', 'Triggers', 'Access', and 'Tasks'. Below this, a sub-navigation bar contains 'Settings', 'Centralized Email', and 'Dynamic Days'. The main content area is titled 'Subject View Management' and is divided into three sections: 'Start Date', 'End Date', and '1st Reminder'. The 'Start Date' section shows '- FO Start Date day(s) from COURSE_END_DATE of Courses 00:00'. The 'End Date' section shows '- FO End Date day(s) from COURSE_END_DATE of Courses 23:59'. The '1st Reminder' section shows 'Not Set'. To the right of these sections are two groups of settings: 'General Settings' and 'Email Settings'. The 'General Settings' group includes four options: 'Require authentication' (checked), 'Include sign out link' (checked), 'Include finalize button' (checked), and 'Show opted-out count' (unchecked). The 'Update dates for open tasks based on current task settings' checkbox is also unchecked and is highlighted with a red arrow. The 'Email Settings' group includes three options: 'Send emails' (selected with a radio button), 'Do not send any emails for this type of task' (unchecked), and 'Do not send invitation emails for this type of task (send reminders only)' (unchecked).

Info	Questionnaire	Definition	Subjects	Members	Triggers	Access	Tasks
Settings	Centralized Email	Dynamic Days					

Subject View Management

Start Date	End Date	1st Reminder
- FO Start Date day(s) from COURSE_END_DATE of Courses 00:00	- FO End Date day(s) from COURSE_END_DATE of Courses 23:59	Not Set

General Settings

- ☒ Require authentication
- ☒ Include sign out link
- ☒ Include finalize button
- ☐ Show opted-out count
- ☐ Update dates for open tasks based on current task settings

Email Settings

- ☒ Send emails
- ☐ Do not send any emails for this type of task
- ☐ Do not send invitation emails for this type of task (send reminders only)

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 in

By the following date

☒ 

☐ days from

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


☐ End

days from

Start time

Fill out end date

☐ Project default

☒ End date 


is

☐ End date is days from

☐ End

days from

End time



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

☐ Between

days from subject addition

days from subject addition

days from

days from

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

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)



Thank you

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