

# Ask the Expert

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# Agenda

- **8.1.1 Release – What's new?**
- **Submitted Questions**
- **Q&A**

## 8.1.1 Release – What's new

### UI/UX

- Subject Management (SM) Sticky Filters

### Reports

- Automatically updating static viewer groups in reports

### Datasource

- D2L Datasource integration

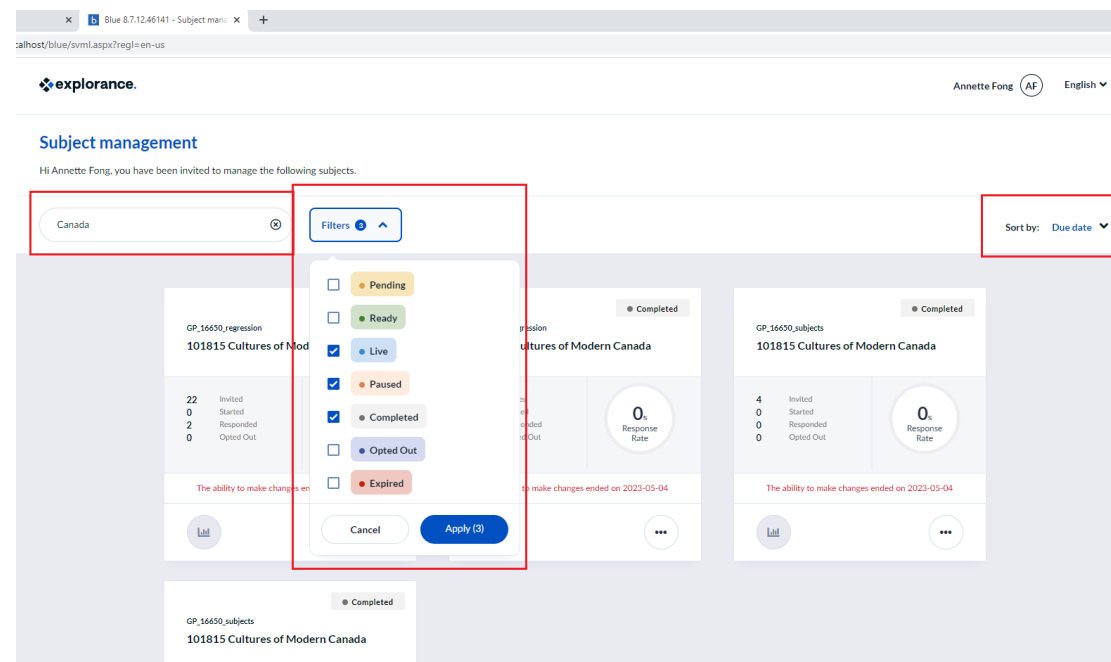
### Project

- Improved timelines for open surveys

## 8.1.1 Release – what's new?

### Subject Management (SM) Sticky Filters

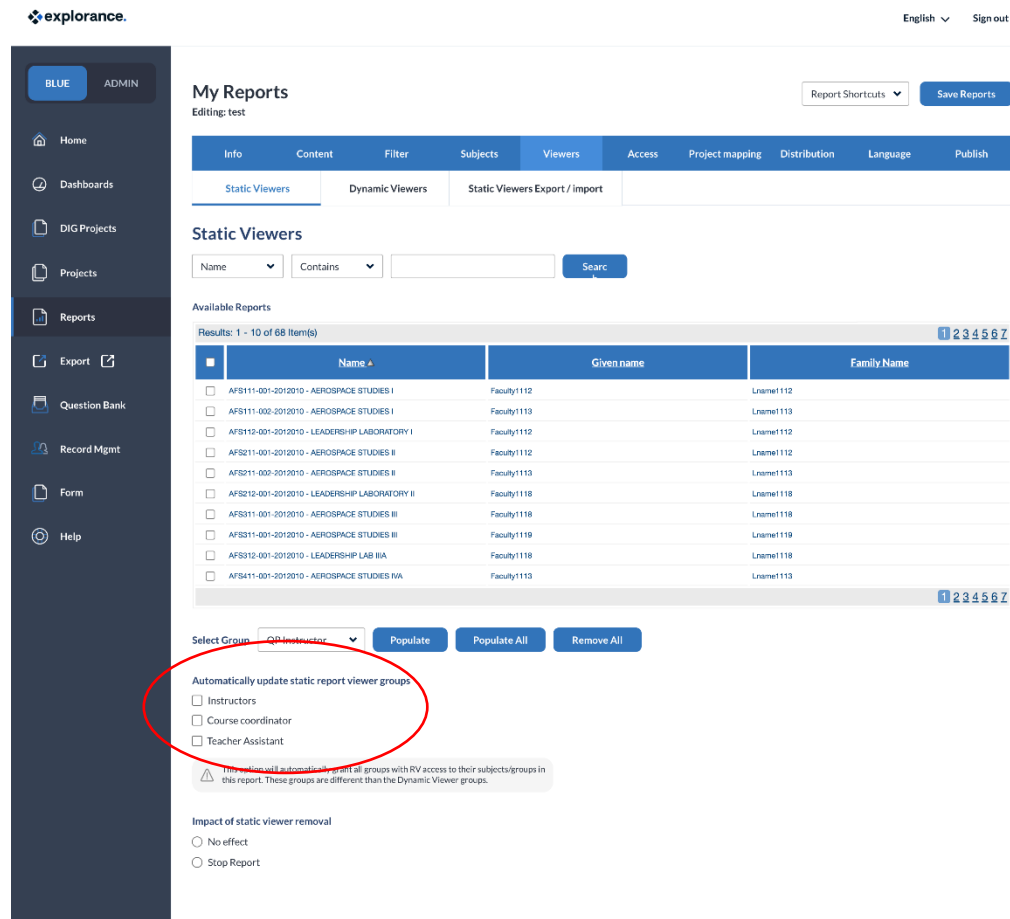
- User search, filter and sorting settings stored within session cookie
- End users are more autonomous and efficient in locating current subjects



## 8.1.1 Release – what's new cont'd...

### Automatically updating static viewer groups in reports

- Automatic update now includes the option to include which static groups to populate
- Provides automation for report viewer access when DRA is not an option (static groups are required)

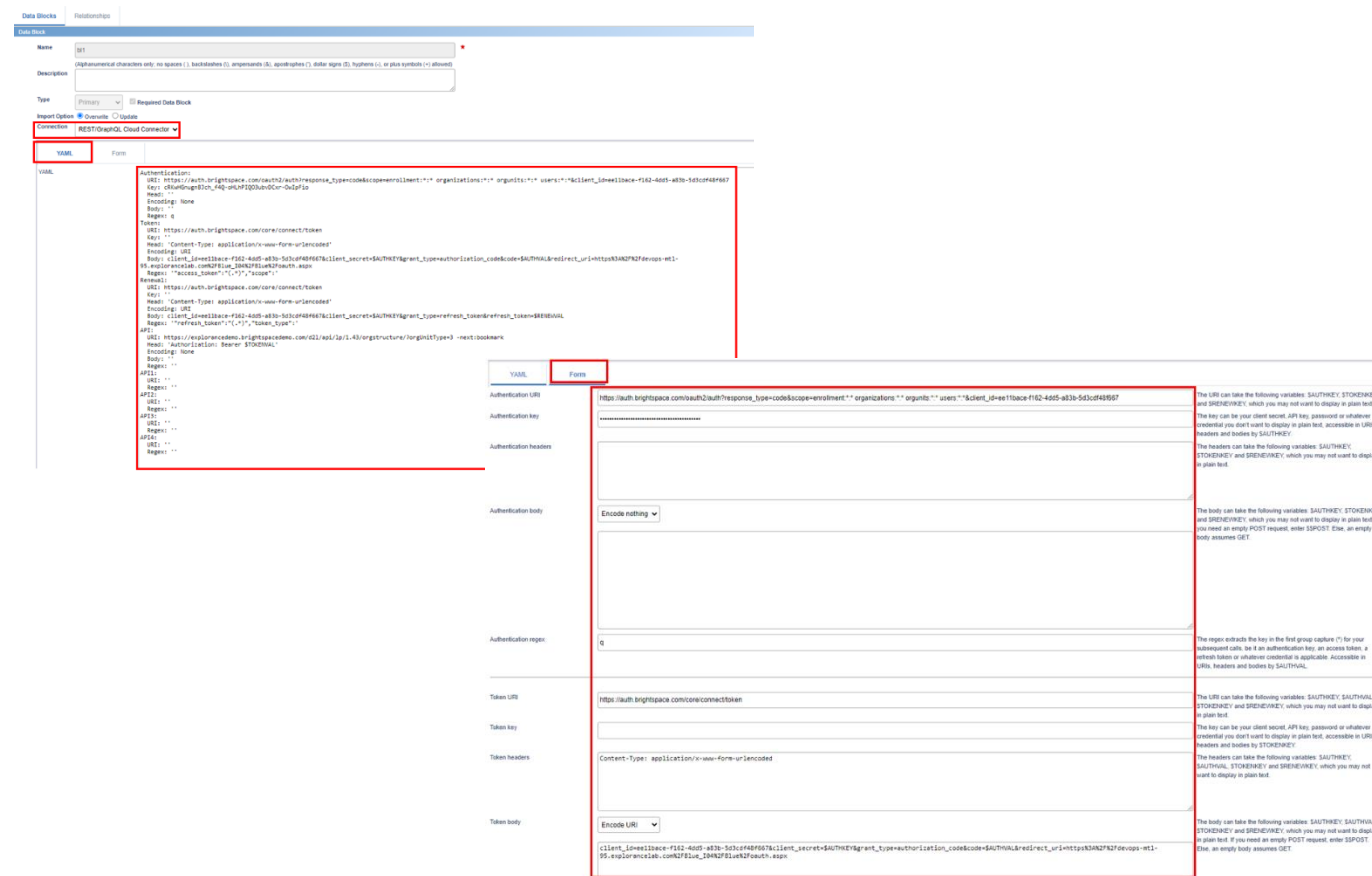


The screenshot shows the 'My Reports' interface in Explorance. The 'Static Viewers' tab is selected. Below the 'Available Reports' table, there is a section for 'Automatically update static report viewer groups' which is circled in red. This section includes checkboxes for 'Instructors', 'Course coordinator', and 'Teacher Assistant'. Below this, there is a warning message: 'This will automatically grant all groups with RV access to their subjects/groups in this report. These groups are different than the Dynamic Viewer groups.' At the bottom, there is a section for 'Impact of static viewer removal' with radio buttons for 'No effect' and 'Stop Report'.

## 8.1.1 Release – what's new cont'd...

### D2L Datasource integration

- Introduction of a self-service data connector that uses REST/GraphQL APIs and vetted for D2L typical endpoints
- Easily integrate data from D2L, which is true source of information



The screenshot displays the configuration interface for the D2L Datasource integration. It features a 'YAML' tab with a code editor containing a complex JSON configuration for authentication and data retrieval. A 'Form' tab is also visible, showing a simplified version of the configuration with fields for 'Authentication URL', 'Authentication Key', 'Authentication Headers', 'Authentication Body', 'Authentication Region', 'Token URL', 'Token Key', 'Token Headers', and 'Token Body'. The 'Form' tab is currently selected, and it contains a 'YAML' button and a 'Form' button. The 'Form' button is highlighted with a red box. The 'Form' tab also includes a 'Content-Type' dropdown set to 'application/x-www-form-urlencoded' and an 'Encode URI' dropdown set to 'Encode URI'. The 'Form' tab also includes a 'Content-Type' dropdown set to 'application/x-www-form-urlencoded' and an 'Encode URI' dropdown set to 'Encode URI'.

## 8.1.1 Release – what's new cont'd...

- **Improved timelines for open surveys**
  - Task start data is now based on rater addition (if rater is added after subject start date)
  - Blue Admin now has the flexibility to configure schedules based on subject date or rater addition

# Submitted Questions

# Questions covered

- Impact on configurations following an upgrade
- Exporting data from DIG
- Copying a project with a new definition
- Filtering tasks
- Project End Date & Sync Date
- Report Expiry dates and impact on auto sync

# Impact on configurations following an upgrade

## Question

When I choose to upgrade, what will be the impact on any current configurations of past projects or reports?



## Answer

- Be sure to review Release notes and transition guides prior to upgrading
- Custom CSS bluecaptions will be preserved

When in doubt, please ask Support!

# Exporting data from DIG

## Question

Is there a way to export Data from DIG staging via API to help with Schools in their validation process?



## Answer

Enable setting allowing Task Owners to import/export

*Optional: disable import using custom CSS*










DIG 3.0

Advanced filters

☐ Edit selection ▼ (0 selected / 586 found)
 

Manage Columns ▼

Reset display settings

Actions	Alerts	Status	Group	Object ID	Name	Course_Code
<input type="checkbox"/>	⋮	Original	Teacher 1  ▼	201809_MRKT_452_003_25820	MRKT 452: Consumer Behaviour - Lecture (Section 003, CRN 258...	MRKT 452
			Student 33  ▼			
			TO 9  ▼			
<input type="checkbox"/>	⋮	Original	Teacher 1  ▼	201809_MRKT_453_001_968	MRKT 453: Advertising and Media - Lecture (Section 001, CRN...	MRKT 453
			Student 17  ▼			
			TO 9  ▼			
<input type="checkbox"/>	⋮	Original	Teacher 1  ▼	201809_MRKT_455_001_969	MRKT 455: Sales Management - Lecture (Section 001, CRN 969)	MRKT 455
			Student 49  ▼			
			TO 9  ▼			

# Copying a project with a new definition

## Question

How can we (easily) copy a project and apply it to a new definition?



## Answer

- Available for Subject-only definition
- Blue is designed to reuse datasources with different data : term to term, yearly
- Test to Production (change groups)
- Language file

# Filtering tasks

## Question

How can we filter tasks by rater ID?



## Answer

Can filter by Task Owner Name (first & last)

If you must, can map ID into either name fields

# Project End Date

## Question

What does the Project End Date do?



## Answer

- Project End means no addition nor removal of :
    - Subjects
    - Members
    - TasksAutomatically or manually \*
- \* RV group members*

# Project Auto Sync

## Question

What does the Project "auto sync" date do? Can you manually sync later?



## Answer

- Field Sync End means the selected demo fields are no longer auto-syncing from the datasources
- Can manually sync demo fields in Field Management

# Report Expiry date and impact on auto sync

## Question

What does the Report Expiry date do?



## Answer

- Report expiry means viewers no longer have access to the report
- Report Stop Sync Date means the report is no longer syncing data with the project

# Q&A

# Resources

- Release Notes : link to [Product news](#)
- DIG export option: [Manage Access to the DIG Project](#)
- Setting up a test project : <https://www.youtube.com/watch?v=-NhC3TeggtU>
- Export/Import Language file: [XML language file](#)
- Field Synchronization: [Manage data](#)