

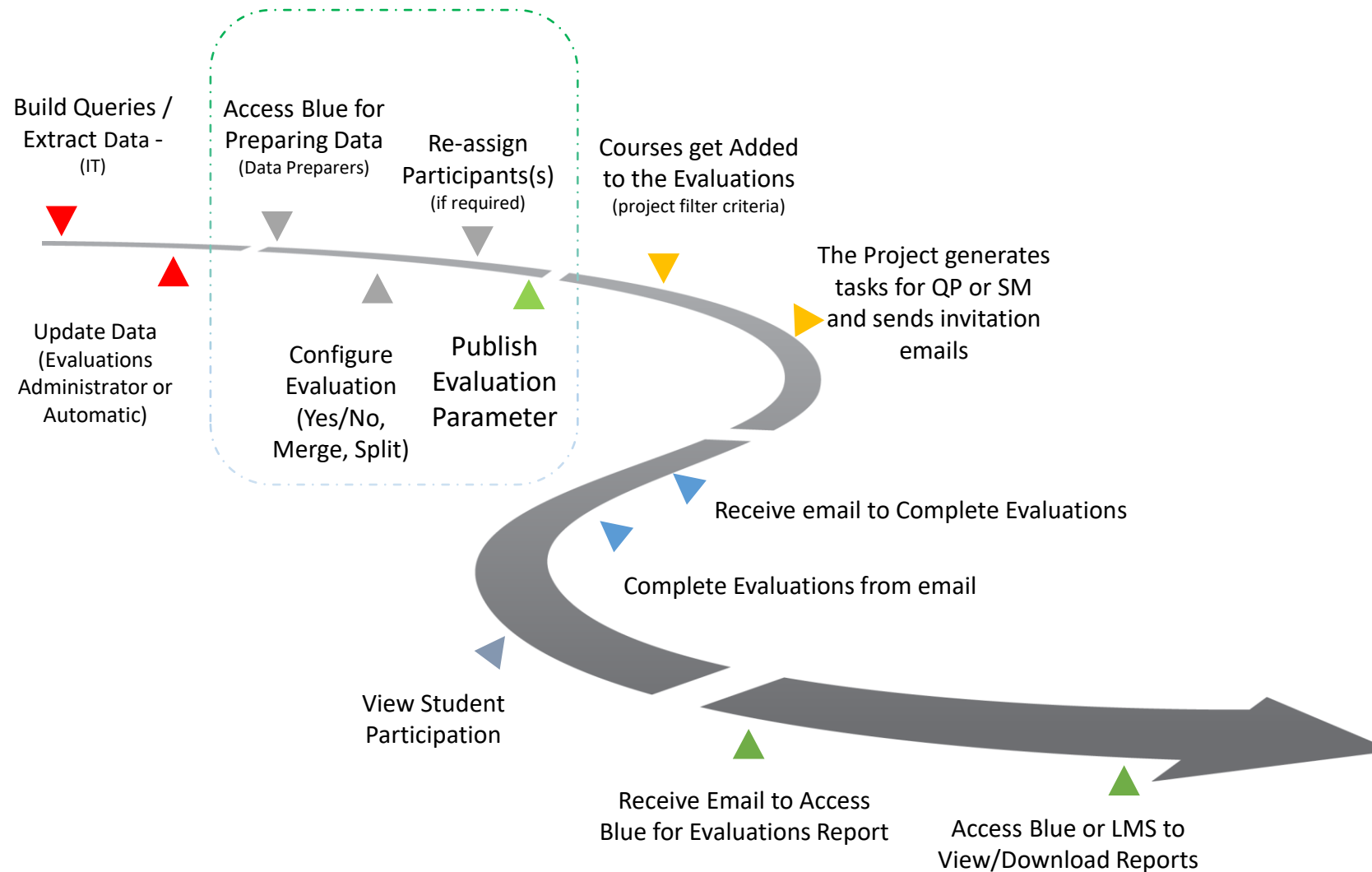
Data Journey with Blue (Episode 1 of 3) Preparing the Data.

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Fernando Sanchez, Explorance
June 14th, 2023

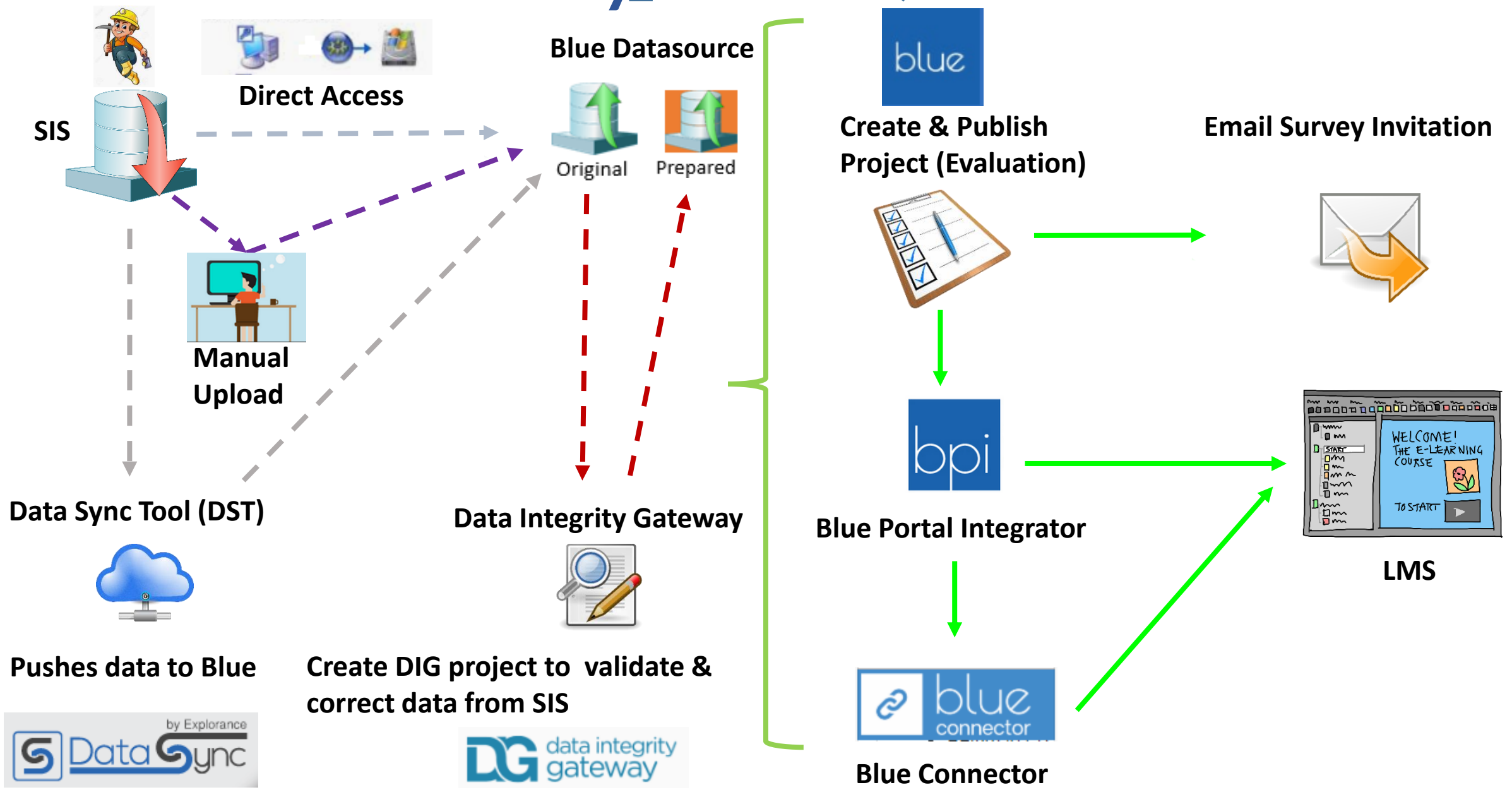
Agenda

- **Course evaluations data journey**
- **Data Journey Methods & Tools**
- **Preparing the Data**
- **Scenarios and handling changes to the data**
- **Data Integrity Gateway (DIG)**
- **Data import scheduling and Blue wake up**
- **Best practices**

Course evaluations data journey



Data Journey Methods & Tools



Scenarios and handling changes to the data

Use of Extension Blocks

User_ID	FirstNam	LastNam	Level	E-Mail	Gender	Residency
1000	annina	Kalish		student@explorance.com	F	Province
1001	ames	Chow	Graduate	student@explorance.com	M	Province
1002	ebbie	Yoshida		student@explorance.com	F	Province
1003	Abbas	Agarwal	Undergraduate	student@explorance.com	M	Province
1004	orey	Hu	Graduate	student@explorance.com	M	Province
1005	ee Wan	Hwang	Graduate	student@explorance.com	F	Province
2000	Christa	Montecillo		student@explorance.com	F	Country
2001	hiroaki	Flores	Graduate	student@explorance.com	M	Country
2002	Chi Wing	Foster	Undergraduate	student@explorance.com	M	Country
2003	Matthew	Gupta	Undergraduate	student@explorance.com	M	Country
2004	Carmen	Ho	Undergraduate	student@explorance.com		Province
2005	Hyun Wook	lizumi	Undergraduate	student@explorance.com		Province

User_ID	CellPhone	CellProvider	Status
1000	15142331000	Bell-Canada	0
1001	15142331001	Bell-Canada	0
1002	15142331002	Bell-Canada	0
1003	15142331003	Bell-Canada	1
1004	15142331004	Bell-Canada	1
1005	15142331005	Bell-Canada	1
2000	15142332000	Bell-Canada	0
2001	15142332001	Bell-Canada	0
2002	15142332002	Bell-Canada	0
2003	15142332003	Bell-Canada	0
2004	15142332004	Bell-Canada	0
2005	15142332005	Bell-Canada	0

The Primary Block

The Extension Block

Info Authentication **Data** Import/Export Display Settings

Data Blocks Relationships

Data blocks for datasource - Student-SMS

Results: 1 - 2 of 2 Item(s)

	Data Block Name	Type	Connection	Required	Edit
<input type="radio"/>	Students	Primary	CSV File Upload	Yes	Edit
<input type="radio"/>	Cell	Extension	CSV File Upload	Yes	Edit

Info Authentication **Data** Import/Export Display Settings

Data Blocks Relationships

Relationship

From Data Block Cell

To Data Block Students

Relationship Type Links

User_ID * in Cell

Links to User_ID * in Students

Linking the 2 blocks using a common field

Details

User ID 1003 *

Given name Abbas *

Family Name Agarwal *

Email student@explorance.com

Mobile Number

SMS Opt-In Status

Level_1 Undergraduate

Gender M

Residency Province

Cell\$CellPhone 15142331003

Cell\$CellProvider Bell-Canada

Cell\$Status_1 0

Blue User Type Default

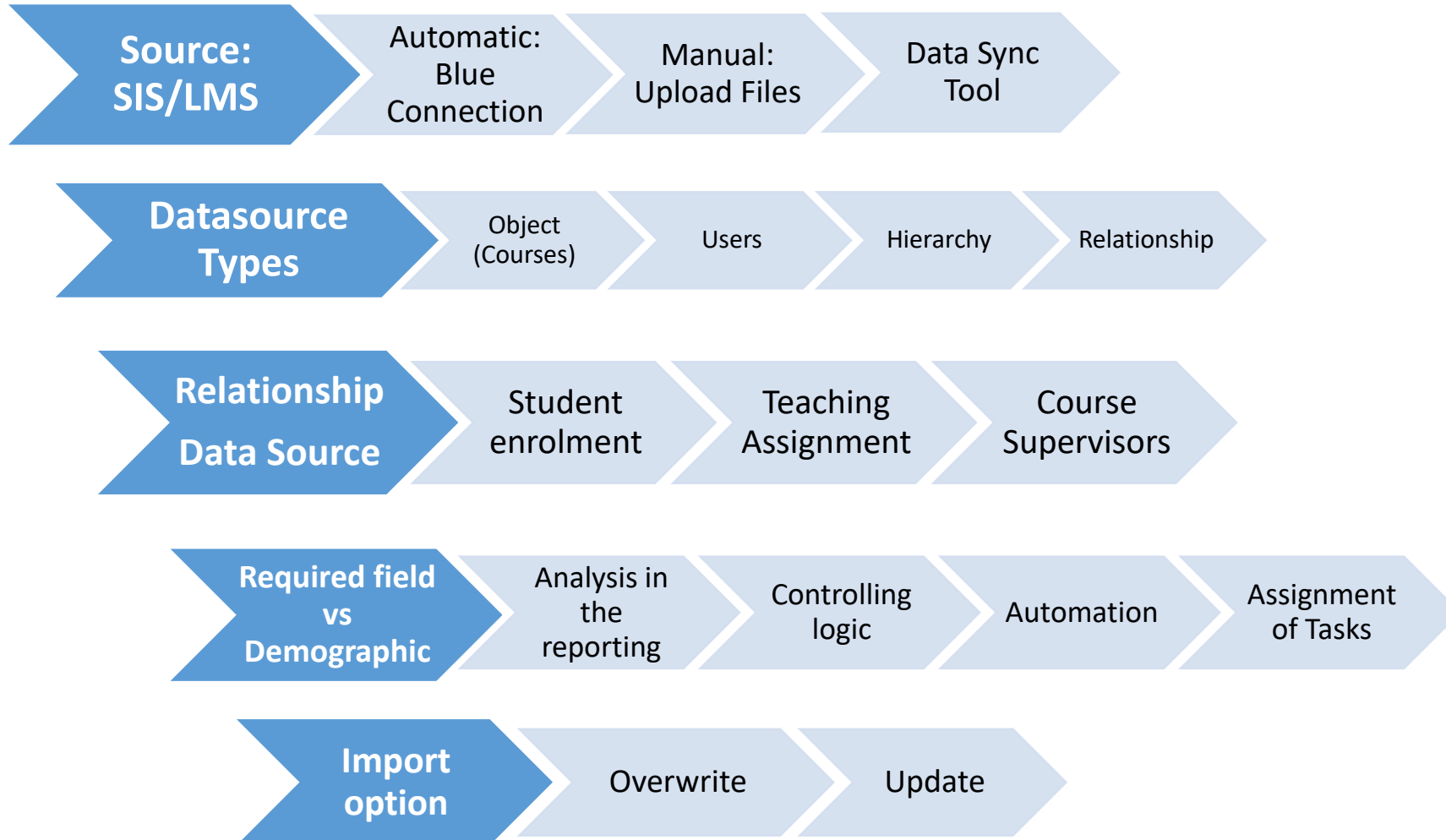
Fields from the extension block

Data Journey - Methods & Tools, continued ...

Data Sync Tool

- Recap to configure the Data Sync Tool
 - Add a Datasource
 - Connect external DS with a Blue DS and Map fields
 - Set Sync options
 - Configure error messages
- Note that if there is a change to the data structure, that will require to
 - Update the impacted datasource from the Blue UI → reconfigure data block.
 - DST: Re-read the file with the new data structure from within the DST
 - Verify the mapping & Synchronize (to save settings)

Preparing the Data



How many fields? As many as needed for Reports and Analysis

School Report for Arts & Science

Breakdown By Department

Questions Evaluating the Course

Course guidelines were clearly described in the syllabus.											
Dept	Inv.	Resp	Resp Ratio	SD	D	N	A	SA	Std.D	Mean Sch	Mean Uni
Overall	69	29	42.0%	13.8%	3.4%	10.3%	58.6%	13.8%	1.2	3.6	3.5
Anthropology	26	16	61.5%	12.5%	6.3%	6.3%	50.0%	25.0%	1.3	3.6	
Fine Arts	43	13	30.2%	15.4%	0.0%	15.4%	69.2%	0.0%	1.1	3.6	
The course was intellectually challenging.											
Dept	Inv.	Resp	Resp Ratio	SD	D	N	A	SA	Std.D	Mean Sch	Mean Uni
Overall	69	29	42.0%	3.4%	10.3%	10.3%	62.1%	13.8%	1.0	3.7	
Anthropology	26	16	61.5%	0.0%	12.5%	18.8%	50.0%	18.8%	0.9	3.7	
Fine Arts	43	13	30.2%	7.7%	7.7%	0.0%	76.9%	7.7%	1.0	3.7	
I learned a lot from this course.											
Dept	Inv.	Resp	Resp Ratio	SD	D	N	A	SA	Std.D	Mean Sch	Mean Uni
Overall	69	28	40.6%	3.6%	3.6%	21.4%	46.4%	25.0%	1.0	3.9	
Anthropology	26	15	57.7%	0.0%	6.7%	13.3%	53.3%	26.7%	0.8	3.9	
Fine Arts	43	13	30.2%	7.7%	0.0%	30.8%	38.5%	23.1%	1.1	3.9	3.6

Courses DS

How many fields? As many as needed for controlling content displayed to respondents of a survey

Questions for Elective Courses

We note that this course, **101815 Cultures of Modern Canada**, is outside of your program, **Bachelor of Arts**. how would you rate the level of usefulness of this course towards your program?

Not at all usefull

Somewhat useful

Usefull

Very useful

What suggestions would you have for the instructor for students who, like you, didn't take this course as part of their program?

Enter text here

Course_ID	Student_ID	Program Name	Dropped-Course	Core-Elective	Re
101815-8504-Summer	70088	Bachelor of Culture and Society	No	Core	Yes
101815-8504-Summer	90493	Bachelor of Arts	No	Elective	Yes
101815-8504-Summer	90884	Bachelor of Culture and Society	Yes	Core	Yes
101815-8504-Summer	100830	Bachelor of Culture and Society	No	Core	Yes
101815-8504-Summer	70918	Bachelor of Culture and Society	No	Core	Yes
101848-9502-Summer	90610				O-Y
101848-9502-Summer	70088				O-Y
101848-9502-Summer	90493				O-Y
101848-9502-Summer	90884	Bachelor of Arts	No	Core	O-N
101848-9502-Summer	100830	Bachelor of Arts	No	Elective	O-N
101848-9502-Summer	70918	Bachelor of Arts	No	Core	O-N
102033-1041-Summer	90610	Bachelor of Arts	No	Core	Yes
102033-1041-Summer	70088	Bachelor of Arts	No	Core	Yes
102033-1041-Summer	90493	Bachelor of Arts	No	Core	Yes
102033-1041-Summer	90884	Bachelor of Arts	No	Elective	Yes
102033-1041-Summer	100830	Bachelor of Arts	No	Core	Yes

Course-Students DS

05 - End of Program Survey

Save

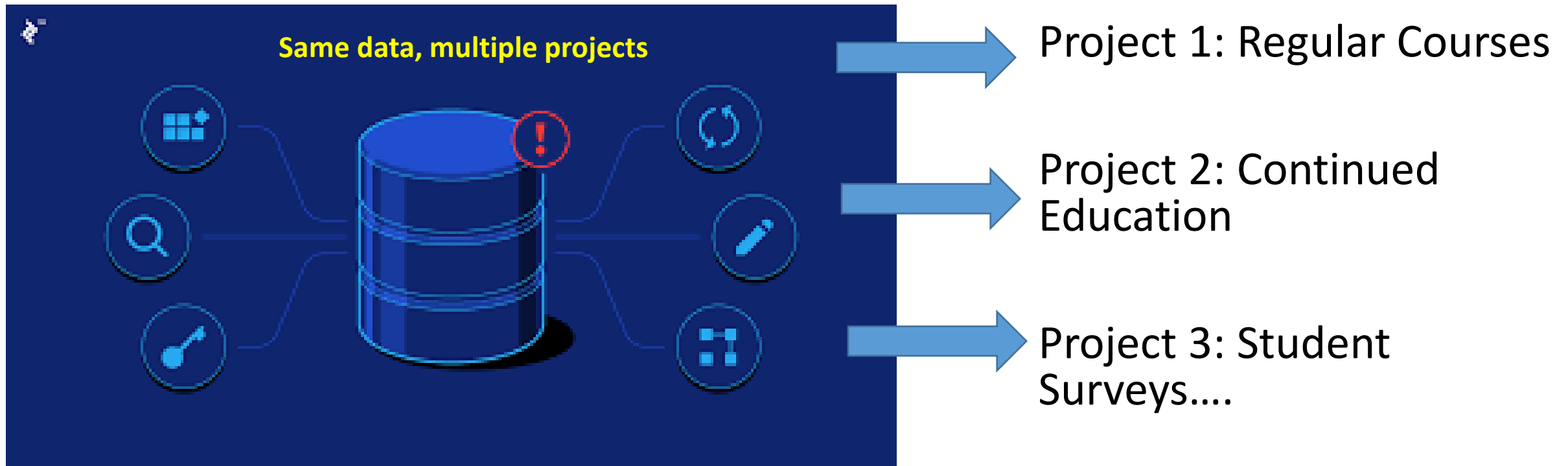
Congratulations Jannina for finishing your Bachelor of Culture and Society program!
We would like to take a few minutes of your time to evaluate your program and help us improve it!

Please evaluate your program: **Bachelor of Culture and Society**

	Poor	Fair	Good	Very Good	Excellent
Clarity of goals and objectives	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Quality of teaching	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>
Quality of Content	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Workload	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Resources availability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>
Overall Satisfaction	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input checked="" type="radio"/>	<input type="radio"/>

Data Sources. Sometimes, One fits all!

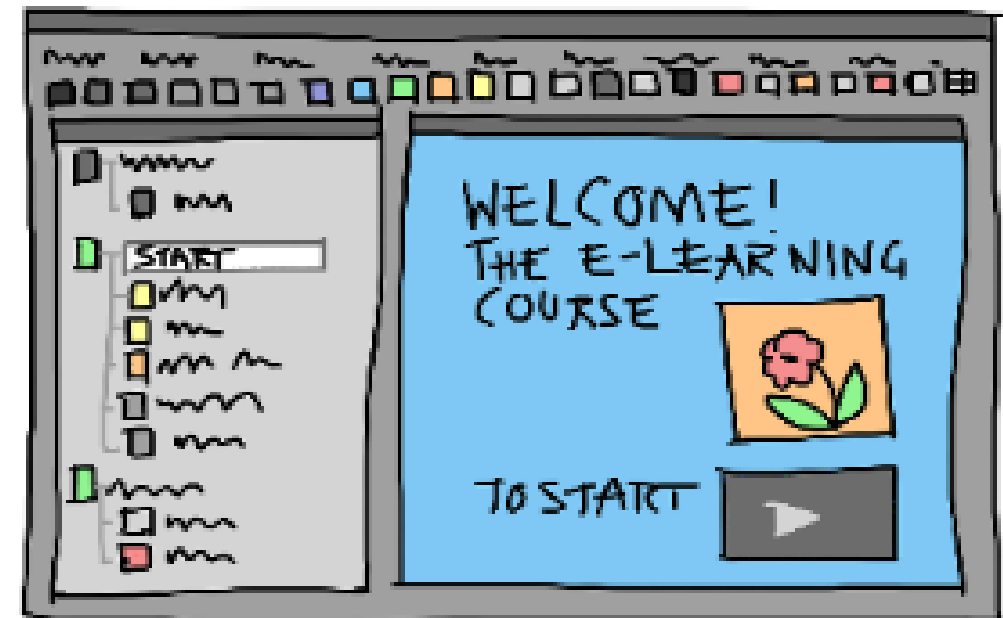
- Course Evaluations Data



Scenarios, continued ...

When the LMS data feeds Blue Course Evals

- Is it different to run course evaluations in an Online University?
 - Students access their courses directly from the LMS
 - Course Demographic: Completion Status
 - When the Completion Status is set to 'Completed'
 - FO task will be created for the specific Course & Student combination
 - Group Filters
 - Based on the Course Enrolment demographic data



Scenarios and handling changes to the data, continued ...

What gets automatically updated?

- Consider that Course Evaluations are 'live' and one of the instructors changed ***name*** and ***email address***?
 - The User data from the SIS gets updated and sent to the Blue datasource
 - What happens in Blue?
- What if there are multiple course evaluations running at the same time, for different terms? (***Active Term, Early Start, Late finish***)
 - ***Evaluate*** demographic data
 - Can be used as filter (e.g. 'Yes', 'No')
 - A course evaluations project can filter-in courses to be evaluated in a specific term.
 - Other areas for filters
 - Courses
 - Teaching assignment
 - Etc.

Scenarios and handling changes to the data, continued ...

Overwrite **OR** Update, that is the Question!

- Import Option Overwrite
 - Easy to handle
 - Resends the data daily

 - New records get added
 - Removed records get deleted
- Import Option Update
 - Institution that prefers sending updates (delta)
 - Volume of data

 - Will update an existing record
 - Will add new records
 - Will NOT delete existing records
 - Will add a new field

Scenarios and handling changes to the data, explorance.

continued ...

Overwrite **OR** Update

- What if Student Enrollment data changes?
 - If using Overwrite
 - Removed data is deleted
 - New records are added
- **But ...**
 - Are there any risks if using Update?

Setting up a project with Automatic Field Synchronization

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

Synchronize Subject Field Synchronize Rater Field Configuration

Synchronize Subject Field

Select Source

Subject
Datasource



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	

Course-Teacher
Datasource



Project Fields

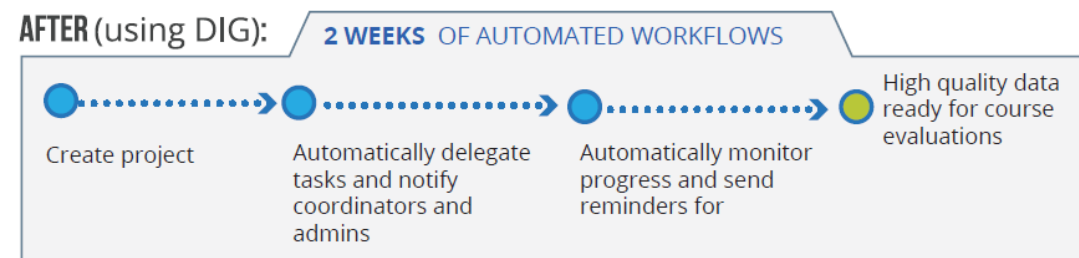
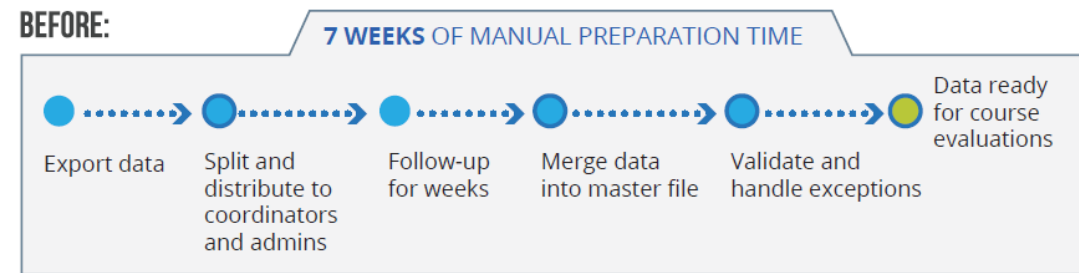
Results: 1 - 4 of 4 Item(s)

<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	

Data Integrity Gateway (DIG)

- Why DIG?

DIG IN ACTION - COURSE EVALUATION PREPARATION



- Who may need DIG?

- Data in SIS is not final
- Decision on what courses get evaluated belongs to Departments or Coordinators
- Parameters need to be set, e.g.
 - ‘form’ to use
 - Merge courses to meet policies related to MIN number of students enrolled
 - Updating teaching assignment, etc.

Check the DIG Online Training Module here:

<https://explorance.smarteru.com/user/learnerdashboard/v2/#/course/277239/76078196>

- ✓ Changing course evaluation dates
- ✓ Changing teaching assignments
- ✓ Changing course enrollments
- ✓ Splitting courses
- ✓ Merging courses
- ✓ Etc.

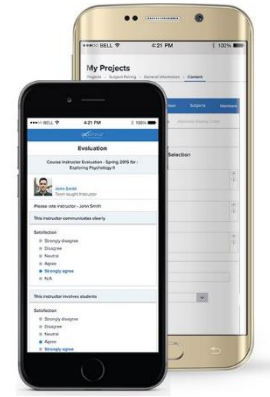
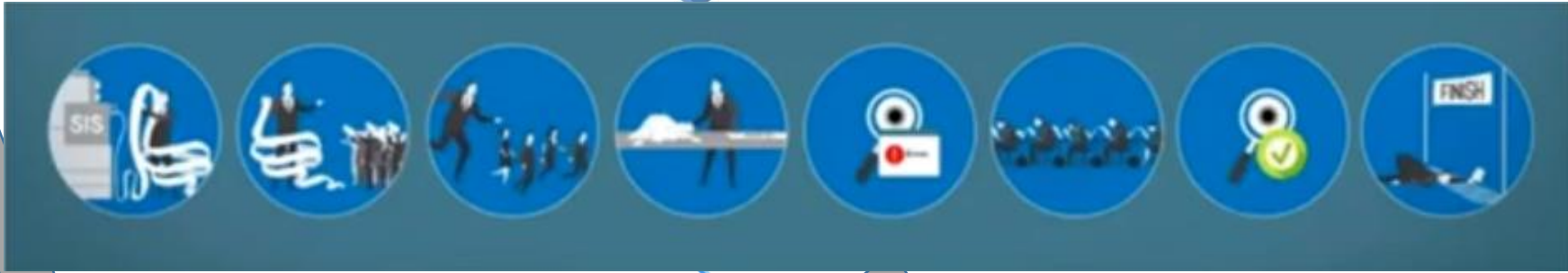


DIG – Data Integration in



Dahlia

Civil Eng.



SIS
Student Information System



Domingo

Anthropology



Data import scheduling and Blue wake up

- **Data importing**
 - Order of scheduling data imports matter
 1. Object, Users
 2. Relationships
 - Time
 - Between 9pm and 1am
 - Leave at least 20 minutes difference between each scheduled datasource import
 - Make sure data is imported before the next Blue wake up time
- **Blue wake up time**
 - Automatic processes get launched, including creation of new tasks and generation of Blue reports
 - Default time is 2am (server time)

Best Practices

- **Data Structure**
 - Keep it simple (minimize number of data sources)
 - Avoid duplication of information, e.g. multiple Users data sources (unless necessary)
 - Duplication of data leads to additional configuration
 - Requires additional maintenance
 - Considerations for SSO, e.g. need to select a data source from a list, if the Instructor/Student was added to multiple data sources
- **Reuse the DEFINITION for every Course Evaluation**
 - This will guarantee the same datasource is used across all terms
 - Will enable your institution for Trend-Analysis possibilities
 - Will allow to copy, adjust & reuse previous projects
- **Email Notifications for Scheduled data imports**
 - Enter very descriptive messages and include datasource name, date/time, and error log
 - This will improve the troubleshooting of issues when the data import fails



Want to re-listen; Recording Available?

Available via the [Past Learning Webinar Page](#)
for Bluenotes Community Members



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Scenarios and handling changes to the data

- What if I need to bring more data from another source?
 - Extension blocks for Student's Opt-Out
 - Students who opted out from receiving SMSs for course evaluations
 - Carries sends ID + opt-out
- What if I need to bring more data from another source?
 - Extension blocks to map to the Blue language pack
 - 360 evaluations – company where employees are in different countries, their language code would be different
 - LMS has the Employee's regional language code, e.g. English
 - en-us
 - en-gb
 - en-ca
 - en-au

Data Integrity Gateway (DIG)

- What if your institution needs to merge courses?
 - Courses with less than 10 students
 - Describe ...
- What if large courses need to be split?
 - Students were assigned to different TAs in cohorts of 10 per TA
 - Describe ...

Data Integrity Gateway (DIG)

- What if your institution needs to assign instructors to evaluate?
 - Tutors are not in the SIS because they are external and only provide on the field tutoring
 - *Describe ...*
- What if evaluations parameters need to be provided by Department Coordinators?
 - There may be courses that Departments have the final say to decide if those will be evaluated with a specific Questionnaire/Form
 - *Describe ...*