

# Data Journey with Blue (Episode 2 of 3)

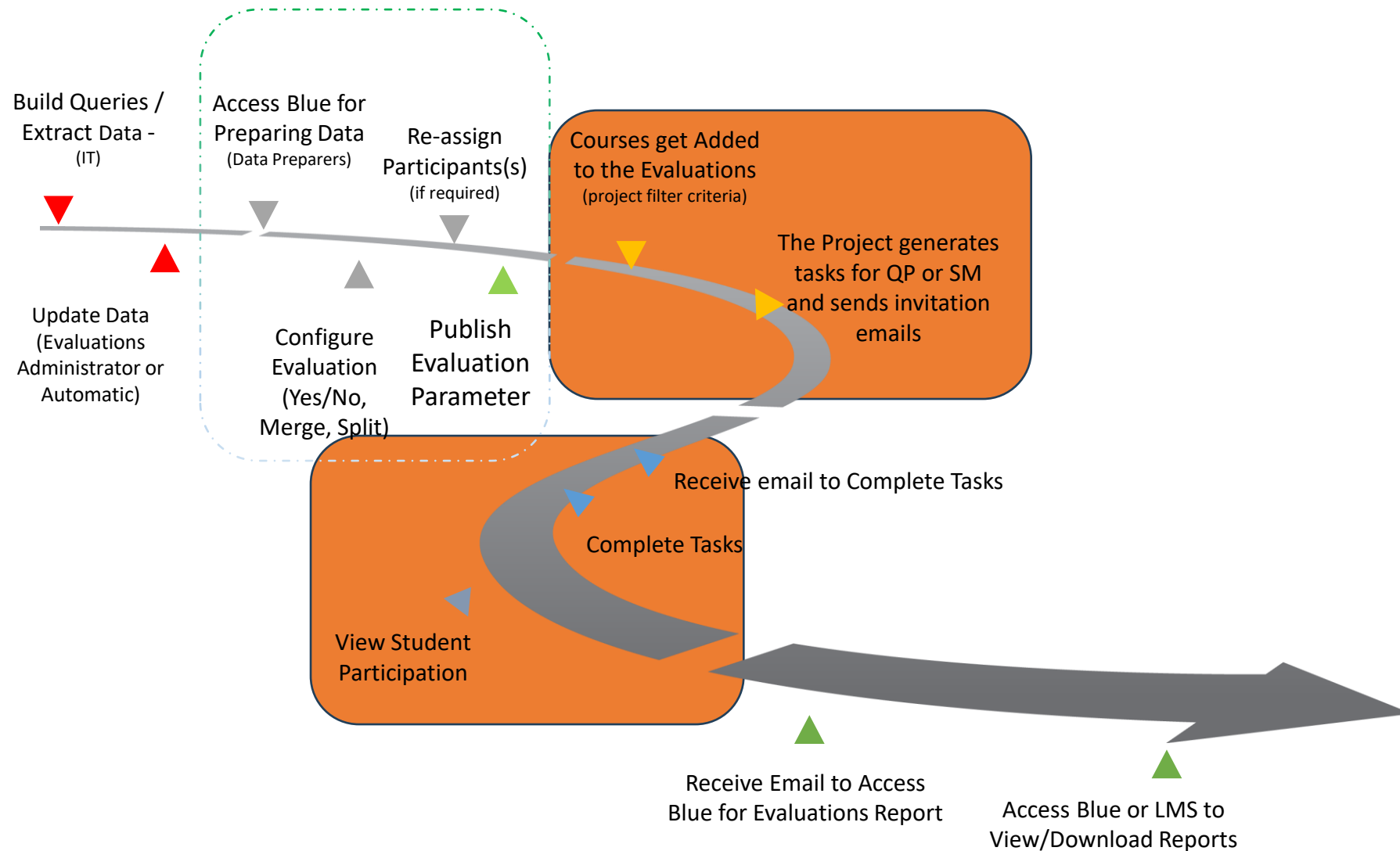
## Synchronizing the Data to Blue

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July 12<sup>th</sup>, 2023

# Agenda

- **Course evaluations data journey**
- **Data import scheduling and Blue wake up**
- **Data Journey and Project Lifecycle**
- **Adding/Removing Course Evaluations Data**
  - Viewing the content of Datasources
  - Adding Course Evaluations Data
  - Removing Course Evaluations Data
  - Filters
- **What happens when adding fields to a Datasource?**
- **Data Updates in an Expired Project**
- **Data Field Syncing**

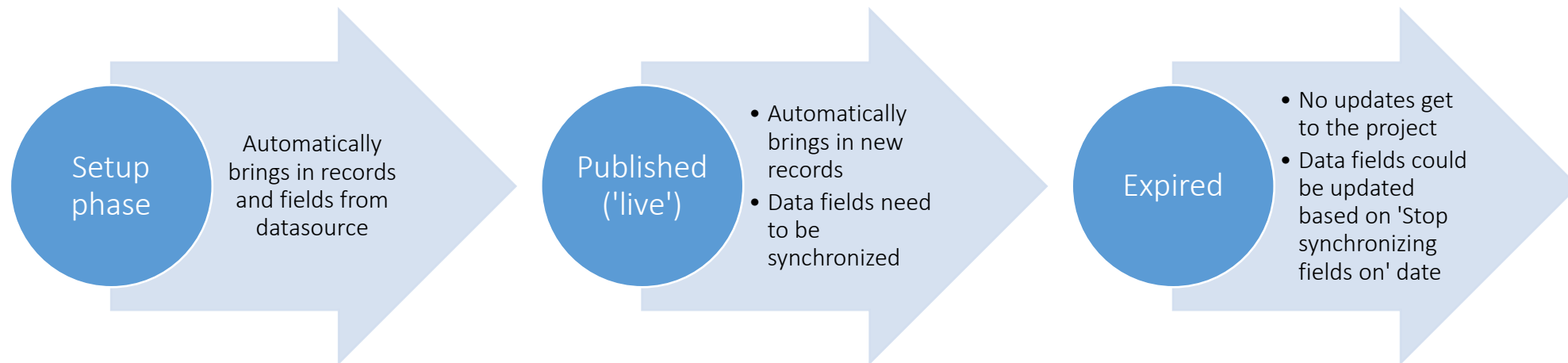
# Course evaluations data journey



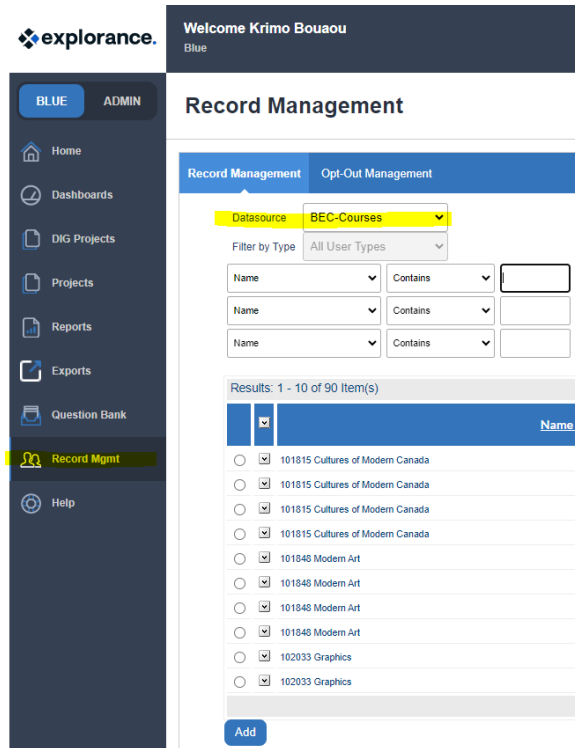
# Data import scheduling and Blue wake up

- **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)

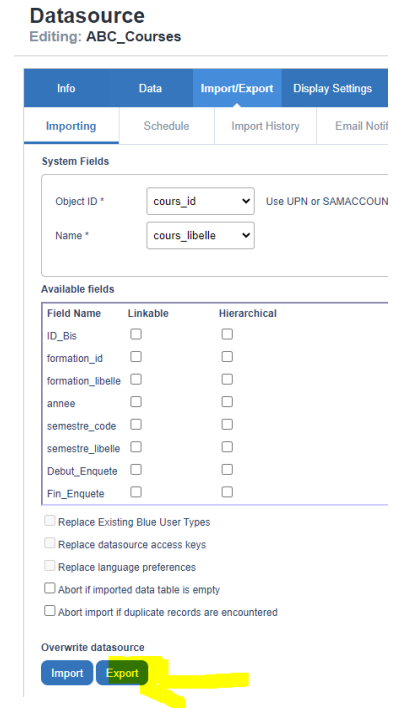
# Data Journey and Project Lifecycle



# Viewing the content of Datasources



From the Record Mgmt  
Navigation Bar



By Exporting the  
Datasource Content

# Demo

“Viewing the content of datasources”

# Adding Course Evaluations Data

- Automatic Update
  - Blue automatically adds any entry.
- Manual Update
  - Subjects need to be selected and users have to be 'populated' in the project.
  - *Mostly used for other type of Surveys.*

Info
Questionnaire
Definition
**Subjects**
Members

Subject Selection
Subject Pairing Selection

### Selected Subjects (Course)

(Warning: Subjects with no associated secondary subjects will not be saved.)

Source: FS\_Courses

Name	Contains	
Name	Contains	
Name	Contains	

Filter

Results: 0 - 0 of 0 Item(s)

--

Delete
Delete All
Select Subjects
Select All Subjects

Info
Questionnaire
Definition
**Subjects**
Members
Triggers

Subject Members
Secondary Subject Members
Global Selection
Export / Import

### Selection of members linked to subject (Course)

(Warning: Subjects with no associated secondary subjects will not be saved.)

Name	Contains	
Name	Contains	
Name	Contains	

Filter Clear

Results: 1 - 3 of 3 Item(s)

Name
101815 Cultures of Modern Canada
101815 Cultures of Modern Canada
201821 Bioarchaeology

Select Group
Students
Populate
Populate All Groups
Remove All

Students
Instructor SM



# Demo

Manual update: “No Automatic Updates”

# Removing Course Evaluations Data

- Automatic Update
  - Project Info -> Options tab -> Remove Subjects/Raters

## At the Project level

Info	Questionnaire	Definition	Subjects	Members
Content	<b>Options</b>	Advanced Settings		

**Options**

☐ Public Audience  
☐ Confidential  
☒ Remove subjects and raters that have been deleted from their datasources or excluded by a filter (applies to groups with Automatic Update only)

- Task --> Impact of Owner Removal

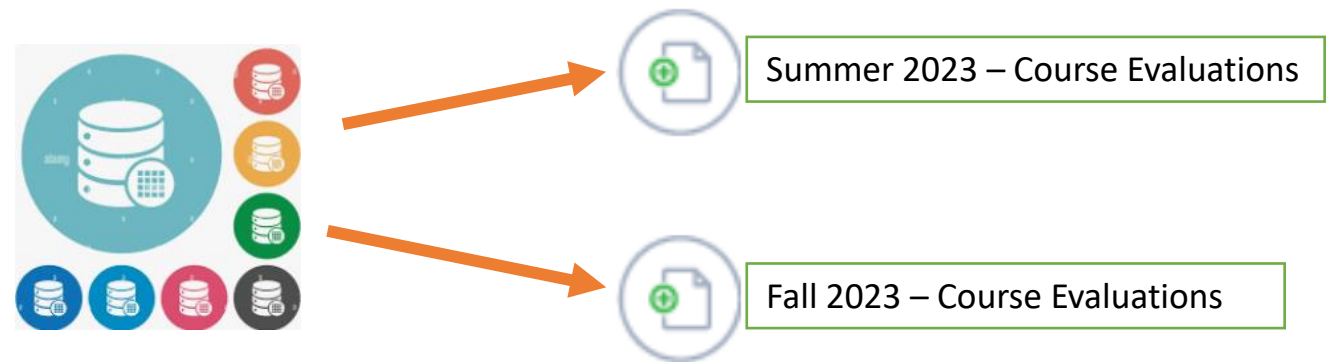
## At the Task level

**Impact of owner removal**

☐ No effect  
☐ Stop task  
☒ Delete task

# Filters - Addition and Removal of Data

- Project Filters control the addition and removal of course evaluations data.
- Project filters are copied from project to project. Report filters are not.
- Examples
  - Term
  - Evaluate



Info	Questionnaire	Definition	Subjects	Members	Triggers	Access
General	Organizational Links	Group	Shared Group	<b>Subject Filter</b>	Secondary	

**Subject Filter (Course)**

Select Subject Source: Course ▾ Add Filter: Course Date ( ) And Or Not

Results: 1 - 3 of 3 Item(s)

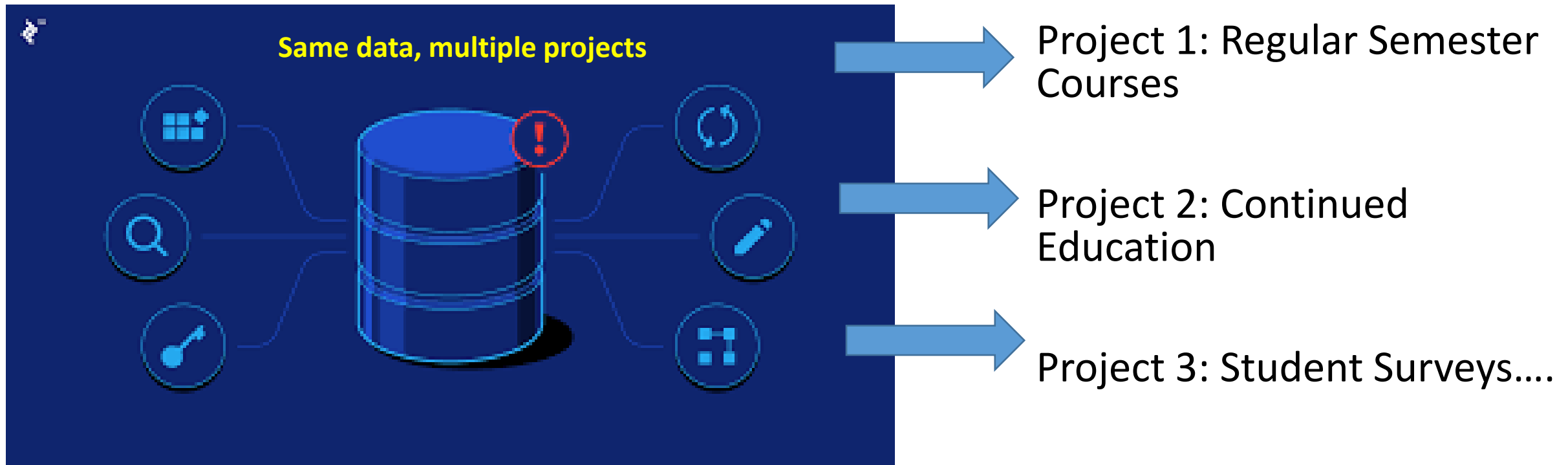
	Filter Condition
<input type="radio"/>	BEC-Courses.Term Contains Fall
<input checked="" type="radio"/>	And
<input type="radio"/>	BEC-Courses.Evaluate Contains Yes

# Demo

Filters: “To Exclude a Subset of the Data”

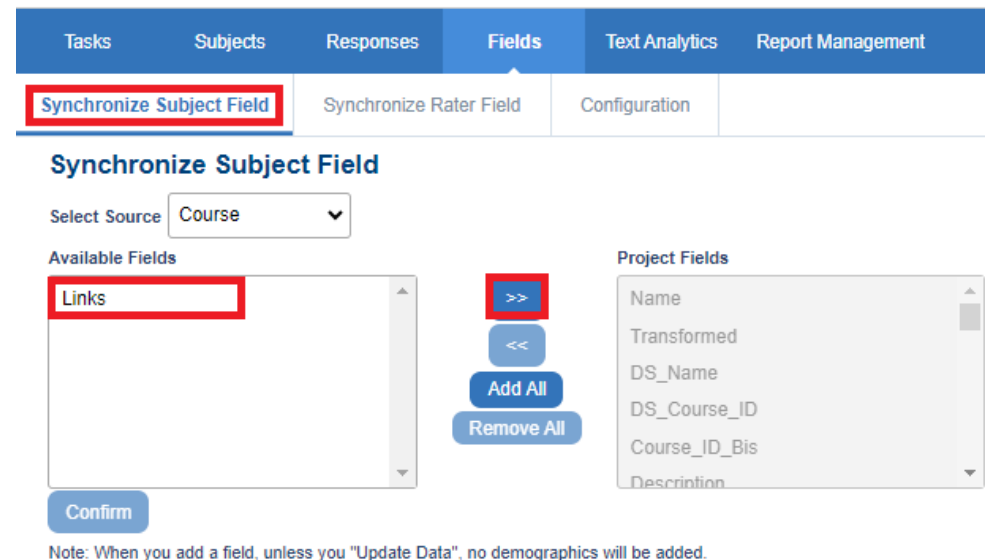
# Using Filters for capturing the required data

- Same Data can feed different type of projects



# What happens when adding fields to a Datasource?

- The fields are NOT automatically added to the project
  - Blue admin adds these from the Project Management console.



The screenshot shows the 'Synchronize Subject Field' interface. At the top, there is a navigation bar with tabs: Tasks, Subjects, Responses, Fields (selected), Text Analytics, and Report Management. Below this, there are three sub-tabs: 'Synchronize Subject Field' (highlighted with a red box), 'Synchronize Rater Field', and 'Configuration'. The main content area is titled 'Synchronize Subject Field'. It includes a 'Select Source' dropdown menu set to 'Course'. Below this is a list of 'Available Fields' with 'Links' highlighted by a red box. To the right of the 'Available Fields' list are three buttons: '>>' (highlighted with a red box), '<<', and 'Add All'. Below these buttons are 'Remove All' and 'Confirm' buttons. To the right of the 'Available Fields' list is a 'Project Fields' list containing: Name, Transformed, DS\_Name, DS\_Course\_ID, Course\_ID\_Bis, and Description. A note at the bottom states: 'Note: When you add a field, unless you "Update Data", no demographics will be added.'

# Data Updates in an Expired Project

- Expired projects will not read the data updates happening in the datasources as of the *Project End Date*.
- Project activity will remain self-contained in the project for reporting
- Reports can be built/updated based on an expired project.

## Publishing Properties

### Project Start Date



### Project End Date



### Automatic Field Synchronization End Date



### Test Email

### Publish

Note on 'Export Summary': You must save the project in order to reflect the most recent changes.

# Data Updates and Fields Syncing

Field syncing 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.



# Fields Syncing, where does it apply?

- 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)

# Data Updates and 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**

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**Field Management Configuration**

Stop synchronizing fields on

2019-12-31

**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
<b>Subject Management (SM Task)</b>	Used to change the default task date by the end user
<b>Evaluation Timing Condition (ETC)</b>	Used to automatically overwrite the default task date
<b>Live Demographic Sync (LDS)</b>	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 Management (SM)	Evaluation Timing Condition (ETC)	Live Demographic Sync (LDS)	Result
Off	Off	Off	Old Blue behavior
Off	Off	On	LDS
On	Off	On	SM
Off	On	On	ETC
On	On	On	SM (Until ETC conditions are met)

# Impact of SM and the Project Advanced Settings in project date synchronization

2023-07-13

## 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

## SM Condition

when You give instructors the option to change course start/end dates in SM 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 SM 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 - what you will see

- All FO tasks are set – by default to start on Sept. 01 and finish on Sept. 30
- Instructor Annette changes Evaluation Start Date to Sep 15 from the SM Task
- Blue Admin – on behalf of an Instructor- changes Start Date to Sep 8 from Task Management
- Blue Admin – on behalf of a student - starts 2 tasks. One will be submitted, the other kept In progress
- Blue Admin changes the setup of the FO Task to Start on Aug 20, and enables the 'Apply updated task dates to all open tasks' in the Advanced Options
- The above items were shown using fixed dates, in a real scenario, most institutions would deploy surveys based on a course date field, e.g. EvalEnd date ... let's check that out.

# Demo

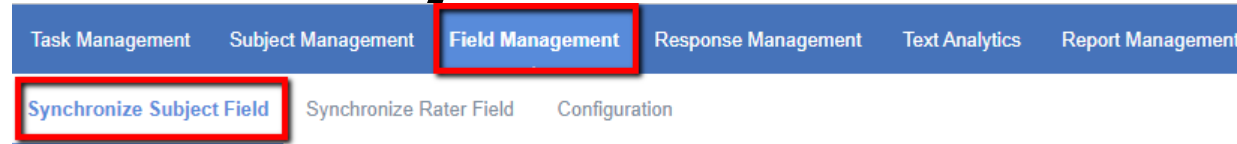
Impact of: “Update dates for open tasks based on current task settings”

Impact of SM/Task Setting/Evaluation Timing

Impact of Field Synchronization

# Setting up a project with Automatic Field Synchronization

2023-07-13



## Synchronize Subject Field

Select Source Courses

Subject  
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	

Course-Teacher  
Datasource







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