

Ask the Expert

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Agenda

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

8.1.2 Release – What's new

Datasource

- Ellucian Ethos Datasource Integration
- Workday Datasource Integration

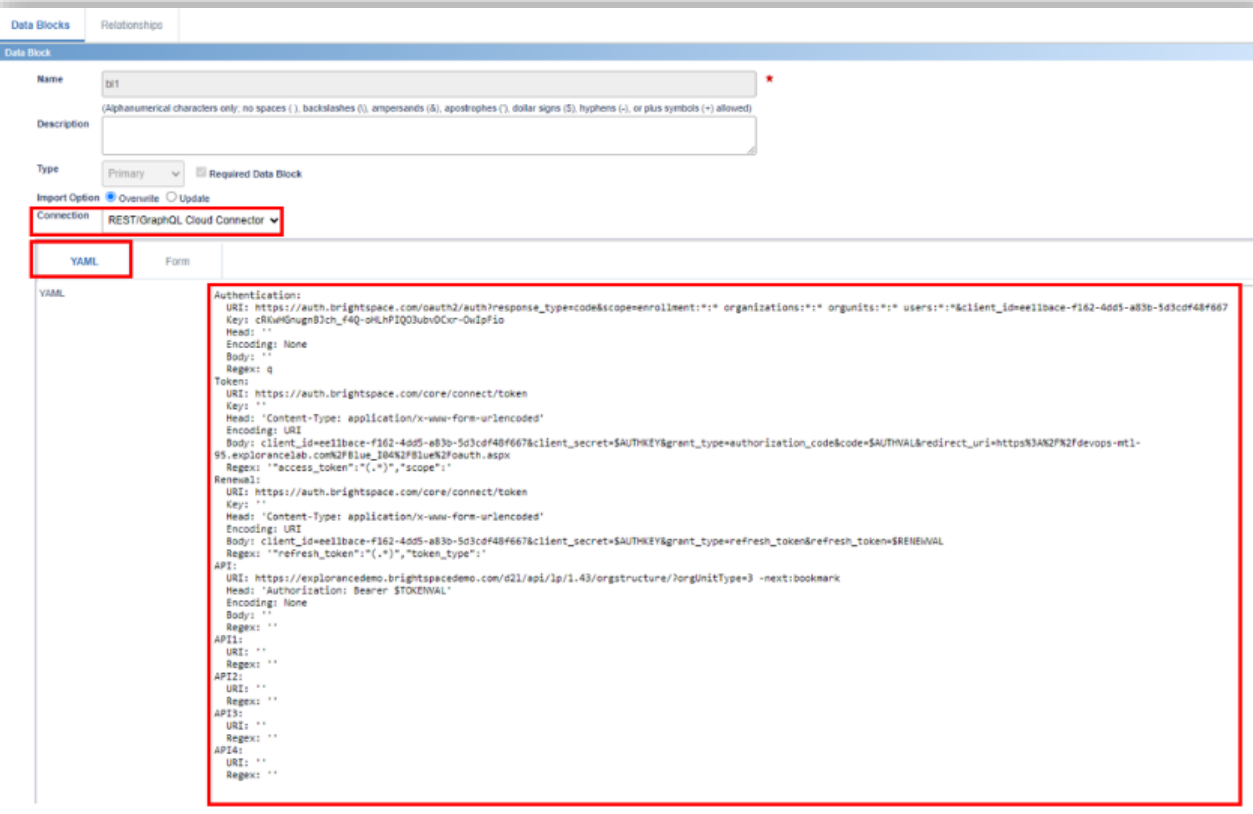
LMS Integration

- Enhancements to Canvas Connector

8.1.2 Release – Extension of REST/GraphQL Connector

Extended to :

- Ellucian Ethos (GraphQL resources)
- Workday (RaaS / custom reports)
- Captures valuable data points
- Easily integrate data from Ethos/Workday as the true source of information to Blue

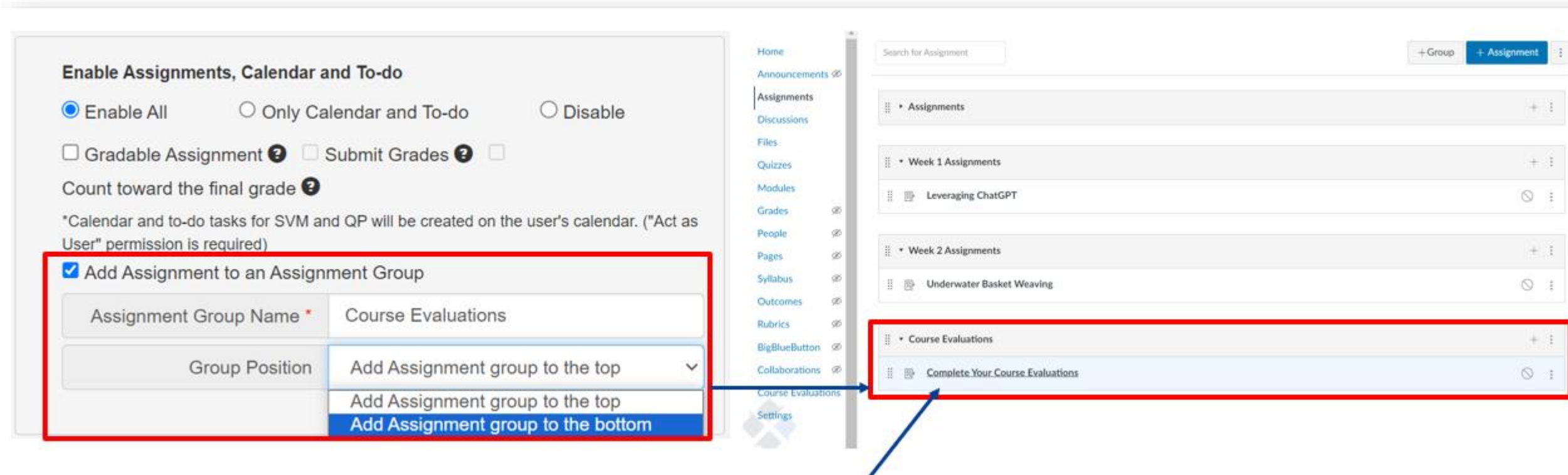


The screenshot shows the 'Data Block' configuration page in the Explorance interface. The 'Name' field is 'DB1'. The 'Description' field is empty. The 'Type' is set to 'Primary'. The 'Connection' dropdown is set to 'REST/GraphQL Cloud Connector'. The 'YAML' tab is selected, showing a complex JSON configuration for authentication and API endpoints. The configuration includes fields for 'Authentication', 'Token', 'Renewal', and 'API' endpoints, along with their respective headers, bodies, and regex patterns.

```
YAML
Authentication:
  URI: https://auth.brightspace.com/oauth2/auth?response_type=code&scope=enrollment:* organizations:* argunits:* users:*&client_id=ellbace-f162-4dd5-a83b-5d3cf48f667
  Keys: cKwH6mgnB3ch_f4Q-ohLhPIQ03ubv0Cm-OwIpFio
  Head: ''
  Encoding: None
  Body: ''
  Regex: q
Token:
  URI: https://auth.brightspace.com/core/connect/token
  Keys: ''
  Head: 'Content-Type: application/x-www-form-urlencoded'
  Encoding: URI
  Body: client_id=ellbace-f162-4dd5-a83b-5d3cf48f667&client_secret=$AUTHKEY&grant_type=authorization_code&code=$AUTHNAL&redirect_uri=https%3A%2F%2Fdevops-ml-99.explorancelab.com%2F81ue104N2P81ueN2foauth.aspx
  Regex: "access_token": "(.*)", "scope": ""
Renewal:
  URI: https://auth.brightspace.com/core/connect/token
  Keys: ''
  Head: 'Content-Type: application/x-www-form-urlencoded'
  Encoding: URI
  Body: client_id=ellbace-f162-4dd5-a83b-5d3cf48f667&client_secret=$AUTHKEY&grant_type=refresh_token&refresh_token=$RENEWVAL
  Regex: "refresh_token": "(.*)", "token_type": ""
API:
  URI: https://explorancedemo.brightspacedemo.com/d2l/api/lp/1.43/orgstructure/?orgUnitType=3 -next:bookmark
  Head: 'Authorization: Bearer $TOKENVAL'
  Encoding: None
  Body: ''
  Regex: ''
API1:
  URI: ''
  Regex: ''
API2:
  URI: ''
  Regex: ''
API3:
  URI: ''
  Regex: ''
API4:
  URI: ''
  Regex: ''
```

8.1.2 Release – enhanced Canvas LMS Integration

- Assignment groups can be added to manage and standardize surveys



Enable Assignments, Calendar and To-do

☒ Enable All
 ☐ Only Calendar and To-do
 ☐ Disable

☐ Grable Assignment ?
 ☐ Submit Grades ?

Count toward the final grade ?

*Calendar and to-do tasks for SVM and QP will be created on the user's calendar. ("Act as User" permission is required)

☒ Add Assignment to an Assignment Group

Assignment Group Name * Course Evaluations

Group Position Add Assignment group to the top Add Assignment group to the bottom Add Assignment group to the bottom

Search for Assignment

+ Group + Assignment

Assignments

Week 1 Assignments

Leveraging ChatGPT

Week 2 Assignments

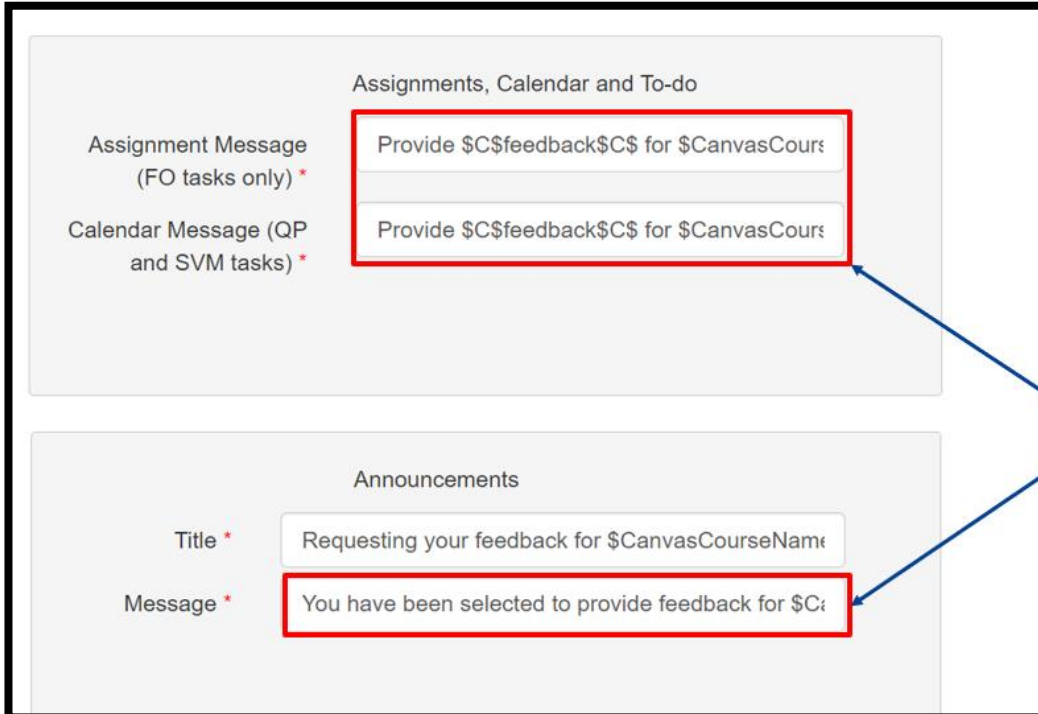
Underwater Basket Weaving

Course Evaluations

Complete Your Course Evaluations

8.1.2 Release – enhanced Canvas LMS Integration cont'd

- Announcements can be more detailed with the increase to 4000 characters
- Enables greater flexibility in communications as well as allow more room for HTML



The screenshot displays a form with two main sections. The top section, titled "Assignments, Calendar and To-do", contains two text input fields. The first field is labeled "Assignment Message (FO tasks only) *" and the second is labeled "Calendar Message (QP and SVM tasks) *". Both fields contain the placeholder text "Provide \$C\$feedback\$C\$ for \$CanvasCourseName\$". The bottom section, titled "Announcements", contains two text input fields. The first field is labeled "Title *" and contains the placeholder text "Requesting your feedback for \$CanvasCourseName\$". The second field is labeled "Message *" and contains the placeholder text "You have been selected to provide feedback for \$C:". Red boxes highlight the placeholder text in the "Assignment Message", "Calendar Message", and "Message" fields. Blue arrows point from the right side of the form to the "Calendar Message" and "Message" fields.

Want more?

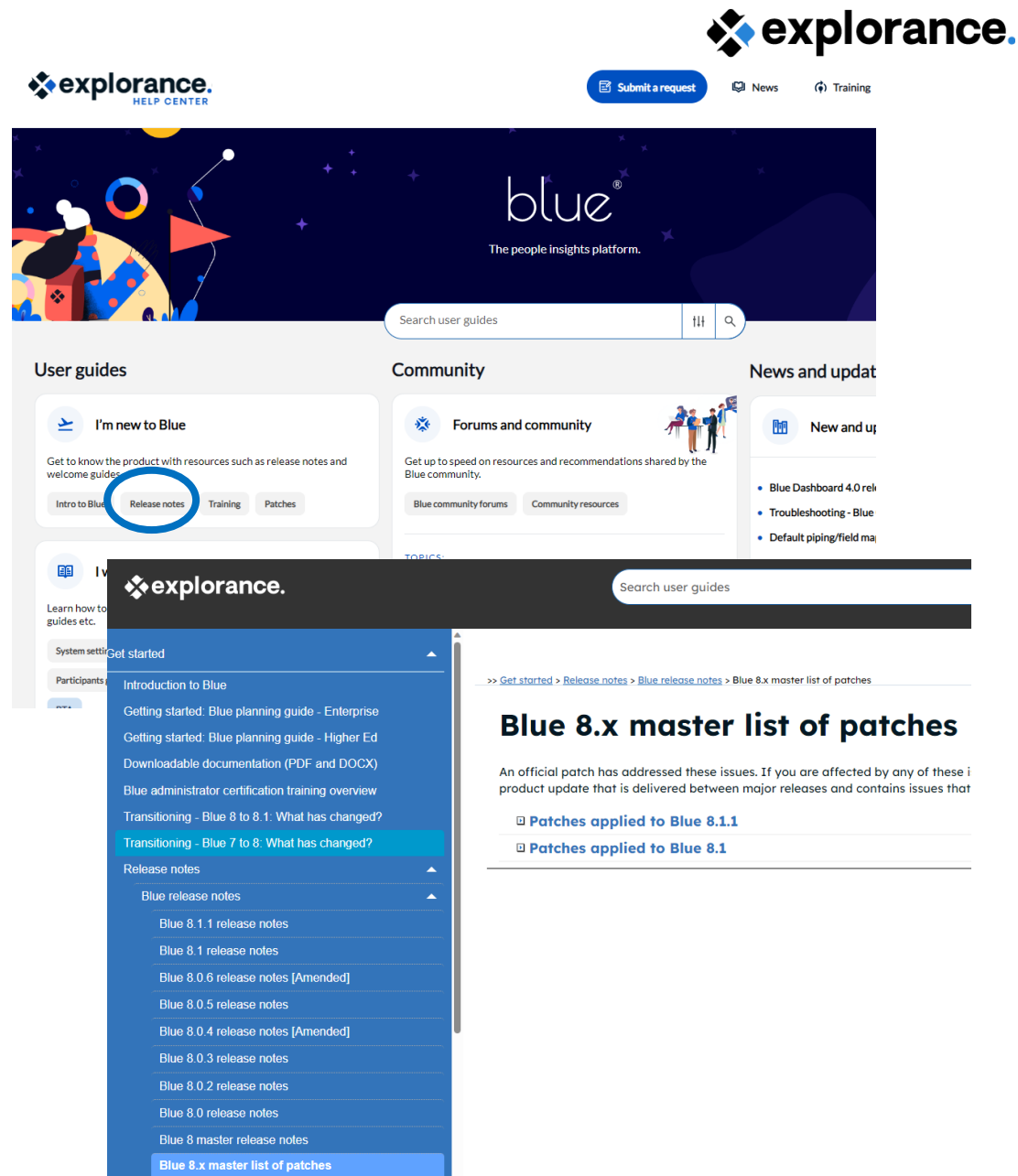
- Release notes available in our Help Centre

- Features
- Known Issues
- Compatibility

Tip: Check out the master to view a cumulative list of the above

- Master list of patches

- Fixed issues with build number for patch



The screenshot displays the Explorance Help Center interface. At the top, the Explorance logo and navigation links (Submit a request, News, Training) are visible. The main header features the 'blue' logo and the tagline 'The people insights platform.' Below the header, there are three main sections: 'User guides', 'Community', and 'News and updates'. In the 'User guides' section, the 'Release notes' link is circled in blue. A dropdown menu is open, showing a list of links including 'Introduction to Blue', 'Getting started', 'Downloadable documentation', 'Blue administrator certification training overview', 'Transitioning - Blue 8 to 8.1: What has changed?', 'Transitioning - Blue 7 to 8: What has changed?', 'Release notes', 'Blue release notes', and 'Blue 8.x master list of patches'. The 'Blue 8.x master list of patches' link is highlighted at the bottom of the dropdown. To the right, a page titled 'Blue 8.x master list of patches' is visible, showing a list of patches applied to Blue 8.1.1 and Blue 8.1.

Submitted Questions



Questions covered

- Using Boolean Operators with filters
- Linking to Blue reports/tasks in an email
- Reporting on data from multiple projects
- Using HTML in emails & messages



Using Boolean Operators with Filters

Question

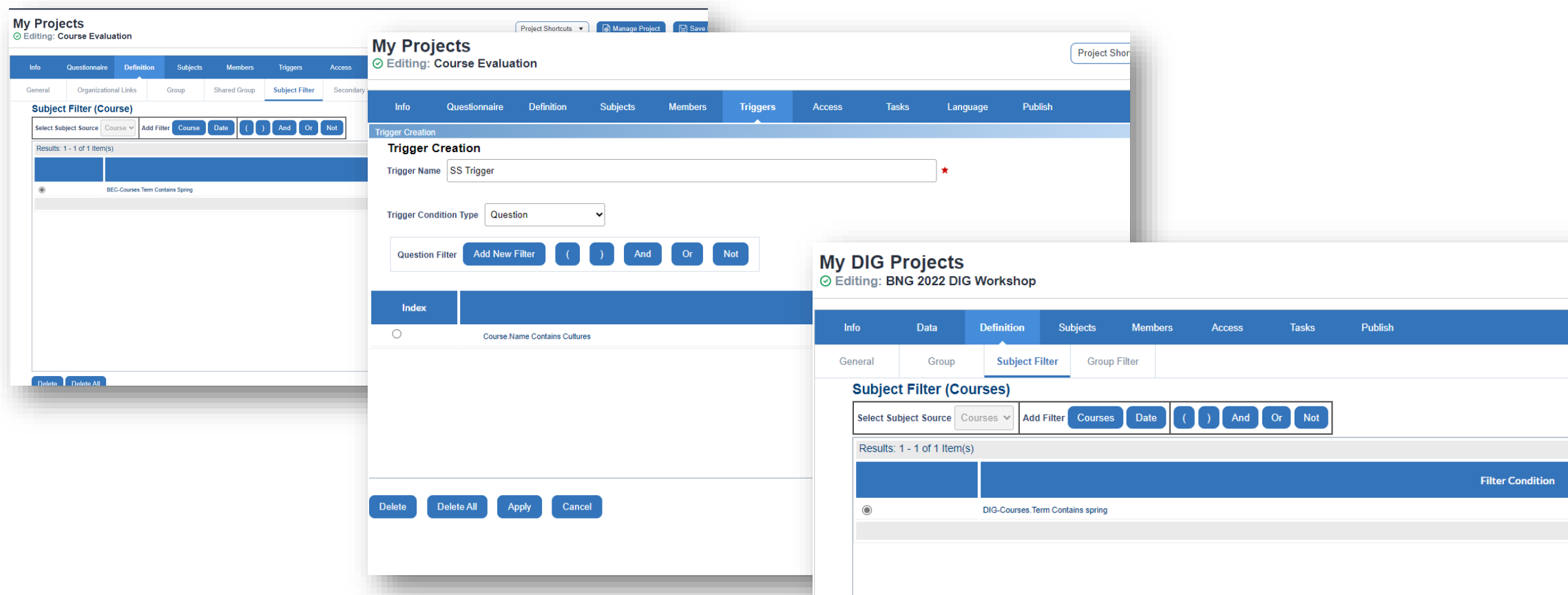
How do you know where to add or not add parentheses?

Answer

When using Boolean operators, the expression is resolved in order in priority (NOT, AND, OR); except for what's contained in parentheses – they are always resolved first

Using Boolean Operators with Filters cont'd

Applies anywhere you see filters



The image displays three overlapping screenshots of the Explorance user interface, demonstrating the application of Boolean operators in different filter contexts.

- Left Screenshot (Subject Filter (Course)):** Shows the 'Subject Filter (Course)' section. It includes a 'Select Subject Source' dropdown set to 'Course', an 'Add Filter' button, and a row of filter buttons: 'Course', 'Date', '(', ')', 'And', 'Or', and 'Not'. Below this, a table shows one result: 'BEC-Courses Term Contains Spring'.
- Middle Screenshot (Triggers):** Shows the 'Triggers' section under 'My Projects'. It features a 'Trigger Creation' form with a 'Trigger Name' field containing 'SS Trigger', a 'Trigger Condition Type' dropdown set to 'Question', and a 'Question Filter' section with an 'Add New Filter' button and Boolean operator buttons: '(', ')', 'And', 'Or', and 'Not'. Below the form is an 'Index' table with one entry: 'Course Name Contains Cultures'.
- Right Screenshot (Subject Filter (Courses)):** Shows the 'Subject Filter (Courses)' section. It includes a 'Select Subject Source' dropdown set to 'Courses', an 'Add Filter' button, and a row of filter buttons: 'Courses', 'Date', '(', ')', 'And', 'Or', and 'Not'. Below this, a table shows one result: 'DIG-Courses.Term Contains spring'.

Using Boolean Operators with Filters cont'd

Example: Term: 202309, Courses: ECON 101, ECON 201

Filter: Term is 202309 **AND** CourseNum is 101 **OR** CourseNum is 201

➤ *Courses included:*

➤ *Econ 101 from 202309*

➤ *All Econ 201 courses from any term found in the datasource*

Filter: Term is 202309 **AND** (CourseNum is 101 **OR** CourseNum is 201)

➤ *Courses included (Parentheses resolved first)*

➤ *Econ 101 and ECON 201 from 202309*

Linking to Blue reports or tasks in a notification

Question

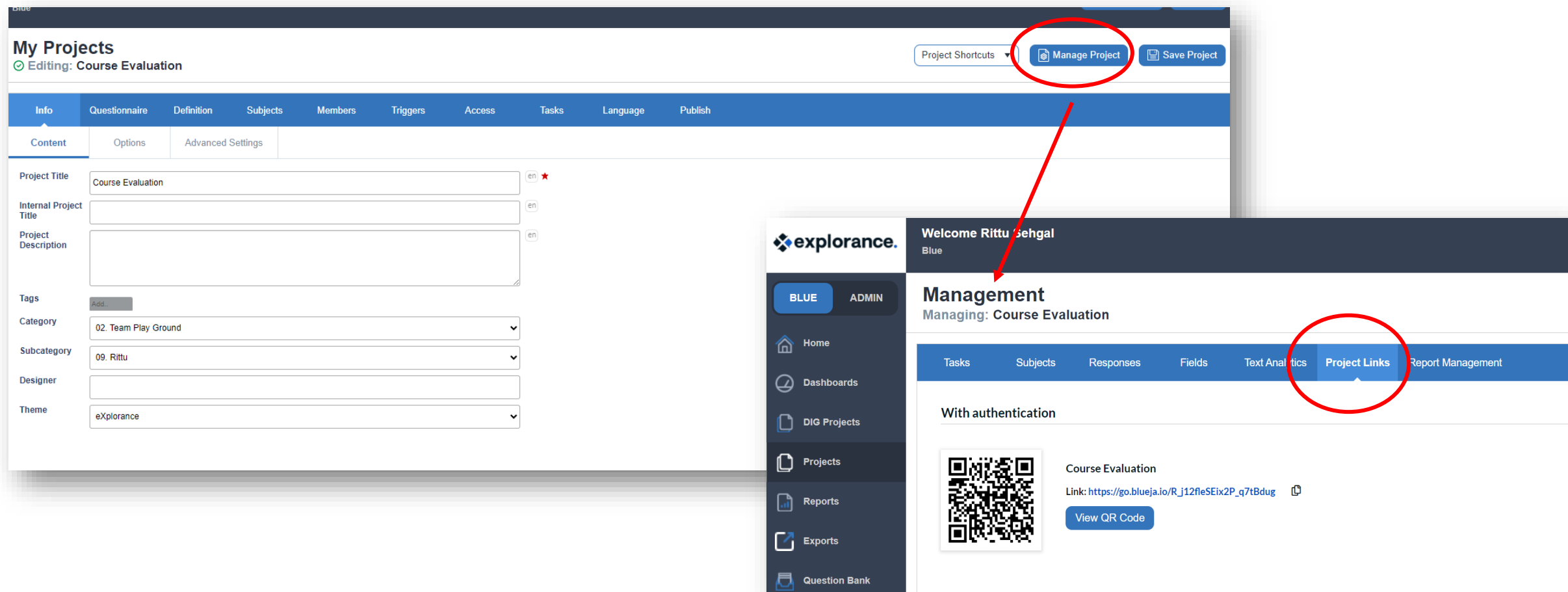
Can you issue an email to a task owner that provides them with a link to Closing the Feedback Loop task and module report?

Answer

- Link to a Project:
 - Short link available via the Manage Project page
- Link to a report:
 - Link to your Blue homepage, where users have access to all their reports
 - Can link to a report via it's ReportID (URL of report truncated to only include site and reportID)

Linking to Blue reports or tasks in a notification

• Project Link:



The image shows two screenshots of the Explorance interface. The left screenshot is the 'My Projects' page, where the 'Manage Project' button is circled in red. The right screenshot is the 'Management' page, where the 'Project Links' tab is circled in red. A red arrow points from the 'Manage Project' button to the 'Project Links' tab.

My Projects Page:

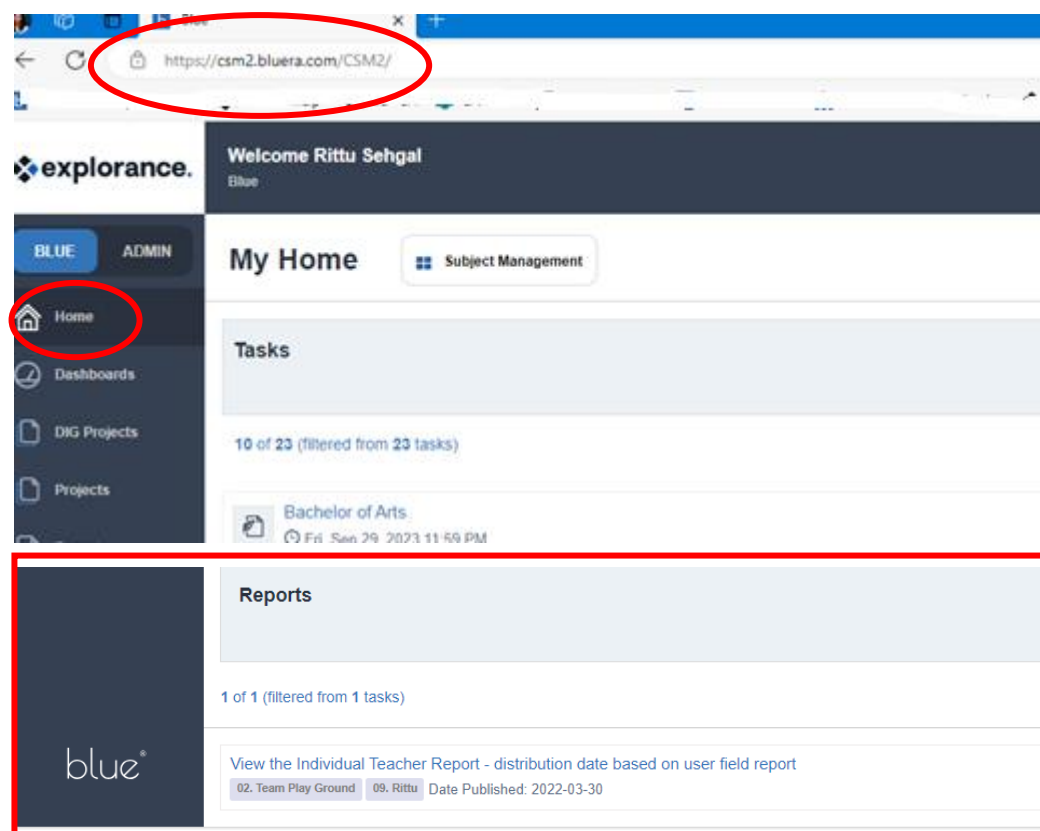
- Header: My Projects, Editing: Course Evaluation
- Buttons: Project Shortcuts, Manage Project (circled), Save Project
- Tabs: Info, Questionnaire, Definition, Subjects, Members, Triggers, Access, Tasks, Language, Publish
- Sub-tabs: Content, Options, Advanced Settings
- Form fields: Project Title (Course Evaluation), Internal Project Title, Project Description, Tags, Category (02. Team Play Ground), Subcategory (09. Rittu), Designer, Theme (eXplorance)

Management Page:

- Header: Welcome Rittu Sehgal, Blue
- Buttons: BLUE, ADMIN
- Left Sidebar: Home, Dashboards, DIG Projects, Projects, Reports, Exports, Question Bank
- Management: Managing: Course Evaluation
- Tabs: Tasks, Subjects, Responses, Fields, Text Analytics, Project Links (circled), Report Management
- Section: With authentication
- QR Code: Course Evaluation
- Link: https://go.blueja.io/R_j12fleSEix2P_q7tBdug
- Button: View QR Code

Linking to Blue reports or tasks in a notification

- Report Link – Home page

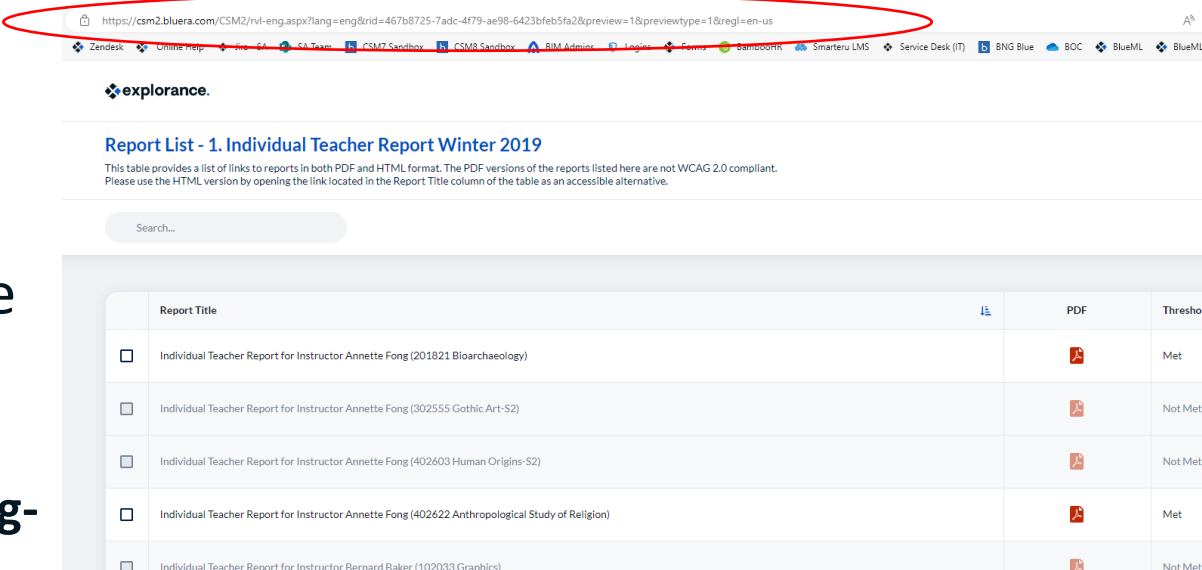


Linking to Blue reports or tasks in a notification

• Report Link: Report ID URL

- Go the Publish Tab of the report
- Click View Report
- The URL contains the link to the report ID. Locate it by identifying the **rid=** part of the URL and copy everything up to the next “&”






For example: **<https://blue.myinstitute.com/blue/rvg-eng.aspx?lang=eng&rid=05ae93e6-81ec-4f43-83fd-845517649a7b&preview=1&previewtype=1&redi=1>**



Report List - 1. Individual Teacher Report Winter 2019

This table provides a list of links to reports in both PDF and HTML format. The PDF versions of the reports listed here are not WCAG 2.0 compliant. Please use the HTML version by opening the link located in the Report Title column of the table as an accessible alternative.

Search...

	Report Title	PDF	Threshold
<input type="checkbox"/>	Individual Teacher Report for Instructor Annette Fong (201821 Bioarchaeology)		Met
<input type="checkbox"/>	Individual Teacher Report for Instructor Annette Fong (302555 Gothic Art-S2)		Not Met
<input type="checkbox"/>	Individual Teacher Report for Instructor Annette Fong (402603 Human Origins-S2)		Not Met
<input type="checkbox"/>	Individual Teacher Report for Instructor Annette Fong (402622 Anthropological Study of Religion)		Met
<input type="checkbox"/>	Individual Teacher Report for Instructor Bernard Baker (102033 Graphics)		Not Met

Reporting on data from multiple projects

Question

What are some methods for creating reports that consolidate data from multiple projects?

Answer

- Project Mapping
 - Functionality to allow pulling in data from similar projects to compare or merge results
 - Option available for both Web/PDF and Export reports
- Blue Dashboard:
 - Add-on for trend analysis at the individual and aggregate level

Reporting on data from multiple projects

Project Mapping – Web/PDF version

Some key points:

- Data is only included for a subject in base project and the same subject found in mapped projects
- Solo/Compare or Merge All options available in report blocks
- Question bank questions, spreadsheets and breakdowns not compatible

My Reports

Editing: Annual Teacher Report

Info	Content	Filters	Groups	Viewers	Access	Project Mapping	Distribution	Language	Publish
Project Selection	Question Mapping	Group Mapping							

Project List

	Category	Subcategory	Project Title	Project Alias	Base P
<input type="checkbox"/>	95. BNG	00. BOC	BOC - Course Evaluation Spring 2023	Summer 2020	Yes
<input type="checkbox"/>	01. Main Content	01. Main Content	14) Course Evaluation - Winter 2020 (With Faculty Feedback)	Winter 2019	No

Question:

Questions evaluating the Course

Projects Included

Mapping Mode: ☒ Solo/Compare ☐ Merge All

	Index	Project Title
<input checked="" type="checkbox"/>	1	Summer 2020
<input checked="" type="checkbox"/>	2	Winter 2019

Reporting on data from multiple projects

Project Mapping – Export Report

- Data is included for all subjects found in the base and mapped projects

My Reports

🕒 Editing: Export Report - Dept report

Info	Content	Content for Export	Filters	Groups	Viewers	Access	Project Mapping	Distribution	Language	Publish
Project Selection	Question Mapping	Group Mapping								

Project List

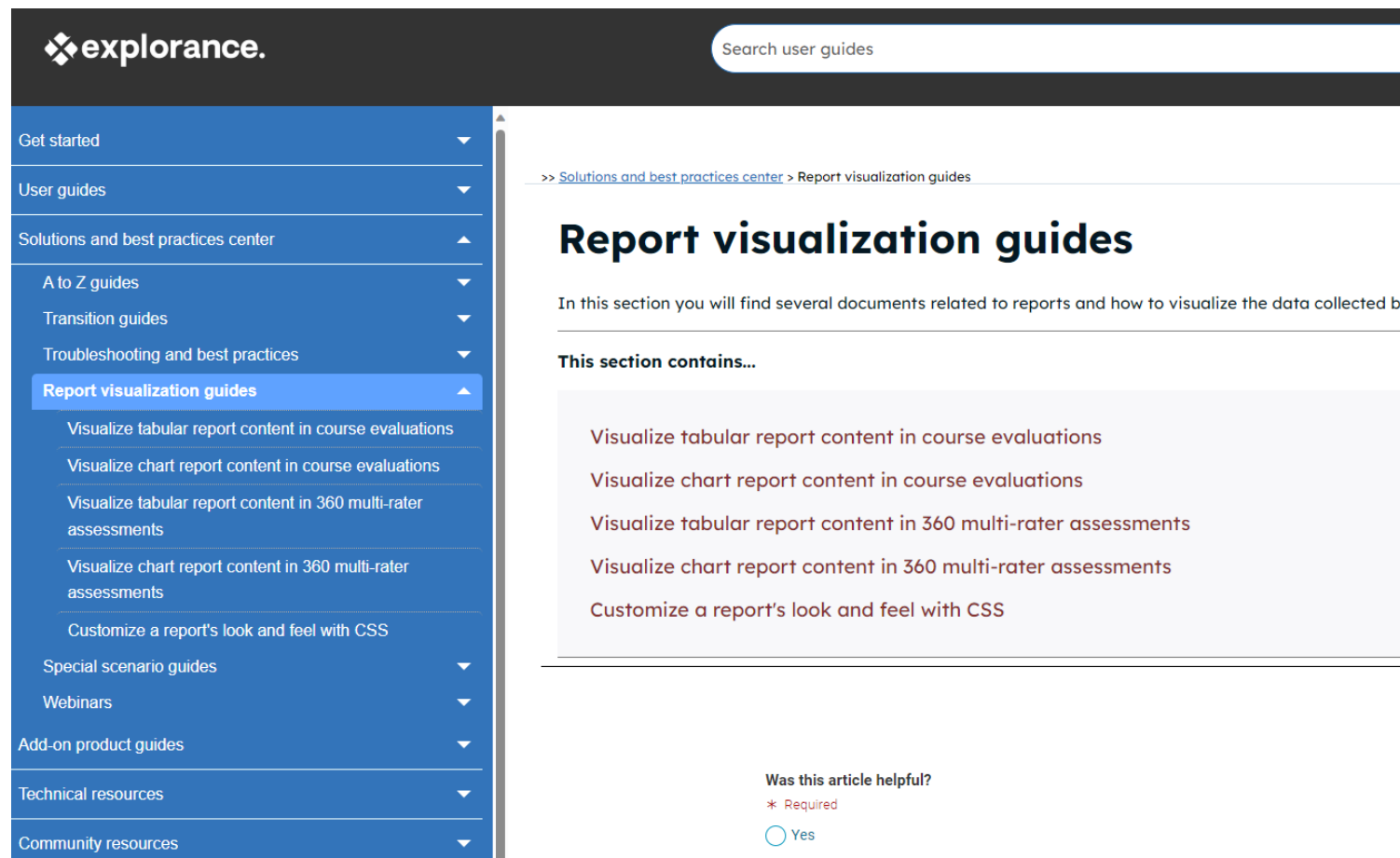
	Category	Subcategory	Project Title	Base Project	
<input type="checkbox"/>	95. BNG	00. BOC	BOC - Course Evaluation Spring 2023	Yes	Tu
<input type="checkbox"/>	01. Main Content	01. Main Content	14) Course Evaluation - Winter 2020 (With Faculty Feedback)	No	Fr

Info	Content	Content for Export	Filters	Groups	Viewers	Access	Project Mapping
Block List for Export							
<input checked="" type="radio"/> Compare Projects							
<input type="radio"/> Merge Projects by Course							
<input type="checkbox"/> Breakdown to Faculty level							
<input type="checkbox"/> Hide rows with blank or filtered out responses							
<input type="checkbox"/> Do not display question statistics in a child report for questions without responses.							
Sorted by field secondarysubject_Uniquename Ascending <input type="checkbox"/> Cross projects sorting							
Choose a Date/time format dd-mm-yyyy hh:mi:ss							
	Index	Export File Header					
<input type="checkbox"/>	1	Course - Term				en	subject_Term
<input type="checkbox"/>	2	Uniquename				en	secondarysubject_Uniquename
<input type="checkbox"/>	3	Invited				en	InvitedCount

Reporting on data from multiple projects

Project Mapping – Examples

For step-by-step instructions on adding Trend Analysis data – check out our Report Visualization guides in the Help Centre (found under Solutions and best practices centre)



The screenshot shows the Explorance Help Centre interface. On the left is a blue sidebar with a navigation menu. The main content area on the right displays the 'Report visualization guides' page. The sidebar menu includes items like 'Get started', 'User guides', 'Solutions and best practices center', and 'Report visualization guides' (which is highlighted). The main page has a search bar at the top, a breadcrumb trail '>> Solutions and best practices center > Report visualization guides', and a list of guide topics under the heading 'This section contains...'. At the bottom right, there is a feedback section asking 'Was this article helpful?' with radio button options for 'Yes' and 'No'.

explorance. Search user guides

>> [Solutions and best practices center](#) > Report visualization guides

Report visualization guides

In this section you will find several documents related to reports and how to visualize the data collected by

This section contains...

- Visualize tabular report content in course evaluations
- Visualize chart report content in course evaluations
- Visualize tabular report content in 360 multi-rater assessments
- Visualize chart report content in 360 multi-rater assessments
- Customize a report's look and feel with CSS

Was this article helpful?

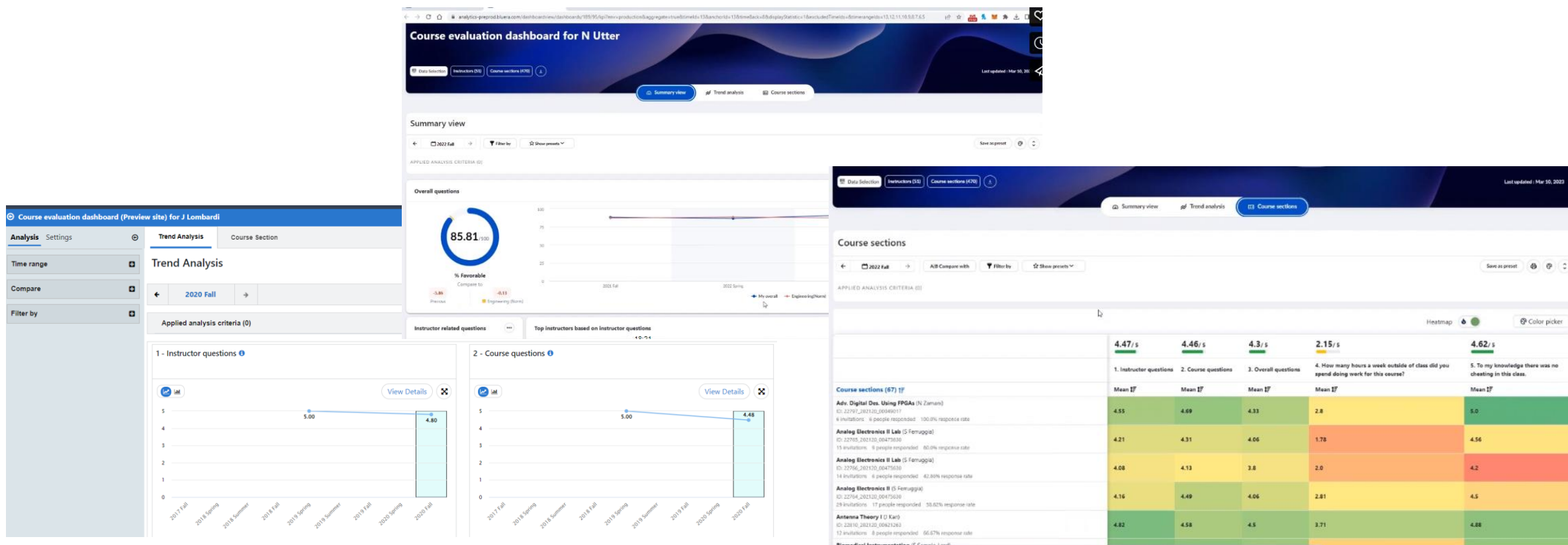
* Required

☒ Yes ☐ No

Reporting on data from multiple projects

Dashboard

- Add-on module – please talk to your Account Manager if interested!



Using HTML in emails/messages

Question

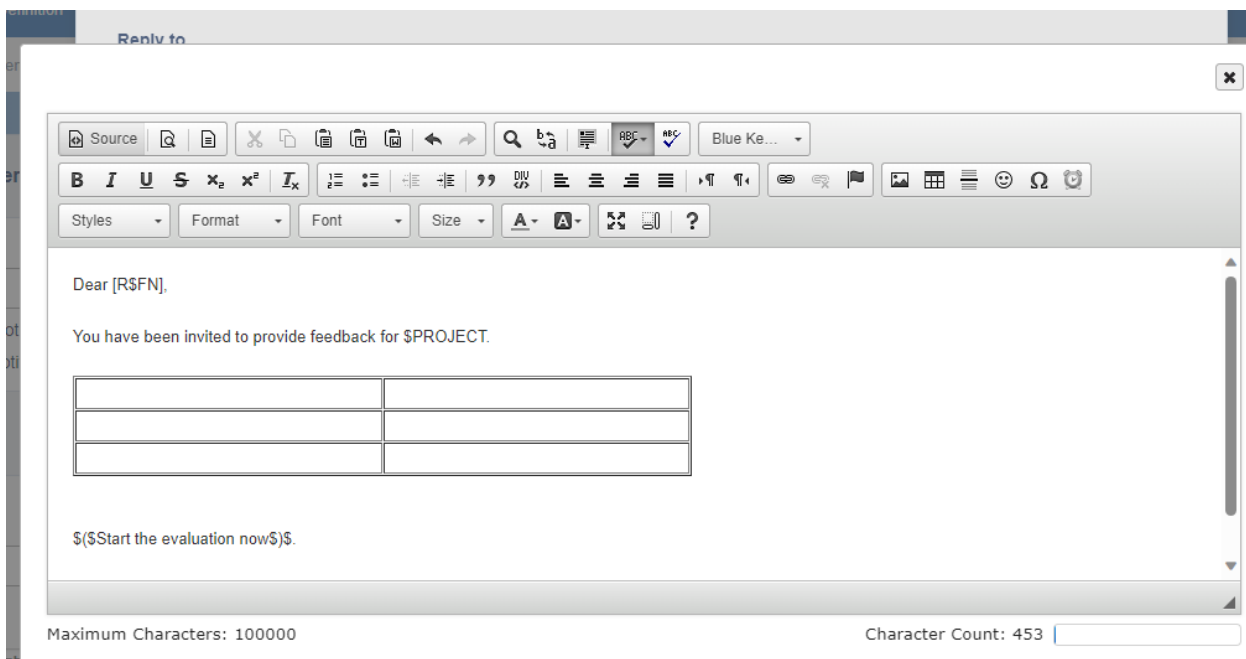
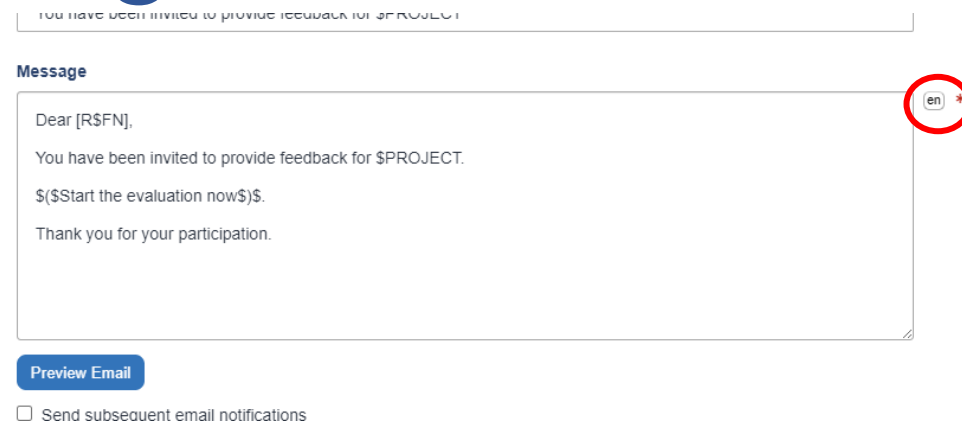
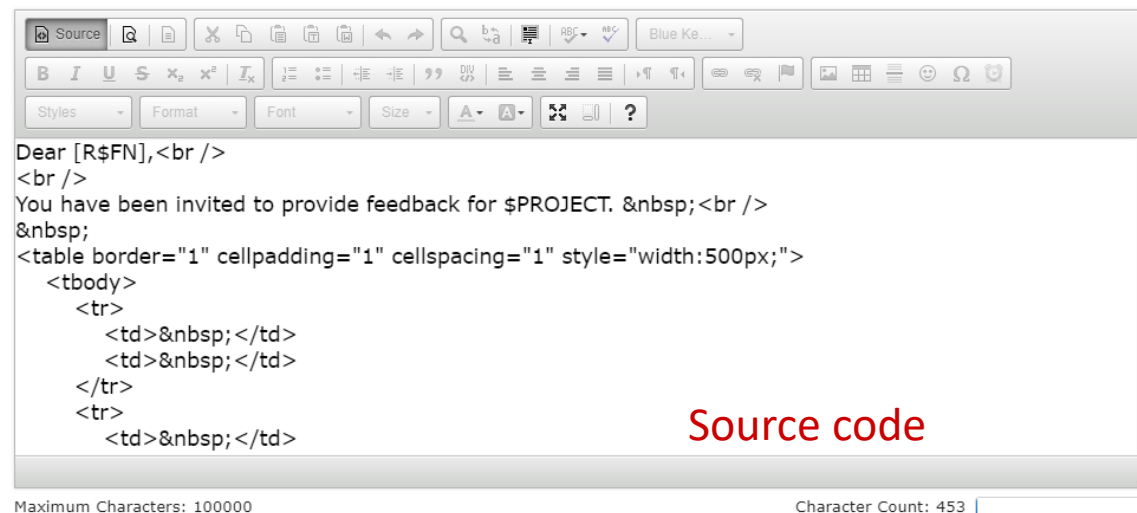
- Pls provide examples and instructions for using HTML to create messaging in emails, welcome pages, and Canvas/LMS announcements

Answer

- Use the WYSIWYG editor
 - If familiar with HTML, can use Source code for advanced editing
- LMS Integration: Blue connector no html editor

Using HTML in emails/messages

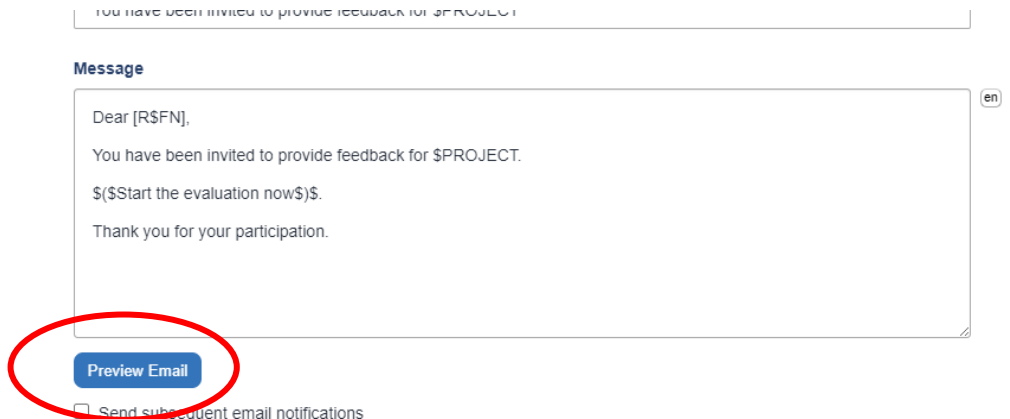
- Get to WYSIWYG editor by clicking language icon
- Can use editor to add things like a table, images etc
- Click Source to apply advanced edits

Using HTML in emails/messages

- Preview email to view HTML formatting

(Note Blue field mapping will not resolve itself in the preview as it's general and not user-specific)



You have been invited to provide feedback for \$PROJECT.

Message

Dear [R\$FN],

You have been invited to provide feedback for \$PROJECT.

\$(Start the evaluation now)\$.

Thank you for your participation.

Preview Email

☐ Send subsequent email notifications

Tip: If using advanced HTML formatting, send yourself a test email!

Q & A



Resources

- Link to [Product news](#)
- [Create filters](#)
- [Map projects together for reporting](#)
- [Report visualization - Trend Analysis](#)
- [Guide to the Blue Dashboard](#)
- [\(Webinar\) Blue Dashboard 4.0 release webinar](#)
- [The HTML editor in Blue | Explorance](#)
- [Bluenotes Community - University of Toronto Email Sample](#)

