

Data Journey with Blue (Episode 3 of 3) End-to-End Automation & Delegation for Engagement.

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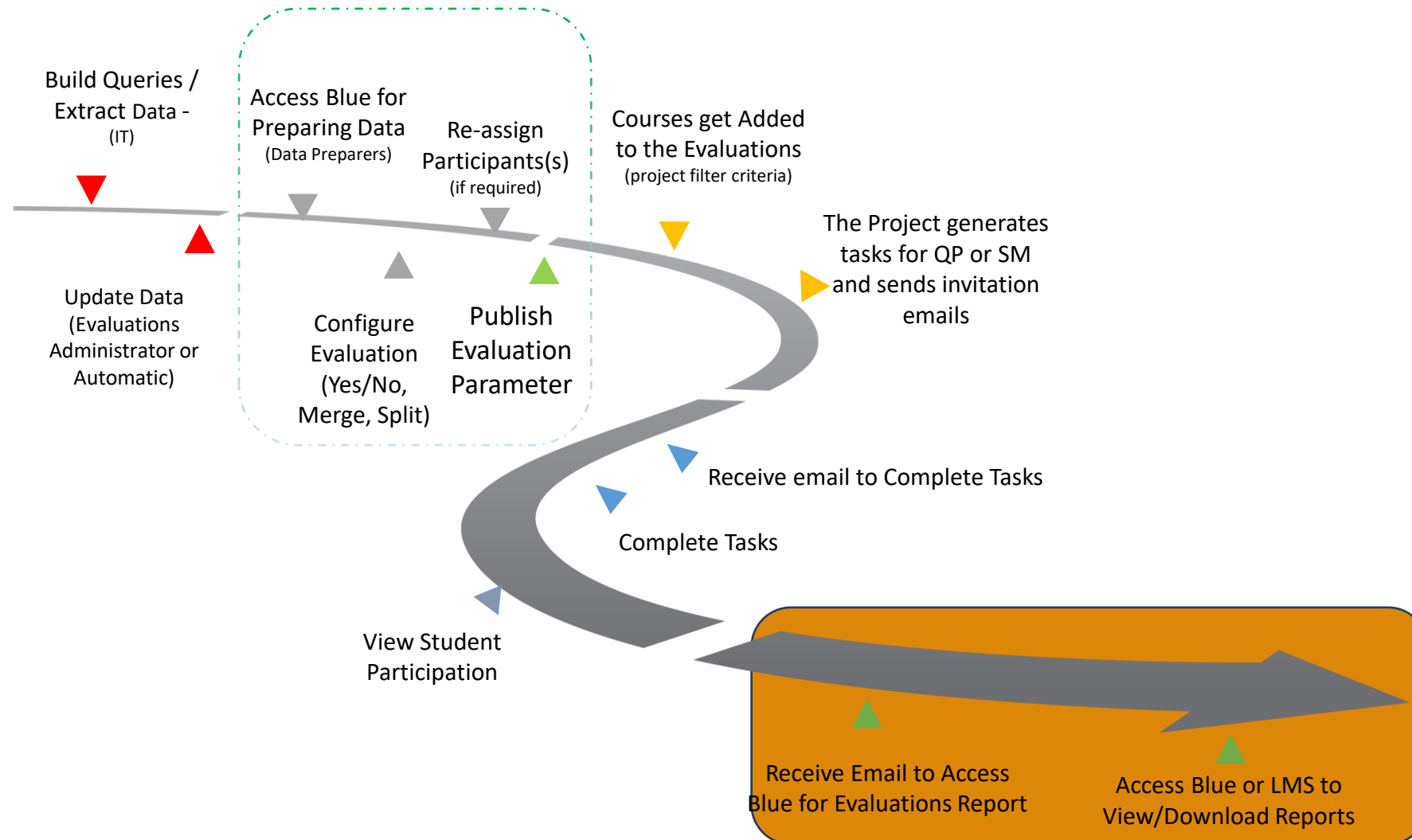
Description

- Now that you know how to prepare your data and how to sync the data to Blue, in this last episode of this 3-part learning webinar series, we will share with you tips for the final step in your data journey with Blue - end-to-end automation and delegation, such as:
 - Giving permissions to change the data within the project (Subject Management)
 - Automating the report delivery
 - Updating projects after expiry - when and how to do it.

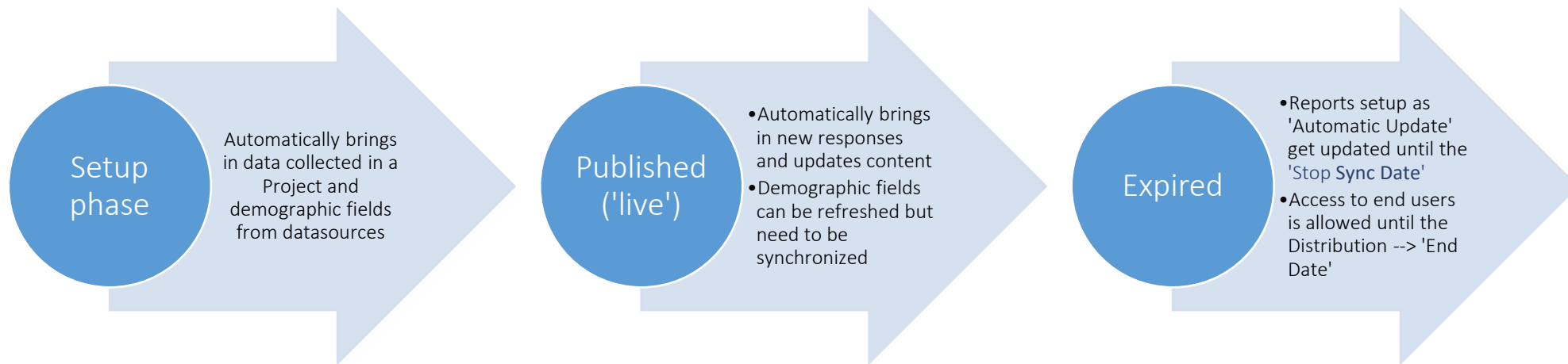
Agenda

- **Course evaluations data journey**
- **Data Journey and Reports Lifecycle**
- **Reports delivery based on data or end-user task events**
- **Unexpiring a Course Evaluations project**
 - When to do it
 - What to consider
- **Data Journey in Blue: Wrapping things up?... New episodes?!**

Course evaluations data journey



Data Journey and Reports Lifecycle



Reports Delivery Based on End-User Task Events or Data change

- **Blue End-User Tasks**

- **Scenario: SM Faculty or Coordinator member extends the evaluation window**
 - **Example: Individual Course-Instructor Report delivery date is pushed to release the individual report based on the new end date of the FO task**

- **Data change**

- **Scenario 1: Data fields get updated and used for distribution (but need to be synchronized in the project!!)**
 - **Example: The report gets distributed either because it is used as a report filter (e.g. *Consent to release results* 'Yes' / 'No'), or because it is a date field used as the Individual Report distribution date**
- **Scenario 2: Relationship data changes**
 - **Example: The report counts change and may not meet the 'Report availability threshold'**

Reports Delivery Based on End-User Task Events

Explorance Evals - Spring 2023 - Filtering / Deletion Impact Cancel

101815 Cultures of Modern Canada

Changes allowed until 2023-09-29

Choose timing Scheduled

Start Date 2023-07-11 00:00

End Date 2023-09-21 23:59

SEPTEMBER 2023 < > | X

I have finished all my

Su	Mo	Tu	We	Th	Fr	Sa
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

23 : 59

Apply

Info Content Filters Subjects Viewers Access Project Mapping **Distribution**

Start Date
+0 day(s) from
Subject end date

+ 0 days from Course(Project)

End Date
[No Expiry]

+ 0 days from Subject end date

Fixed Start Date

FO task end date is extended from the Subject Mgmt Task

Report Setting to push the report release date as per the New FO end date

Demo

Extending a FO task and updating the report
availability date

Reports Delivery Based on Data change

Info Content **Filters** Subjects Viewers

Questions Raters Subject **Secondary Subject**

Selection List

+Consent_to_Release Contains **Yes**

Given name Contains

Given name Contains **Filter**

Results: 1 - 2 of 2 Item(s)

Given name	
Peter	Altman
Annette	Fong

Report List - Spring 2023 Individual Reports Students Access - PUBLIC V0

	Report Title	Threshold Status
<input type="checkbox"/>	Spring 2023 Individual Reports for Instructor Annette Fong (201821 Bioarchaeology)	Met
<input type="checkbox"/>	Spring 2023 Individual Reports for Instructor Annette Fong (302555 Gothic Art-S1)	Not Met
<input type="checkbox"/>	Spring 2023 Individual Reports for Instructor Annette Fong (302555 Gothic Art-S2)	Not Met
<input type="checkbox"/>	Spring 2023 Individual Reports for Instructor Peter Altman (101848 Modern Art)	Met
<input type="checkbox"/>	Spring 2023 Individual Reports for TA Annette Fong (101815 Cultures of Modern Canada)	Met
<input type="checkbox"/>	Spring 2023 Individual Reports for TA Annette Fong (402622 Anthropological Study of Religion)	Not Met

Only reports from Instructors with Consent to Release = Y Show

Instructors give their consent to release their reports to Students

Demo

Build a Public Report to show Individual Instructor Reports to Students

Data Updates in an Expired Project

- This is how Blue prevents any impacts to data that was already collected and their related reports, if there was any accidental change to the datasources afterwards.
- 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.

Unexpiring a Project

- **Unexpiring a project may be needed sometimes**
 - Late subjects need to be evaluated
 - Missing instructor, or wrong instructor being evaluated
 - Accidental Tasks deletion
- **Be careful when unexpiring a project**
 - Make sure all data for the “expired” project is loaded again, in addition to the running project.
 - Adjust the projects’ filters to capture only t
- **You may not need to unexpire a project**
 - Use the Export/Import Subject Details

Management
Managing: Explorance Evals - Spring 2023 - SVM for Instructors + Reporting

Tasks **Subjects** Responses Fields Text Analytics Report Management

Subject Info **Export / Import Subject Details**

Import/Export Fields

Select Information Source: BEC-Courses **Download CSV File**

Import BEC-Courses Information Choose File No file chosen Upload

Field Name	Data Type	Caption	Select
			<input type="checkbox"/>

Export the Subjects
Make the needed changes
Re-Import the Subjects

Continuous project

- A Year long project (or even longer) could be considered:
 - Datasources (**Update** rather than Overwrite)
 - Project settings (Impact of Owner removal)

Demo

Continuous project: “Multi-term projects”

Data Journey The End?

A Few Things to Remember

Relational Demographics help streamline a Project Delivery

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 usefull

Usefull

Very usefull

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

The screenshot shows a data table with columns A through F. A callout box labeled 'Course-Students DS' is positioned over the table. The table contains the following data:

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

Tasks can be triggered by change of Data

Cells		
	N	
End Of Program	HomePa	
2/13/2023	Course e	
3/13/2023	Course e	

Students DS

- Dynamic Groups
 - Example: End of Program Evaluations

Info Questionnaire **Definition** Members Triggers Access Tasks Language Publish

Group Shared Group Group Filter

Groups (Last Automatic Update: 12/31/2021 2:15:39 AM)

Results: 1 - 1 of 1 Item(s)

	Group Name	Privileges	Link Type
0	Students At End of Program (Automatic Update)	F0	Automatic Selection

05 - End of Program Survey Save

Info Questionnaire **Definition** Members Triggers Access Tasks Language Publish

Group Shared Group **Group Filter**

Group Filter

Select Group **Students At End of Program** Add Filter Member Date () And Or Not

Results: 1 - 1 of 1 Item(s)

	Filter Condition
0	BEC-Students End_Of_Program Greater than '01/01/2021'

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"/>

Removing Course Evaluations Data

- Automatic Update
 - Project Info -> Options tab -> Remove Subjects/Raters
- Task --> Impact of Owner Removal

At the Project level

Info	Questionnaire	Definition	Subjects	Members
Content	Options	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)

At the Task level

Impact of owner removal

No effect

Stop task

Delete task

Removing Course Evaluations Data

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- Task --> Impact of Owner Removal

At the Task level

Impact of owner removal

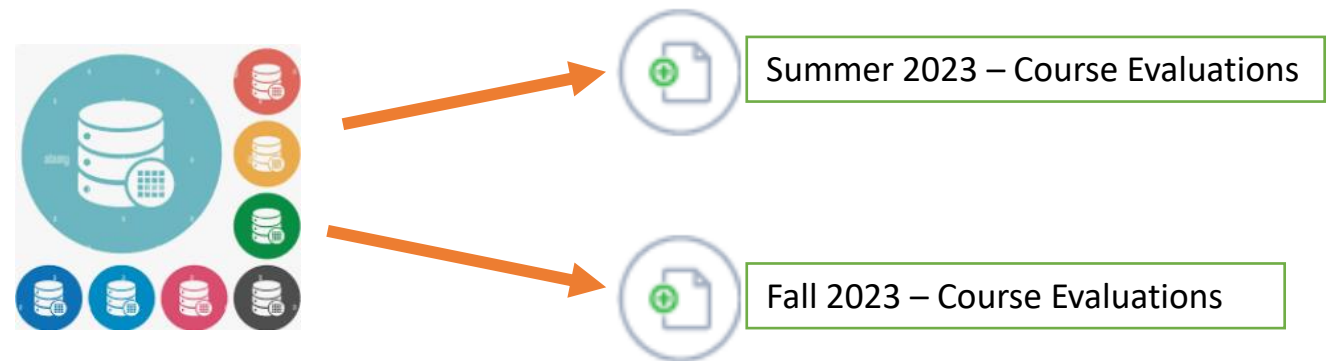
No effect

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	Subject Filter	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



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