

Ask the Expert

November 14-15, 2023

Rittu Sehgal



Agenda

- 8.1.2 Patch fixes (build 8.13)
- Submitted Questions
- Q&A

Blue8 Release notes + patches

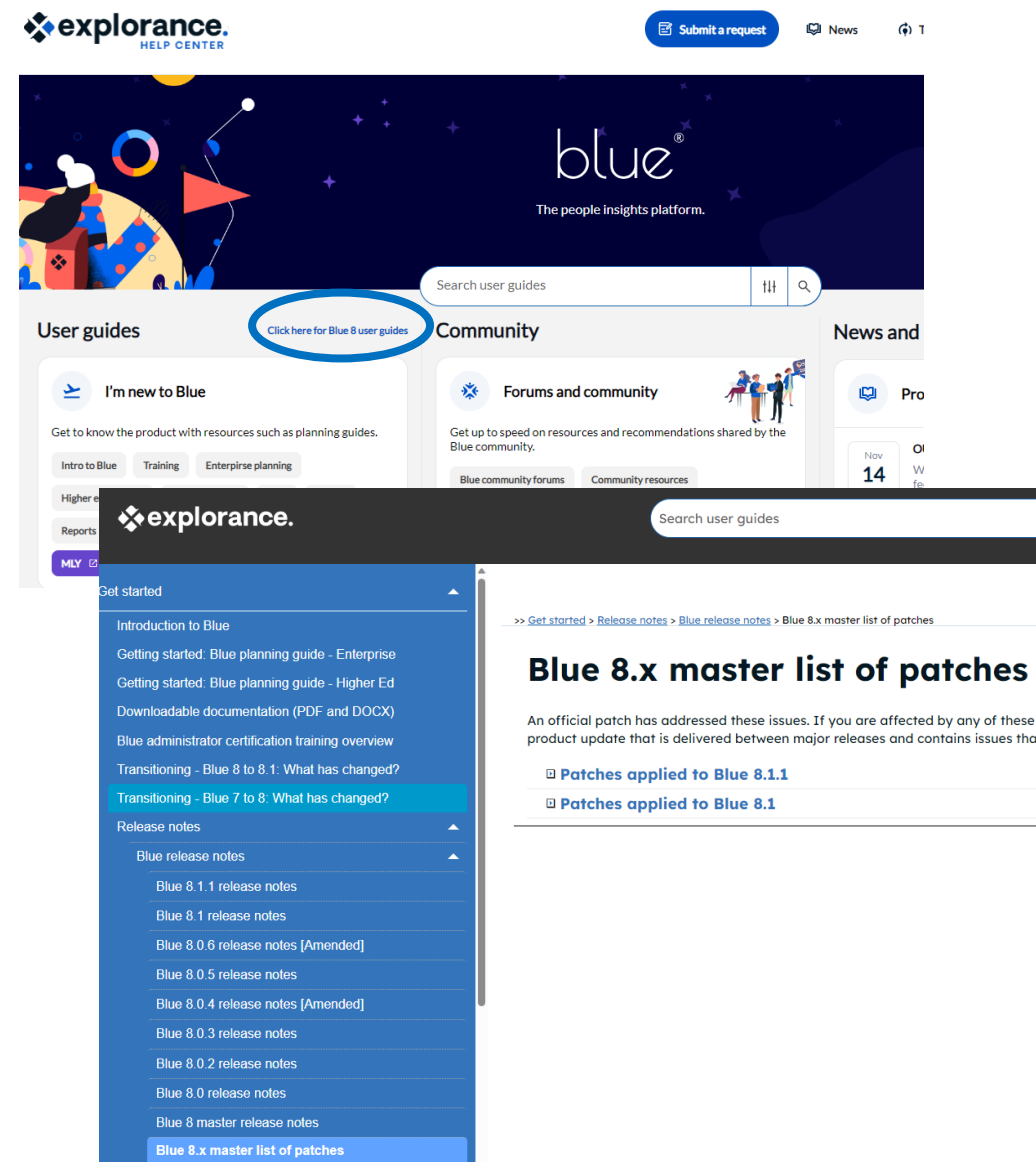
- Release notes available in our Help Centre

- 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



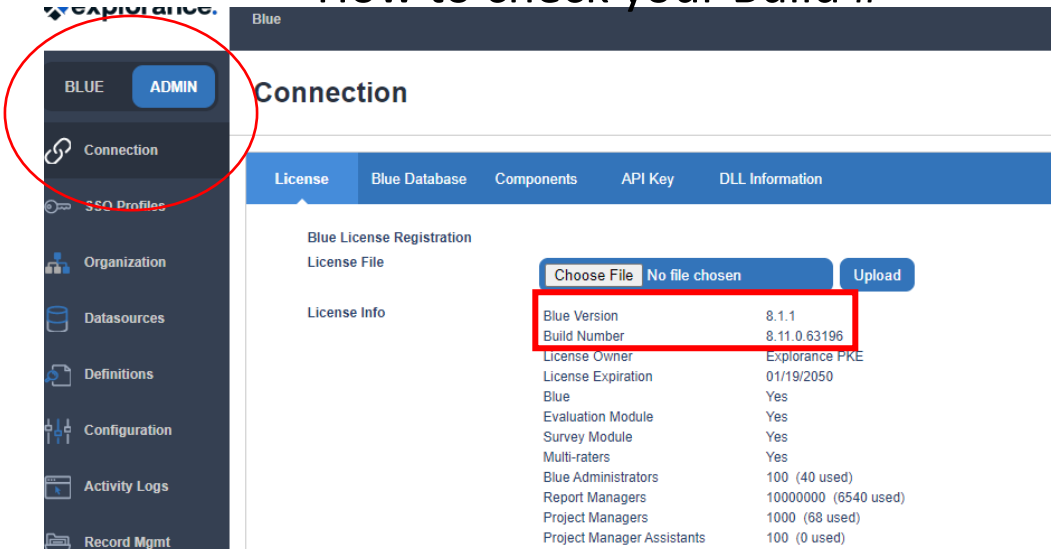
The screenshot shows the Explorance Help Center interface. At the top, there's a navigation bar with the Explorance logo, a 'Submit a request' button, and links for 'News' and '1'. Below this is a hero section with the 'blue' logo and the tagline 'The people insights platform.' A search bar for 'Search user guides' is present. The main content area is divided into 'User guides' and 'Community' sections. In the 'User guides' section, a link 'Click here for Blue 8 user guides' is circled in blue. A dropdown menu is open, showing a list of guides including 'Introduction to Blue', 'Getting started: Blue planning guide - Enterprise', 'Getting started: Blue planning guide - Higher Ed', 'Downloadable documentation (PDF and DOCX)', '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', 'Blue 8.1.1 release notes', 'Blue 8.1 release notes', 'Blue 8.0.6 release notes [Amended]', 'Blue 8.0.5 release notes', 'Blue 8.0.4 release notes [Amended]', 'Blue 8.0.3 release notes', 'Blue 8.0.2 release notes', 'Blue 8.0 release notes', 'Blue 8 master release notes', and 'Blue 8.x master list of patches'. The 'Blue 8.x master list of patches' is highlighted in blue. On the right, the 'Community' section includes 'Forums and community' and 'News and Pro'. Below the navigation bar, there's a search bar and a date selector showing 'Nov 14'. The main content area displays the 'Blue 8.x master list of patches' page, which includes a breadcrumb trail: '>> Get started > Release notes > Blue release notes > Blue 8.x master list of patches'. The page title is 'Blue 8.x master list of patches'. The text below the title states: 'An official patch has addressed these issues. If you are affected by any of these i product update that is delivered between major releases and contains issues that'. Below this, there are two sections: 'Patches applied to Blue 8.1.1' and 'Patches applied to Blue 8.1'.

8.1.2 Patch fixes (build 8.13)

Highlights for build 8.13:

- Report generation stability enhancements
- Report AutoUpdate: re-generation will check for new/changed data

How to check your Build #



The screenshot shows the Explorance Blue interface. On the left is a sidebar with a menu including 'BLUE', 'ADMIN', 'Connection', 'SSQ Profiles', 'Organization', 'Datasources', 'Definitions', 'Configuration', 'Activity Logs', and 'Record Mgmt'. The 'Connection' menu item is circled in red. The main content area is titled 'Connection' and has tabs for 'License', 'Blue Database', 'Components', 'API Key', and 'DLL Information'. The 'License' tab is active, showing 'Blue License Registration' and 'License File' upload options. Below this is the 'License Info' section, which contains a table of license details. The 'Blue Version' and 'Build Number' rows are highlighted with a red box.

Blue Version	Build Number
8.1.1	8.11.0.63196

Submitted Questions



Questions covered

- DRA and missing hierarchy nodes and its impact on aggregate reporting
- Response rate trending & tracking
- Including task dates in notifications
- Centralized email with Blue 8 Schedules



Dynamic Report Access (DRA)

Question

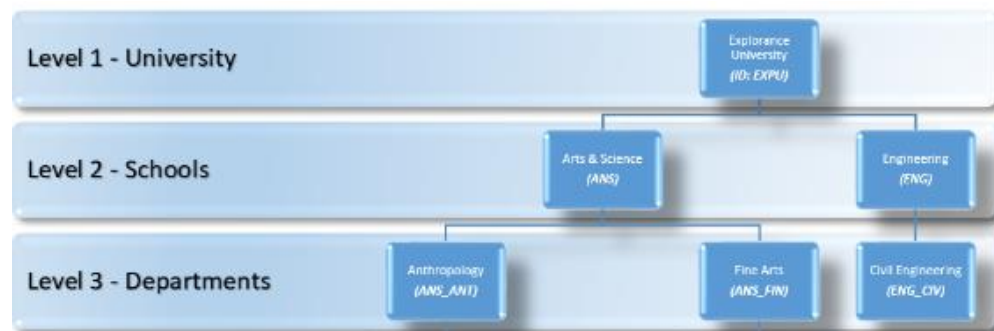
How does Blue deal with missing hierarchy nodes in DRA and how does it affect aggregate reports?

Answer

- A node on the lowest level can be blank in the subject datasource
- A node can't have a parent ID that is more than one level up
- If Group by field has empty values for some subjects, a "Empty" report will be created for those subjects

DRA cont'd

Example: 3-level Hierarchy



Hierarchy datasource

Unit ID	Parent ID	Level
EXPU	Blank	1
ANS	EXPU	2
ENG	EXPU	2
LAW	EXPU	2
ANS_ANT	ANS	3
ENG_CIV	ENG	3
B_ECON	EXPU	3



Courses datasource

Course ID	School ID	Dept ID
ANTH 101	ANS	ANS_ANT
CIVE 202	ENG	ENG_CIV
LAW 101	LAW	blank
ECON 101	blank	B_ECON



Nodes don't quite fit together? – consider a parallel hierarchy

DRA cont'd & Aggregate reporting

- Reports grouped by org unit (hierarchy level) for our Dynamic Viewers

Example: Group by School for Deans, Group by Dept for Chairs

- If a course (subject) has an empty field, the Group By type creates a “empty” report and includes all courses missing that field
- If a dummy unit has to be included for a middle level, a report will be created for it as it does for real units

Resources:

- [DRA Power Guide](#)
 - DRA Training Module in Explorance's [SmarterU LMS](#) **
 - [Group by reports](#)
- Look out for an upcoming Learning webinar on DRA: [Webinars – Bluenotes Community](#)

*** no access? Talk to your Account Manager*

Response Rate trending & tracking

Question

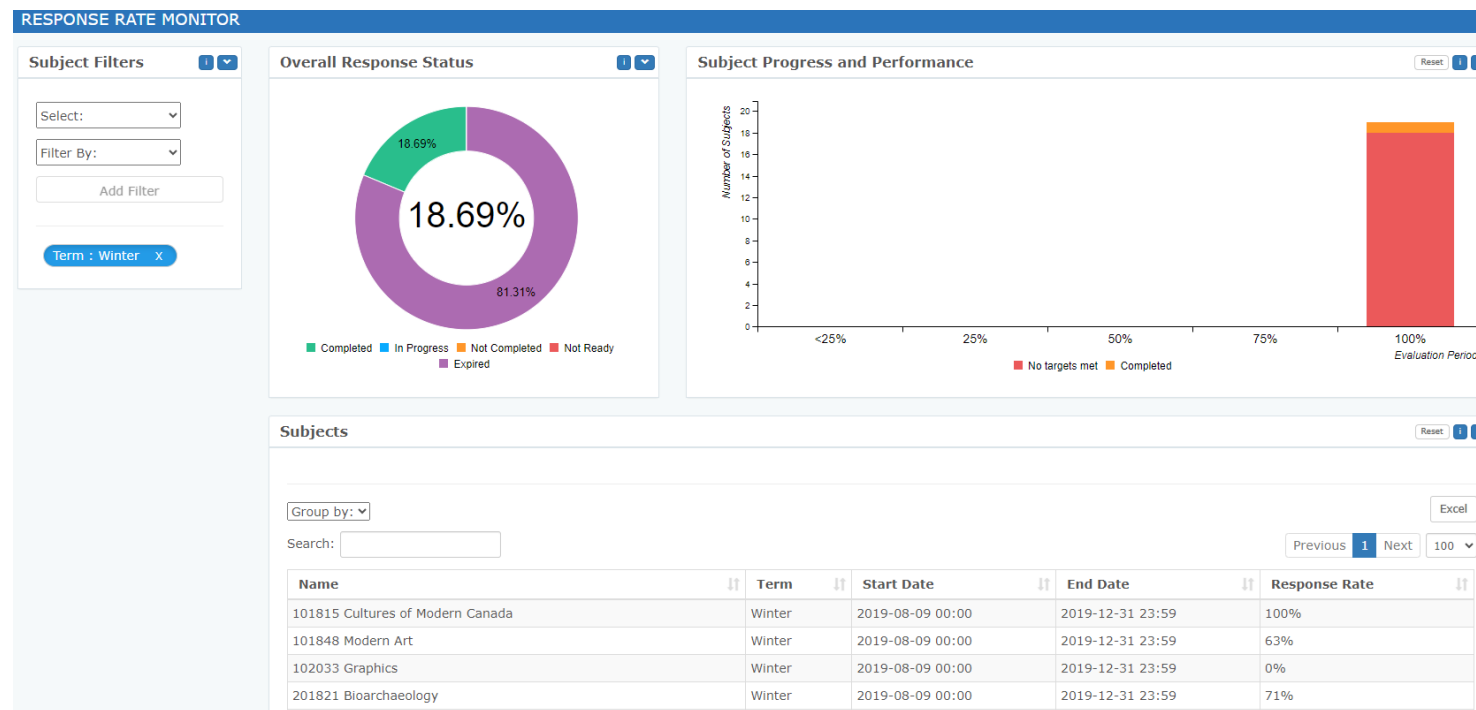
Can response rates be tracked automatically for current and previous semesters?

Answer

- Response Rate Monitor
- Subject View
- Export Response Rate Report
 - Feedback View
- Blue Dashboard (add-on)

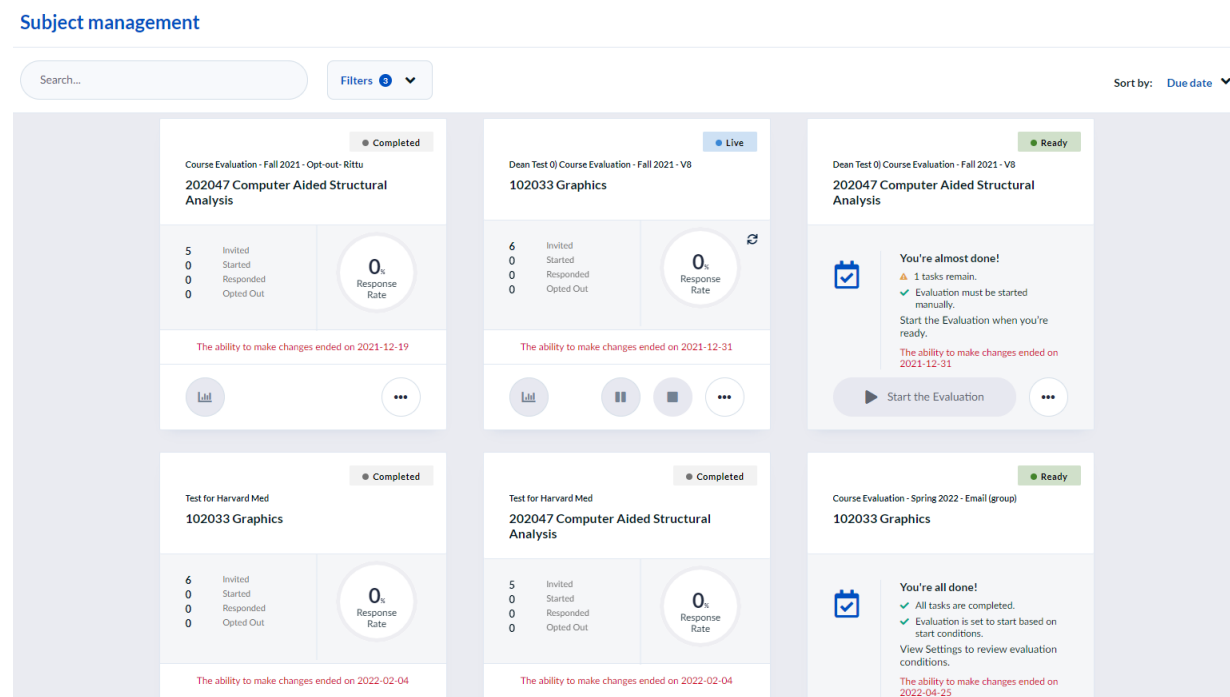
Response Rate Monitor

- Near real-time (~10 mins)
- Can monitor more than one project (ex. for term comparison)
- Under Subjects:
 - Can group by
 - Can export list to Excel



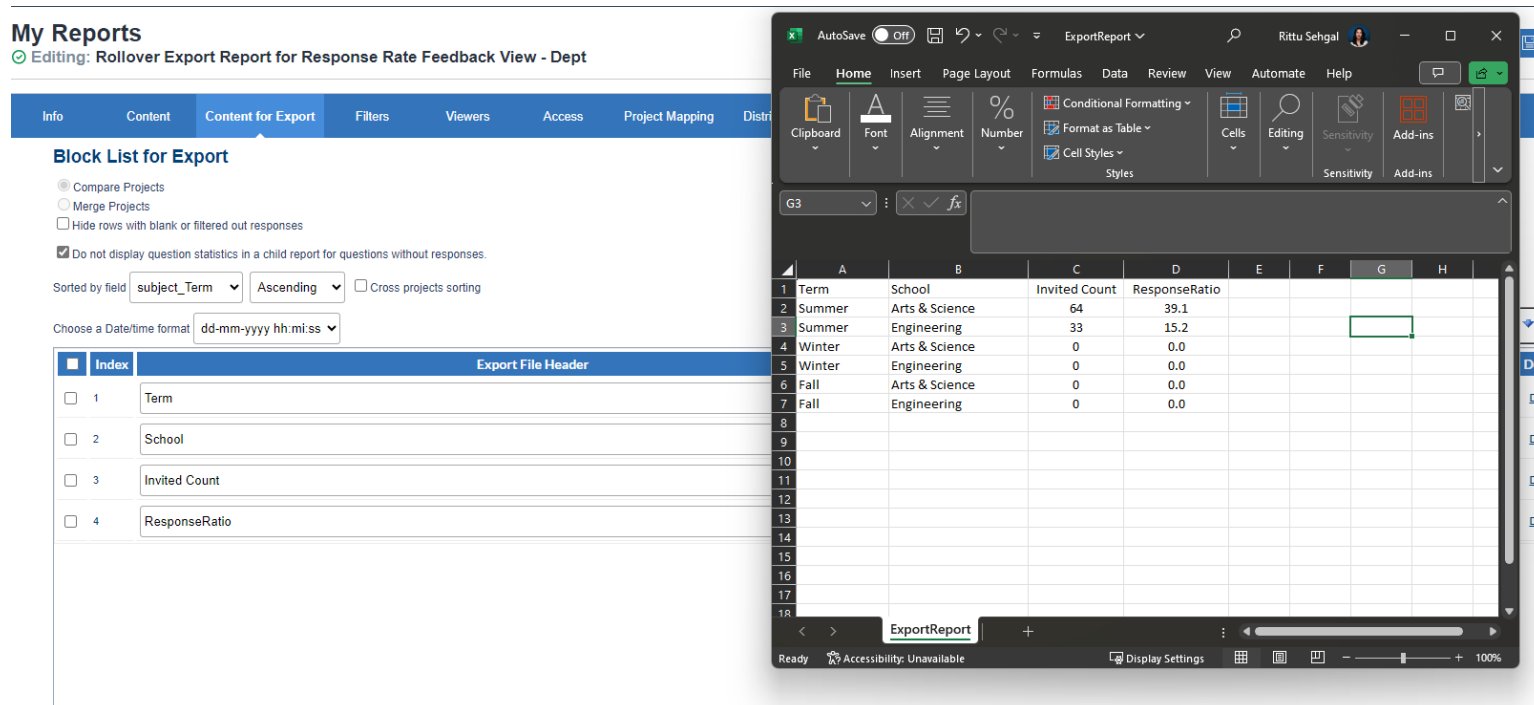
Subject Management

- Near real-time response rate by subject (or by refresh)
- Multi-project view lists all subjects from projects that are not archived



Export Report

- Auto-update enabled: syncs overnight (wake-up time)
- Add project mapping to include multiple terms (projects)
- Can share report with Viewers (will need to re-access report for updated data)



My Reports
 Editing: Rollover Export Report for Response Rate Feedback View - Dept

Info Content **Content for Export** Filters Viewers Access Project Mapping Distribution

Block List for Export

- ☒ Compare Projects
- ☐ Merge Projects
- ☐ Hide rows with blank or filtered out responses
- ☒ Do not display question statistics in a child report for questions without responses.

Sorted by field: **subject_Term** Ascending ☐ Cross projects sorting

Choose a Date/time format: dd-mm-yyyy hh:mi:ss

Index	Export File Header
<input type="checkbox"/> 1	Term
<input type="checkbox"/> 2	School
<input type="checkbox"/> 3	Invited Count
<input type="checkbox"/> 4	ResponseRatio

	A	B	C	D	E	F	G	H
1	Term	School	Invited Count	ResponseRatio				
2	Summer	Arts & Science	64	39.1				
3	Summer	Engineering	33	15.2				
4	Winter	Arts & Science	0	0.0				
5	Winter	Engineering	0	0.0				
6	Fall	Arts & Science	0	0.0				
7	Fall	Engineering	0	0.0				
8								
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Feedback View BPI Block

- Link your export report to a Feedback Block
- BPI sync following Blue sync (overnight updates)
- Share or embed Block link (privilege-based control requires workaround)
- Add a drill-down datasource to include a demographic

[-] CSM-Feedback View

Course	Dept	First Name	Last Name	Invited	Responded	Response Ratio
101815 Cultures of Modern Canada	Anthropology	Annette	Fong	6	5	<div><div></div></div>
101815 Cultures of Modern Canada	Anthropology	Kent	Knightley	6	5	<div><div></div></div>
101815 Cultures of Modern Canada	Anthropology	Mandy	Bush	6	5	<div><div></div></div>
101815 Cultures of Modern Canada	Anthropology	Philippe	Holly	6	5	<div><div></div></div>
101815 Cultures of Modern Canada	Anthropology	Phil	King	6	5	<div><div></div></div>
101815 Cultures of Modern Canada	Anthropology	Patrick	Marr	6	5	<div><div></div></div>
101815 Cultures of Modern Canada	Anthropology	Susan	Crosby	6	5	<div><div></div></div>
101815 Cultures of Modern Canada	Anthropology	Vanessa	Segal	6	5	<div><div></div></div>
201821 Bioarchaeology	Anthropology	Annette	Fong	5	4	<div><div></div></div>
201821 Bioarchaeology	Anthropology	Eva	Kergreen	5	4	<div><div></div></div>
201821 Bioarchaeology	Anthropology	Kent	Knightley	5	4	<div><div></div></div>

Nothing to show for the moment

[-] Schools for Feedback View

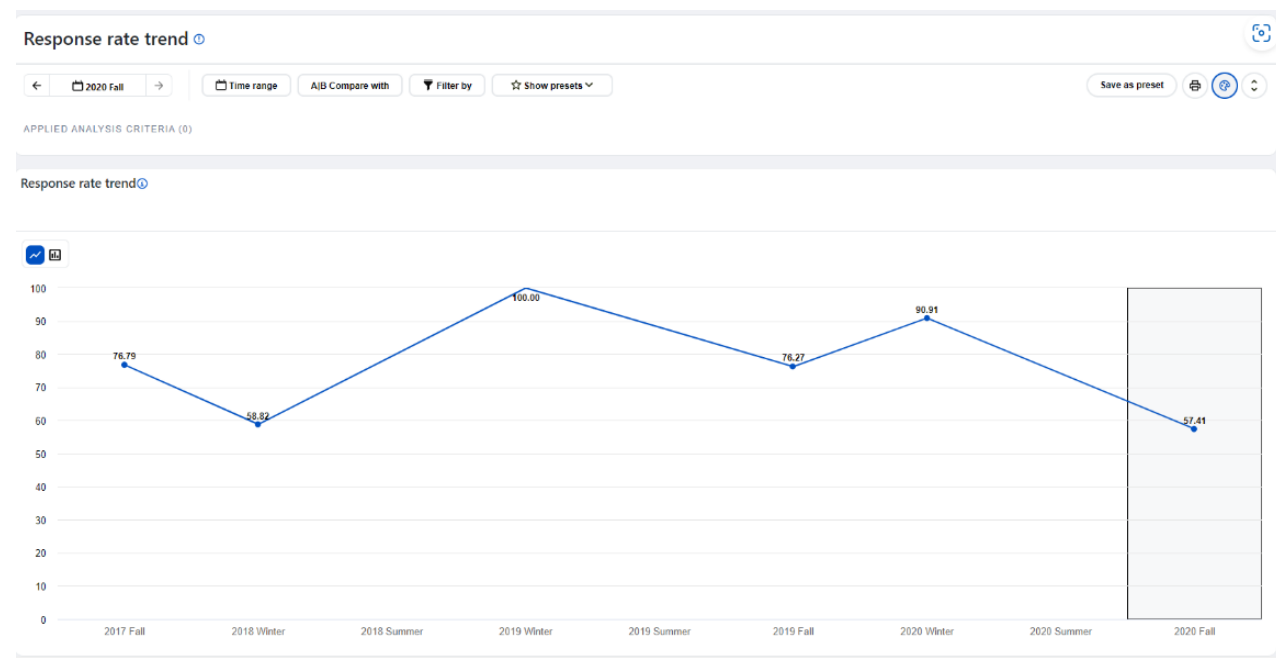
School
Arts & Science
Engineering

[-] Export Report Response Rate School Term

Term	School	Invited Count	ResponseRatio
Summer	Engineering	33	15
Winter	Engineering	0	0
Fall	Engineering	0	0

Blue Dashboard

- Add on module for trend analysis (individual + aggregate)
- Response rate added (available as of version 3.3)
- Projects/data must be added by admin (not real-time)



Resources:

- [Set up the response rate monitor](#)
- [Subject management \(SM\) task](#)
- [Create a public response rate export report with automatic update](#)
- [Configure a Feedback Block in BPI](#)
- [Guide to the Blue Dashboard](#)
- [Participants user guides](#)
 - Each section has the many ways one can monitor their response rates
- [\(Webinar\) Response Rate Optimization](#)



Task dates in notifications

Question

How can I include the task end date in the task notification?

Answer

Will depend on your project setup!

Options include:

- Hard-coded date
- Custom field mapping
- Blue default mapping

Task end date options to include in notifications

Option	Task end date	Useful for:	Not recommended if:
Hard-coded	Example: Dec 12, 2023	<ul style="list-style-type: none"> When all tasks have the same fixed date 	<ul style="list-style-type: none"> Frequent Date changes <i>Must manually update future notifications</i>
Blue default mapping	\$TASK_END_DATE <ul style="list-style-type: none"> Displays the earliest expiration date out of all available tasks that the user has been assigned 	<ul style="list-style-type: none"> To alert users which task requires priority Subject line: “Don’t miss the opportunity, do it by...” 	<ul style="list-style-type: none"> Listing all tasks (in a HTML table for example) who have different end dates
Blue default mapping	\$TASK_LIST_ACTIVE (OR \$TASK_LIST_ALL) <ul style="list-style-type: none"> Display all active and completed tasks (and expired when using task_list_all) 	<ul style="list-style-type: none"> Anticipated date changes either via SM and/or datasource/sync updates 	<ul style="list-style-type: none"> Using custom formatting (the list is not formattable)
Custom field mapping <i>Create your own mapping to any field in a datasource</i>	Example: Courses has a field called “SurveyEnd” which indicates the date the survey closes – \$\$SURVEYEND	<ul style="list-style-type: none"> Schedule uses that field to schedule the task end date (relative) & field syncing enabled (future notifications will pick up new date) The Field contains the date the task will end 	<ul style="list-style-type: none"> SM tasks are enabled allowing date changes (notifications will not reflect new dates) Schedule uses a formula with the field i.e. task end = 7 days after course end

Task date considerations

- Linking to the Blue task list – if task updated, changes will be reflected
 - \$(text)\$
 - Project specific
- Using BPI and/or Connector (add-on) to send tasks to LMS
 - With sync on, tasks & dates will be updated
 - Can includes all active tasks across projects
- DIG (Add-on)
 - DIG can be setup to allow users to change the dates in the Blue datasource

Resources:

- [Default piping/field mapping symbols](#)
- [Advanced field mapping symbols](#)
- [Create custom field mapping symbols](#)
- [Configure project task messages](#)
- [Guide to the Data Integrity Gateway \(DIG\)](#)
- [Guide to the Blue Portal Integrator \(BPI\)](#)
- [Guide to Blue Connector](#)



Centralized email with Blue 8 schedules

Question

- How does centralized email work with multiple schedules (and templates) in both the child and parent projects?

Answer

- Parent project in charge of sending notifications
- For child tasks, it will pick up the last used template from parent

Centralized email considerations

- Useful if it's necessary to run multiple projects in the same timeframe and want to :
 - Use the same email templates
 - Reduce the number of notifications a rater may get
- Remember:
 - Child project notifications must be disabled to avoid duplicate emails
 - \$TASK_LIST default piping will include tasks from both parent and child projects
 - Blue task list will combine tasks from both parent and child projects
- With Blue 8 scheduling, there may be an opportunity to combine projects (and thus no longer requiring centralized email option?)

Resources:

- [Configure centralized email](#)
- [Configure project task schedules](#)
- [\(Webinar\) Scheduling different course evaluation periods and emails in one project](#)



Q & A

