

Ask the Expert

Sep 24-25, 2024

Krimo Bouaou & Dean
Cooloorgeorgen



Agenda

- Blue 9.2 and 8.1.2 Patch fixes (build 8.14)
- Submitted Questions

Release notes + patches

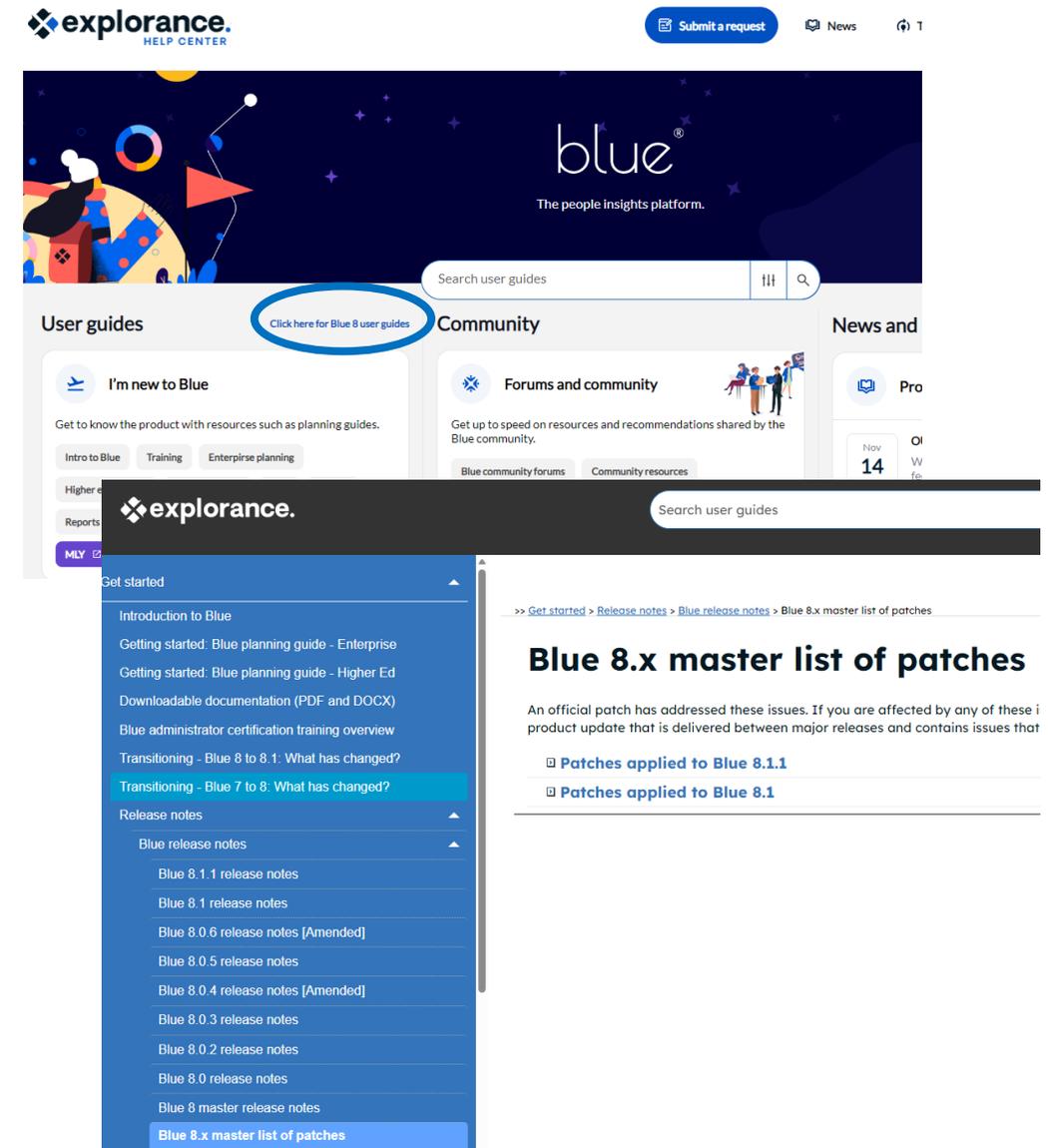
- [Blue 8 Release notes](#)
- [Blue 9 Release notes](#)

- Features
- Known Issues
- Compatibility

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

- [Blue 8 Master list of patches](#)
- [Blue 9 Master list of patches](#)

- Fixed issues with build number for patch



Patch release highlights

Included in Blue 9.2 and Blue 8.1.2 (Build 8.14.4)

Task list page

- The secondary subject field mapping symbols [C\$FN] and [C\$LN], will now display properly for the Question personalization tasks.

Configure the task list page

Task list page title
 en *

Task list page message
 en *

Displayed task name
 en *

Tasks

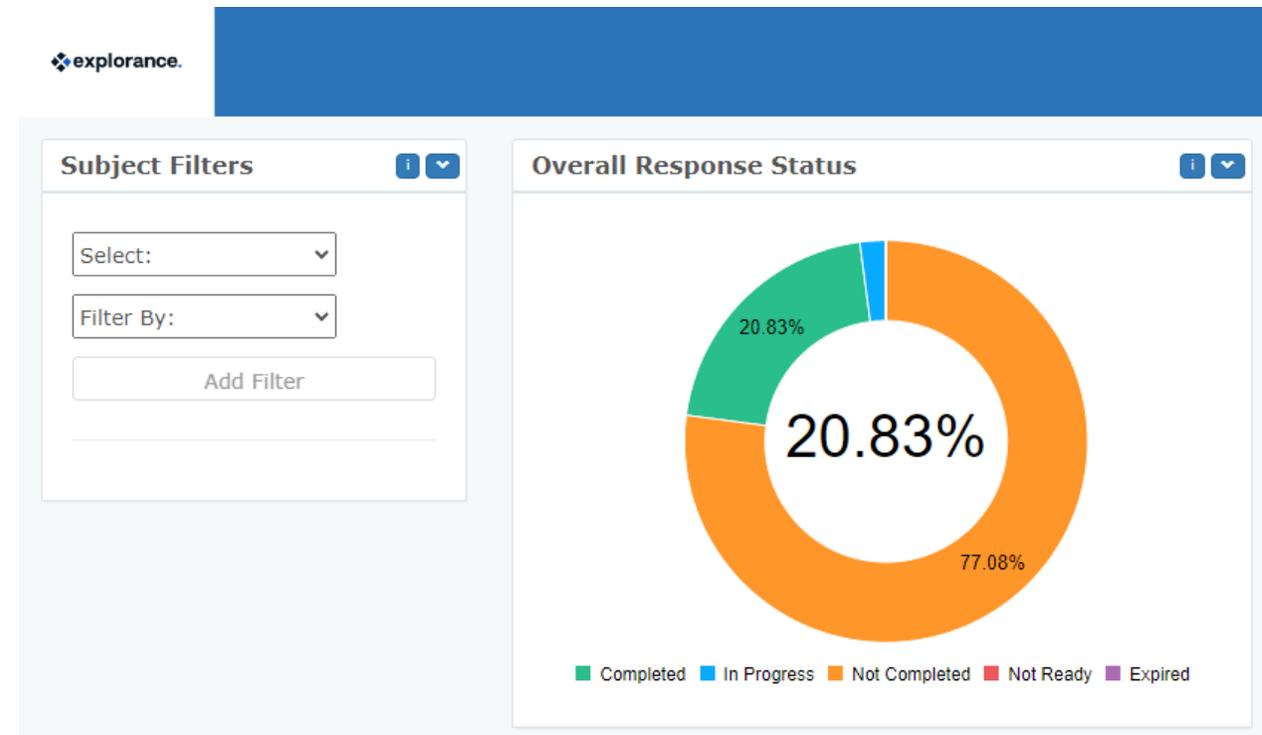
10 of 16 (filtered from 107 tasks)

 101848 Modern Art Question Personalization for **Benard Baker**
 Tue, Dec 31, 2024 10:09 AM

Patch release highlights

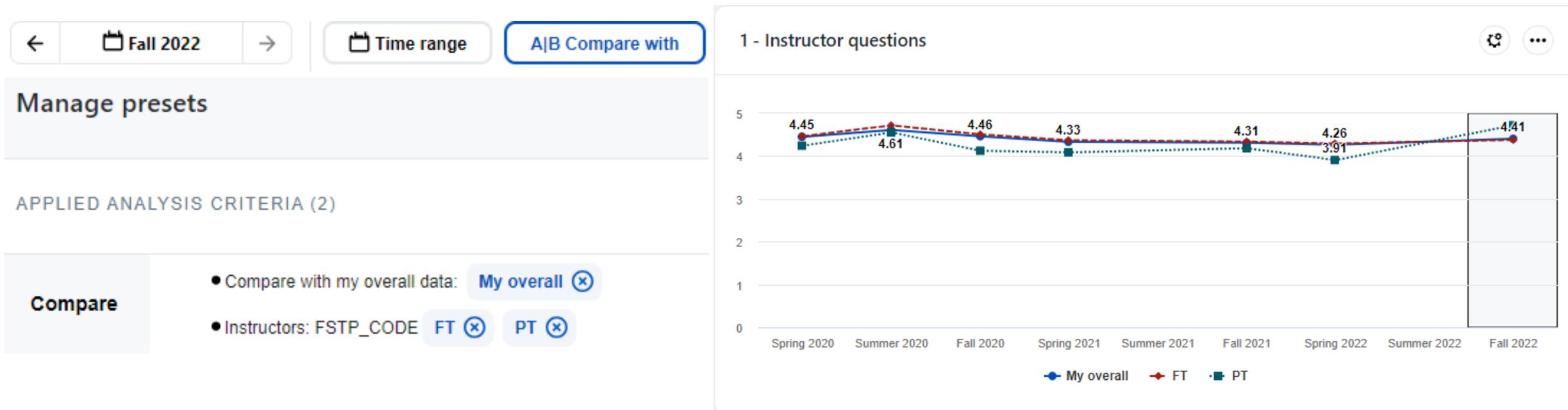
Included in Blue 9.2.2 - Blue Home

- The Response rate monitor widget will now display on Blue home for administrators and users who have access to this view.



Patch release highlights cont'd

- Blue Dashboard
 - Improved the presets by ensuring that comparisons for overall scores are now being saved correctly.



Submitted Questions



Questions covered

- Secondary Subject Selection
- Handling Course Schedule Outliers
- Aggregate and Trend Course Data



Secondary Subject Selection

Question

Can we allow students to select a single instructor to provide feedback when using the Multi Secondary definitions? We only want them to select one.

Answer

Using the Secondary subject selection option in your Questionnaire, allows the student to choose among all the instructors assigned the course. You can go further by leveraging relational demographics and have students choose instructors by their specific teaching role.

Secondary Subject Selection – Key things to know

- Supports only multiple secondary project definitions.
- There can only be one of these sections per questionnaire and it must appear before any secondary subject questions.
- A page break must follow the Section Title block for the branching to have an impact.

Select the teachers, tutors, and teaching assistants you worked with this term.

Please select Instructor

<input type="checkbox"/>  Annette Fong	<input type="checkbox"/>  Kent Knightley
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Please select TA
(Select Min 1)

<input type="checkbox"/>  Mandy Bush	<input type="checkbox"/>  Philippe Holly
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Secondary Subject Selection – Key things to know

- A demographic field that contains the grouping information can be included in the relation datasource groups of secondary subjects, i.e. (Instructor, TA, Lab Tech, etc).
- The item criteria must be an exact match to the data in the datasource.
- If there are not enough subjects in a group to meet the minimum selection requirement, then that requirement is ignored.
- All secondary subjects not specified in a group will continue to be displayed as part of a preselected group of secondary subjects.

Secondary Subject Grouping

All secondary subjects are selectable by default. Add groupings to specify which subsets are available for selection, once groupings are created, all other secondary subjects will be preselected.

Group secondary subjects where the relationship demographic field TeachingRole 1 is equal to Dean 2 Add 3

Item	Min	Max	
TeachingRole is 'Instructor'	1	3	Remove
TeachingRole is 'TA'	1 4	5	Remove

Hide pre-selected secondary subjects (section will be hidden when only pre-selected secondary subjects are available).

Note: If there are not enough secondary subjects to meet the minimum threshold, the minimum threshold will be ignored.

Secondary subject selection – Common Scenario Setup

With Course Evaluations (using Multiple definition)

- Ensure your Primary/Secondary relationship datasource file has a teaching role demographic used to group the secondary subjects.
- Enter a Min and Max value to enforce the number of subject in that group that the student can select.

Optional

- Include an image that will be displayed with each subject. The image URL must end with (.jpg, .jpe, .jpeg, .tiff, .tif, .bmp, .gif.).
- Hide pre-selected secondary subject.

Resources:

- [Section title question blocks | Explorance online help](#)
- [Set up groups to be evaluated based on their roles \(secondary subject selection filter\) | Explorance online help](#)



Handling Course Schedule Outliers

Question

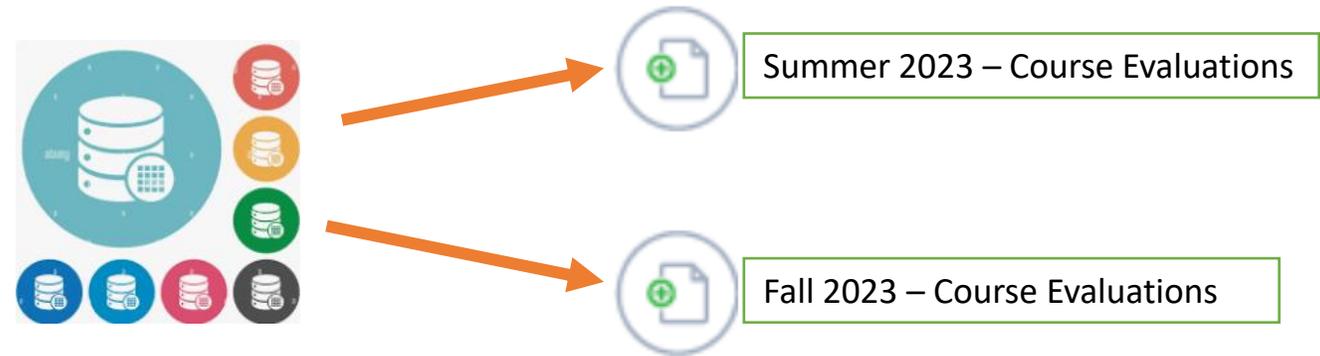
How do I set the start, reminders, & end dates for courses that have start/end outside the normal term/s?

Answer(s)

- Consider the start and end date of your project to include all courses for that term ensuring that data remains in your datasources for the duration of the project.
- Leverage course demographic field such as Eval Start/End Dates, using a relative dates as part of your schedule.
- Build multiple schedules within the Fillout tasks using course demographics
- For "1 off" courses, manually change the task start and end date using Task Management.

Filters - Controlling what is in the project

- 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

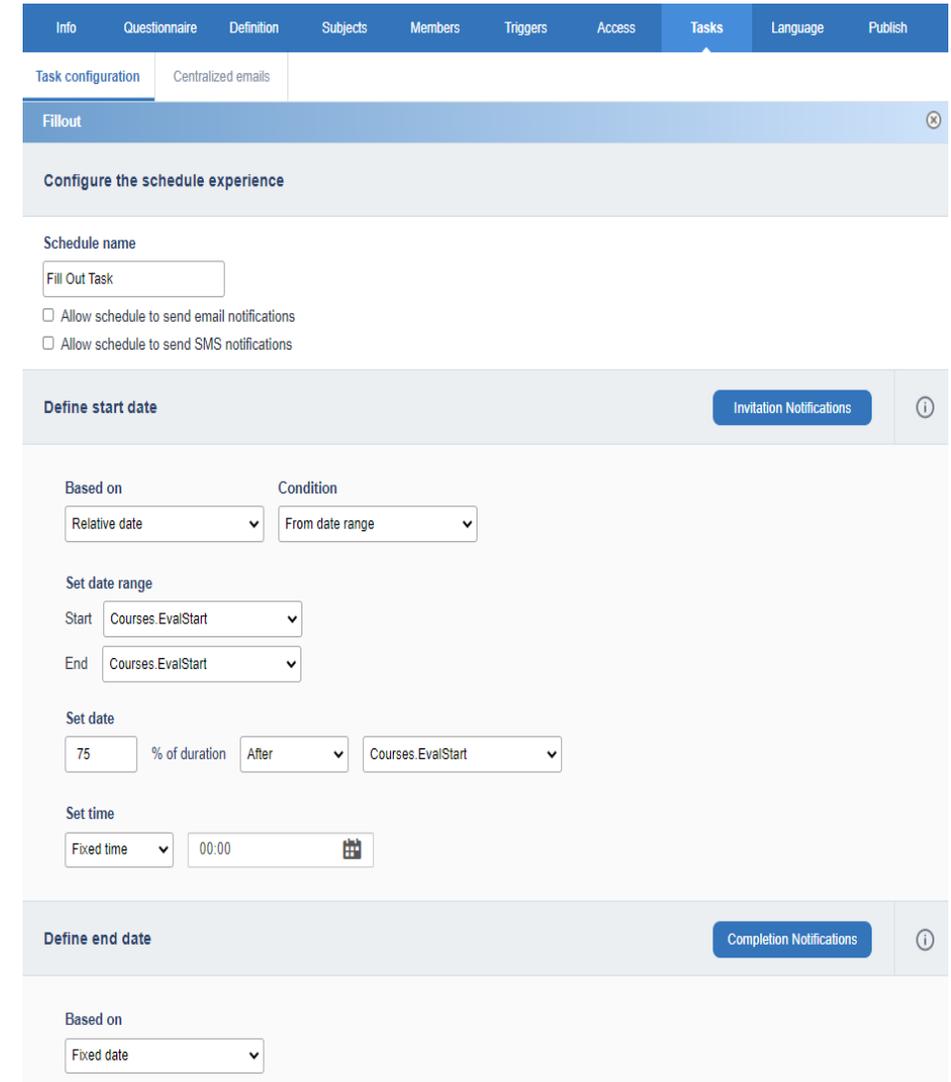
Results: 1 - 3 of 3 Item(s)

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

Evaluation Schedules– Key things to know

Schedules control the distribution and execution of each task. Each task is governed by one or more schedules and each schedule is responsible for determining when a task starts, when a task ends, and how a user is notified that they have a task assigned to them.

- Schedules can be based on:
 - **Fixed date** - the simplest kind of date, it is an actual date and time on the calendar.
 - **Relative date** - this date is dependent on a date that is specific to this task or subject and there are a number of relative dates that allow for highly flexible schedules.



The screenshot shows the 'Task configuration' page for a 'Fillout' task. The interface includes a navigation bar with tabs for 'Info', 'Questionnaire', 'Definition', 'Subjects', 'Members', 'Triggers', 'Access', 'Tasks', 'Language', and 'Publish'. The 'Tasks' tab is active, and the 'Fillout' task is selected. Below the navigation bar, there are sections for 'Configure the schedule experience' and 'Define start date'. The 'Define start date' section includes options for 'Based on' (Relative date) and 'Condition' (From date range). It also has fields for 'Set date range' (Start and End) and 'Set date' (75% of duration After Courses.EvalStart). The 'Set time' section is set to 'Fixed time' at '00:00'. There are also buttons for 'Invitation Notifications' and 'Completion Notifications'.

Evaluation Schedules– Key things to know cont'd

- Schedules conditions can be based off the demographic data related to the subject being evaluated or schedule conditions can be based off date ranges.
 - Subject field conditions - Field in the datasource is selected and then an operator is chosen and finally criteria is entered, and the subject is applied.
 - Date range conditions - Date range conditions allow the administrator to set schedules that can vary depending on the period of length.
- Schedule priority determines which schedule is applied to the task first. The last schedule should be a general "catch all" for courses that do not fit the criteria for any higher priority schedules.

Evaluation Schedules – Common Scenario

With Course Evaluations (using Multiple definition)

- Fixed dates should only be used when all courses have the same evaluation period for that schedule within the project.
- Relative dates can be used when a date demographic field exist within the datasource.
- Best Practice - Reminder cadences should leverage the "From Start date/From End date" or "Percentage of date ranges" for the tasks reminder to determine appropriate timing.
- Use Task Management to manage by exception for courses that have unique timing.

Resources:

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



Aggregate and Trend Course Data

Question

What are different ways of aggregating course data across term and academic year?

Answer

- The Group by report type option allows grouping response data by any field in your datasource and will create child reports for each different value that is contained in that field.

Project ran by term/semester, the Project mapping option may allow combining data over an academic year to merge or compare results.

- The Blue Dashboard module is a great supplement to Blue Reporting that allows both instructors and organizational leader to view aggregated data over time.

Group By Reports – Key things to know

- A Group by report allows you to aggregate data collected on your survey based on the group level you select.
- Reports may be created using any group options available in your course or user data, or by using instructor information to create an aggregate report for instructors who teach multiple courses and would like to have their results consolidated in a single report.
- Typical use cases
 - A group by report could provide the leader of a school/organization with the aggregate results of course performance for each department.
 - Provide instructors with an aggregate report for all of the courses they teach.

Teacher Full Term Report for Annette Fong



Report prepared by Krimo Bouaou
Created Wednesday, September 18, 2024



Course Audience: 27
Responses Received: 15
Response Ratio: 55.6%
Opted out: 1

Downloads

 Download PDF	
 Download CSV	

Executive Summary

In Summary:



Group By Reports Project Mapping – Key things to know con't

- In group by reports, data is only included for subjects that exist in the master project. If a subject exists only in the auxiliary project, it's data will not be a part of the report, but also the auxiliary projects must have demographic data that matches the demographic data in the master project to be included.
- Only questions of the same type can be mapped.
- Supported question types include single selection, single selection table, multiple selection, multiple selection table, and comments.
- Filters cannot be used with project mapping except when mapping survey projects.
- Only questions with the same scale (number of options and score values) can be mapped.
- Spreadsheet and breakdown section blocks are not supported in project mapping.

Project List

Category	Subcategory	Project Title	Project Alias	Base Project	From	To	Details
<input type="checkbox"/> 01 Main Content	01 Main Content	BOC - Course Evaluation Summer 2023	Summer 2023	Yes	Tuesday, July 2, 2019	Sunday, December 31, 2023	Details
<input type="checkbox"/> 01 Main Content	01 Main Content	14) Course Evaluation - Winter 2023 (With Faculty Feedback)	Winter 2023	No	Friday, August 9, 2019	Thursday, December 31, 2020	Details

Mapping

Master Project BOC - Course Evaluation Summer 2023

Index	Master Project Question	Status (Winter 2023)	Map Manually
1	Questions evaluating the Course	Mapped	Map Manually
2	In this course I learned how to assess my own work and improve.	Mapped	Map Manually
3	The course incorporated various feedback from different perspectives in class.	Mapped	Map Manually
4	The goals of this course were met.	Mapped	Map Manually
5	The classroom presentation is effective (e.g., organization, format, structure, etc.)	Mapped	Map Manually
6	In this course I learned how to assess my own work and improve.	Mapped	Map Manually
7	The course was well planned, organized and followed a coherent pattern.	Mapped	Map Manually
8	MEQ: Different assignments and activities seemed well coordinated, so I felt they built on each other as I did them	Mapped	Map Manually
9	MEQ: Course prerequisites prepared me to successfully learn the concepts and/or skills taught in this course.	Mapped	Map Manually
10	MEQ: The examinations tested my achievement of course outcomes.	Mapped	Map Manually
11	Course lectures improved my understanding of the course material.	Mapped	Map Manually
12	Classroom discussions improved my understanding of the course material.	Mapped	Map Manually
13	Course assignments, projects, tests, and/or papers highlighted important concepts of the course.	Mapped	Map Manually
14	My grades accurately represent my performance in the course.	Mapped	Map Manually
15	The assignments were clearly written.	Mapped	Map Manually
16	The textbooks reflected the objectives of the course.	Mapped	Map Manually
17	The course provided opportunity to develop my interpersonal/communication skills (i.e. sharing ideas with others).	Mapped	Map Manually
18	The course provided opportunity for me to develop my oral presentation skills.	Mapped	Map Manually
19	The course provided instruction on how to create an oral presentation.	Mapped	Map Manually
20	The course provided opportunity to conduct quantitative research.	Mapped	Map Manually
21	The course provided instruction on how to interpret quantitative information (e.g. statistics, statistical analyses).	Mapped	Map Manually

Mapping

Master Project BOC - Course Evaluation Summer 2023

Select Auxiliary Project

Auxiliary Project Group Name	Auxiliary Project Group	Master Project Group Name
Students	<input type="text" value="Students"/> (en)	<input type="text" value="Students"/> ▼
Faculty Feedback	<input type="text" value="Faculty Feedback"/> (en)	<input type="text" value=""/> ▼

Map by Caption All projects

Group by Report and Trend – Common Scenario Setup

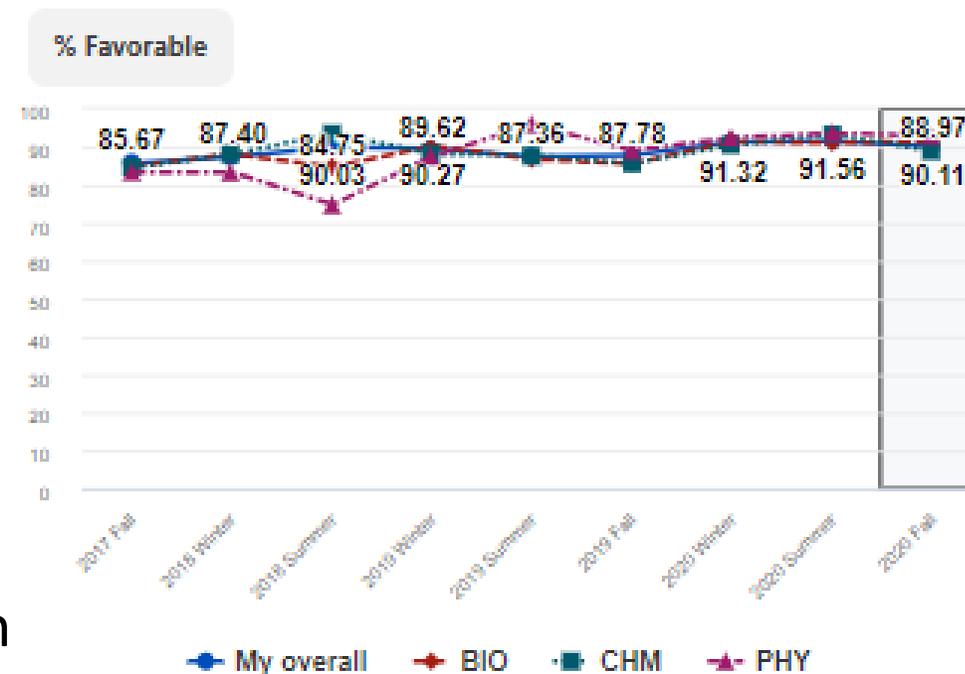
- Find a common demographic field used to aggregate all the data collected against that Group
 - Course Example: Group by Dept, College/School, etc.
 - Instructor Example: Group by unique name, email, ID, etc.
- Determine what projects should be included to show data collected over time.
- Identify which report blocks are needed to represent the data.
 - Make sure the report blocks include all projects that are mapped.

Note: The spreadsheet block is not supported in reports that use project mapping.

Blue Dashboard – Key things to know

- Blue Dashboard contains two sub-modules:
 - The individual dashboard - responses displayed in this dashboard belong to this individual directly.
 - The aggregate dashboard - analyzes results at the organizational level or per unit level.
- The aggregate and individual dashboards are created together and share most of their settings with each other.
- The aggregate dashboard includes a summary view utilizing a list of widgets to highlight key information and provide a summary of events.

7. Instructor questions



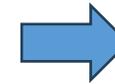
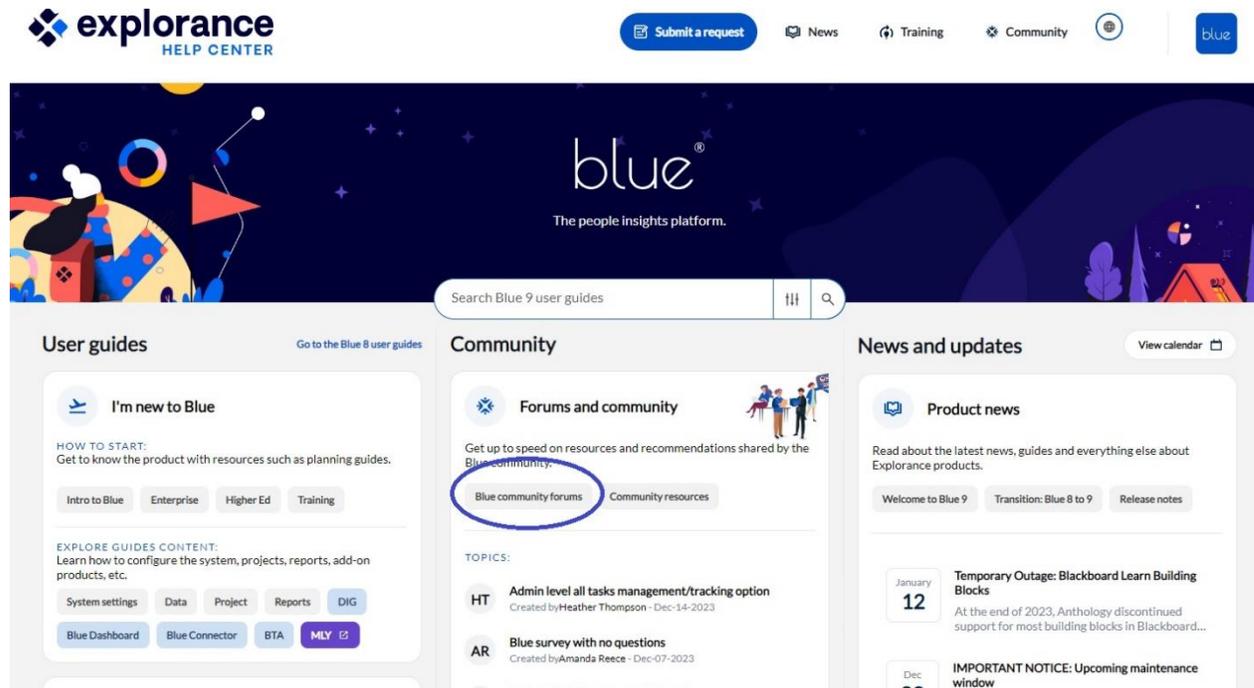
Best practice - Include questions identifiers within your project questionnaire to easily map questions across multiple projects on the Dashboard.

Resources:

- [Group by reports | Explorance online help](#)
- [Breakdown by field | Explorance online help](#)
- [Add a section type report block | Explorance online help](#)
- [Map projects together for reporting | Explorance online help](#)
- [Blue Dashboard \(Overview\)](#)



Community resources



[\[Learning Webinar - Questions, Discussions, & Post-Webinar Follow-up\] September 25: Ask an Expert! About Response Rates and Project/Report Set-ups in Blue](#)