

# Boost Response Rates by Automating Course Component Selection for Students in Course Evaluations with 3-Level Relationships

February 18-19, 2025

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# 3-Level Relationship activities

## Agenda

### 3-Level Relationship in Projects

- How to setup a project

### 3-Level Relationship Reporting

- Basic reporting

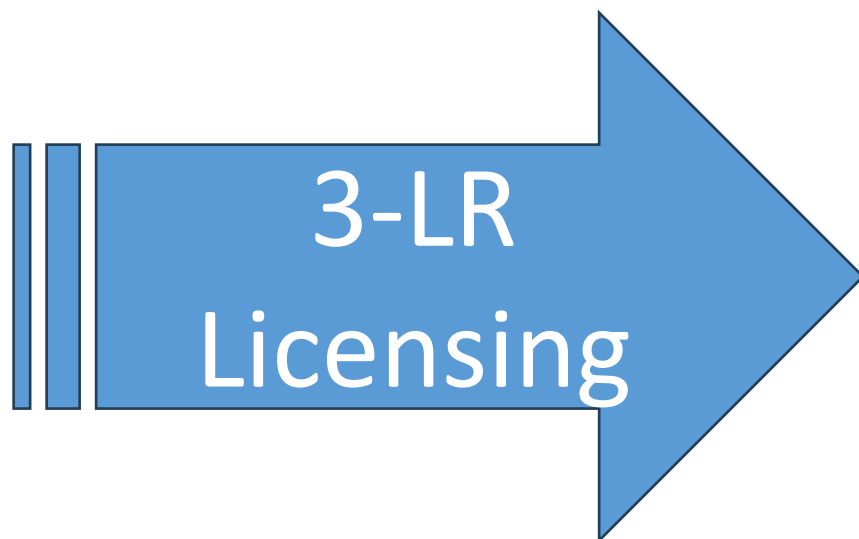
### 3-Level Relationship and Dashboard

- Attention should be paid to the interpretation of the enrollment numbers





# 3-Level Relationship Licensing



Prior to Blue 9.3

The 2 options have to be selected

Auto Calculate	No
Task Time	Yes
Rater-Secondary subject association	Yes
Trend Report Block	No
SMS	Yes
3-Level Relationships	Yes
Fillout API	No
OneDrive Connector	No
Certificate	Yes
Self-enrollment & QR code	Yes
System Languages	English, Español, Franç

Blue 9.3

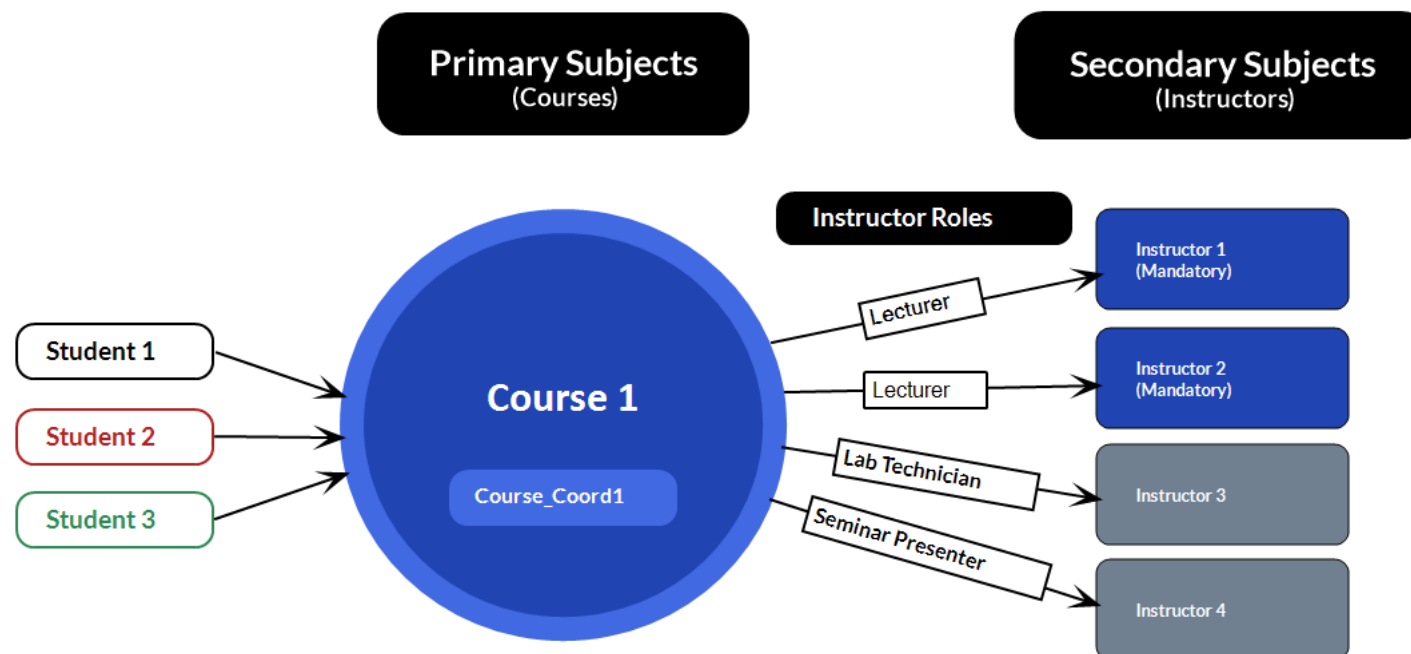
3-Level Relationship productized.  
No more licensing needed



# A Course Evaluation Scenario

Explorance University evaluates:

- Course, Lecturer, Tutors, Labs, (and additional components of the course where applicable)





# A course evaluation Scenario - Continued

Using the Secondary Subject Selection and relational demographics (Teaching Role), we can delegate to students to choose their instructors

- The tutorials are delivered in separate sections and each Tutor is responsible for their own section
- Students only attend one tutorial
- PROBLEM: Students were often picking the wrong tutor!


**Instructor Items**


---

**Please select your Teaching Team**


---


**Preselected Instructor**


☒  Mandy Bush


☒  Philippe Holly

**Please select Lab**  
(Select Max 1)


☐  Phil King


☐  Patrick Marr

☐  Susan Crosby

☐  Vanessa Segal

**Please select TA**  
(Select Max 2)

☐  Annette Fong

☐  Kent Knightley



# Multiple options to consider ...

- Make the subject ID a concatenation of course-tutorial and assign tutors and students accordingly

- This will create multiple forms for the Instructor

OR

- Create tutorials as their own subject ID and assign tutors and students accordingly

- This will create multiple forms for the student for the same course

OR

- Use 3-level relationship to filter the secondary subject

- One form, requires relationship between student and secondary subject

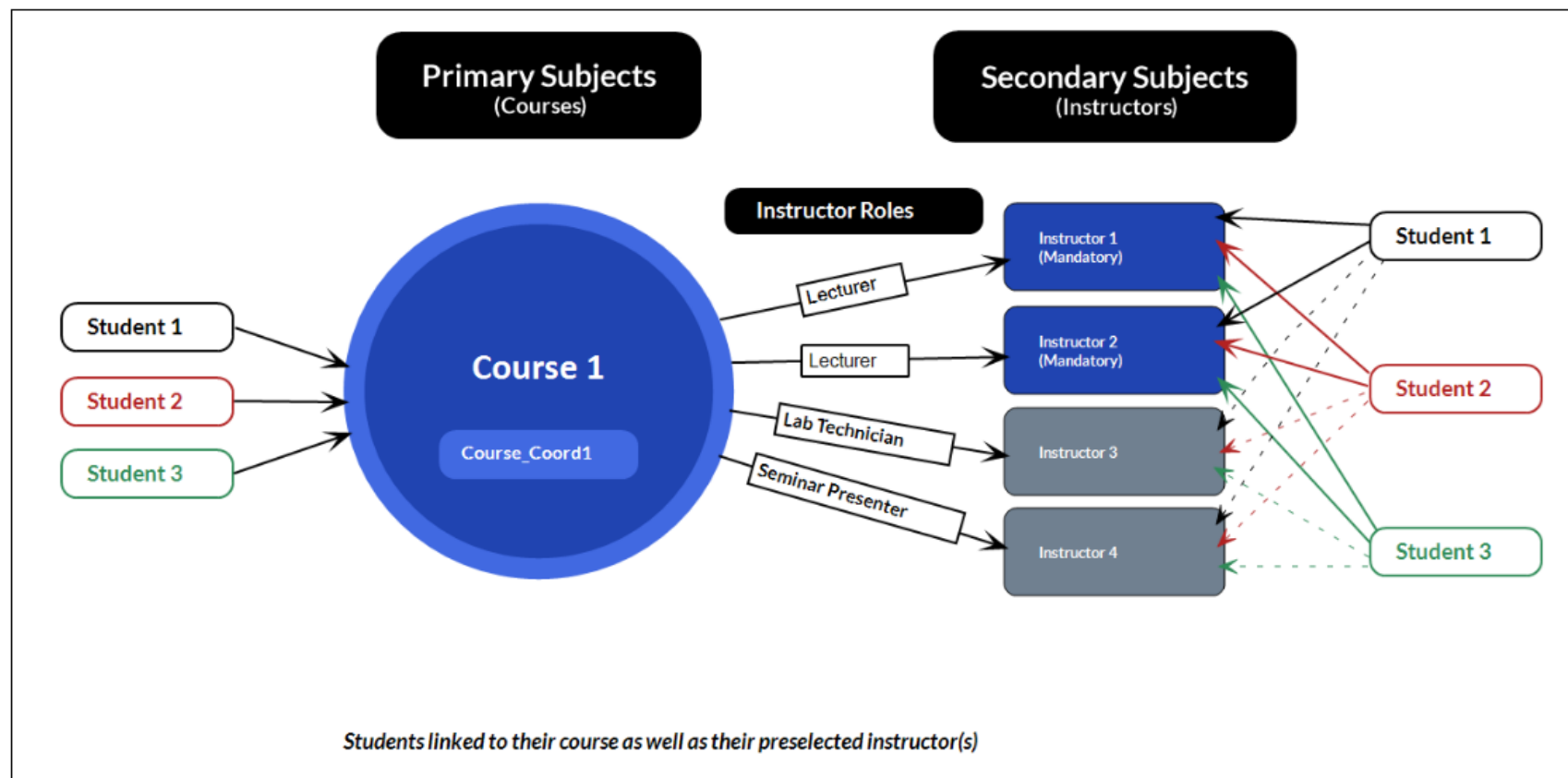






# 3-level relationship as the solution...

Data setup should look like this:





# 3-level relationship as the solution...

The Secondary Subject Selection goes from this

**Instructor Items**

Please select your Teaching Team

Preselected Instructor

☒ Mandy Bush ☒ Philippe Holly

Please select Lab (Select Max 1)

☐ Phil King ☐ Patrick Marr ☐ Susan Crosby ☐ Vanessa Segal

Please select TA (Select Max 2)

☐ Annette Fong ☐ Kent Knightley

To this: where the selections are filtered by student according to the student-secondary subject relationship

Please select your Teaching Assistant

Preselected Instructor

☒ Mandy Bush ☒ Philippe Holly

Please select Lab (Select Max 1)

☐ Vanessa Segal

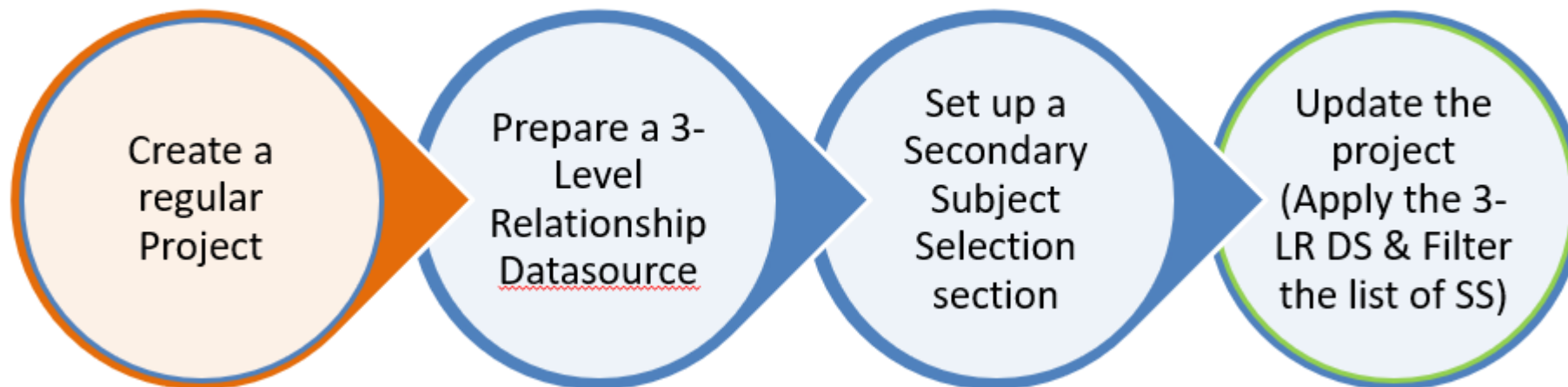
Please select TA (Select Max 2)

☐ Annette Fong ☐ Kent Knightley

Only 1 Lab assistant to select



# 3-level relationship : How To





# 3-level relationship New Datasource

	A	B	C
1	Teacher	Student	Teaching Role
2	mbush();101815-8504-Summer	70088	Instructor
3	mbush();101815-8504-Summer	90493	Instructor
4	mbush();101815-8504-Summer	90884	Instructor
5	mbush();101815-8504-Summer	100830	Instructor
6	pholly();101815-8504-Summer	70088	Instructor
7	pholly();101815-8504-Summer	90493	Instructor
8	pholly();101815-8504-Summer	90884	Instructor
9	pholly();101815-8504-Summer	100830	Instructor
10	afong();101815-8504-Summer	70088	TA
11	afong();101815-8504-Summer	90493	TA
12	afong();101815-8504-Summer	90884	TA
13	afong();101815-8504-Summer	100830	TA
14	kknightley();101815-8504-Summer	70088	TA
15	kknightley();101815-8504-Summer	90493	TA
16	kknightley();101815-8504-Summer	90884	TA
17	kknightley();101815-8504-Summer	100830	TA
18	pking();101815-8504-Summer	70088	Lab
19	pmarr();101815-8504-Summer	90493	Lab
20	scrosby();101815-8504-Summer	90884	Lab
21	vsegal();101815-8504-Summer	100830	Lab
22			

	A	B	C
1	Teacher	Student	Teaching Role
2	mbush();101815-8504-Summer	70088	Instructor
3	mbush();101815-8504-Summer	90493	Instructor
4	mbush();101815-8504-Summer	90884	Instructor
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8	pholly();101815-8504-Summer	90884	Instructor
9	pholly();101815-8504-Summer	100830	Instructor

## Datasource

Editing: KB-3-Level Relation

Info

Data

Import/Export

Display Settings

Importing

Schedule

Import History

Email Notifications

Datasources

Source

BEC-Staff

★

Teacher

Target

BEC-Students

★

Student

System Fields

Source ID

Teacher

★

Target ID

Student

★

Our setup:

- 6 students are enrolled in the course, but 4 only have been added to the 3-Level Relationship file







# 3-level relationship – General

- **CURRENT:** limited feature, license controlled
  - **With 9.3:** part of license
- **CURRENT:** requires special user-user (student-secondary subject) relationship datasource, which has to get added to the project
  - **With 9.3:** same
- **CURRENT:** requires using Secondary Subject Selection question with filter checkbox enabled
  - **With 9.3:** same
- **CURRENT:** 3<sup>rd</sup> level relationship not DIG-able
  - **With 9.3:** same
- **CURRENT:** Didn't work with Project Mapping
  - **With 9.3:** Now works with Project Mapping



# Applying the 3-level relationship datasource

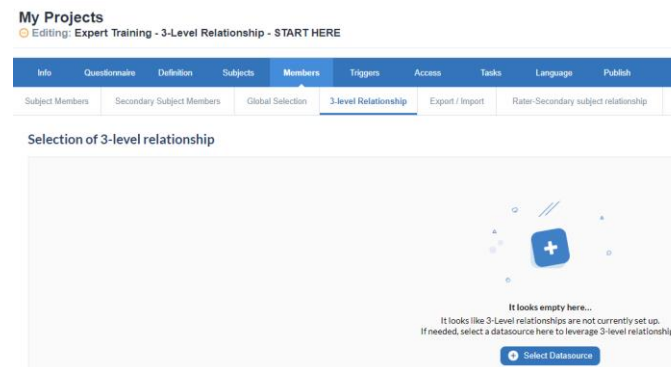
After creating and importing the 3lvl relationship datasource,  
we go to the Project->Members->  
3-level Relationship – select Datasource

## Current:

- Will automatically update if subject or rater automatic update enabled

## With 9.3:

- Same
- What does this mean?




## My Projects

Editing: Expert Training - 3-Level Relationship - Demo

Info	Questionnaire	Definition	Subjects	Members	Triggers	Access	Tasks	Language	Publish
Subject Members	Secondary Subject Members	Global Selection	3-level Relationship	Export / Import	Rater-Secondary subject relationship				

## Selection of 3-level relationship

3-level relationship datasource selected:


3-Level Relationship V0
Change Datasource
Remove 3-level relationship

Automatic update has been enabled for either the subjects or raters for this project, therefore the 3-level relationship is also being automatically updated.



# Data Validation: An important step

## Current:

- Validation had to be done outside of Blue

## With 9.3:

- Validation now in Blue
- Project warnings
- Validation log will provide warnings of relationships out of sync
- Saved relationships - can view the 3lvl relationships included in project


### My Projects

🟢 Editing: Expert Training - 3-Level Relationship - Demo

Info	Questionnaire	Definition	Subjects	Members	Triggers	Access	Tasks	Language	Publish
Subject Members	Secondary Subject Members	Global Selection	3-level Relationship	Export / Import	Rater-Secondary subject relationship				

### Selection of 3-level relationship

3-level relationship datasource selected:


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Change Datasource
Remove 3-level relationship

Automatic update has been enabled for either the subjects or raters for this project, therefore the 3-level relationship is also being automatically updated.

#### INFOS

⚠ Warning. See log for details.

Validation log: [Download](#)

Saved relationship: [Download](#)



# Data Validation: Warnings

Project warnings:

- Alert Admin to go check validation log
- Alert Admin if the filter in the Secondary Subject Selectin question is not enabled

```
- Warnings have been detected in the 3-level relationship datasource. Please review the validation log in the 3-level relationship tab.
- Warning: The option to filter the list of available selections based on the 3-level relationship is not selected, so the 3-level relationship will not be used for the secondary subject selection question.
```

Validation log

- Missing student-secondary subject relationship missing
- Missing the 3<sup>rd</sup> level
- Etc.

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Primary subject	Secondary subject	Rater	Warning code	Warning message										
101815-8504-Summer	N/A	60070	2	The relationship between the subject and the rater exists in the project, but is missing from the 3-level relationship file.										
101848-9502-Summer	N/A	N/A	1	The subject is part of the project, but does not exist in the 3-level relationship file.										

- So, we have these warnings –but what do we do with them?
- Before we can make a decision – we need to know the expected behavior!



# Warnings & impact on FO

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	
Primary subject	Secondary subject	Rater	Warning code	Warning message											
101815-8504-Summer	N/A	60070	2	The relationship between the subject and the rater exists in the project, but is missing from the 3-level relationship file.											
101848-9502-Summer	N/A	N/A	1	The subject is part of the project, but does not exist in the 3-level relationship file.											

**Warning 1: The relationship between subject and rater exists in the project but is missing from the 3-level relationship file**

- What does this mean?
- What impact will it have on the FO task for the student, will there be a one?
- What will it look like?



# 3-level relationship – warnings & impact on FO

A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Primary subject	Secondary subject	Rater	Warning code	Warning message										
101815-8504-Summer	N/A	60070	2	The relationship between the subject and the rater exists in the project, but is missing from the 3-level relationship file.										
101848-9502-Summer	N/A	N/A	1	The subject is part of the project, but does not exist in the 3-level relationship file.										

Warning 2: The subject is part of the project but does not exist in the 3-level relationship file

- What does this mean?
- What impact will it have on the FO task for the student, will there be a one?
- What will it look like?



## 3-level relationship – impact on Reporting

We've seen the impact on FO ...

➤ what about Reporting?







Subject (S) exists in project	Secondary Subject (SS) exists in project	Student (R) exists in project	3-Level Relationship file	CURRENT FO/Reporting Behaviour	9.3 FO/Reporting Behaviour
Yes	Yes	Yes	S-SS-R Exist	SS evaluated in FO Tasks *) Instructor report created *) Course report created	SS evaluated in FO Tasks *) Instructor report created *) Course report created
Yes	Yes	Yes	R doesn't exist	*) SS is NOT evaluated in FO Task *) R is NOT counted in Instructor report *) R is NOT counted and NOT reported in Course report	*) SS is NOT evaluated in FO Task *) R is NOT counted in Instructor report *) R is counted and reported in Course report
Yes	Yes	Yes	Some SS exists but not all	*) For missing SS: *) NOT evaluated in FO Task *) NO responses for Instructor report *) Response included in Course report	*) For missing SS: *) NOT evaluated in FO Task *) NO responses for Instructor report *) *) Response included in Course report
Yes	Yes	Yes	No SS exists	*) SS is NOT evaluated in FO Task *) Instructor report is NOT created *) <b>Course report NOT created</b>	*) SS is NOT evaluated in FO Task *) Instructor report is NOT created *) <b>Course report IS created</b>
Yes	Optional (No)	Yes	Yes	*) SS is NOT evaluated in FO Task *) Instructor report is NOT created *) <b>Course report NOT created</b>	*) SS is NOT evaluated in FO Task *) Instructor report is NOT created *) <b>Course report is created</b>
Yes	Yes	No	Yes	FO is not created	FO is not created

Instructor report = Individual type broken down by Secondary subject, Course report = Individual type with no breakdown

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## 3-level relationship & No SS

So, in the case where either the SS didn't exist in the 3<sup>rd</sup>-level  
OR the project had the SS optional option

- **CURRENT :**
  - If we wanted to include those responses in the Course report, we would have to add a dummy ID for the secondary subject
- **With 9.3:**
  - We no longer have to include a dummy ID as the responses will be included



## Impact on Reporting cont'd – What about the Dashboard?

Now we know what kinds of reports are created (or not), but what about the content in Reports and the Dashboard?



# 3-level relationship and Blue Dashboard access

Info	Questionnaire	Definition	Subjects	Members	Triggers	Access	Tasks
General	Organizational Links	Group	Shared Group	Subject Filter	Secondary Subject Filter		
Definition Title	Pilot-Evaluation						en ★
Description	<div>Secondary Subject is an Instructor</div>						en
Type	<input type="radio"/> Subjects <input type="radio"/> Primary/Secondary Subject Pairings <input checked="" type="radio"/> Primary/Secondary Subject Pairings - Multiple Secondary (Multiple Secondary Pairings) <input type="radio"/> Data Integrity Gateway (DIG)						
Subject Source	<div>Subjects</div>						en ★ (Primary Caption) (a)
Secondary Source	<div>Staff</div>						en ★ (Secondary Caption)
Pairing Source	<div>Subject_Staff (Primary/Secondary)★</div>						

- No change to access behaviour in 9.3
- With multiple-secondary/pairing projects, the Individual viewer is the secondary subject
- DRA/hierarchy setup provides Aggregate viewers access



# 3-level relationship in Blue Reports and Dashboard

**CURRENT** & with Blue 9.3

ECON 101 – with 3 teachers

- 100 students attached to course
- In the 3<sup>rd</sup> level:
  - 40 students – teacher A
  - 60 students – teacher B
  - 0 student – teacher C
- 100% response rate

- Instructor report – even course responses are filtered!
- Why is this important?

	Respondent Count “Course Audience”			Respondent Count “Faculty Audience”		
	A	B	C	A	B	C
Instructor Report	40	60	No report	40	60	No report
Course Report	100			100		
Dashboard (at individual course level)	100	100	100	40	60	0

Instructor report = Individual type broken down by Secondary subject, Course report = Individual type with no breakdown

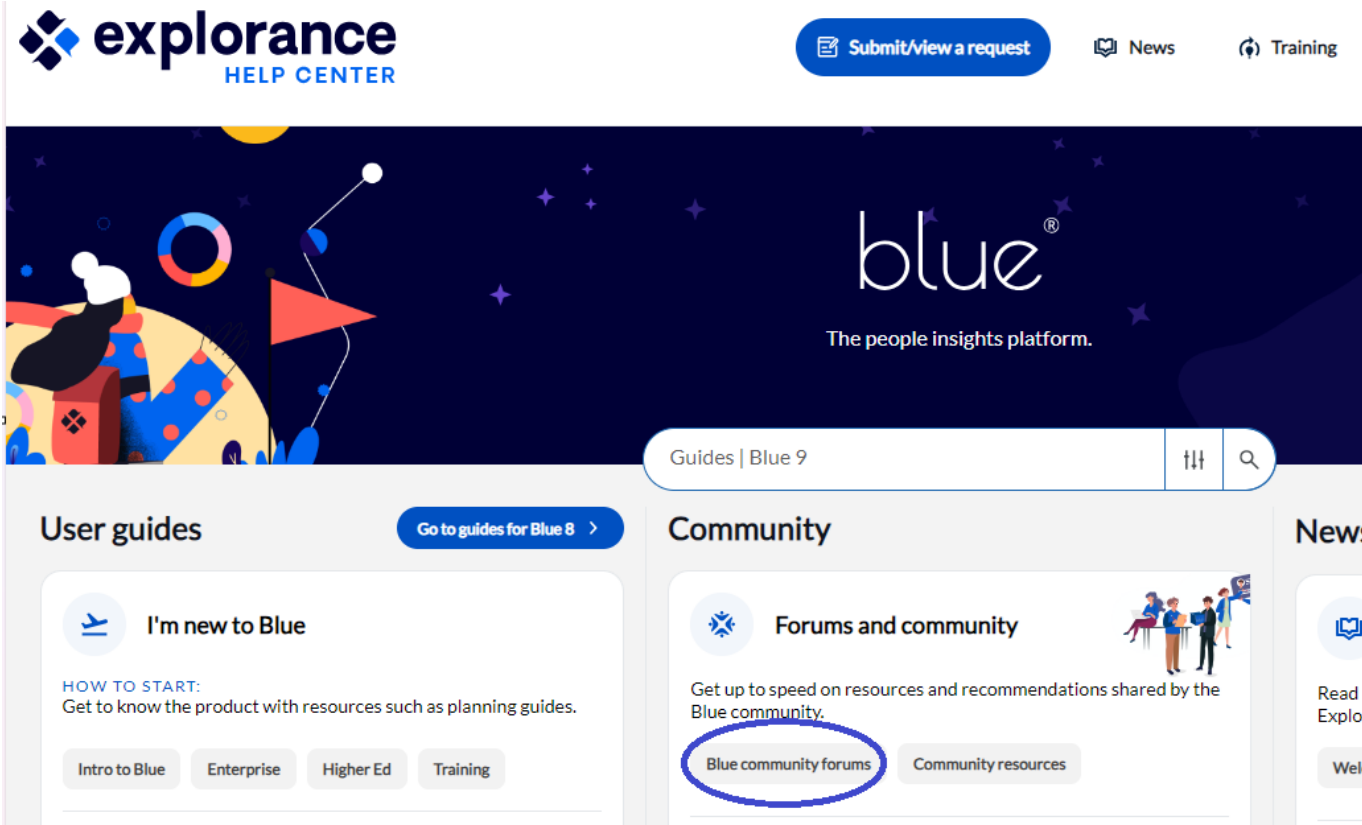


## 3-level relationship and the Blue Dashboard

- For the Instructor report and the BD (when drilled down to the course level) – we may see a discrepancy in the attendance
  - This should be properly communicated
- What can we recommend if they wish to eliminate the discrepancy and match the Report with the BD?
  - Add group element (course average) to the Instructor report for the course questions



# Community resources



The screenshot shows the Explorance Help Center interface. At the top, there's a navigation bar with the Explorance logo, a 'Submit/view a request' button, and links for 'News' and 'Training'. Below this is a large banner for 'blue' with the tagline 'The people insights platform.' and a search bar. The main content area is divided into three sections: 'User guides' (with a 'Go to guides for Blue 8' button), 'Community', and 'News'. The 'Community' section features a 'Forums and community' icon and text, followed by a list of links: 'Blue community forums' (which is circled in blue), 'Community resources', and 'Read a Explorance'. The 'User guides' section includes a 'I'm new to Blue' link and a 'HOW TO START' section with buttons for 'Intro to Blue', 'Enterprise', 'Higher Ed', and 'Training'.



Webinar and Conference Discussion

[\[Learning Webinar - Questions, Discussions, & Post-Webinar Follow-up\] February 19: Boost Response Rates by Automating Course Component Selection for Students in Course Evaluations with 3-Level Relationships](#)

Community Sharing Sandbox Discussion Forum

Connect. Share. Learn. Grow.

9 posts · 14 followers

<https://support.explorance.com/hc/en-us/community/posts/34583606782868-What-s-New-Feb-2025-Edition-New-Project-Reports-Blue-Dashboard-using-3-LR-in-the-BN-CSS>

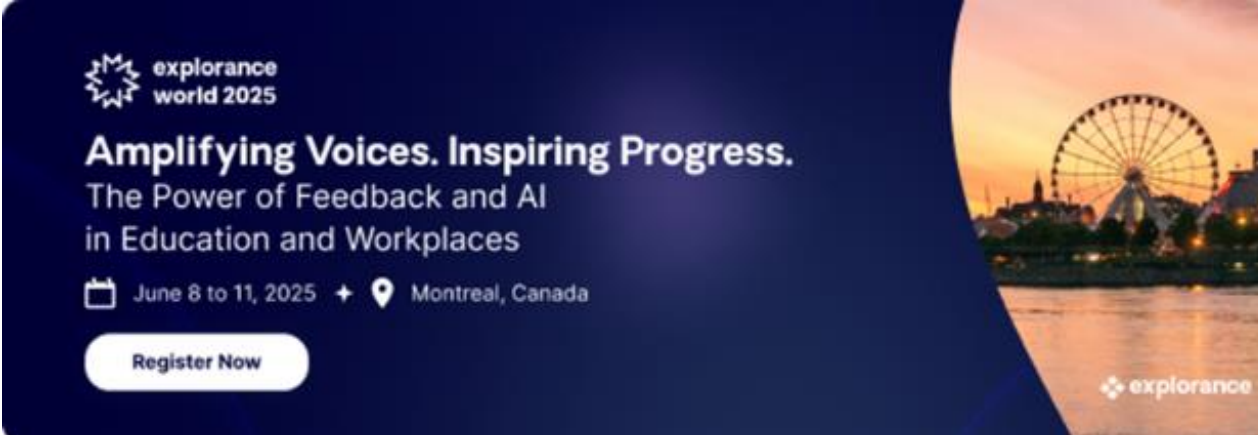


# Resources

- <https://onlinehelp.explorance.com/blue/en/Content/qs/3levelrelationshipimplementation.htm?Highlight=3-level>
- [\(Webinar\) Response Rate Optimization: Engaging Faculty and Students to Improve Response Rates | Explorance online help](#)
- [\(Webinar\) Various approaches to handling multi-section and team-taught course evaluations | Explorance online help](#)
- [Set up the response rate monitor | Explorance online help](#)
- [Create a public response rate export report with automatic update | Explorance online help](#)
  - [Configure a Feedback Block in BPI | Explorance online help](#)
- [Subject management \(SM\) task | Explorance online help](#)
- [Blue Dashboard guide | Explorance online help](#)
- [Configure report information | Explorance online help](#)
  - [Add a Cross Category Type Report Block | Explorance online help](#)
  - [Spreadsheet report block | Explorance online help](#)



# Upcoming events

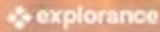


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The banner features a dark blue background on the left with white text, and a photograph of a Ferris wheel at sunset on the right. A white button with the text 'Register Now' is positioned below the main text.



# Q/A....Thank you!

