



Bluenotes **GLOBAL** 2019
CONFERENCE

Using Relationship Demographics to Enhance Your Projects and Reports

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What do we mean by relationship demographics?

- Additional columns of information in relationship datasources that provide more granular details about users' relationships to courses (subjects)
- You're no longer limited to 2!
- More flexibility and capabilities in questionnaire content and behavior, trigger options, filtering and reporting





Common scenarios

Course-Instructor relationships

- Multiple teaching roles: primary instructor, lab instructor, TA, lecturer, etc.
- Supports situations where same people have different roles for different courses
- Courses / instructors linked to different programs
- Any details unique/specific to the course-instructor pairing

| | A | B | C | D | E |
|----|-----------|------------|--------------|-----------|---------------------|
| 1 | CourseID | UserID | TeachingRole | Position | Program |
| 2 | 101815-85 | afong | Instructor | Full time | Anthropology |
| 3 | 101815-85 | kknightley | Instructor | Full time | Anthropology |
| 4 | 101815-85 | mbush | TA | Adjunct | Arts & Sciences |
| 5 | 101815-85 | pholly | TA | Adjunct | Culture and Society |
| 6 | 102033-1C | bbaker | Instructor | Adjunct | Arts & Sciences |
| 7 | 201821-65 | afong | TA | Adjunct | Anthropology |
| 8 | 201821-65 | kknightley | Instructor | Full time | Anthropology |
| 9 | 201821-65 | mbush | TA | Adjunct | Arts & Sciences |
| 10 | 201821-65 | pholly | TA | Adjunct | Culture and Society |
| 11 | 202047-7C | jscott | Instructor | Full time | Engineering |
| 12 | 202702-64 | jscott | Lecturer | Full time | Engineering |
| 13 | 302778-81 | ldaniels | Instructor | Adjunct | Engineering |





Common scenarios

Course-Student relationships

- Provide granular details about students' relationships to courses
- Are courses required or elective; attended in-class, online or a combo; are students Grads, Undergrads, Continuing Ed, etc.?

| | A | B | C | D | E | F |
|----|-----------|--------|---------------|----------|----------------------|--------------|
| 1 | CourseID | UserID | Core_Elective | Delivery | Level | Program |
| 2 | 101815-85 | 70088 | Elective | Online | Graduate | Anthropology |
| 3 | 101815-85 | 90493 | Core | In-class | Undergraduate | Anthropology |
| 4 | 101815-85 | 90884 | Core | In-class | Undergraduate | Anthropology |
| 5 | 101815-85 | 70917 | Core | In-class | Undergraduate | Anthropology |
| 6 | 101815-85 | 100830 | Core | In-class | Undergraduate | Anthropology |
| 7 | 101815-85 | 80890 | Core | In-class | Undergraduate | Anthropology |
| 8 | 101815-85 | 80904 | Elective | Online | Continuing Education | Anthropology |
| 9 | 101815-85 | 70918 | Elective | Online | Continuing Education | Anthropology |
| 10 | 101815-85 | 90681 | Elective | Online | Continuing Education | Anthropology |
| 11 | 101815-85 | 90682 | Elective | Online | Graduate | Anthropology |
| 12 | 101815-85 | 90688 | Audit | Online | Graduate | Anthropology |



How can this information be used?

In the questionnaire:

- Questions based on instructor role or course delivery (trigger questions)
- Ability for students to select instructors to evaluate based on different roles (secondary subject selection)

Filters and Tasks

- Use the relationship data in filters, e.g. to limit access to tasks based on roles

Reports

- Create aggregate reports based on instructor or student relationship data
- Cross-tabulate results using student demographic details



How can this information be used?

Information stemming from relationship data easy to identify in all filter mechanisms by plus sign (+) in front of field names

- Course-instructor demographics appear in all secondary subject data filters
- Course-student demographics appear in all student (rater) data filters

Position
+TeachingRole

Filter Condition for Instructors-SVM

| | | |
|---------------|----------|------------|
| +TeachingRole | Contains | Instructor |
| Given name | Contains | |
| Given name | Contains | |

Filter Clear



How can this information be used?

- Easily create triggers based on teaching role
- When instructors, TAs, lecturers, etc., are evaluated using different sets of questions

Position
+TeachingRole

Trigger Creation

Trigger Creation

Trigger Name

Trigger Condition Type

Selection List

| | | |
|---------------|----------|----|
| +TeachingRole | Contains | TA |
| Given name | Contains | |
| Given name | Contains | |





How can this information be used?

- Use filters to isolate tasks to people with specific roles, e.g. SVM task for full instructors only
- Example below: 2 instructors & 2 TAs for course (4 total), but group filter can isolate task to instructors

Group Filter

Select Group: Instructors-SVM

Results: 0 - 0

- Students
- Dept Heads
- Instructors-RV,QP
- Instructors-SVM**
- Deans

Filter Condition for Instructors-SVM

+TeachingRole Contains Instructor

Given name Contains

Given name Contains

Filter **Clear**

Subject view management for 101815 Cultures of Modern Canada (4 Instructors)

NOT SENT Instructors-SVM: Annette Fong (Started)

NOT SENT Instructors-SVM: Kent Knightley (Started)

STARTED Start Date: 2019-02-05 00:00 End Date: 2019-02-07 23:59



How can this information be used?

- Enable students to choose instructors, TAs, lecturers to evaluate based on teaching role using Secondary Subject Selection option
- Thresholds to ensure minimum number of selections met per group

Display Mode
Secondary Subject Selection

Section Heading
Please select at least 1 Instructor and 1 Teaching Assistant to evaluate

Group secondary subjects where the relationship demographic field TeachingRole is equal to Add

| Item | Min | Max | |
|------------------------------|-----|-----|--------|
| TeachingRole is 'Instructor' | 1 | | Remove |
| TeachingRole is 'TA' | 1 | | Remove |

? Please select at least 1 Instructor and 1 Teaching Assistant to evaluate

Annette Fong (Instructor) Kent Knightley (Instructor)
 Mandy Bush (TA) Philipe Holly (TA)





Aggregate reports using demographic groups

- Can create *Group by* reports using instructor data: Subject > Users > choose group
- Or use student data: Rater > Users > choose group

Individual

Group by C_Users

Distributed

Breakdown

Export

Automatic

Update sta

---Subject---

C_Courses

C_Users

---Rater---

C_Users

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BRMC - Winter 2019 Co

C_Users

+TeachingRole

+Position

+Contact_Hours

+Program

Uniquename

| | A | B | C | D | E | F |
|----|-----------|------------|---------------|---------------|-----------|----------------|
| 1 | Course_ID | Teacher_ID | Teaching Role | Contact_Hours | Position | Program |
| 2 | 101815-85 | afong | TA | 35 | Full time | Mathematics |
| 3 | 101815-85 | knightley | TA | 30 | Full time | Social Studies |
| 4 | 101815-85 | mbush | Teacher | 30 | Full time | Psychology |
| 5 | 101815-85 | pholly | Teacher | 30 | Part time | Economics |
| 6 | 102033-10 | bbaker | Teacher | 30 | Part time | Mathematics |
| 7 | 201821-65 | afong | Teacher | 20 | Part time | Social Studies |
| 8 | 201821-65 | knightley | Teacher | 30 | Part time | Psychology |
| 9 | 201821-65 | mbush | TA | 20 | Full time | Economics |
| 10 | 201821-65 | pholly | TA | 30 | Full time | Mathematics |
| 11 | 202047-70 | jscott | Teacher | 35 | Part time | Social Studies |
| 12 | 202702-64 | jscott | Teacher | 35 | Part time | Psychology |

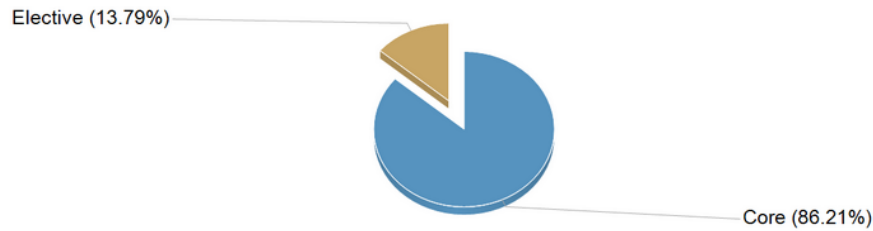


Use demographic data within the reports

Select the data as demographic blocks

Select Report Block Type Demographics Add Report Block +Core_Elective Chart Pie Exploded 3D

Core vs. Elective



| | A | B | C | D | E | F | G |
|----|--------------------|------------|------------|---------------------------------|----------------|---------------|-------------------|
| 1 | Course_ID | Student_ID | Program ID | Program Name | Dropped-Course | Core-Elective | Ready to Evaluate |
| 2 | 101815-8504-Summer | 70088 | BC234 | Bachelor of Culture and Society | No | Core | Yes |
| 3 | 101815-8504-Summer | 90493 | BC234 | Bachelor of Arts | No | Elective | Yes |
| 4 | 101815-8504-Summer | 90884 | BC234 | Bachelor of Culture and Society | No | Core | Yes |
| 5 | 101815-8504-Summer | 100830 | BC234 | Bachelor of Culture and Society | No | Core | Yes |
| 6 | 101815-8504-Summer | 70918 | BC234 | Bachelor of Culture and Society | No | Core | Yes |
| 7 | 101848-9502-Summer | 90610 | BA543 | Bachelor of Arts | No | Core | Yes |
| 8 | 101848-9502-Summer | 70088 | BA543 | Bachelor of Arts | No | Core | Yes |
| 9 | 101848-9502-Summer | 90493 | BA543 | Bachelor of Arts | No | Core | Yes |
| 10 | 101848-9502-Summer | 90884 | BA543 | Bachelor of Arts | No | Core | Yes |
| 11 | 101848-9502-Summer | 100830 | BA543 | Bachelor of Arts | No | Elective | Yes |
| 12 | 101848-9502-Summer | 70918 | BA543 | Bachelor of Arts | No | Core | Yes |
| 13 | 102033-1041-Summer | 90610 | BA543 | Bachelor of Arts | No | Core | Yes |



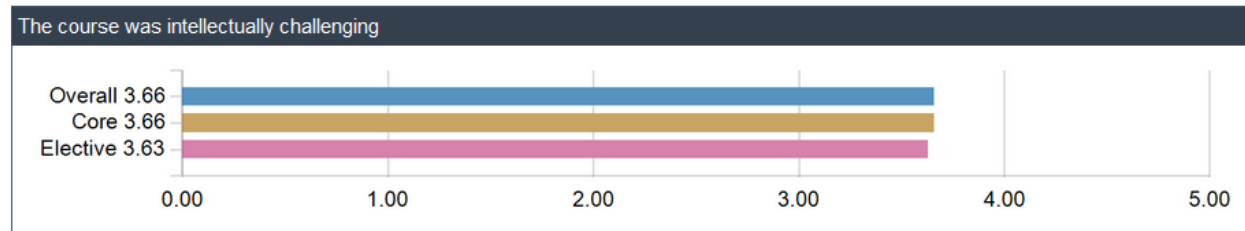
Use demographic data within the reports

Use demographic data to cross-tabulate / compare results between groups

Cross Tabulate To Demographic Field ▼

Rater Group Students ▼

Rater Field +Core_Elective ▼





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Let's see it in action





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Thank you!

Questions?

