Report Generation WorkFlow

Test-Cycle for Individual Instructors

BLUE Course Evaluation System

By

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Modified 6/29/2016 (Making sure the minimum threshold is set to 3)

Modified 9/14/2016 (Minor edits)

Fair warning:

Successful completion of this training material may have negative intellectual implications for the learner.

IUSB/BLUE WorkFlow – Report Generation Test-Cycle

Step 1: Creating a Report by Copying an Existing Report

Select one of the previously created Reports (see below) and then click the "COPY" button.

You should now see a figure similar to the one below:

Step 2: Now click the radio button "SELECT DIFFERENT PROJECT",

You will see a table of PROJECTS appear below to select from. See the following:

Step 3: Now select the PROJECT which should be used by this REPORT. In this case we will pick "<mark>Sprint2016 IUSB Course Evaluation – Production</mark>". Click the "<mark>SELECT</mark>" link.

Note that the ==Project Title== (under step 2) is now changed to the selected project.

Step 4: Make sure the following are selected:

Map questions:

==By question ID==

Report Type:

==Individual==

==Distributed (multiple instructors will see the result of the eval)==

==Break down by secondary subject== (only the correct faculty will be able to see their results)

Note to SELF and OTHERS:

One may ask the question, why are these checkboxes, radio buttons are selected, and others are not! Well, that is a good question. Some of these items may appear more intuitive or logical, and some may not. For now, we are simply copying the old report generated by the "company". A significant attempt to make sense of the naming conventions used by BLUE may be futile and counter-productive. So, for now let's call it "Best Practice".

Case and point: One may ask in the screen shot below, what the difference is between: (By Question ID vs. By Question Identifier), and the answer is probably because it is ….("best practice").

Step 5: Now Click <mark>VALIDATE</mark>, and then click the "<mark>View Warnings</mark>"

If there are any warning, they will look like: (at this point, I am not sure how these errors should be handled, check with Explorance)

Step 6: Now Click Create:

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Step 7: Modify the following fields:

Report Title:

Spring 2016 IUSB - Individual instructor report - Test Cycle

Individual Report Title:

Individual Report for [C$FN] [C$LN] - [S$NAME]

Subcategory:

Spring 2016

Then click the SAVE button.

Added on 6/29/2016

Step 8: Click the OPTIONS tab and make sure the THRESHOLD MINIMUMS are properly set. More specifically, make sure the minimum for RESPONSES is set to 3. This means that if the class has less than 3 responses, the report should not be visible by the instructor. This is for anonymity reasons. The data will still be used for the calculation of Academic Unit and Campus norms.

Step 9: Adding/Modifying the Content of the Report BLOCKS

Now click the CONTENTS tab, and under the BLOCKS sub tab note the host of "INVALID" warnings!

I have no idea why these "report blocks" are invalid at this time! Since it was just copied from an existing report from last semester. See the two figures below (1st is this report) and (2nd is the report it was copied from). One possibility is that I have not "CLOSED / STOPPED" the project yet, and all report blocks that rely on campus norms are marked as invalid. (note to self, look in to this later!!)

According to the BLUE representative, these errors sometime popup (there is a bug), but if we simply click the "EDIT" link in front of each report block then simply click the "APPLY" button again, we should be fine. However when we did that it did not fix the problem. The real problem may be that the data sources in the fall semester were loaded manually and in spring we are using automated load, and some of the fields are now different. Essentially all the "SCORE" report blocks need to be fixed.

Now, get this. I tried the above process the following day (Edit followed by Apply), and it now seems to be working!

This software is not very predictable. See the screen shot below. (Regardless, for some reason you may have to go through and click edit and apply for several questions in your Report Block List.)

9/14/2016

On the latest generation of reports for Summer 2016, the above error no longer appeared. This may be because the questions / report blocks have not changed, or because between spring and summer the company has fixed some bugs.

Before (Edit and Apply)

After (Edit and Apply)

Report Block List

Move to position [   ] Go

|	Index	Title	Type	Content	Edit	Preview
	1	Title	Section	Section Title	Edit	Preview
	2	Interpretation guidelines	Section	Custom Text	Edit	Preview
	3	Instructor Course information	Section	Custom Text	Edit	Preview
	4	Page Break	Section	Page Break	Edit	Preview
	5	Core Questions:	Section	Section Title	Edit	Preview
	6	Instructor Results:	Section	Section Title	Edit	Preview
	7	Questions for [C$FN] [C$LN]	Single Selection Table	Spreadsheet	Edit	Preview
	8	Questions for [C$FN] [C$LN]	Single Selection Table	Score	Edit	Preview
	9	Page Break	Section	Page Break	Edit	Preview
	10	Questions for [C$FN] [C$LN]	Single Selection Table	Score	Edit	Preview
	11	Page Break	Section	Page Break	Edit	Preview
	12	Overall, how do you rate this instructor?	Single Selection	Score	Edit	Preview
	13	Overall, how do you rate this instructor?	Single Selection	Frequency	Edit	Preview
	14	Overall, how do you rate this course?	Single Selection	Score	Edit	Preview
	15	Overall, how do you rate this course?	Single Selection	Frequency	Edit	Preview
	16	Page Break	Section	Page Break	Edit	Preview
	17	Any additional comments?	Comments	Comments	Edit	Preview
	18	Page Break	Section	Page Break	Edit	Preview
	19	LEIGHTON SCHOOL OF BUSINESS & ECONOMICS	Section	Section Title	Edit	Preview
	20	The instructor uses effective teaching methods that enhance my learning.	Single Selection	Score	Edit	Preview
	21	The instructor uses effective teaching methods that enhance my learning.	Single Selection	Frequency	Edit	Preview
	22	Instructor cares about student learning and growth.	Single Selection	Score	Edit	Preview
	23	Instructor cares about student learning and growth.	Single Selection	Frequency	Edit	Preview
	24	Assignments and exams are fairly assessed.	Single Selection	Score	Edit	Preview
	25	Assignments and exams are fairly assessed.	Single Selection	Frequency	Edit	Preview
	26	The instructor challenges me to think.	Single Selection	Score	Edit	Preview
	27	The instructor challenges me to think.	Single Selection	Frequency	Edit	Preview
	28	The course objectives are clearly stated	Single Selection	Score	Edit	Preview

Last semester's report content (printed below for comparison):

In addition to the errors, there are several other things to note.

- The number of "report blocks" appear to correspond to the number of "questions" in the fall project. Given that during the spring project several new questions, triggers, actions, etc. were added to the project, I assume those new questions need their own report blocks! (However, this is extremely error-prone and naive design (aka "best practice"), to have the user edit the reports every semester, and then generate it to see what failed!

- It was confirmed by the BLUE representative on 5/19/2016 that indeed all new question must have their own report blocks.

Step 10: One should also notice that the first "Title" report block (when previewed), shows that the report is for "Fall 2015". So, this means this report block must be modified every semester! Alternatively, the report title could be generic so that it does not have to be changed every semester.
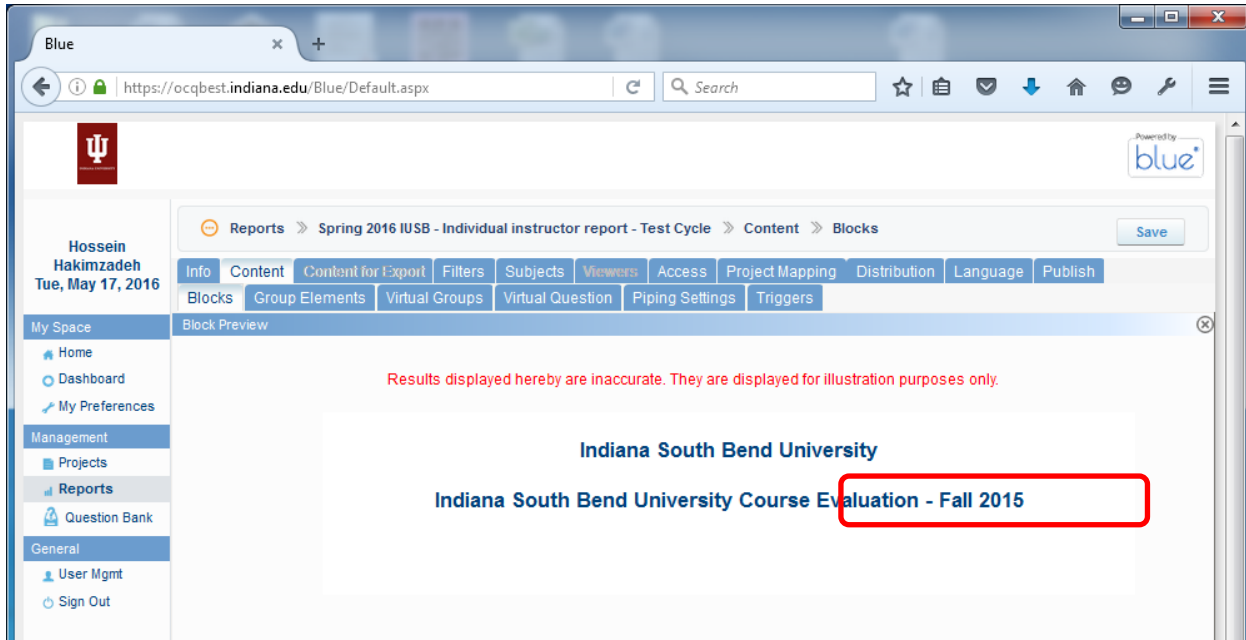

Possibly, we can try editing this item and use one of the BLUE Keys in the title so that we can automatically identify the semester and year. However, it does not seem to give us that feature (note the "en" button for the textbox labeled "TEXT TO DISPLAY ON THE REPORT(S) is not enabled!
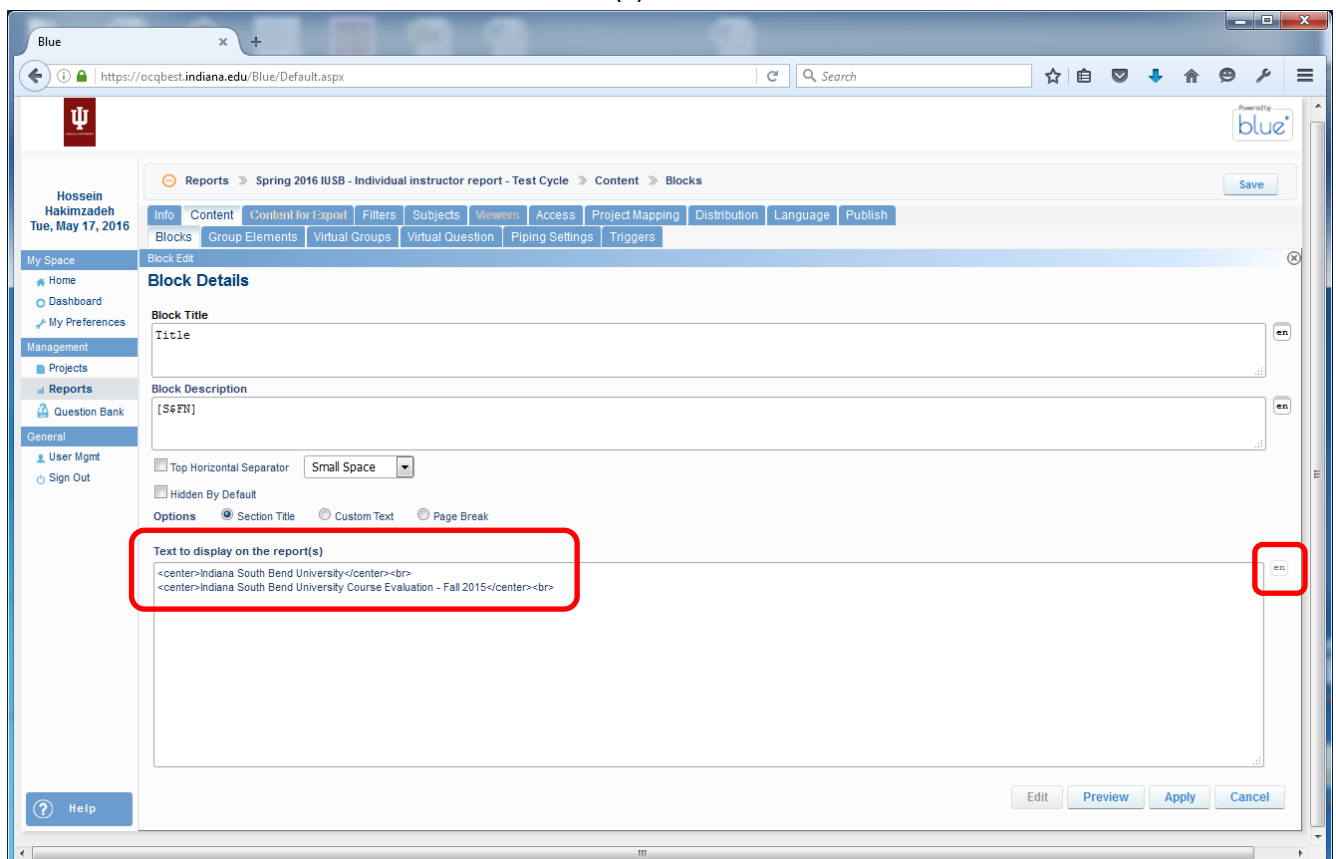
Perhaps the BLUE folks can fix this in the future!

The BLUE key variables (e.g., [S$FN] or [C$LN] etc.) are usually obtained by clicking the "en" button next to the textbox, and then selecting the variable from the combobox list. (See below)
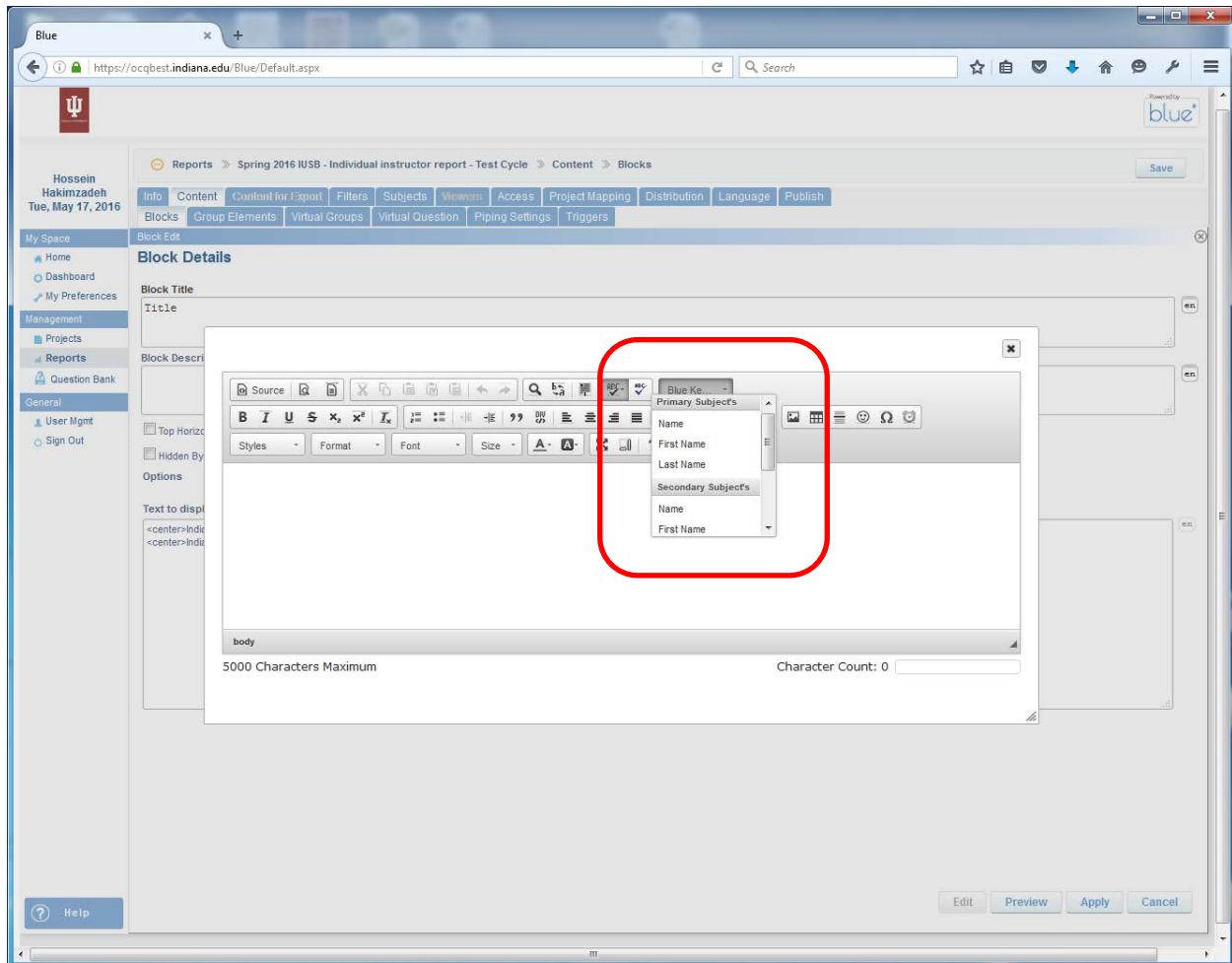
Step 11 : For now I don't have any choice and will manually change the text to read "Spring 2016", then click APPLY. (see below)

Verified with the BLUE representative on 5/19/2016, we have to manually change the above every semester.

Step 12: So, assuming that we fixed the existing blocks that need updating or fixing, we still need to "ADD REPORT BLOCKS" for the new questions added last semester. So that means we should have probably kept good records of which questions were added during the last semester, and now start creating "REPORT BLOCKS" for them! Of course this was not done last semester!
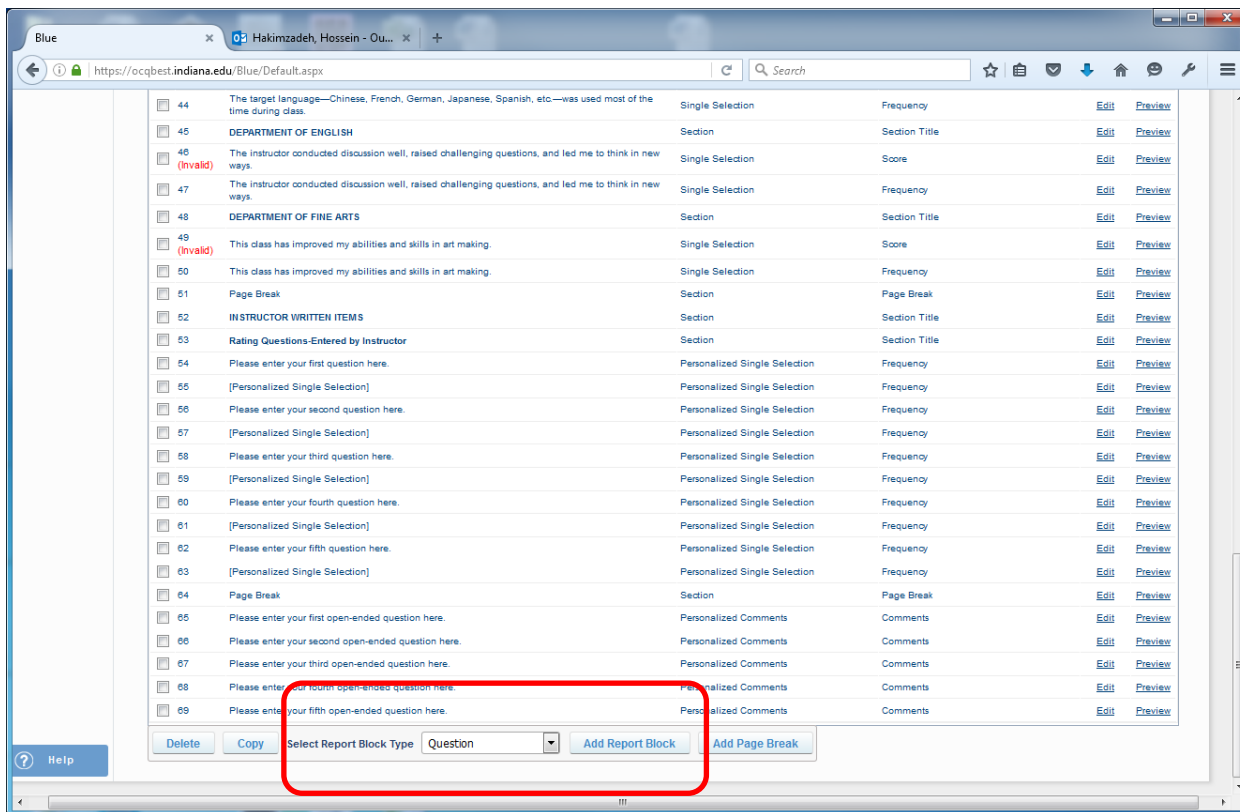
So, let's click the "ADD REPORT BLOCKS" button and see what we see! For now make sure "QUESTION" is selected in the "Select Report Block Type Combobox.

See the THREE figures below for details:

#	Question	Type	Frequency	Scale Distribution	Spreadsheet	Score
25	The target language—Chinese, French, German, Japanese, Spanish, etc.—was used most of the time during class.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
26	The instructor conducted discussion well, raised challenging questions, and led me to think in new ways.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
27	10. The supervisor facilitated effective communication and a positive relationship between the school, program, cooperating teacher, and me.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
28	11. The supervisor was easy to talk with and encouraged me to share my ideas and concerns.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
29	12. The supervisor assisted me as I reflected on my teaching practices.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
30	13. The supervisor reflected genuine interest, enthusiasm, and professional concern for my development and growth as an educator.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
31	14. When needed, the supervisor provided me with appropriate teaching and management tips.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
32	15. The supervisor helped to build my self-confidence and attempted to make me feel at ease in my role.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
33	16. The supervisor encouraged me to have an attitude of inquiry, independent thinking, self-reflection, and respect for alternative approaches.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
34	17. The supervisor observed me teaching at least three (3) times.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
35	18. The supervisor conferred with the classroom teacher on a regular basis.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
36	19. The supervisor regularly reviewed my materials or reflections, and provided feedback. I was made aware of my progress towards meeting IUSB expectations.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
37	20. What was most helpful about the supervision you received from your University Supervisor?	Comments	☐ Comment			
38	21. What suggestions do you have to improve the supervision you received from your University Supervisor?	Comments	☐ Comment			
39	10. The supervisor facilitated effective communication and a positive relationship between the school, program, cooperating teacher, and me.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
40	11. The supervisor was easy to talk with and encouraged me to discuss my ideas and concerns.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
41	12. The supervisor helped me to reflect on my teaching practices.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
42	13. The supervisor reflected genuine interest, enthusiasm, and professional concern for my development and growth as an educator.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
43	14. When needed, the supervisor provided me with appropriate teaching and management tips.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
44	15. The supervisor helped to build my self-confidence and attempted to make me feel at ease in my role.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
45	16. The supervisor encouraged me to have an attitude of inquiry, independent thinking, self-reflection, and respect for alternative approaches.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
46	17. The supervisor regularly reviewed my materials or reflections, and provided feedback. I was made aware of my progress towards meeting IUSB expectations.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
47	18. What was most helpful about the supervision you received from your University Supervisor?	Comments	☐ Comment			
48	19. What suggestions do you have to improve the supervision you received from your University Supervisor?	Comments	☐ Comment			
49	(A). Please give written comments on the instructor. Possible items to comment on include: providing explanations and examples, ability to kindle interest, handling of questions, being prepared for class, office hours, examinations, grading, fairness, etc.	Comments	☐ Comment			
50	(B). Please give written comments on the course. Possible items to comment on include: opportunity to acquire new skills and understanding, pace of the course, appropriateness of laboratory work (if applicable), etc.	Comments	☐ Comment			
51	(C). Please give written comments on the instructional support materials used. Possible items to comment on include: textbook, handouts, computer software/hardware, graphing calculators, course web page, etc.	Comments	☐ Comment			
52	This class has improved my abilities and skills in art making.	Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
53	Please enter your first question here.	Personalized Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
54	Please enter your second question here.	Personalized Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score
55	Please enter your third question here.	Personalized Single Selection	☐ Frequency	☐ Scale Distribution	☐ Spreadsheet	☐ Score

Now this is a little encouraging, since one can see a few questions that were created last semester. For example Questions 49, 50 and 51 are new questions we added for the math department during the last semester. However, these questions were numbered 67, 68, 69 in the PROJECT. So this of course adds to the confusion! (See figure below, taken from Spring 2016 project)

What is not also clear is if one selects one of the above (say questions 49, 50 and 51) and creates a new reporting block, for them, how will that automatically be included in the right report for the Math department. One assumes that this will be done automatically! (Confirm with Explorance later)

I confirmed this on 5/20/2016. When the questions are added to the REPORT BLOCKS, they will automatically appear on their corresponding evaluations (depending on the triggers, and actions developed in the project. Also, one other thing should be checked in the REPORT- INFO tab. (Make sure that the "HIDE REPORT BLOCKS WITH NO RESULTS is checked.) (See below)

Of course as with everything in this software, there is no logical workflow. You simply have to remember little factoids! (but rest assured this is a "Best Practice" in software engineering.)

Adding New Report Blocks

Now, our task is to correctly identify the THE NEW QUESTIONS ADDED LAST SEMESTER and, then ADD NEW REPORT BLOCKS FOR EACH QUESTION.

This is probably best done by:

1) Printing the questions from the PROJECT (and identifying which questions may be new from last semester)
2) Printing the QUESTION BLOCK SELECTION, from the current REPORT
3) Then identifying which question BLOCKS must be added and what type of QUESTION BLOCKS they should be (e.g., Frequency, Scale Distribution, Spread Sheet, Score)

** Essentially, all the "single selection" questions in our campus are created as FREQUENCY as well as SCORE. The Frequency report block type, basically shows how many students from your class provided a certain response. The Score report block type, basically shows your score compared to your department, college, and campus. Of course, this may not make any sense for the college and campus, if the question is specific to a given department or perhaps certain courses. (but for now that is what IUSB is doing). This may have to be revisited.

NOTE: this is a very time consuming and error prone process. Be careful. Any errors here will have to be discovered during the audit process and then fixed and the new reports have to be recreated. This will be a multi-hour or multi-day process!

CONFIGURING THE REPORT BLOCKS

After the new REPORT BLOCKS have been added to the list, we need to edit (configure) each of them. Again, this is another tedious and error prone process.

Essentially, every <mark>SCORE Block</mark> should have the following layout: (note that this configuration is for IUSB, other campuses may want to do things differently). However, many of the checkboxes, etc. (see below) are not intuitive, and the manual does not really give you much help. You can always try to pick some option and then try to preview it, but the preview is bogus and won't show you much. To really test it, you need to actually create the report (a multi hour process) and then look/audit the reports. Again a very time consuming process. (see the two images below)

Every **Frequency Block**, we can just leave it as is, and it simply gives you a lot of information (some may be redundant) (see below)

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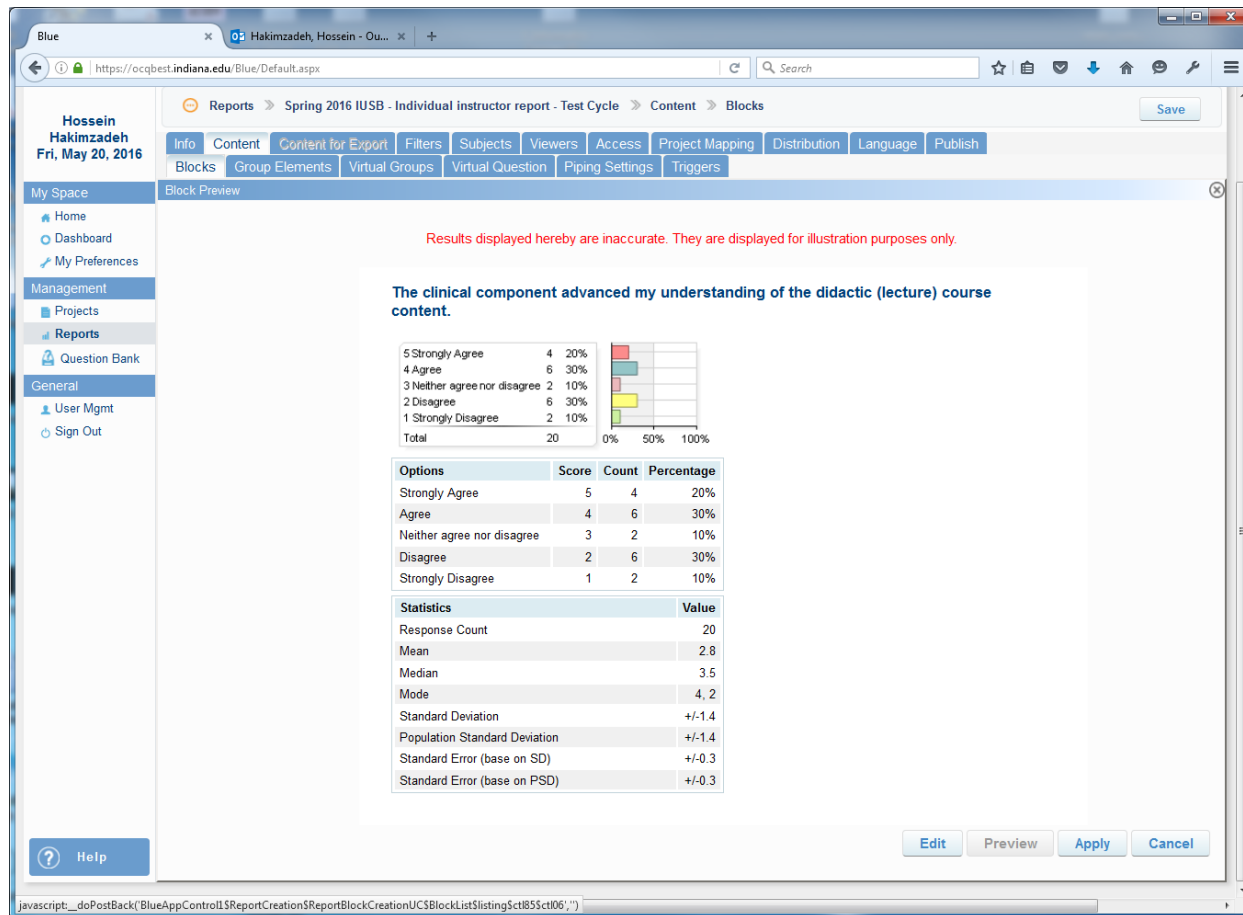
Or we can remove some check boxes to get more minimal report. For example we can remove the middle table as well as the statistics by removing the check boxes for "Display Table" and "Display Statistics": (see below)

The next image shows the result:
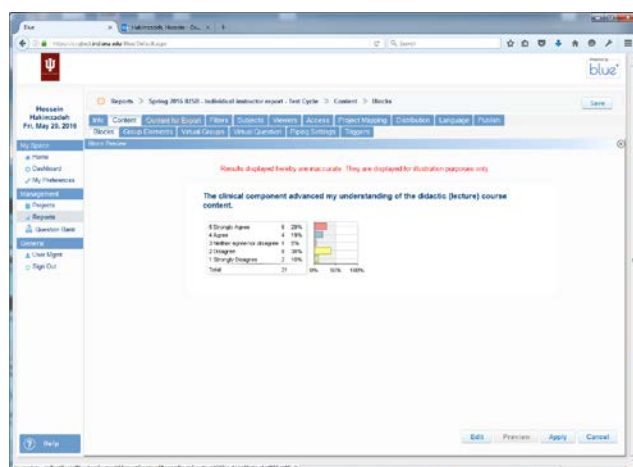
Every **Comment Block**, should have it's "SELECT RATERS GROUP ELEMENT" set to "Comments" (see below)

Then click "APPLY" (Bottom right).

Adding/Modifying the Content – Group Elements

Click the "<mark>Group Elements</mark>" sub-tab under the "<mark>Content</mark>" tab. Once again we will see some "Invalid" elements. At this point I assume this is because the Spring Project, which this report is based on, is still not closed for a few days and therefore, "Department", and "Academic Group" (Norm across responses) can't be calculated.

However, if we use the above logic, then "IUSB" averages can't be calculated either. Why is that not flagged as "Invalid"? Also, I have no idea why "comments" would be a group element? Unless that is how you are supposed to get the comments for an individual instructor. Let's also put this under the "Best Practice" column and check this with Explorance.

After verifying with the BLUE representative, it turns out that these errors are more related to the data fields which each GROUP ELEMENT is dependent upon. For example:

1) The IUSB Group Element is of type NORM ACROSS RESPONSES (all responses).

2) Department (is of the same type: NORM ACROSS RESPONSES) except it is further aggregated by COURSES FIELD (Courses table), based on the DEPT CODE.

3) Academic Group (School)

4) Comments (see next page)

5) Your Score

Virtual Groups?

The company did not put anything there, so we'll put that under "Best Practice".

Report/Content/Virtual Questions (subtab)

Clicking on the first of these virtual questions… (See below)

It appears that these may have been used at some point, but are not used right now. They may have to be removed?!

Check with Explorance as to how we can determine if these virtual questions are being used anywhere?

Report/Content/Piping Settings (sub tab)

According to the manual this is useful if no response was received for a given question. Essentially replacing the piping variable with a default "text or caption". Given that in our project there are no "Default Caption"s given, I am not sure why these are here to begin with. Again this is something that has either been automatically created or put in by the BLUE representatives during the fall 2015 semester. We'll leave these alone for now!

Report/Content/Trigger List (sub tab)

According to the manual, these are used to adjust the report based on certain conditions.

This is supposedly similar to the Triggers in the project, however more convoluted. The manual is not helpful.

In our current setup, this tab appears to be empty!

Report/Filters

Appear to be empty!
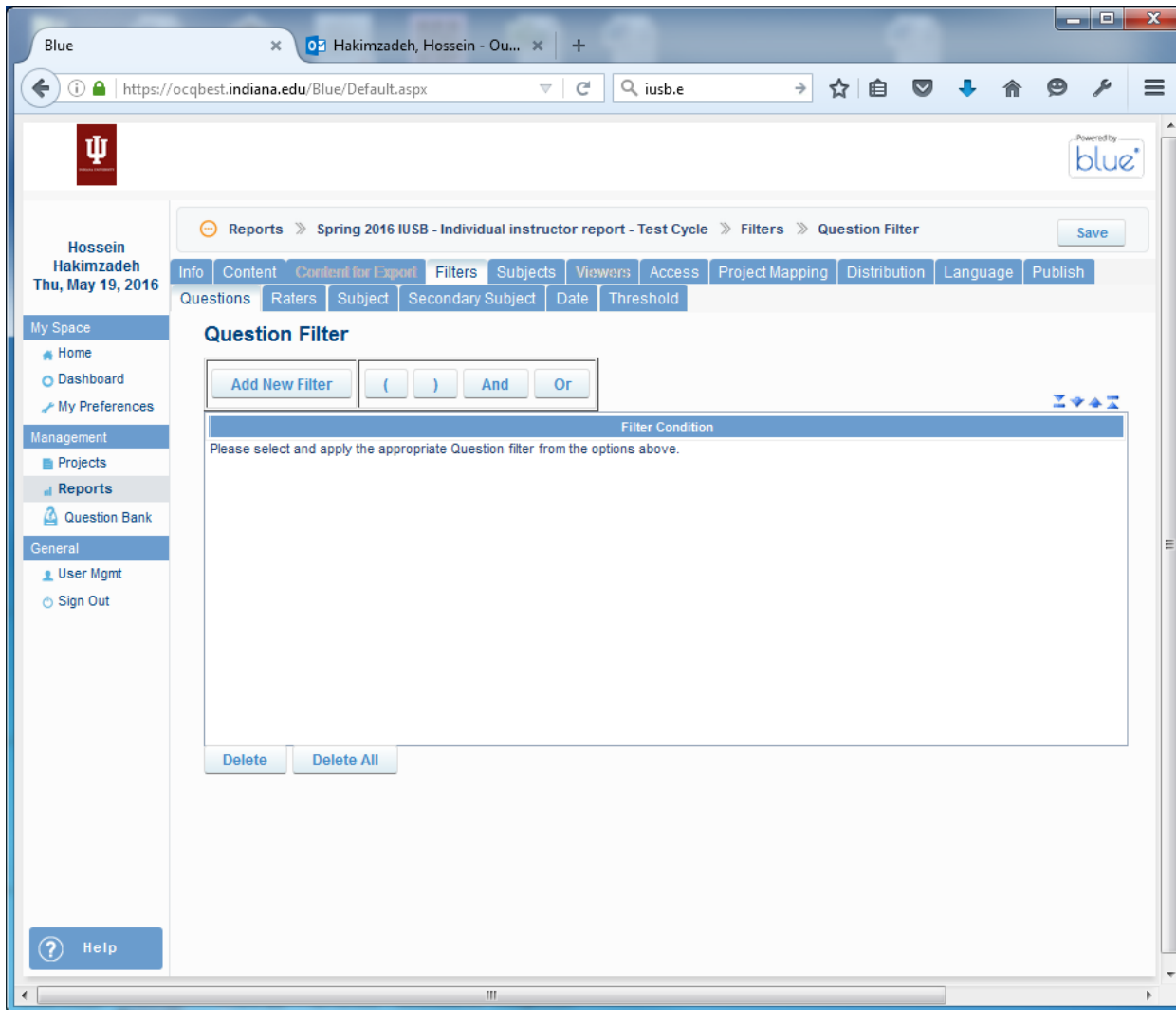
Report/Subjects

These typically mean courses in BLUE. Currently no subjects are visible.
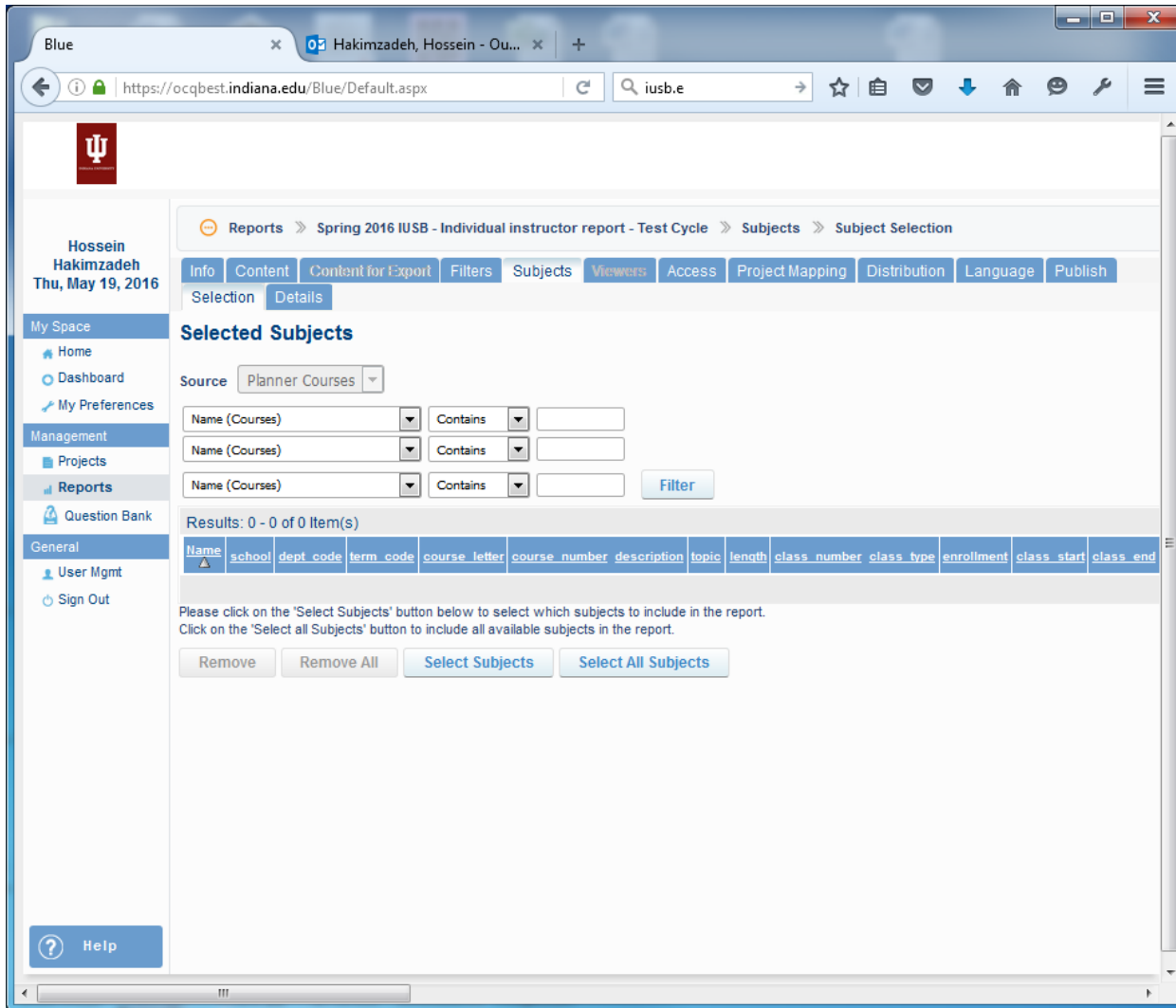
Assuming the subjects are connected to the project that we are using, we should be able to simply click the "SELECT ALL SUBJECTS" to load all the subjects.

See next page!

Step 13: Click "SELECT ALL SUBJECTS" now (see last page). See the figure below, about 1500 subjects are loaded!

Step 14: After this step, make sure to press the SAVE button. (remember that the system does not automatically save anything!)

IMPORTANT: Also remember in order to find the SAVE button, you may have to scroll to the right, and to the top of the web page.

Step 15: Report/Viewers

According to the manual, users in the viewers list are able to view the reports during the distribution period. (only used for restricted or private audience).
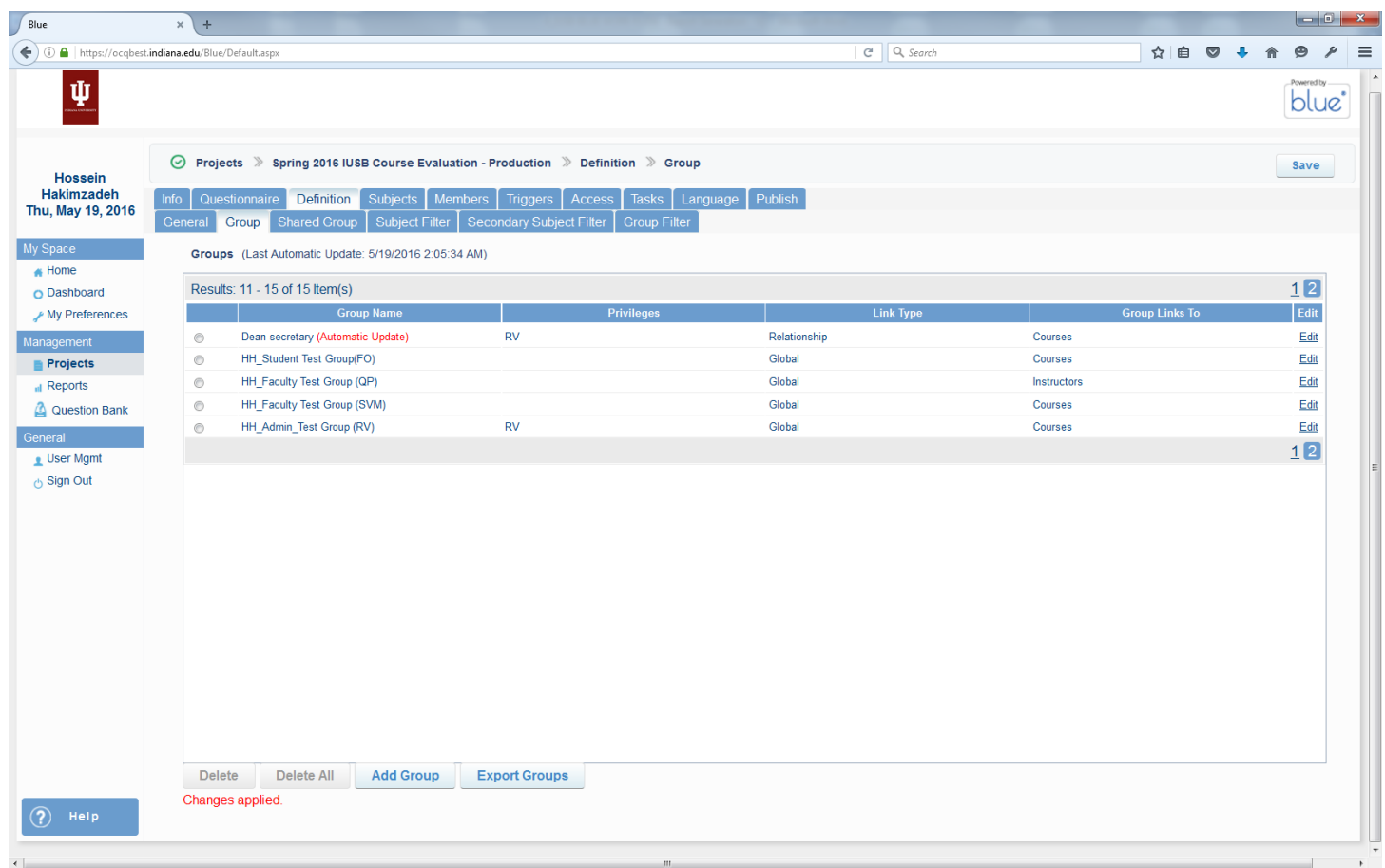
It appears that no one by default has access to report views. (click the Edit Viewers button to verify). Of course this is a good thing. Except, that at this point we are running a test-cycle and we don't want the faculty to see their reports until we have had a chance to audit the reports first.

After asking the explorance representatives, it was determined that we need to have another test group for RV. This apparently should have been added back in the PROJECT creation phase, when I created the other test groups for (FO, SVM, etc. Page 24, 27 of the Project Creation work flow. I have updated the project creation document to reflect the new group, but I'll also include the information below:

HH_ADMIN Test Group (RV)

(Added on 5/20/2016 after trying to test the reports and noting that there was no group for testing reports!)

- Group Linked to: Subject
- Link Type: Global
- Data Source: ADMIN
- Privileges: Report Viewing

Ask Explorance how the current list of faculty can be prevented from "Viewing" the reports until we are done auditing the reports. Do I click "Clear All" to remove all the

Also ask Explorance reps about the "Select Group" combo box and the corresponding buttons. What does that do? (see above)

Access

According to the manual "ACCESS" indicates which managers have access to the reports. Initially there was no one in this list, so we add the two campus administrators to the list of people who have "Access". I did so by clicking the "SELECT INDIVIDUALS" button, and then searched for John and Hossein, and added them.
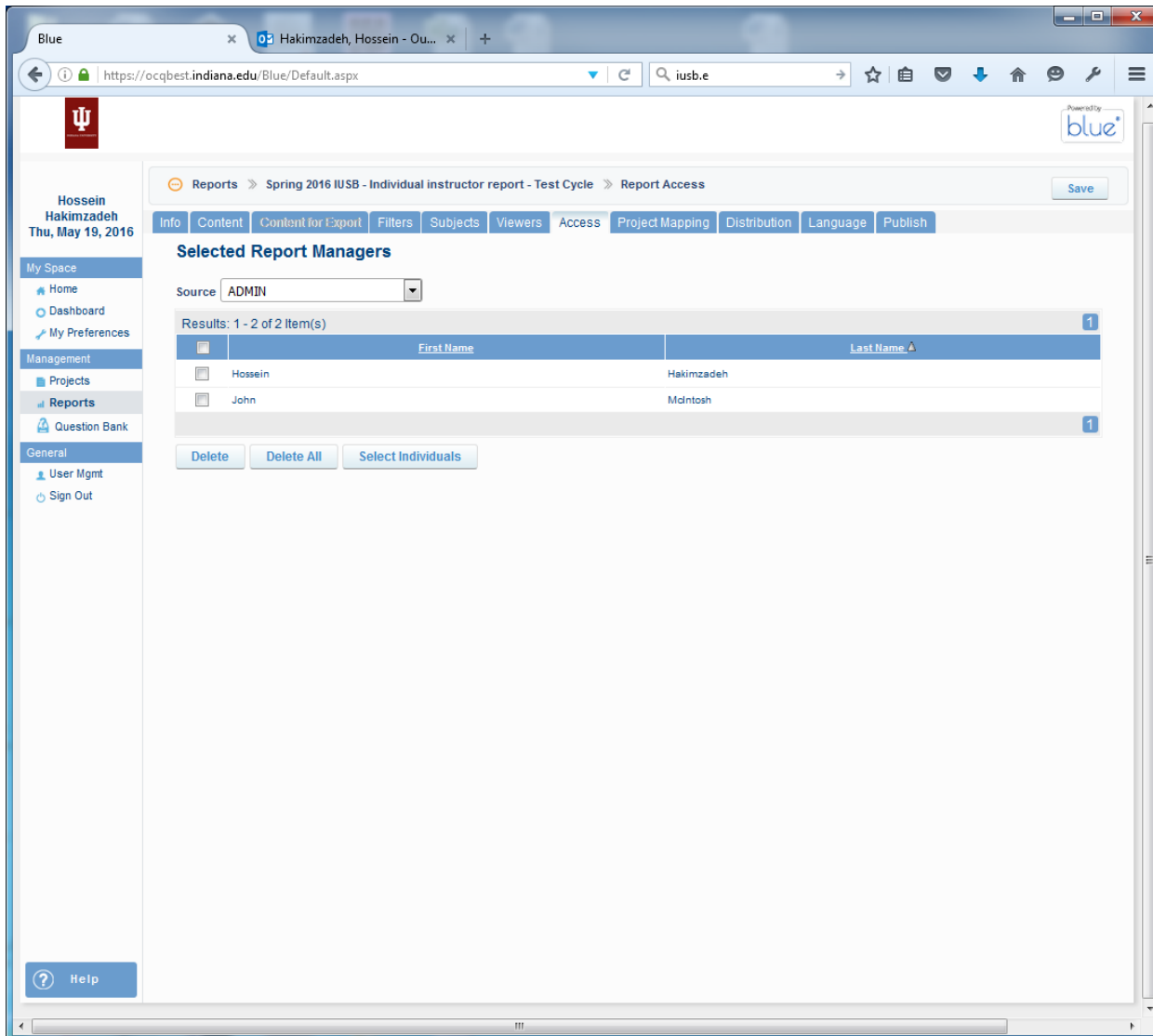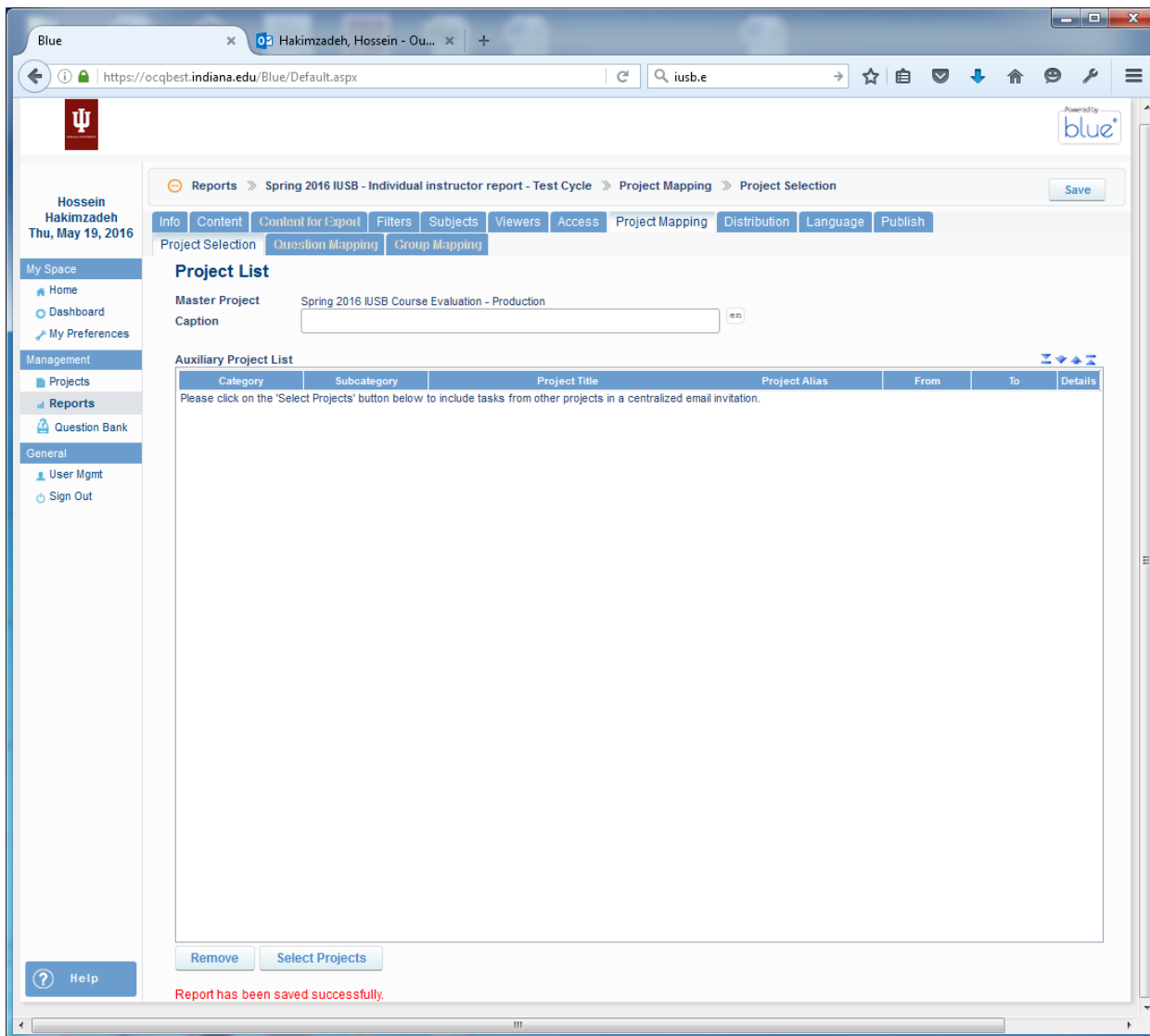
Apparently these report managers can also "modify" the report parameters.

Report/Project Mapping

Seems to be empty. Of course we have already mapped the project the report in the INFO tab, when we indicated that this report is for project "Spring 2016…". Apparently we can add Auxiliary projects to for this report.

Ask BLUE!! What is the purpose of auxiliary projects? When do we use them? How do we use them?

Report/Distribution

There are 4 things to set here:

1) Start date
2) End date
3) Email Setting
4) Options

Start date

Set it today's date

End date

Set it to ==Turn Off Report Expiry Date==

Email Settings

Fix the Email message….

Try making the email message and title more generic so, it does not have to be changed every semester. (see below)
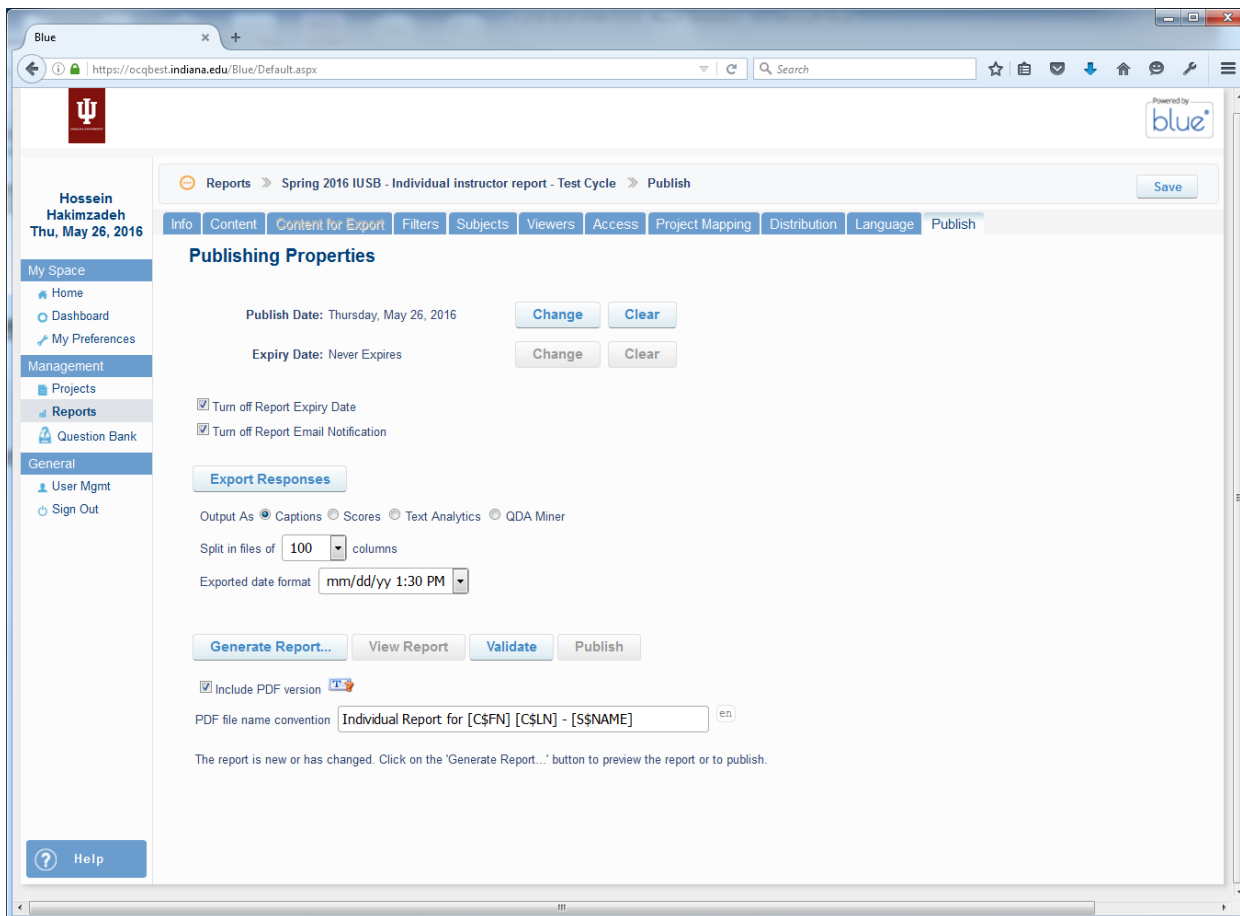
Report/Distribution/Options

Select "Stop Report" as the "Impact of Subject Removal".

Or ask BLUE.
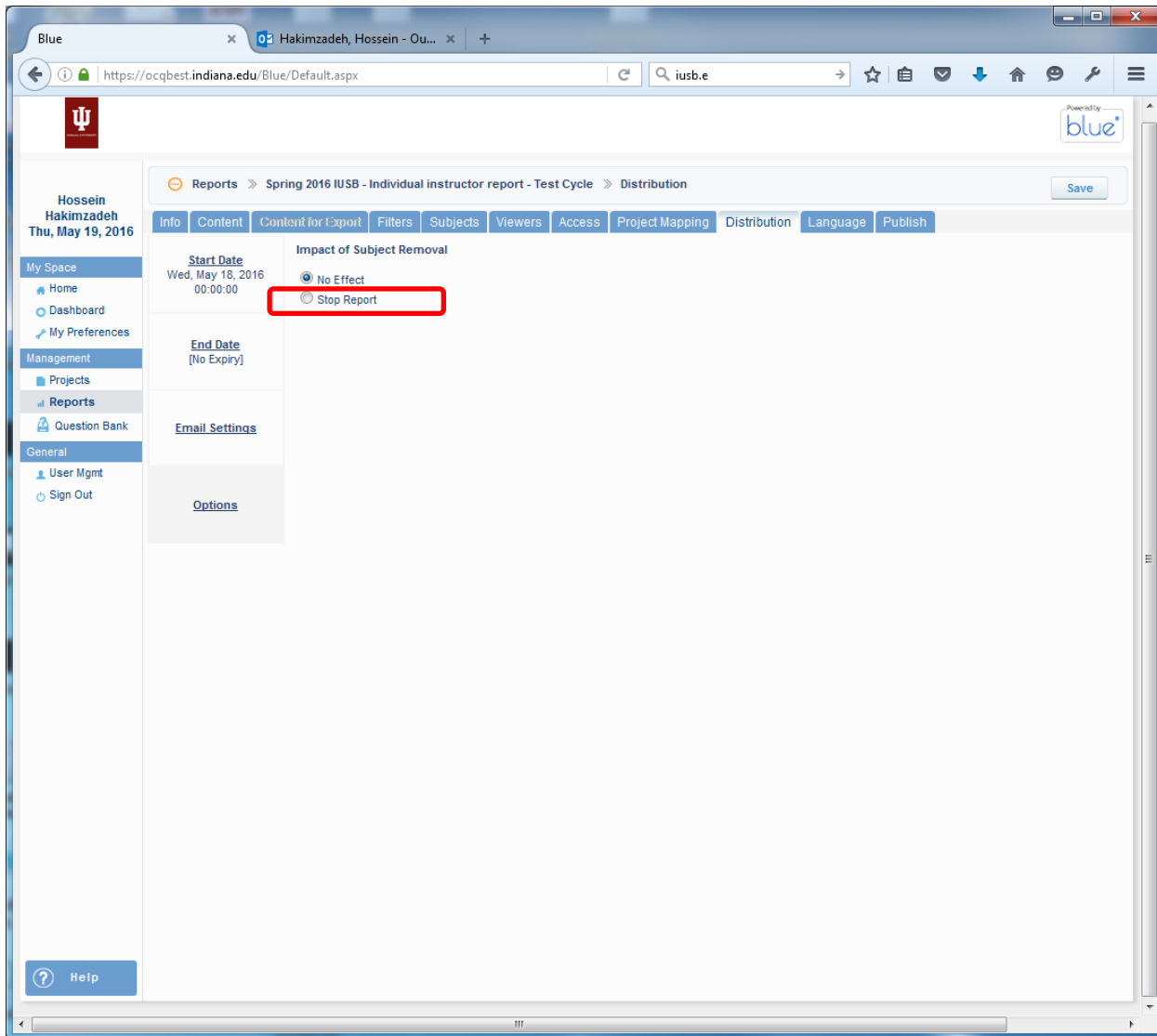
Report/Publish

1) Set the "Publish Date" to today's date
2) Set the Turn off Report Email Notification (this is a test cycle)
3) Click Validate to see if there are any errors (if so, fix!!)
4) Click "Generate Report"

This will take several minutes to several hours (depending on how many subjects/courses have been selected). If the entire 1500 sections are selected, it will probably take some time to generate the reports.

Once the reports are generated, we can "preview" them before "finalizing" them.

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