

# CourseLoop Product Update

Quarter 1 and Quarter 2 2019



**Table of Contents**

**THEME: PROPOSAL MANAGEMENT..... 3**  
    TASKS..... 3  
    SNAPSHOT VERSIONS..... 3  
    MULTIPLE USERS..... 3

**THEME: ACADEMIC ITEM MANAGEMENT..... 4**  
    COURSELOOP DASHBOARD ..... 4

**THEME: PLATFORM ADMINISTRATION..... 5**  
    ADMIN PORTAL ..... 5  
    REPORT BUILDER..... 6

## Theme: Proposal Management

This theme addresses enhancements to the user experience of proposal development and management in CourseLoop Lifecycle.

### Tasks

This feature enables tasks to be sent to CourseLoop users to support a proposal. It can be used to support additional consultation and approval steps which supplement the formal workflow.

- Ability to send various task types to CourseLoop users, including generic task, approval task, review task
- Ability for task recipient to approve/reject approval task
- Notifications can be triggered from the task process

### Snapshot Versions

The 'Mark As Complete' function in CourseLoop can be configured to either lock a proposed academic item from further editing, or allow editing access for given user roles. In the latter case, as a proposed academic item progresses through multiple committees and potentially evolves, users want the ability to view what a proposal looked like at the time it was submitted to each committee. The purpose of this feature is to create a snapshot version of the proposal at the time it was submitted to a committee.

When a proposal is "Submitted" to the next stage of the workflow, the system automatically creates a snapshot of the proposal. The snapshot is a read-only version of the proposal that contains:

- All Academic Item related information
- All Proposal information
- Comments
- Attachments

A snapshot version is configured for both Academic Items and Initial Proposals.

A user can use the "Compare versions" functionality to compare the changes between a snapshot version and either the (a) parent full version or (b) other snapshot versions that are created within the same parent.

### Multiple users

Previously, multiple users could be editing the same proposal documents at the same time, with no indication that this was happening. The purpose of this feature is to display an alert that other users are editing the same document. This feature offers:

- A configurable alert message that another user(s) are on the document at the same time

- Ability to define the role that a user must have for the alert to be triggered for other users
- Ability to define the role that a user must have to view an alert
- Ability to define the stage/s the alert appears
- Display avatar to display user presence
- Ability to hover on user avatar to display user first and last name.

## Theme: Academic Item Management

This theme addresses enhancements to the way academic items are managed in CourseLoop Lifecycle.

### CourseLoop Dashboard

The CourseLoop Dashboard provides a single landing page for users to search all academic items, easily review full and initial proposals in progress and display CourseLoop notifications. The Dashboard feature sits behind a feature toggle. When the toggle is true, the following actions occur:

#### *Academic view*

- Dashboard link is added to the main navigation bar
- Academic Item and Initial Proposal search pages are removed from the main navigation bar
- The client logo link is directed to the Dashboard page

#### *Admin view*

- View Dashboard link is added
- View all Academic Items link is removed
- When a user navigates to the Dashboard page, the following containers are shown:

#### *Academic Items container*

- As per existing academic item search page, user can search and filter academic items.
- Filter on "My Academic Items". This will return any proposal that the user is an academic contact.
- Ability for user to define amount of records displayed on container (5, 10, 20 or 40)
- Automatic save of last filter search (store search parameters and records display count on user profile)
- Ability to create academic items
- Ability to set which role(s) are required by a user to view container

#### *Proposals container*

- Display Full Proposals and Planning Proposals
- Clearly display the progress of a proposal. Refer to "Proposals container features" in the table below
- Filter on "My Academic Items". This will return any proposal that the user is an academic contact.
- Ability for user to define amount of records displayed on container (5, 10, 20 or 40)Automatic save of last filter search (store search parameters and records display count on user profile)
- Ability to set which role(s) are required by a user to view container

#### *Notifications*

- Display basic information regarding CourseLoop notifications sent to a user, including time, date and title
- Enable the user to review the notification from the dashboard
- Ability to set which role(s) are required by a user to view container
- Styling of the Dashboard is adopted from a client's primary and secondary colours.

## Theme: Platform administration

This theme addresses enhancements to CourseLoop which provide additional functionality for system administrators and super users.

### Admin Portal

The Admin Portal enables clients to manage users, groups and notifications within CourseLoop.

#### *User management*

- Ability to create new users
- Apply modify attributes on a user record, including: First name, Last name, UserID, Password (Local login only), Email, Contact details
- Ability to reset password (Local login only)
- Ability to unlock accounts
- Ability to assign users to groups
- Ability to remove users from groups
- Ability to activate/deactivate user
- Ability to delete a user

### *Group management*

- Ability to create a new group (Notification only)
- Ability to modify attributes of a group, including: Name, Description, Type, Email
- Ability to view which users are assigned to a group
- Ability to activate/deactivate group
- Ability to assign Academic Org

### *Notification management*

- Ability to create new notification
- Ability to modify attributes for a notification, including: Name, Description
- Ability to add/remove Recipient Types to a notification, including: Users, Groups, Academic Contacts, Related Academic Contacts (i.e. If a change occurs on a Course, a notification is sent to the contacts listed on a Unit that is associated to the course via Curriculum Structure), Actioner (i.e. User performing UI action)
- Ability to add individual users to receive a notification
- Ability to add groups to receive a notification
- Ability to select Notification trigger (pre-defined and non-configurable)
- Ability to define email subject line
- Ability to define notification content
- Ability to enhance notification content via rich text formatting, tables, links, font size, images, lists (bullet and numbered)
- Ability to add CourseLoop variables to notification contact (based on trigger selected)
- Ability to delete a notification

### **Report Builder**

The report builder allows clients direct access to the ServiceNow Report Builder feature to allow the client to self-serve reports. The functionality is suited to access by users with a good understanding of the CourseLoop data structure.

Access is controlled by a specific security role.

Information correct as at August 2019.

[www.factor5.com.au](http://www.factor5.com.au)



©Factor5 2019