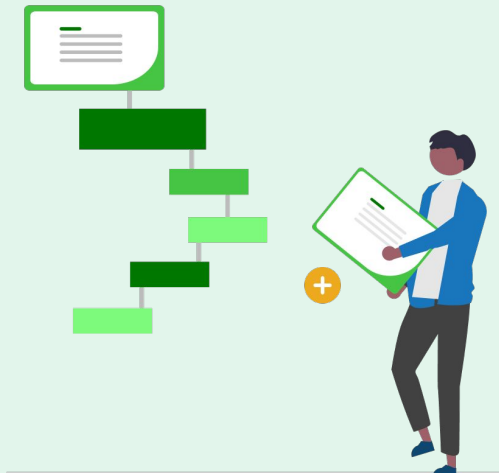


CourseFlow

# Tutorial 101

Get Started with CourseFlow

## How to create a Course workflow



# Before you start

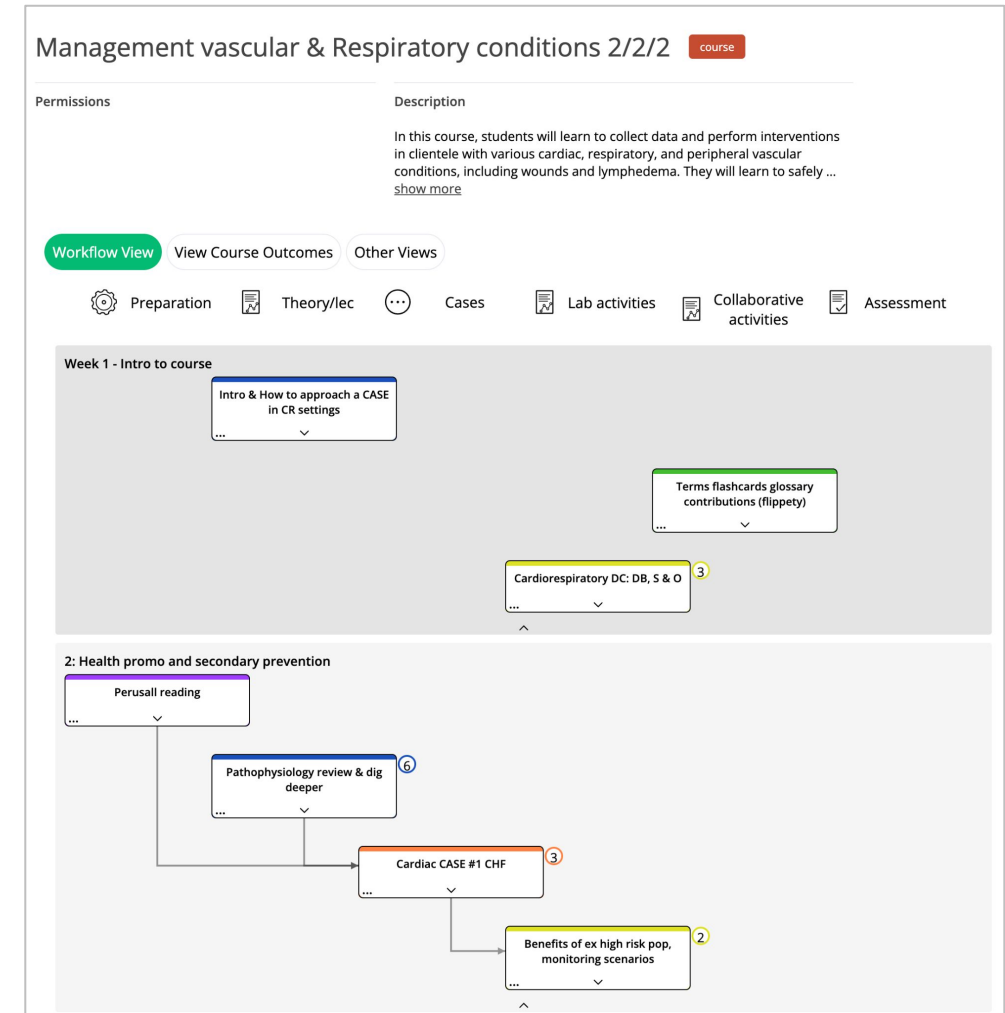
Do you have basic questions about CourseFlow? If yes, check out these two presentations before you start.

1. **What is Courseflow? (Getting started):** this tutorial provides an overview of the Courseflow navigation, organizational structure, and a description of workflow types (Course, Activity, Program).
2. **How to Create a Project (Tutorial 100)** or have a Project already set up in Your Library: this is an essential step because all workflows (Course, Activity or Program) must be saved in a Project.

To view a Course workflow example, [click here](#).

**Do you have a CourseFlow account? If no,** sign up for one.

- To get an account, sign up [click here](#).



# Tutorial 101

## The objective of this tutorial:

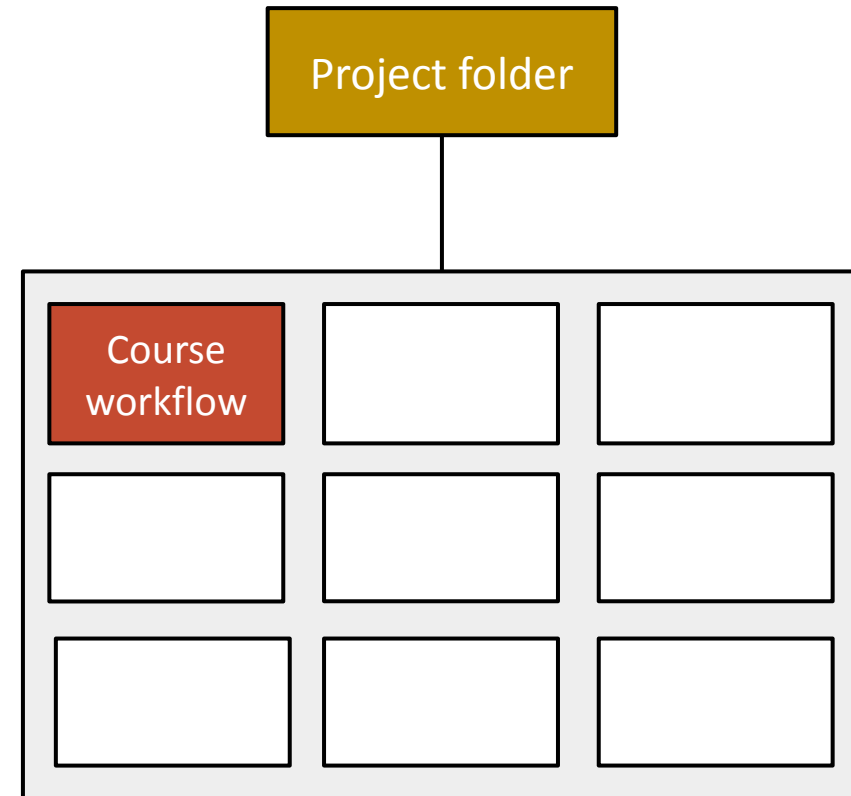
1. To describe how to create a workflow at the **Course level**.

## What is a Course workflow?

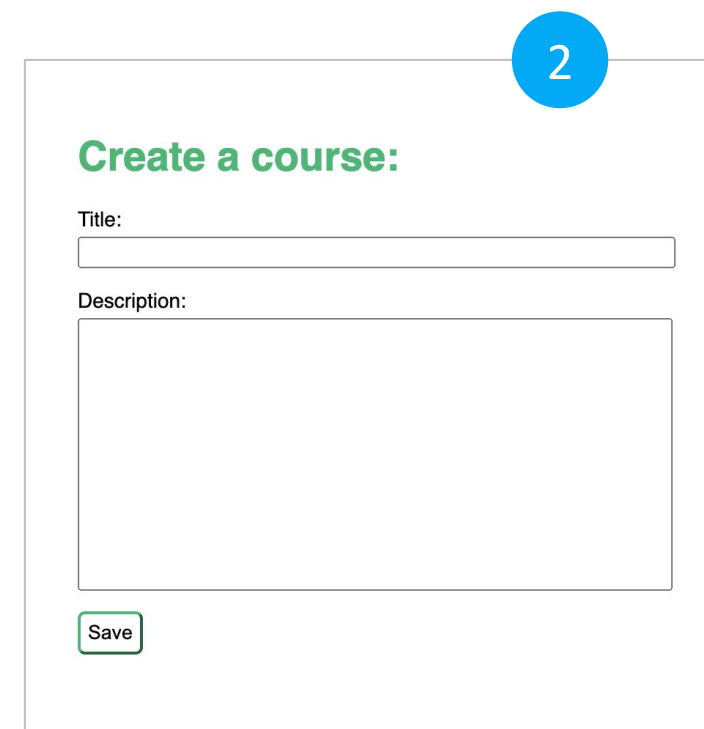
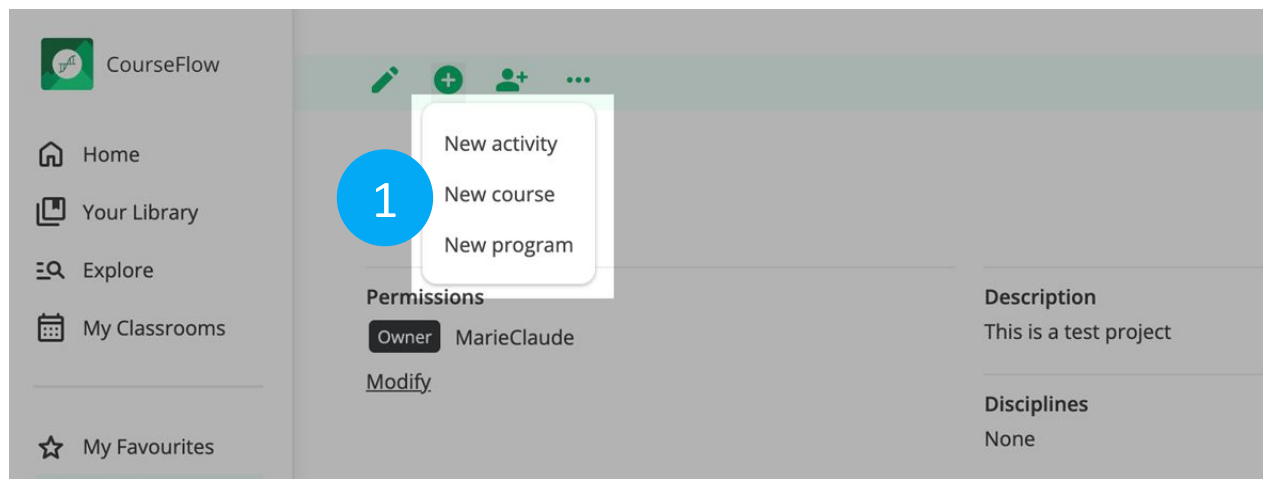
Course workflow is the middle-level of planning within the CourseFlow system. It is intended to help instructors map their course outlines in an interactive and dynamic representation. It can be enhanced to include course learning objectives (learning outcomes), and linked to specific activity workflows, which helps both instructors and their students plan ahead and follow the course with a greater sense of coherence.

Workflow type:

# Course



# Using the Project Action Bar to create a Course workflow



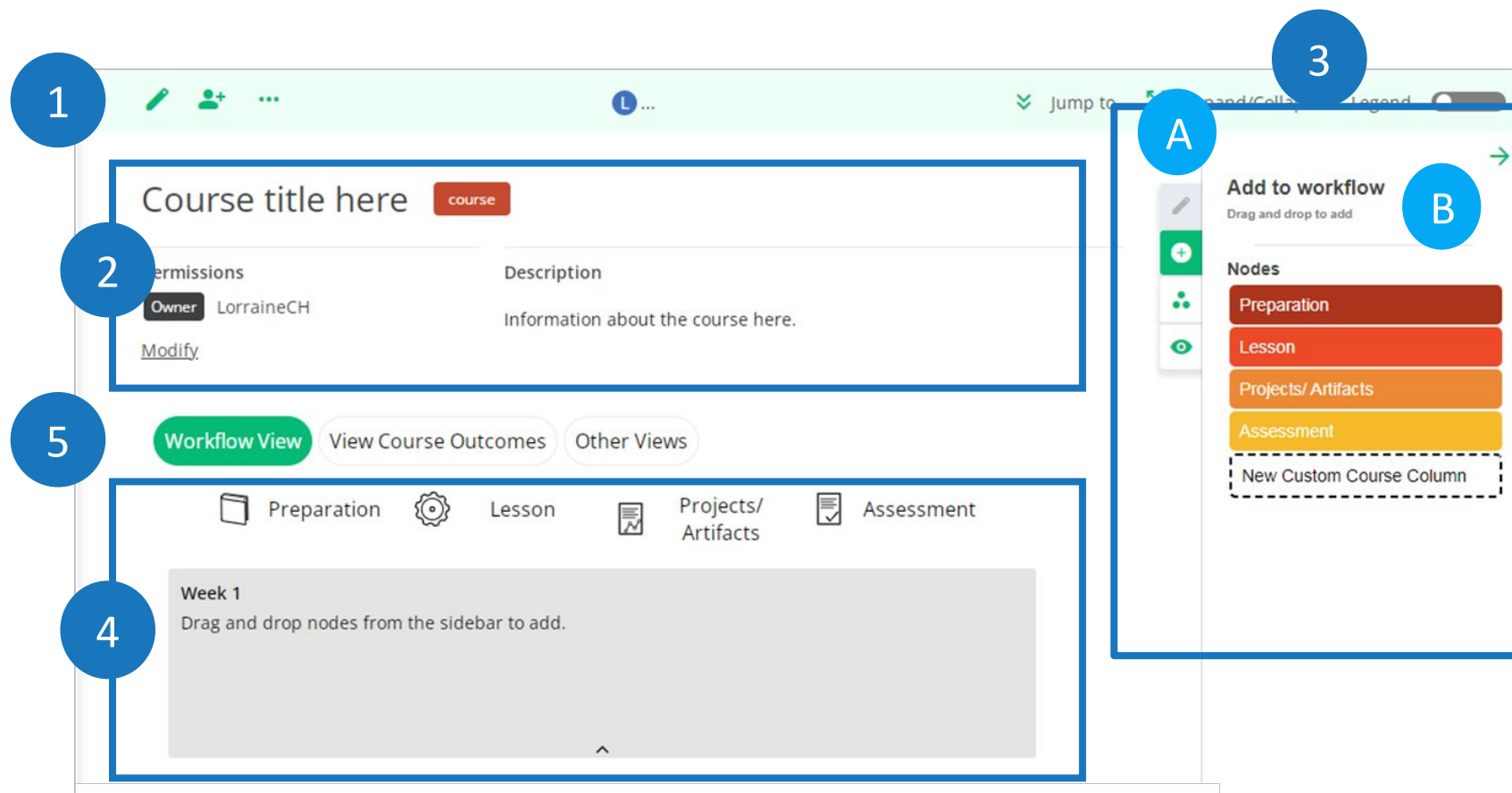
In the Project:

- 1) Click the Plus (+) icon, on the Action bar, and select “New course” from the dropdown. NOTE: your workflow will automatically be saved in the Project.
- 2) Type in the Course “Title” and “Description”, and click the “Save” button on the “Create a course” page. NOTE: This can be modified later.



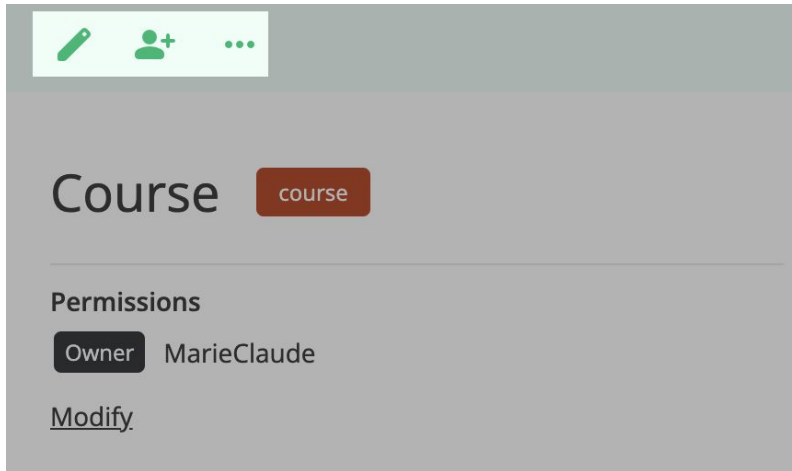
If you are not inside a Project, CourseFlow will automatically ask which Project you want to save your workflow in. Remember a Project and its workflow(s) are saved in Your Library.

# Elements of the Course workflow interface



- 1) Action bar (three icons): to perform (a) edit overview, (b) share, (c) visibility options.
- 2) Overview: to add a brief description about the workflow and collaboration permissions.
- 3) Workflow builder: to create and edit workflow nodes, categories and sections; consists of two parts - A) tabs and B) tools
- 4) Workspace: to display and edit workflow nodes, categories and sections.
- 5) Views: to provide different visual displays of the workflow information.

# Action Bar



Action bar icons:

- 1) Pencil icon: to edit and add information on the Course overview.
- 2) Person icon: to share, publish and create a public link of a Course workflow.
- 3) 3 Dots icon: to provide more options – Export, Copy to my current project, Copy to my library, Import Outcomes, Import Nodes, Archive workflow.

NOTE: Action bar elements, Jump to, Expand/Collapse and Legend are outside the scope of this introductory level tutorial.



All three workflow types (Course, Activity, Program) use these same tools

# Overview

Course

permissions

Owner MarieClaude

Modify

Description

This is a description of this course.

Workflow View

View Course Outcomes

Other Views

Preparation

Lesson

Artifact

Assessment

Week 1 Title

Lesson

Project

Edit Course

Title

Course

Description

This is a description of this course.

Code (Optional)

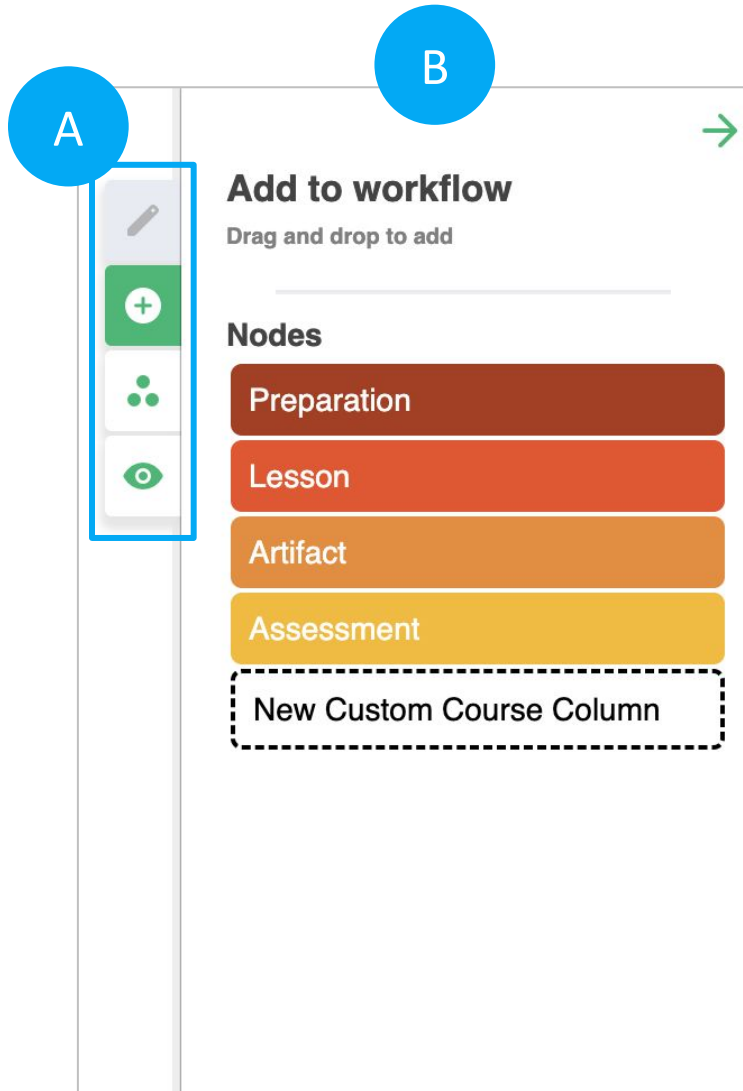
Time

3 credits

Overview: to provide a title, brief description and collaboration permissions.

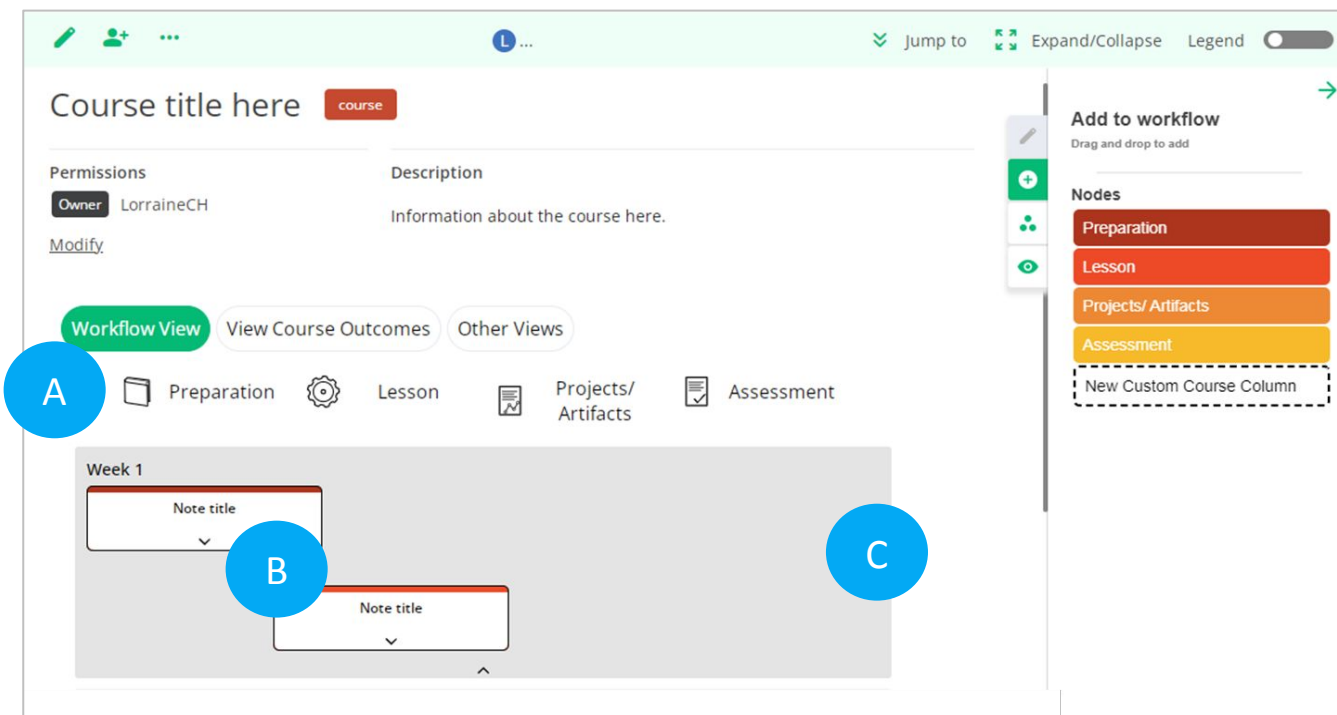


# Workflow Builder – two elements



- A) Workflow Builder **Tabs** (5 tools)
- 1) Pencil icon: to edit. NOTE: It indicates that the selected item on the workflow is in "edit" mode (Edit course (overview), Edit column (category), Edit week (section) etc.).
  - 2) Plus (+) icon: to access the "Add to workflow" tool panel
  - 3) 3 Dots Triangle icon: to access outcomes section (not covered in this tutorial)
  - 4) Eye icon: to create object sets, ways to categorize nodes (not covered in this tutorial)
  - 5) Restore icon: to restore deleted items (visible when something is deleted)
- B) Workflow Builder **Tool**: to manage elements within the workflow as well as the entire workspace. This area is dynamic and changes depending on what you are working on (e.g. "Edit course" tool to edit the Course Overview).

# Workspace



NOTE: These three components can be edited and modified.

## Components of the Workspace interface:

- Category** (the 4 titles at the top of the workspace): to classify the curricular decision types. NOTE: the default setting starts with four categories: Preparation, Lesson, Projects/Artifacts and Assessments. Custom categories may be added, as needed. TIP: we recommend that these should be organized/selected before adding nodes.
- Node** (the thumbnail box with text): to provide a brief description of the content for the particular task on the workspace. NOTE: the node itself only appears after you "drag and drop" it from the category stack on the Workflow builder tool. The location where the node appears on a workspace will correspond to the type of node category selected from the nodes category stack.
- Section** (the grey background): to define a unit of time (or segment of a course - e.g., module), with related curricular tasks. NOTE: the default setting defines a section as a "week".

# Views

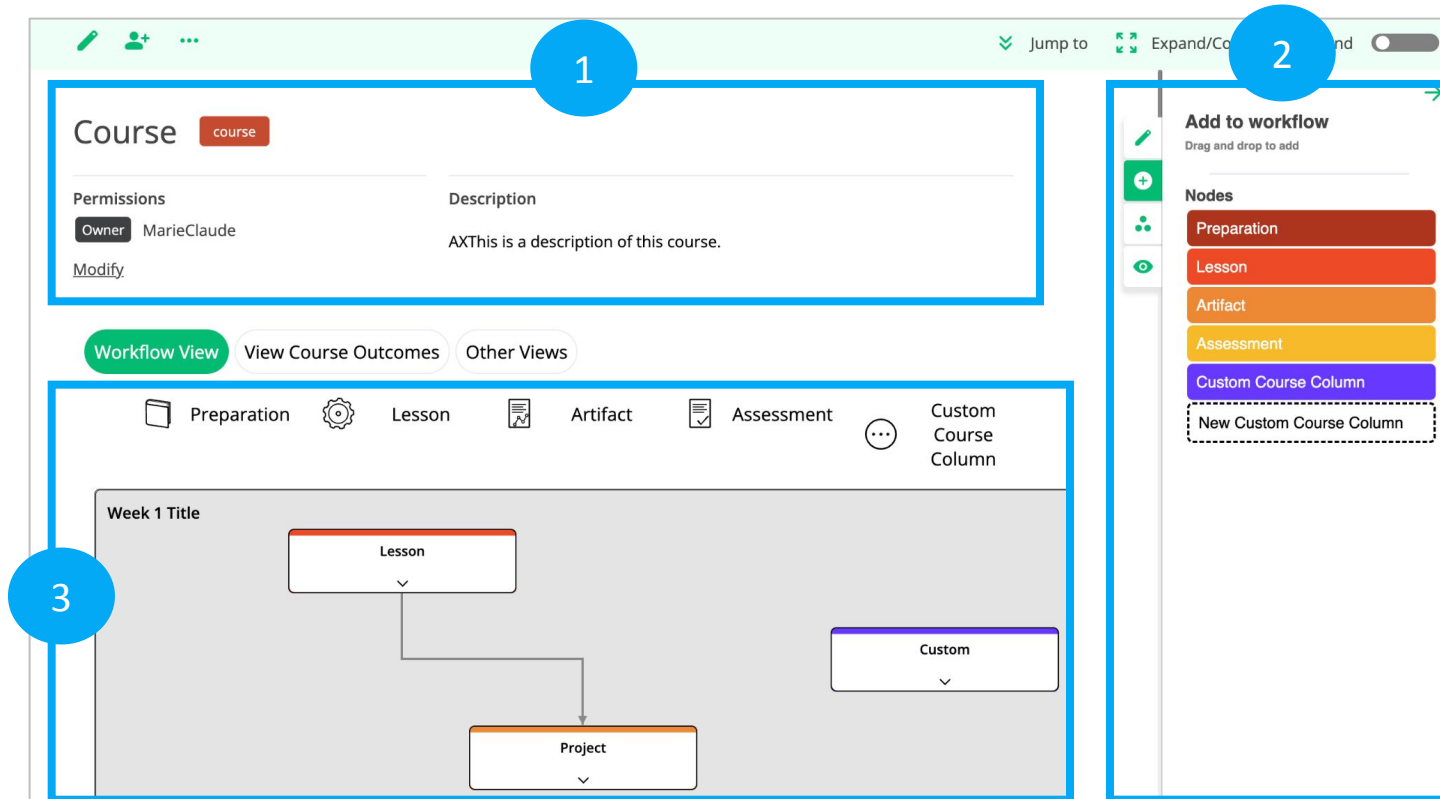
The screenshot displays the 'Course' management interface. At the top, there's a 'Course' header with a 'course' button. Below this, the 'Permissions' section shows 'Owner: MarieClaude' and a 'Modify' link. The 'Description' section contains the text 'This is a description of this course.' Below these sections are three tabs: 'Workflow View' (highlighted in green), 'View Course Outcomes', and 'Other Views'. Above these tabs are three blue circles labeled 'A', 'B', and 'C'. Below the tabs is a navigation bar with icons and labels for 'Preparation', 'Lesson', 'Artifact', and 'Assessment'. The main content area, titled 'Week 1 Title', shows a workflow diagram with a 'Lesson' box connected to a 'Project' box by an arrow. Both boxes have a downward arrow below them.

Views three tab options:

- A) Workflow View: to work on a workflow, this view must be selected.
- B) View Course Outcomes: to add and edit outcomes on the Outcomes page.
- C) Other views: to represent the workflow information as data tables. It provides a dropdown with two options: Course Outcome Table and Course Outcome Analytics.

NOTE: options B & C are not covered in this tutorial.

# Getting ready to build a workflow



These are the three elements you will need to create and build your workflow, starting with editing:

- 1) the Overview.
- 2) the Workflow builder - Two elements Tabs and Tools
- 3) the workspace

In the next few slides we will explain how to use these elements to create a workflow.

NOTE: The workflow builder and the workspace work together, allowing you to create and refine your workflow.

# Editing the Course Overview

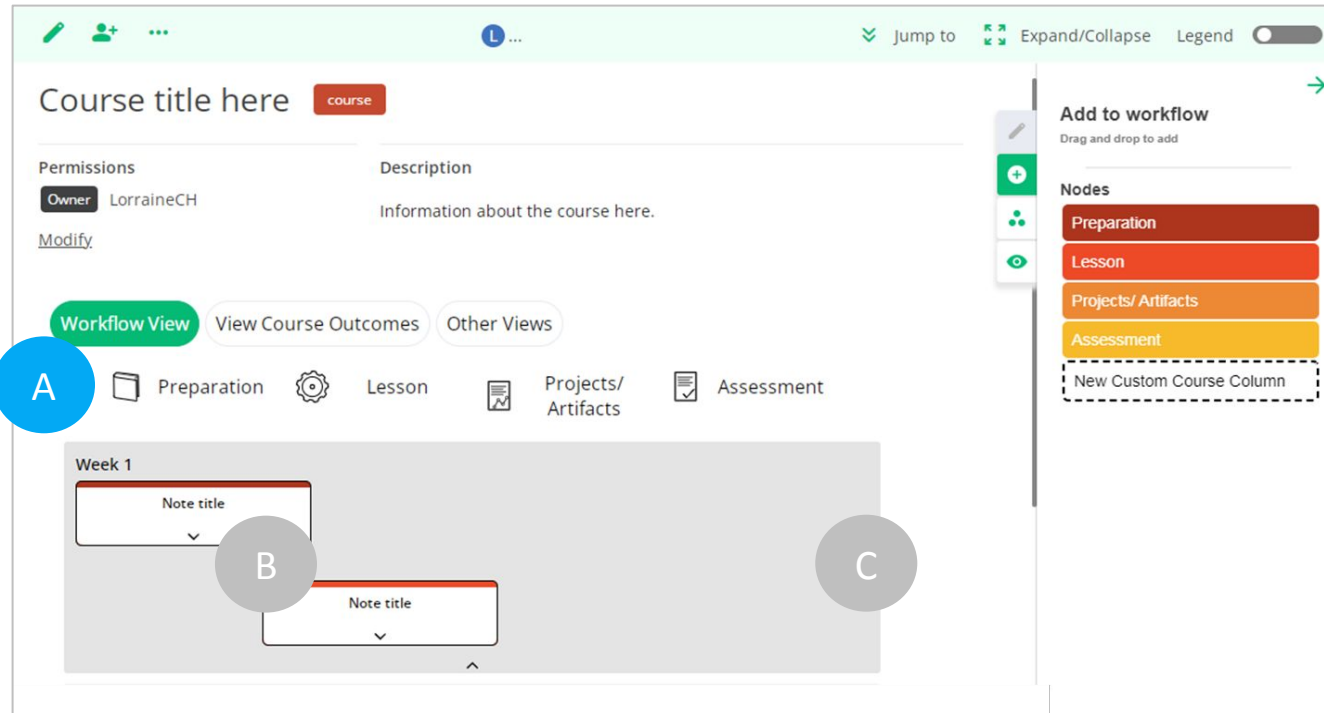
The screenshot shows the 'Course Overview' interface. A blue circle with the number '1' points to the pencil icon in the top-left action bar. A blue circle with the number '2' points to the 'Edit Course' button in the right-hand sidebar. The main content area displays course details: 'Course' (with a red 'course' tag), 'Permissions' (Owner: MarieClaude), 'Description' (AXThis is a description of this course.), and a 'Modify' link. Below this are tabs for 'Workflow View' (selected), 'View Course Outcomes', and 'Other Views'. A horizontal bar contains icons for 'Preparation', 'Lesson', 'Artifact', 'Assessment', and 'Custom Course Column'. The main workspace shows a 'Week 1 Title' section with a 'Lesson' box and a 'Custom' box.

- Click the (1) Pencil icon on the Action bar, or click anywhere on the Overview portion.
- Both will open the (2) Workflow builder “Edit Course” tool, allowing you to add and edit information about the course.

NOTE: features not covered in this tutorial:

- Modify button on the Overview section (opens Share pop up).
- Code, Time, Ponderation, Settings Outcomes Style and Condensed View on the “Edit Course” tool

# Editing Course Categories



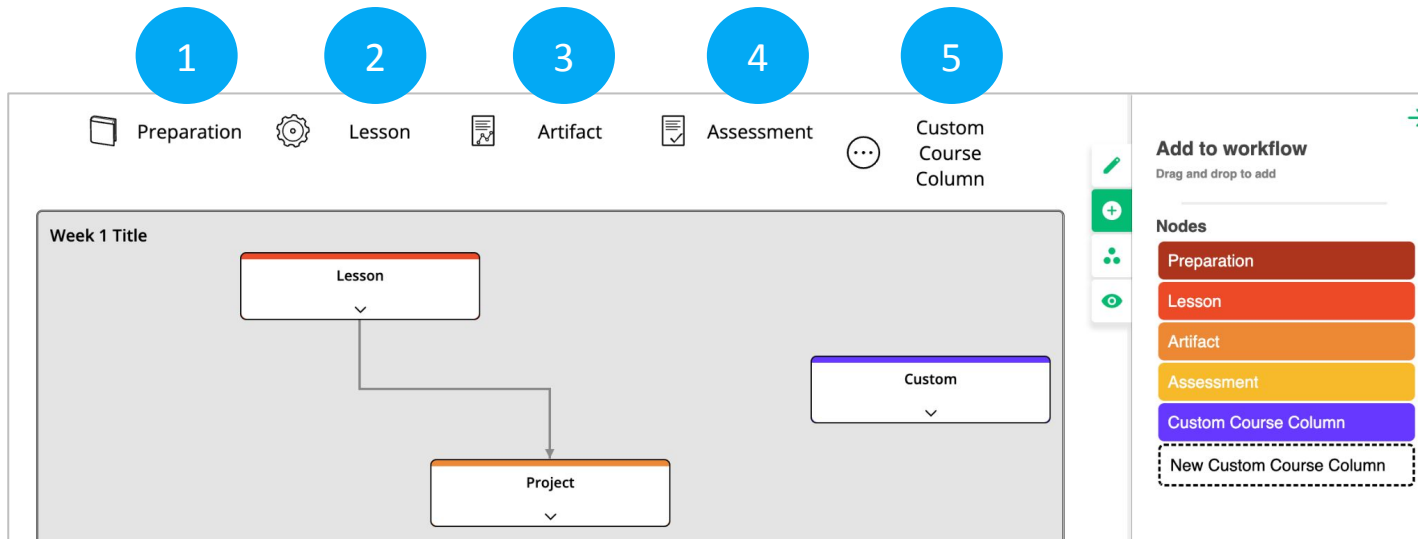
**A)** Categories provide structure to a workflow, and should be organized first, before adding nodes.

The category default number and sequence (Preparation, Lesson, Projects/Artifacts and Assessment) can be edited, modified, moved, duplicated and deleted.



**TIP:** If the “Add to Workflow” tool is not visible, click the Plus (+) icon on the Workflow builder tab.

# Course Category Explanation



- 5) **Custom (optional)** : to create/add other curricular/decision types. For example, adding Labs if they are a specific part of your course curriculum and not shared with the Lesson.

NOTE: the layout of the categories/nodes follows a convention of reading left to right; and the sections layout convention is a top to bottom progression. These orientation conventions can be changed by the author of the workflow.

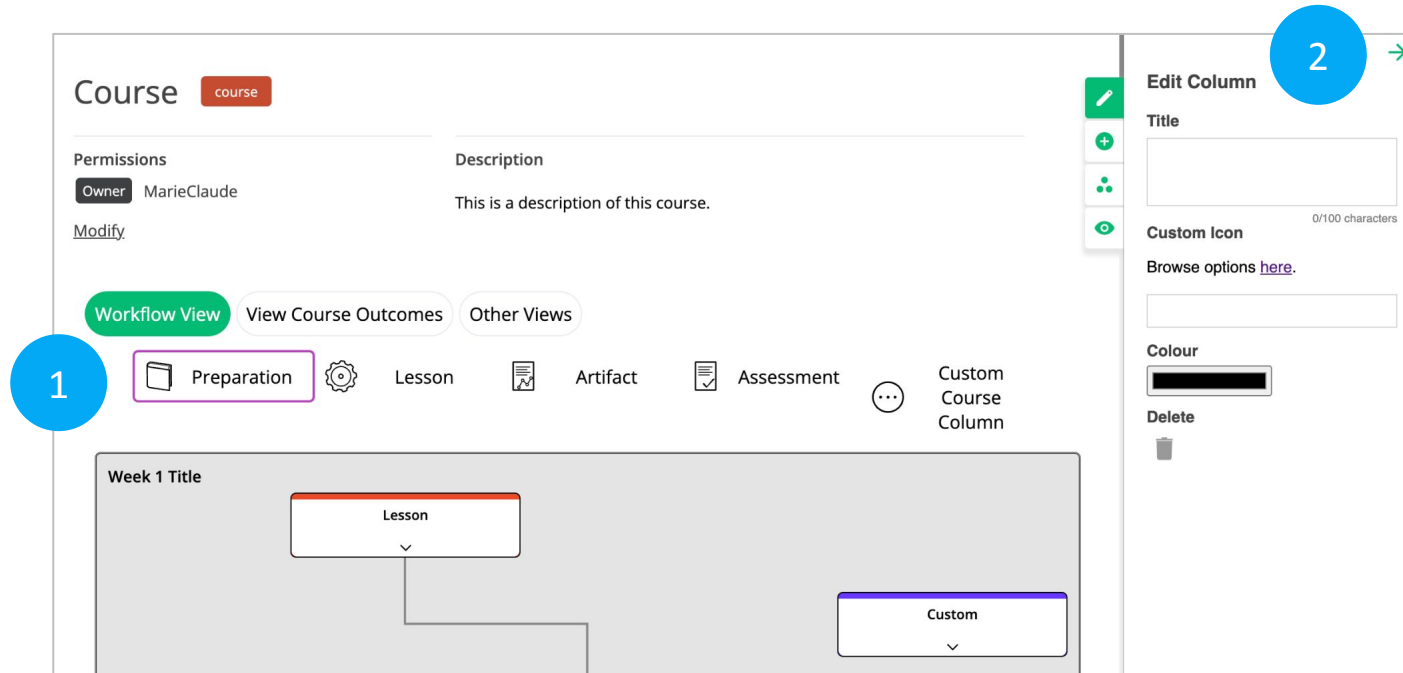


TIP: adding too many categories may make your workflow too complex to understand.

## Description of the four default categories:

- 1) **Preparation** - a curricular decision that prepares students for their class. For example, providing students with a reading, a video, exercises ahead of the class, which will prime their knowledge and/or curiosity for the learning that is to come during the class/lesson period.
- 2) **Lesson** - a curricular decision that provides students with opportunities to gain the knowledge and skills associated with the course objectives.. Typically this is the “in-class” synchronous portion of a course (e.g., lectures, labs, studios/workshops).
- 3) **Projects/Artifact** - a curricular decision that provides students with explicit tasks that produce some form of assignment that is reviewed by the teacher either weekly or periodically.
- 4) **Assessment** - a curricular decision that provides students with feedback. Nodes for formative and summative tasks and activities to gauge progress and learning are placed here.

# Editing Course Categories: Accessing the “Edit column” tool



- 1) Click on a category title to access the workflow builder “Edit column” tool.
- 2) Type your title in the “Title” field.  
NOTE: The title is automatically updated on the category label.

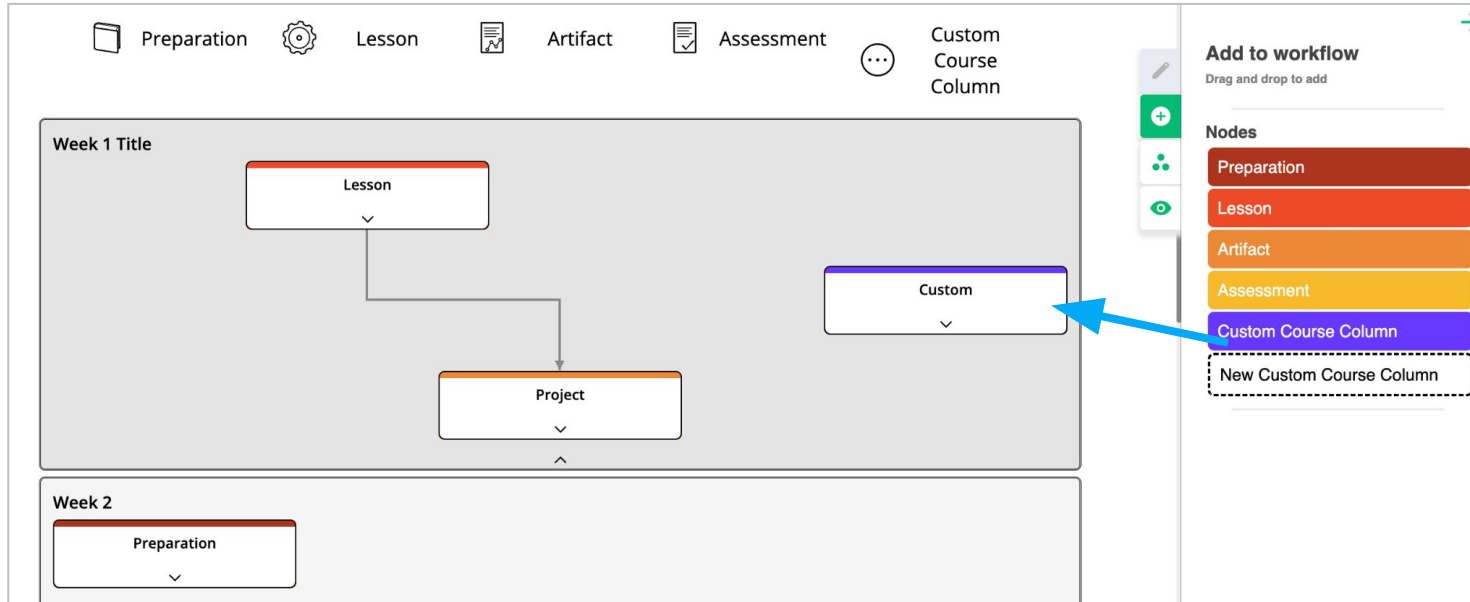
Also on the tool:

- Colour - to change the colour of nodes associated with a category,
- Delete - to delete a category.

NOTE: Custom Icon Browse options here, is outside the scope of this tutorial.



# Adding a Custom Course Node Category



Drag and drop the “Custom Course Column” (node) from the “Add to Workflow” tool, to the workflow.

This automatically creates a new node category (column) where the node will reside.

NOTE: new node category and new node can be moved and modified.



TIP: If the “Add to Workflow” tool is not visible, click the Plus (+) icon on the Workflow builder tab.

# Moving Course Categories

Course course

Permissions  
Owner MarieClaude  
[Modify](#)

Description  
This is a description of this course.

Workflow View View Course Outcomes Other Views

Preparation Lesson Artifact Assessment

Week 1 Title

Lesson

Select the category title and drag and drop the category to where you want it on the workflow.



The default settings for a Course workflow are set up with a specific category sequence - Preparation, Lesson, Projects/Artifacts, and Assessment. If this setup does not work for your course you can modify this.

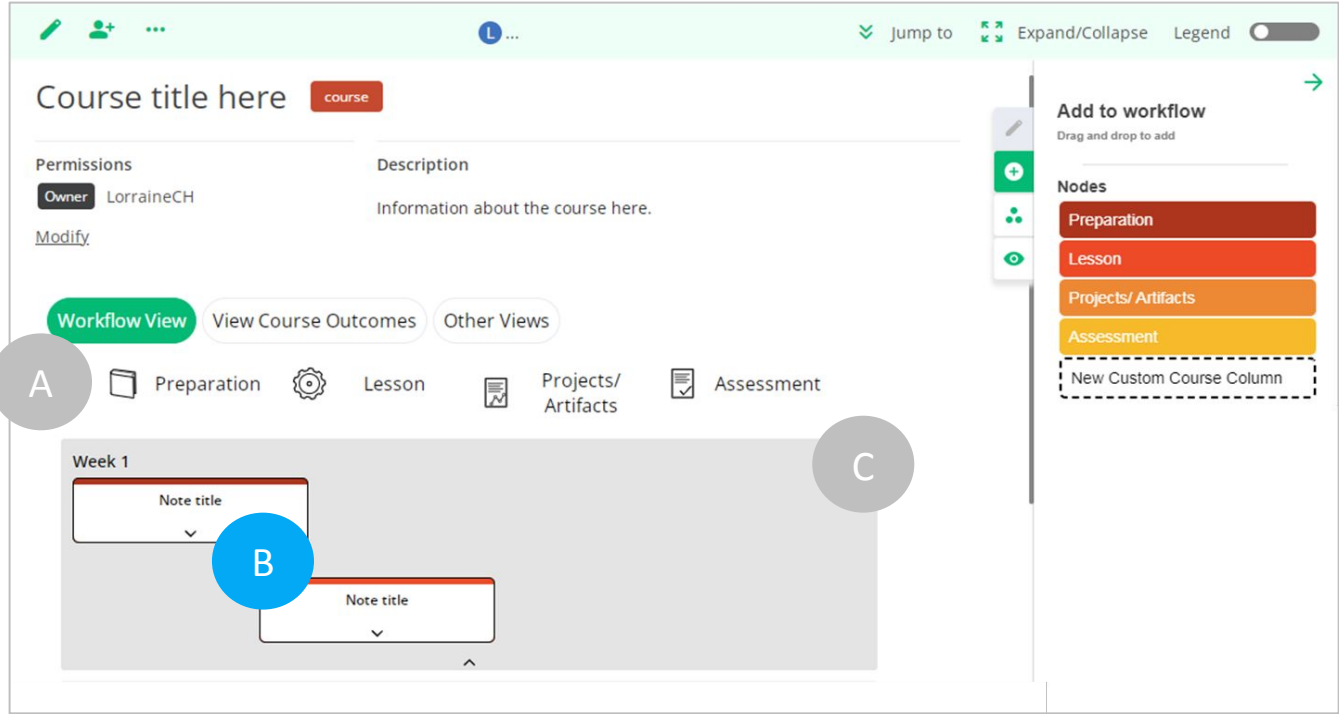
# Using Category Shortcuts to Add, Duplicate, Delete & Comment



Hover over a category title to click on a roll over icon.

- Plus (+) icon – to add a Course category (without nodes).
- Duplicate icon – to create an exact copy of a category (with nodes).
- Delete icon – to delete a category. Note: Only the category is deleted, any nodes in the category will move to the first category.
- Comment icon – to add a comment to a category.

# Editing Course Nodes

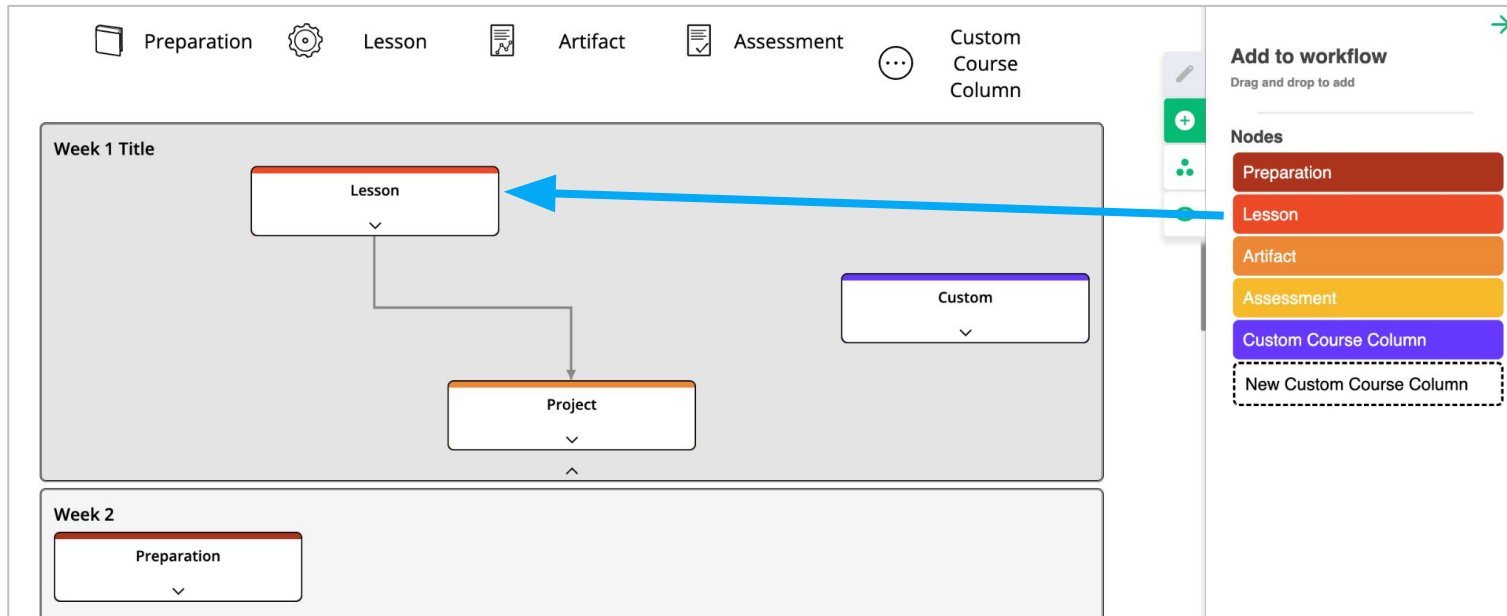


**B) Nodes** at the Course level are the workflow building blocks representing “who is responsible” for the work to be done and the “types of tasks”.

Course level nodes are attached to a category, which is represented as columns. In the workflow, nodes are represented as thumbnails (box containing node title and description).

Once a node is added to a workflow, it can be moved, duplicated, or deleted it as needed.

# Adding a Course Node: Populating the Categories



Select and drag a node category (Preparation, Lessons Projects/Artifacts or Assessments) to the workspace from the Workflow builder “Add to workflow” tool.

It will be dropped in the appropriate category (column) based on the node category you have selected (e.g. the lesson node will automatically be placed in the lessons category, etc.).

Add more nodes: continue to drag and drop the nodes from the “Add to Workflow” tool to the workspace.



TIP: If the “Add to Workflow” tool is not visible, click the Plus (+) icon on the Workflow builder tabs.

# Editing Course Nodes: Accessing the “Edit Course Node” tool

Course course

Permissions

Owner MarieClaude

Modify

Description

This is a description of this course.

Workflow View

View Course Outcomes

Other Views

Preparation

Lesson

Artifact

Assessment

Custom Course Column

Week 1 Title

1

Lesson

Project

Custom

2

Edit Course Node

Title

Lesson

Description

6/100 characters

Context

None

Task

None

Time

Click on a (1) node thumbnail to access the workflow builder (2) “Edit Course node” tool.

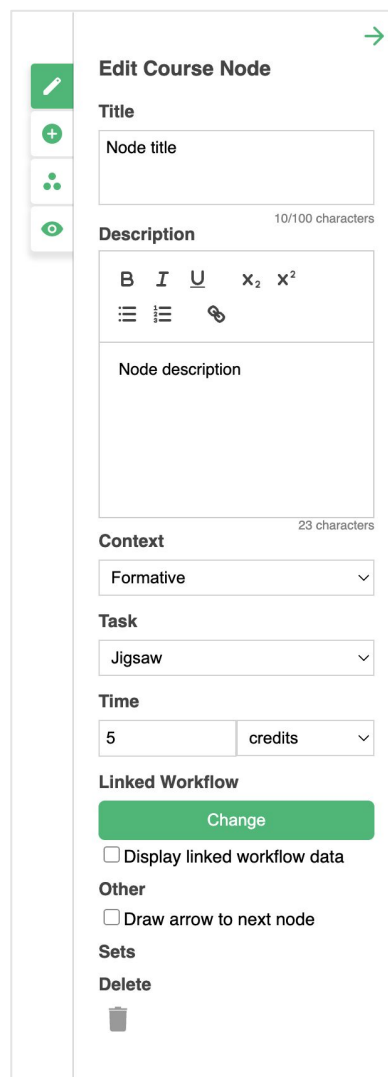
NOTE: it is through the “Edit Course node” tool that information, content and details about learning tasks are added. Details about node thumbnail content is explained on the next slide.

NOTE: on the node thumbnail the description content appears below the title. This portion of the node is hidden by default, however it can be expanded by clicking on the arrow at the bottom of the node.



Everything you add to the Workflow builder tool “Edit Course node” is automatically saved and updated on the node.

# Adding content to the “Edit Course Node” tool



The screenshot shows the 'Edit Course Node' interface. On the left, there is a vertical toolbar with four icons: a pencil (1), a plus sign (2), a three-dot menu (3), and an eye (4). The main form has the following sections:

- Title:** A text input field labeled 'Node title'.
- Description:** A text area with a character count of 10/100. It includes a rich text editor with buttons for Bold (B), Italic (I), Underline (U), and mathematical symbols ( $x_2$ ,  $x^2$ ).
- Context:** A dropdown menu currently set to 'Formative'.
- Task:** A dropdown menu currently set to 'Jigsaw'.
- Time:** A field with the value '5' and a unit dropdown set to 'credits'.
- Linked Workflow:** A green 'Change' button and a checkbox for 'Display linked workflow data'.
- Other:** A checkbox for 'Draw arrow to next node'.
- Sets:** A section header.
- Delete:** A trash icon.

Click on the following text fields:

- 1) Title: to add a title of 2-3 words
- 2) Description: to describe or to elaborate on the tasks, provide links to materials, quizzes/questions.
- 3) Context: to denote type of student assessment (e.g. Formative, Summative), if applicable. Note: the selection is displayed as an icon in the upper left corner of the node.
- 4) Other (optional) check box: to add more functionality to the arrows. Drawing an arrow (link) to the next node to show connection or flow of learning.

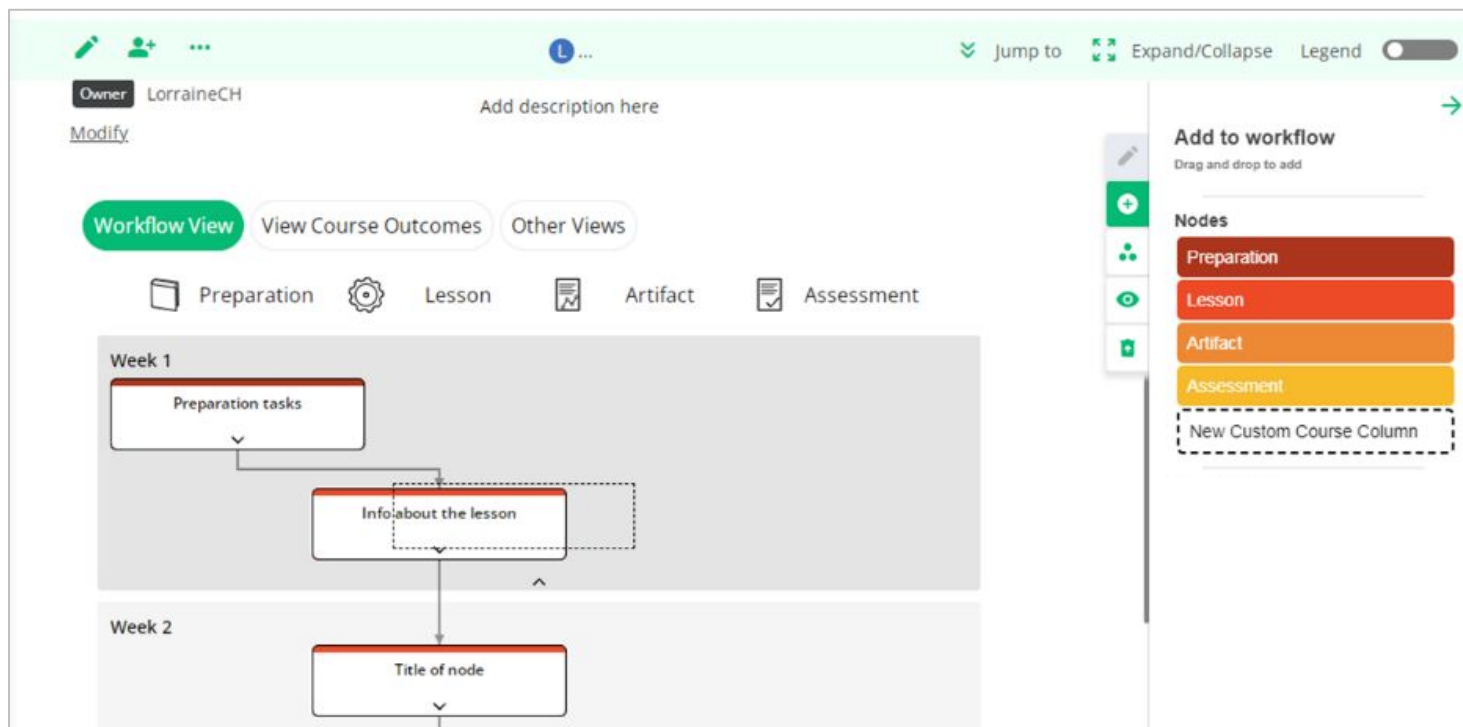


TIP: node title should make it clear what the node information contains.

Optional node features not covered in this tutorial:

- Task: to identify/associate a particular node with the use of a pedagogical strategy. Selected from a list of possible strategies or personal templates. Note: the selection is displayed as an icon in the upper right corner of the node.
- Time (optional): to indicate the amount of time the curricular activity takes, specified by the node. For instance, indicating how long it will take to complete the task.
- Linked workflow (optional): to link an Activity workflow to a specific node.

# Moving Course Nodes



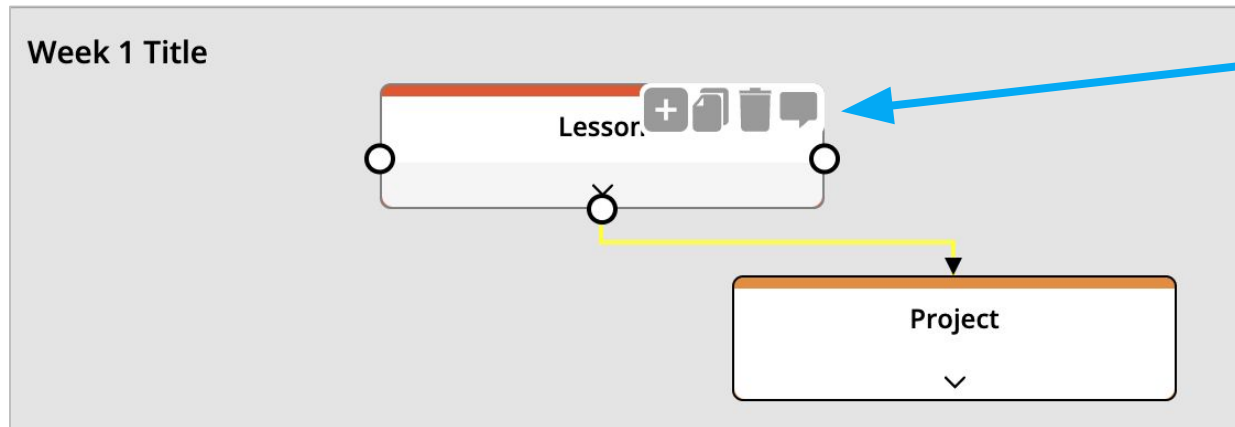
Select the node, and drag and drop it where you want it to be on the workflow.



Once nodes are dropped into the workspace, they can be moved from category to category (column to column) and up and down between sections (weeks).



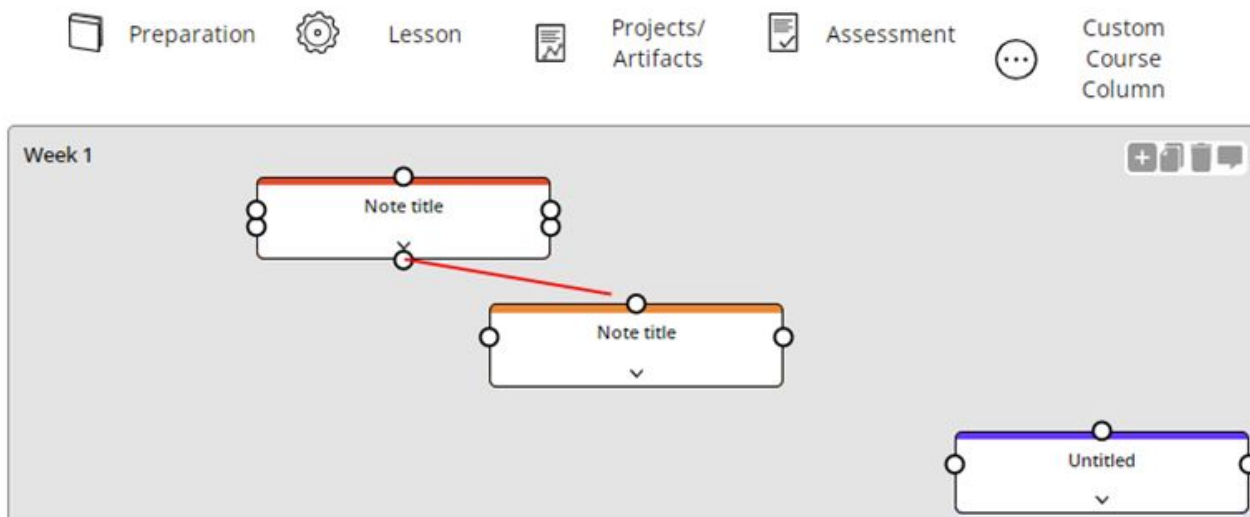
# Using Node Shortcuts to Add, Duplicate, Delete & Comment



Hover over a node to click on a roll over icon.

- Plus (+) icon: to add a blank node below the original (without content).
- Duplicate icon: to create an exact copy of a node below the original (with content).
- Delete icon: to delete a node.
- Comment icon: to add a comment to a node.

# Links (Arrows) between Nodes (optional)



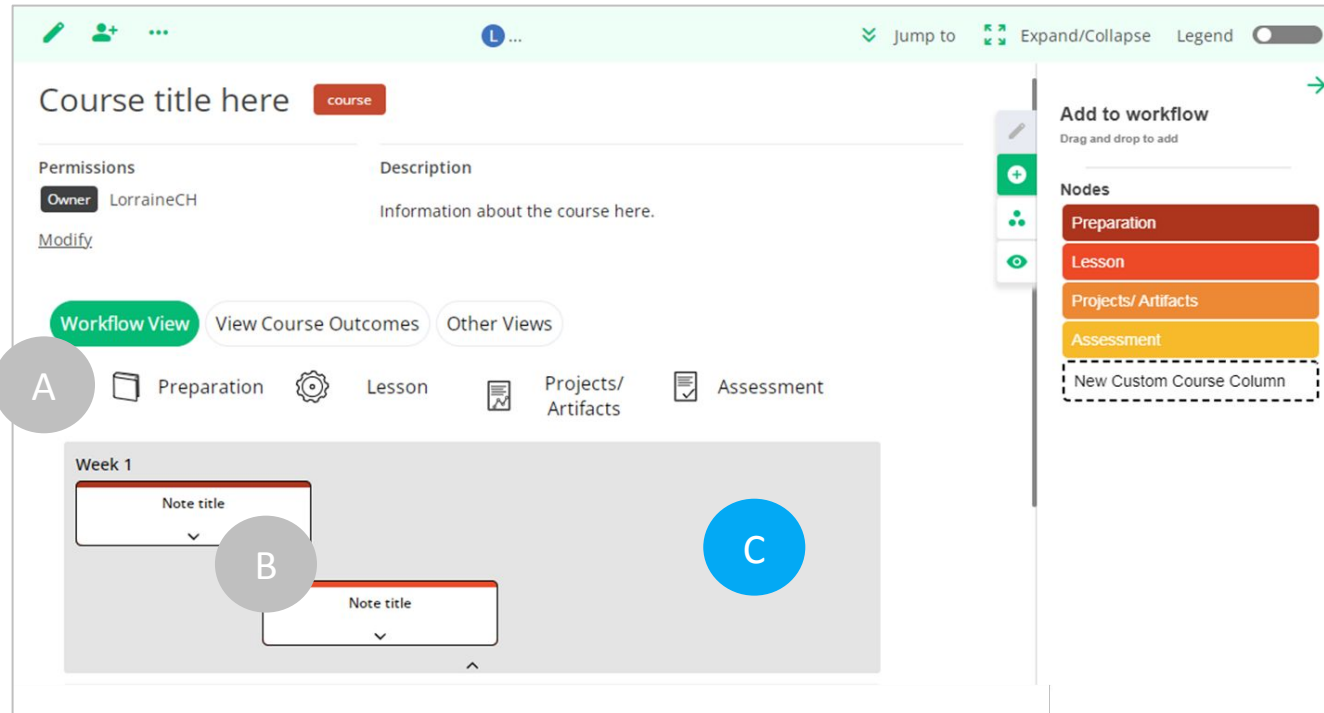
- 1) Hover over a node thumbnail to see 3 or more dots (O).
- 2) Click on a dot (O) and drag to connect to a dot on another node thumbnail. This action links the two nodes by creating a line that ends with an arrow.

Nodes at the Course level are not linked by default, as the relationship between nodes is not always straightforward. Instead, links (arrows) between nodes have to be made by the user and should only be used to illustrate the flow of course content and instruction, where needed.



Links (arrows) should only be added when a workflow is complete or nearing completion. This is because when a node is moved, the lines can overlap or no longer reflect the content flow, requiring modification.

# Editing Course Sections

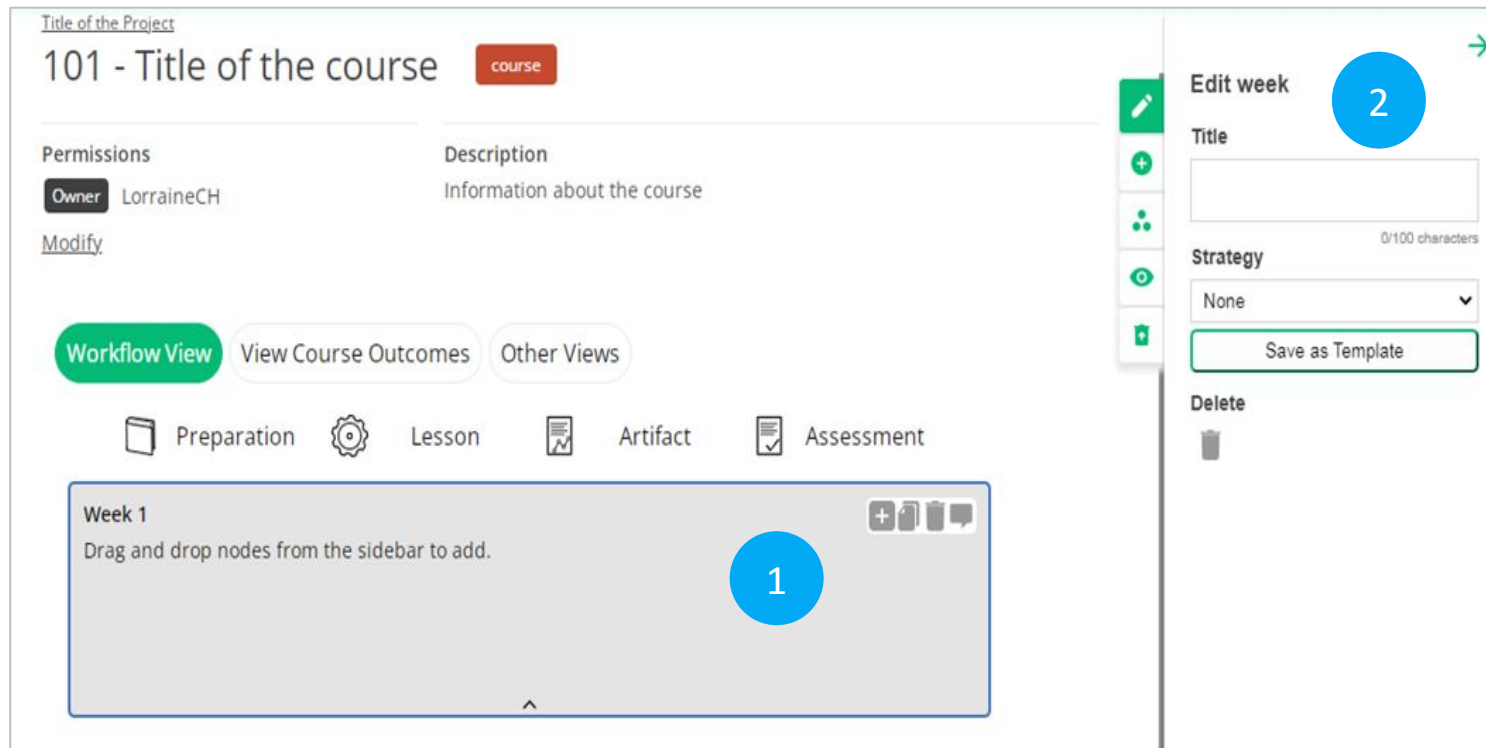


**C) Sections** at the course level are blocks/units of related curricular tasks.

When a Course workflow is first created it has by default the first section (week 1) set up. You can add as many sections (weeks) as needed to reflect your course. Sections can also be moved, duplicated and deleted as needed.

If you prefer to plan your course by topic or by class, the week section can be retitled.

# Editing Course Sections: Accessing the “Edit week” tool



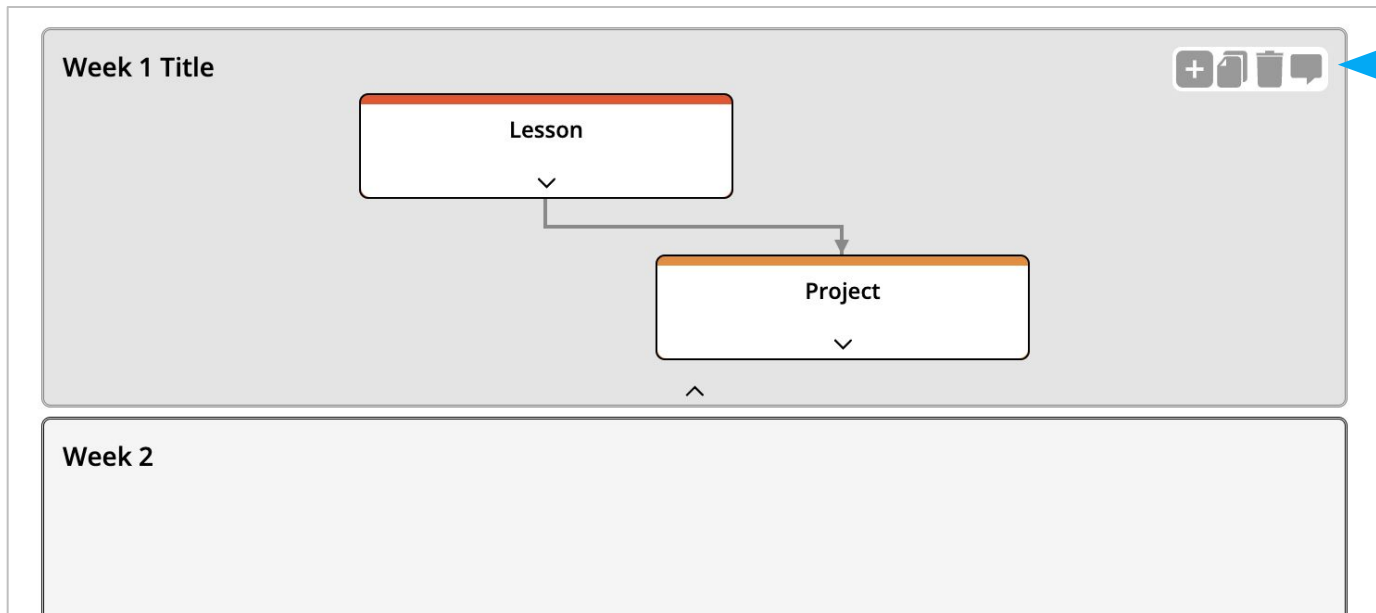
- 1) Click on a section (week) to access the workflow builder “Edit week” tool.
- 2) Type your title in the “Title” field. The title is automatically updated on the section.

Also on the tool:

- Delete - to delete a section (week). NOTE: when a section is deleted all the section’s nodes are deleted as well.

NOTE: Advanced features - Strategy and Save as Template are outside the scope of this tutorial.

# Adding Course Sections



Hover over a section, to access the roll over icons, and click on the Plus (+) icon.

This will add a blank Course section (without nodes) below the original.

NOTE: Courseflow renames the weeks automatically, the new section becomes week 2, etc.



The new section can be moved and modified later

# Moving Course Sections

[Project example](#)

Title of Course

course

Permissions

Owner LorraineCH

[Modify](#)

Description

Information about the course

Workflow View

View Course Outcomes

Other Views



Preparation



Lesson



Lesson



Artifact



Assessment

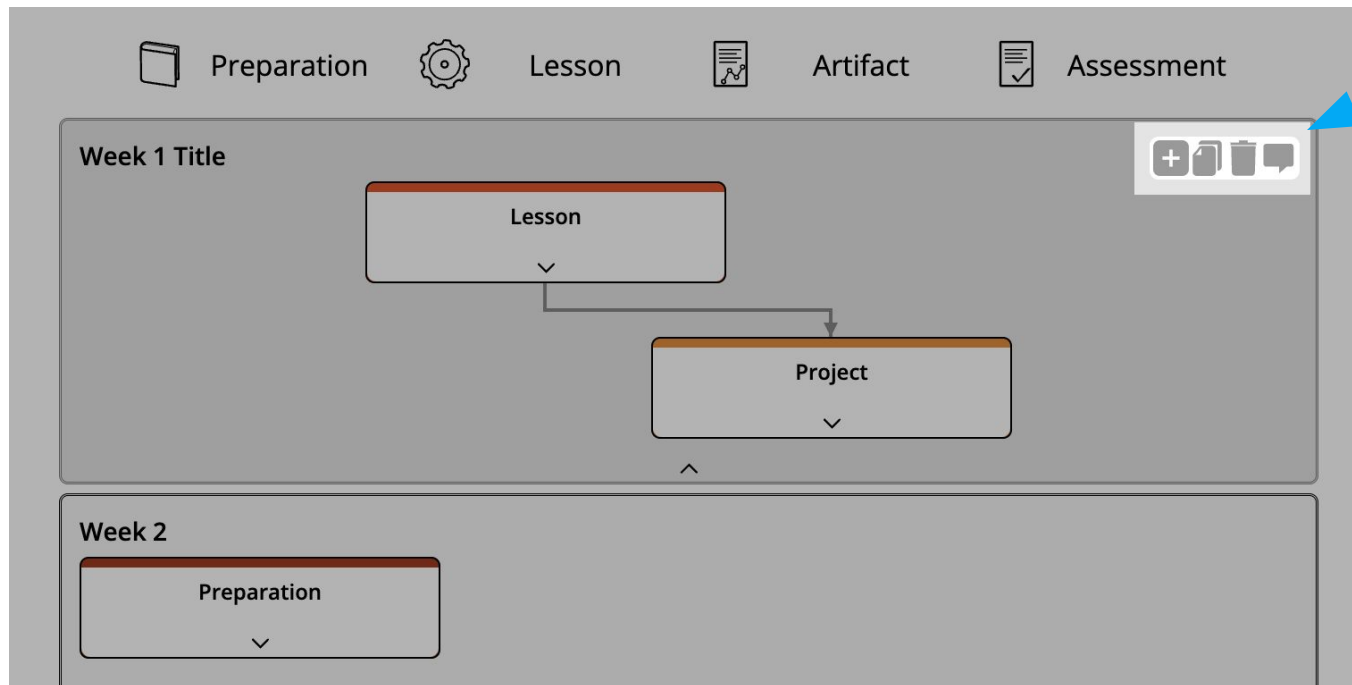
Week 1

Drag and drop nodes from the sidebar to a

Week 2

Select the section, and drag and drop the section where you want it on the workflow.

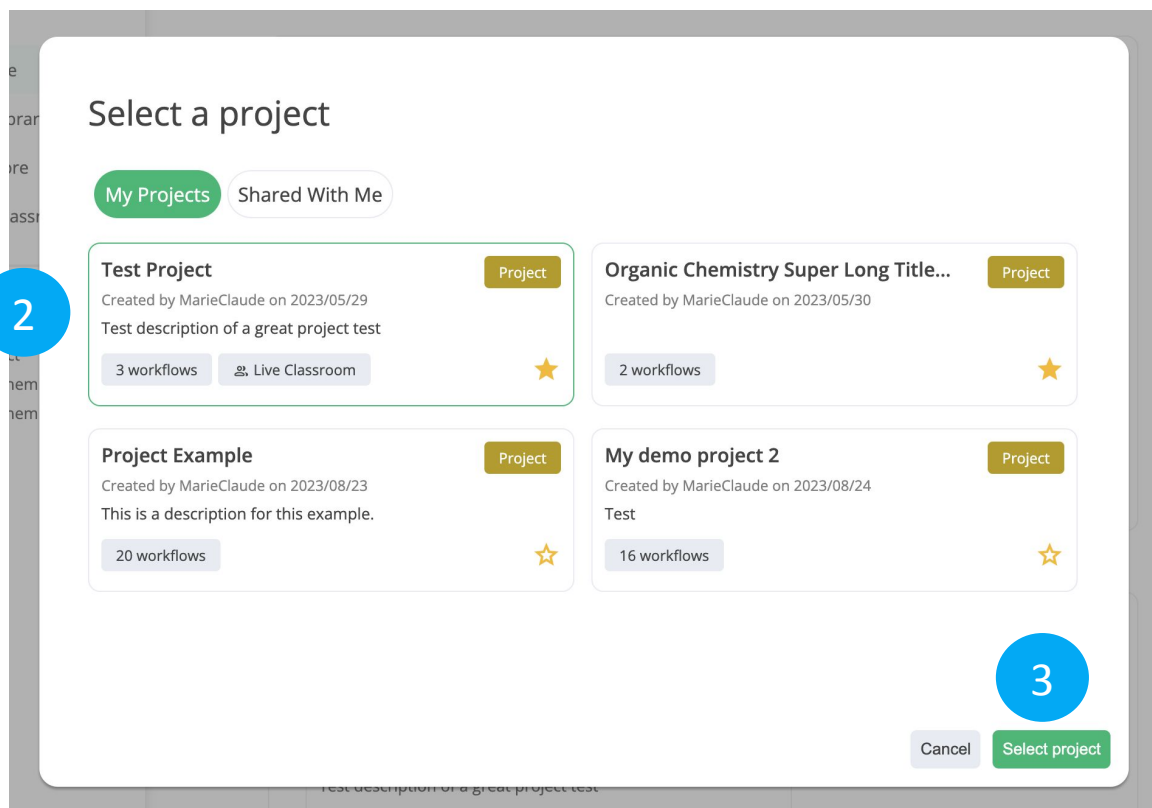
# Using Course Section Shortcuts to Duplicate, Delete & Comment



Hover over a section to click on an icon.

- Plus (+) icon: to add a new section below the section
- Duplicate icon: to create an exact copy of a section (with nodes).
- Delete icon: to delete a section.
- Comment icon: to add a comment to a section.

# Selecting a Project to save a workflow



If you are not inside a Project, CourseFlow will automatically ask which Project you want to save your workflow in.

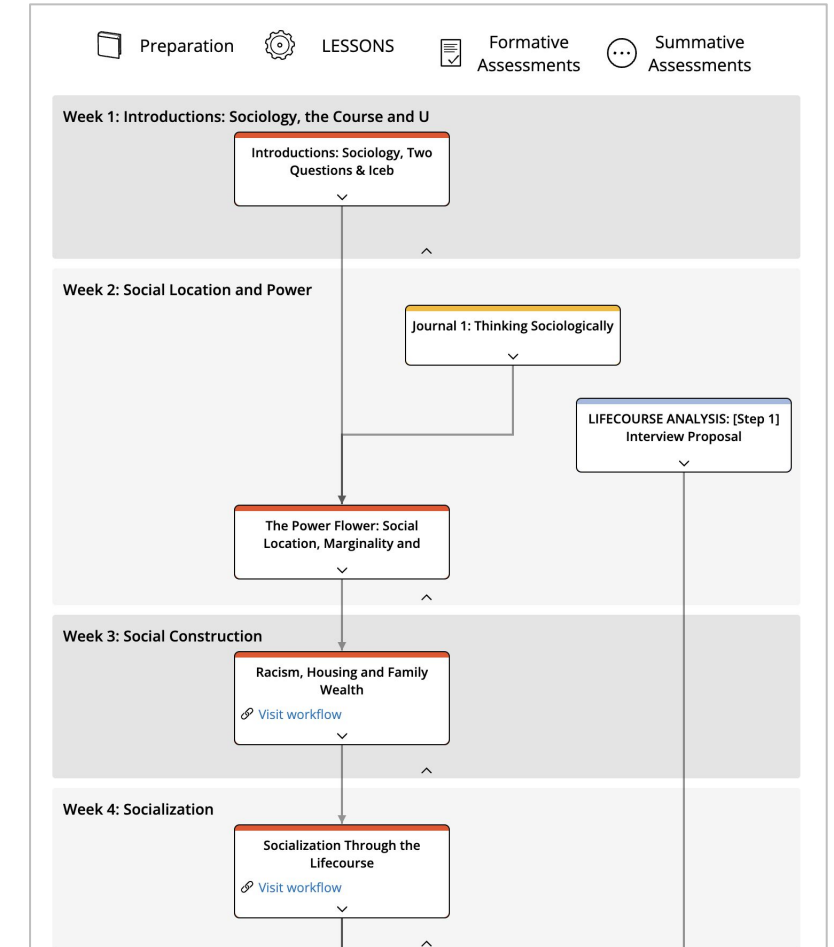
- 1) Click on the Plus (+) icon, on the Utility Navigation, and select the type of workflow from the dropdown menu you want to save. This opens the "Select a project" pop up (shown on left).
- 2) Click the Project (thumbnail) where the workflow will be saved. NOTE: This will highlight the Project thumbnail.
- 3) Click the "Select project" button (bottom right). This opens the "Create a (course, activity or program)" page (will depend on workflow type chosen) .
- 4) Add the workflow "Title" and "Description", and click the "Save" button. NOTE: The workflow is automatically saved in the selected Project.



# What a final Course workflow looks like

- Course in Social Science: Individual and Society
- Course in Medical Technologies: Management vascular & Respiratory conditions
- Course in Science: Mechanics

To see more Course workflow examples check out the “Explore” feature under Courseflow’s main navigation, where you can search for projects and workflows created by other users.



# Want more tutorials on using CourseFlow ?

## **Here are the list of available tutorials:**

- How to create an Activity Workflow (Tutorial 102)
- How to Create a Project (Tutorial 100)
- What is Courseflow? (Getting started)

# Learn more about CourseFlow



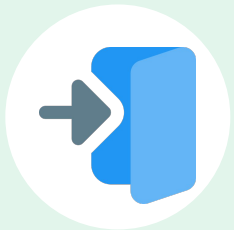
## **Interested in learning more and/or trying out CourseFlow?**

We are accepting applications for pilots of the tool with your program revision and auditing efforts. [Email us](#) to book a demonstration or request more information.



## **Need Help?**

If you are already a CourseFlow user and are looking for help, please visit our [help desk](#).



## **Accessing CourseFlow**

Already have a CourseFlow/myDALITE account? [Log in here](#).

*Reminder: If you are an instructor, pedagogy counselor or curriculum developer select Teacher and have your username and password ready.*

# About CourseFlow & SALTISE

CourseFlow is a free application that supports educators in the design of instructionally and pedagogically coherent and aligned courses, curricula units, and academic programs.



## Who is the CourseFlow development team?

- Jeremie Choquette, our main developer in conjunction with LittleBox, SALTISE's web development partners.
- SALTISE research team



## Who is SALTISE?

We are a learning community service that Supports Active Learning & Technological Innovation in Studies of Education by bringing together instructors and professional development staff from English and French educational institutions within the greater Montreal area, as well as other regions of Quebec, Canada and beyond. Our key goals are based on the ideals of implementing evidence-based pedagogy involving instructional innovations and often leveraging the use of educational technology to promote improved learning.

For more information go to [SALTISE.ca](https://saltise.ca).

# Acknowledgement

Entente Canada-Québec pour l'enseignement dans la langue  
de la minorité et des langues secondes



# Thank you to our partners

We acknowledge the support of our network partners and look forward to future collaborations.

