Getting Started with Coursedog!

This overview outlines the implementation process for the Coursedog platform. The guide contains information such as who is involved with the implementation, an overview of each implementation stage, and a summary of the types of meetings required for implementing each Coursedog product. Throughout the implementation process, the Coursedog team will partner closely with stakeholders from your institution to work towards configuring your instance of Coursedog to be set up based on your business processes and needs.

Project Team

<table>
<thead>
<tr>
<th>COURSEDOG RESOURCES:</th>
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</thead>
<tbody>
<tr>
<td>Project Manager</td>
</tr>
<tr>
<td>Data Engineer</td>
</tr>
<tr>
<td>Customer Success Manager</td>
</tr>
<tr>
<td>Third-Party API Partner</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>PARTNER RESOURCES:</th>
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</thead>
<tbody>
<tr>
<td>Project Champion</td>
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<tr>
<td>Project Manager / Lead</td>
</tr>
<tr>
<td>Functional Stakeholders</td>
</tr>
<tr>
<td>IT Resources (Kickoff, Discovery and Launch only)</td>
</tr>
<tr>
<td>End User Testers (UAT only)</td>
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</tbody>
</table>

Phases At A Glance

<table>
<thead>
<tr>
<th>PHASE</th>
<th>KICKOFF / DISCOVERY</th>
<th>CONFIGURATION &amp; INTEGRATION</th>
<th>UAT</th>
<th>LAUNCH</th>
</tr>
</thead>
<tbody>
<tr>
<td>Timing*</td>
<td>1-3 Weeks</td>
<td>4 - 16 Weeks</td>
<td>2 - 4 Weeks</td>
<td>1-2 Weeks</td>
</tr>
</tbody>
</table>

*Timing varies by product, product launch priority of the institution, the integration scope and Student Information System. These estimates are a typical approximation. Your project manager will provide a detailed and customized project implementation schedule post kick-off.
# Phases At A Glance

<table>
<thead>
<tr>
<th>PHASE</th>
<th>Description</th>
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</thead>
<tbody>
<tr>
<td>KICKOFF / DISCOVERY</td>
<td><strong>Kickoff</strong>&lt;br&gt;The implementation team will kick off the project with an overview of resources, timeline, methodology, scope, risks, effort, and discovery next steps. Following the kick-off call you can expect:&lt;br&gt;• Meeting with our integrations partner (if relevant) to start the process of SIS integration enablement&lt;br&gt;• Access to Coursedog shared drive&lt;br&gt;• Intro and access to assets and resources to support your training and configuration&lt;br&gt;• Staging Sandbox access&lt;br&gt;• SSO/Authentication Set-up&lt;br&gt;• Branding configuration&lt;br&gt;<strong>Discovery</strong>&lt;br&gt;Coursedog works with the institution to understand the data, systems, and processes that are being used and to also identify key stakeholders.&lt;br&gt;• Data Workbooking - serves as the data contract between Coursedog, our Integration Partner, and your institution. The Coursedog team will provide you with data workbook templates and set up at least two 1-hour sessions to help guide you through the process. In sum, the discovery ensures that we get all the field data we need from your SIS so we can get that integration built.&lt;br&gt;• Business Process Review - Ensures alignment for the whole implementation team on current business processes and how they should be translated to Coursedog.&lt;br&gt;• System Survey - Insight into the SIS system set-up, history, and ongoing maintenance.</td>
</tr>
<tr>
<td>CONFIGURATION &amp; INTEGRATION</td>
<td>During this phase, the Coursedog team will start configuring together your platform and setting up your integrations based on everything discussed during the mapping process. The institutional team will be involved with training sessions led by the Coursedog team to dive into the various tools to see how they work and discuss the ideal configuration based on those business processes. A benefit of the Coursedog platform is that it can easily be configured by end users to fit your institutional business practices. During the implementation, your Coursedog contacts will help you set up the platform, but you can also easily make ongoing adjustments on your own without needing assistance from the Coursedog engineering team or your institutional IT team. <strong>The Coursedog team will do things such as:</strong>&lt;br&gt;• Work with your technical team to set up the bi-directional SIS integration&lt;br&gt;• Create the fields and processes in the platform to best align with your ideal business practices&lt;br&gt;• Provide in-depth training on the tools and processes within the platform&lt;br&gt;• Configure all of the various areas of the product to align with your business processes and needs&lt;br&gt;• Handle any CSV Imports</td>
</tr>
<tr>
<td>VALIDATION and UAT</td>
<td><strong>Data Validation</strong>&lt;br&gt;• As different parts of the platform are implemented and integration endpoints become available and wired to your environment, your team and Coursedog work together to test and validate the incoming data&lt;br&gt;• Post Testing - this is the validation of writing data back to the SIS from Coursedog <strong>User Acceptance Testing (UAT)</strong>&lt;br&gt;• Coursedog will provide you with a thorough checklist of all features, functionality, and processes to test. Your team then works through this to guarantee accuracy and sign-off confirming the platform works as expected and meets requirements. Coursedog team will hold syncs, answer questions, and work through issue resolution.</td>
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| Launch      | Production Migration - Coursedog will clone your staging environment into a production environment, and our integration partner will work with your team to connect us to your Production SIS environment; we will wire the integration to that effect.  
- Production UAT  
- Your Customer Success Manager will begin taking the reigns on your ongoing needs and goals |
| Training    | The Coursedog team will conduct additional training for Admins and provide them with documentation and resources to enable end user rollout. The Coursedog knowledge base for FAQs, training, videos, product guides, etc. is also available.  
- Coursedog executes a train-the-trainer format throughout implementation, but will be available for advanced Q&A during final end user rollout sessions.  
- Training on ongoing support management and Q&A resources |

**LAUNCH**

**THROUGHOUT**

Reference our [Knowledge Base](#) articles and configurations design documentation relating to each configuration topic covered in training to provide onboarding and ongoing support.

The comprehensive Coursedog help center and design doc has several types of help documentation that users can take advantage of during and after the implementation process, such as:

- Thorough set-up guides for every product-based on the platform
- Videos of key modules and settings
- Best practices and checklists for configuration
- Introductory documentation to make it easy to onboard new end users
- Technical documentation about your SIS integration
- FAQs for easy reference to your most commonly asked questions

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**Implementation Consultation Sessions**

Configuration and Training Meetings by Product Scope

*Integration activities are often all-inclusive across applications on the platform. I.e. Data Workbooking session can apply to all 4 products and not require a separate session(s) individually.*

<table>
<thead>
<tr>
<th>Scheduling MEETINGS</th>
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</thead>
<tbody>
<tr>
<td><strong>Admin</strong></td>
</tr>
<tr>
<td>Kickoff &amp; Config Guide Overview</td>
</tr>
<tr>
<td>UAT Kickoff &amp; Status Syncs</td>
</tr>
<tr>
<td>Trainings:</td>
</tr>
<tr>
<td>Request Saved States</td>
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<tr>
<td>Integration Management</td>
</tr>
<tr>
<td>Rollovers</td>
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<tr>
<td>Section Optimizer</td>
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<tr>
<td>Admin General</td>
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</table>

Async Config: **SSO, Branding**
### Curriculum MEETINGS

<table>
<thead>
<tr>
<th>Admin</th>
<th>Integration*</th>
<th>Pre Data In-app Config</th>
<th>Post Data In-app Config</th>
</tr>
</thead>
</table>
| • Kickoff & Config Guide Overview  
• UAT Kickoff & Status Syncs  
• Trainings:  
  • Admin General: Agendas, Proposal Management, Reports & Saved States, Publishing Forms  
  • Integration Management  
  • Effective Dating | • Data Workbook & Form Analysis  
• Partner Kickoff  
• (if needed) Program and/or Requisite Data Inclusion  
• GETs Validation (H)  
• Archived Course Codes  
• POST testing | • Users & Roles  
• Program Templates  
• Courses Templates | • Forms  
• Department Config (for logic jumps) & Course Sets  
• Requisite Config  
• Workflows  
• Degree Maps (optional)  
• Form Routing |

Async Config: **SSO, Branding, Committees** (optional), **Document Types** (optional), **Agendas** (optional)

### Catalog MEETINGS

<table>
<thead>
<tr>
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<th>Post Data In-app Config</th>
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</thead>
</table>
| • Kickoff & Config Guide Overview  
• UAT Kickoff & Status Syncs  
• Trainings:  
  • URL  
  • Terms  
  • Effective Dating  
  • Rollover and versioning (how to create next catalog/other versions)  
  • Review requests dashboard and column customization, saved views, and csv exports  
  • PDF creation | • Course & Program Templates  
• Department Pages | • Home Page & Custom Pages & Dept/Program Image Collection  
• Users & Roles  
• Navigation  
• Workflows & Notifications  
• Recommended Pages (optional) | • SSL Config  
• Program & Course Search Config |

Async Config: **SSO, Branding**, Website Settings, Accessibility Checker, Committees

### Events MEETINGS

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• UAT Kickoff & Status Syncs  
• Trainings:  
  • Admin General  
  • Integration Management | • Data Workbook  
• Partner Kickoff  
• GETs Validation (H)  
• POST testing | • Users & Roles  
• Rooms CSV & Blackout Dates  
• Organizations & Resources  
• Events Types, Forms, Workflows  
• Room Templates & Settings Config | • Requests, Requests Dashboard & Saved States  
• Public Website & Nav |

Async Config: **SSO, Branding**
Implementation Summary

(M) Meeting (H) Homework

1. Getting Started
   • (M) Kickoff
   • (M) Discovery: Data Workbooking
   • (M) Partner Staging Env IT Deployment

2. Configuration Training Workshops
   • (M & H) Scheduling Trainings
   • (M & H) Curriculum Trainings
   • (M & H) Catalog Trainings
   • (M & H) Events Trainings

3. Integration Workshops
   • (M & H) Template Configuration
   • (H) Data Mapping Validation
   • (M & H) Post Testing: Stage
   • (M & H) Partner Prod Environment IT Deployment / Production Migration

4. User Acceptance Testing
   • (M) UAT Kickoff
   • (M) UAT Status Syncs
   • (M & H) Partner Production Env IT Deployment

5. Additional Training
   • (M) Scheduling
   • (M) Curriculum
   • (M) Catalog
   • (M) Events
Coursedog’s Integrated Academic Operations Platform empowers academic administrators with integrated academic and event scheduling, course demand projections, curriculum, catalog, and academic reporting tools through a single, bi-directional integration with your SIS.

Our mission is to break down barriers to opportunity for students

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