

# Requirements: Course Cloning

**User Story #1:** an instructor wants to make an exact copy of a course they've previously created. They want to save the time it would take to create a new shell course and load each of their previous tasks individually. With a "clone course" feature, they could create a new course with copies of all of the previous tasks in the copied course ready to go.

**User Story #2:** a program administrator wants to make multiple copies of the same course for each instructor in their program. The courses will all have the same set of tasks copied from their sandbox course, but each clone can be customized (i.e. title, dates, co-instructors) for the individual instructors the copies are made for, but this can all be one from a single screen.

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## Step 1: Change to 'module' table

The 'module' table contains all of the 'course' meta-containers. Its metadata gives a course a definition (title, section, dates, etc). To accommodate this new function, and to provide some accountability and analytics, the table must be able to track the parent course from which it was cloned (if it was cloned at all).

**Table:** module (change to existing table)

Field	Type	Description
cloned_parent_id	Int, null default	If null, course is new; if not null, value corresponds to module.id of course from which this record was copied

The system-wide 'module' object should be updated to include this value as well, in case it should become useful (especially on the [Course Settings](#) menu where it may need to be visible)

## Step 2: Initiating cloning

Users will initiate the course cloning process by click on the name of the course they wish to clone, taking them to the course homepage ([eli/src/application/modules/unit/views/scripts/index/module.phtml](#)) and clicking on the "Clone This Course" link, located near the existing "Create New Task" button.

**WRA 320 Technical Writing (Section 001)**

Home Roster Completion Analytics Downloads Settings

Active Tasks 27 Archived Tasks 24

Clone This Course Create New Task

Task Type	Link	Task Name	Due Date	Progress	Archive
Writing	<a href="#">🔗</a>	Module 5: Revised Information Product	2015-05-08	84%	Archive
Writing	<a href="#">🔗</a>	Module 5: Revision Description	2015-05-08	84%	Archive
Review	<a href="#">🔗</a>	Review of Module 5: Frankenstein Draft	2015-05-01	74%	Archive
Revision	<a href="#">🔗</a>	Revision Plan for Module 5: Frankenstein Draft!	2015-05-01	84%	Archive

Clicking “Clone This Course” opens the cloning UI (step 3) for this specific course.

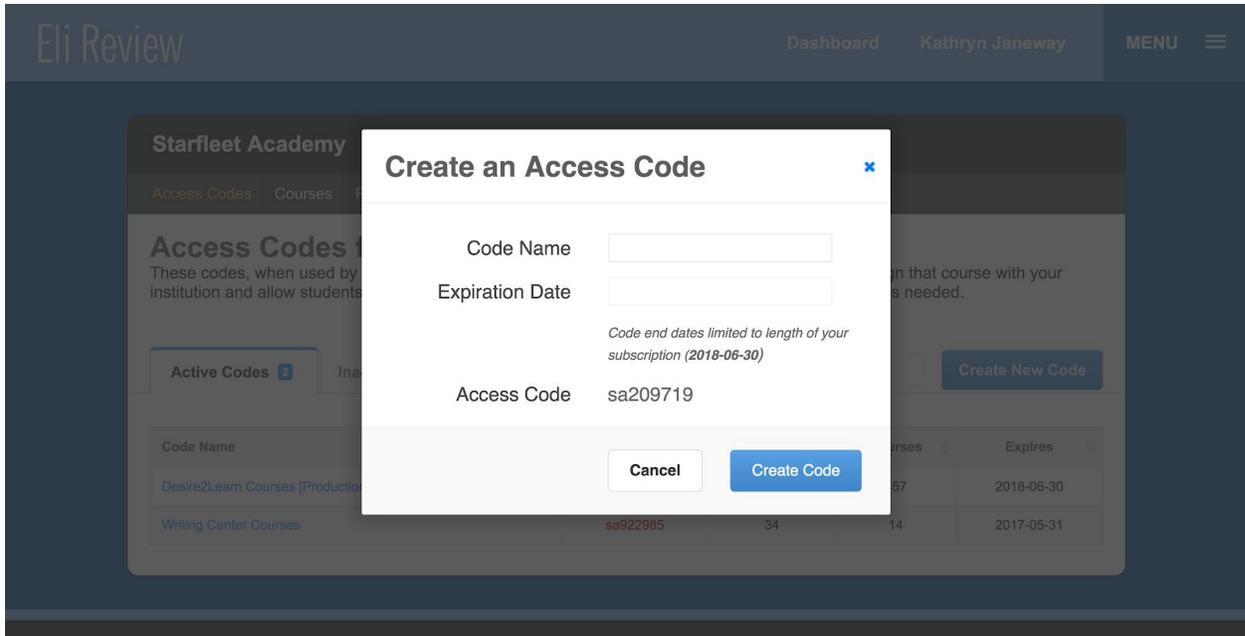
**Completed UI work** - the work for this UI has been completed and can be found in the course [cloning resources folder](#) on Google Drive:

- module.phtml - added <p> element and clone link
- dashboard-onboarding.css - added styles to position <p> element

## Step 3: Customize Clone / Number of Clones

Modal window - user specifies number of clones + details

When the user clicks “Clone This Course”, a modal window opens with form fields pre-populated with data from the existing course. This UI for this modal should reuse the existing UI in which institution managers create new access codes by clicking “Create New Code” ([sample link](#), see screenshot below).



The purpose of the modal window is to allow the user to define attributes for the cloned course. Fields in this form (*all required*) include:

- Number of copies - user specifies how many clones to make (default 1, max 10)
- Title - default value of module.title
- Section / Hour - default value of module.number
- Start Date
  - Utilize existing system date and time picker
  - if module.start\_date < today, default value of today (cannot start before today)
  - if module.start\_date > today, default value of module.start\_date
- End Date:
  - User does not customize end date; end date is set based on original course
    - if module.start\_date < today, default value of today + days difference
    - if module.start\_date > today, default value of module.end\_date
    - If user changes start\_date from picker, new end date = new start\_date + days difference between original module start\_date and end\_date
  - End Date cannot be < Start Date (reuse existing course date options)
- Instructors
  - Force unchecked and disabled if “Number of copies” > 1 (forces instructor to make choices for each clone in the clone creation window)
  - If “Number of copies” == 1 and unchecked, current user made primary instructor of cloned course and clone does not inherit co-instructors from original course
  - If checked, clone inherits primary and co-instructors from parent course

- **Critical:** every course and clone must have a primary instructor, and should all else fail, the user creating the clone becomes the primary instructor of the clone
- Primary Button
  - If “Number of copies” == 1, text = “Create Clone” (default value)
  - If “Number of copies” > 1, text = “Customize Clones”

See below for modal mockup and [workflow diagram](#).

### Clone This Course

Specify the number of clones and basic details about them.

Number of clones	<input style="width: 90%;" type="text" value="1"/>
Title / Name	<input style="width: 90%;" type="text" value="Introduction to Technical Writing"/>
Section / Hour	<input style="width: 90%;" type="text" value="WRA 101"/>
Start Dates	<input style="width: 90%;" type="text" value="2018-05-01 12:00 am"/> <input style="width: 10%; height: 20px;" type="button" value="📅"/>
Instructors	<input checked="" type="checkbox"/> Keep instructors from original course

## Customizing Clones

If the user indicates they want to make more than one clone, they primary action of the “Clone This Course” modal changes from “Create Clone” to “Customize Clones”. Clicking the primary CTA takes them to the “Customizing Clones” UI. Notes:

- Form should be a new view, not a sub-view of parent module, something like/unit/index/module-clone (similar to [“Create a Course”](#))
  - Form must confirm that cloning user has permission to access module, same method that exists on any course page (anticipating URL hacking)
- All values (title, section, start) inherited from the “Clone This Course” modal
- All fields required (even if they aren’t changed from the “Create Clone” modal)
- Start Date and End Date
  - Fields use system date and time picker, just like the modal

- Follow same rules for values as the modal
- User still cannot modify the end date manually; end date adjusts with start date based on days difference between start and end dates of original module
- Co-Instructors - optional - follow same pattern as exists in course settings ([example](#))
  - Typing name or email in input triggers autocomplete
  - Selecting an autocomplete adds that name to a bulleted list
  - An email address for a person not in the system creates an invite for that instructor
  - All have an option to “delete”
- No “module” records created until the user clicks the “Create Copies” button
- Only one submit button for the entire form, not each individual clone

See the mockup for the “Customize Copies” form below

## Step 4: Create Clones

### System Procedure

Once the user finishes making customizations and clicks “Create Clone” or “Create Clones”, the system should respond in this manner:

1. Create one “modal” record per clone
  - a. Use form values for title, number, start\_date
  - b. Calculate new end date based on procedure described above
  - c. Generate new “passcode” value using existing system rules
  - d. Inherit these values from parent:
    - i. module.timezone
    - ii. module.institution\_id
    - iii. module.department\_id
    - iv. module.institutional\_group\_id
  - e. module.trial\_eligible = 0 for all clones
  - f. [module.parent\\_id](#) of all clones matches the module.id of the parent
  - g. Remaining fields have system defaults (follow course creation protocol)
2. Assign instructor roles for each course as indicated
  - a. User creating the clones is the primary instructor
  - b. Any co-instructors are added and notified according to existing system rules
3. Load tasks from original course into each clone, saving all tasks as drafts
  - a. Create a procedure that can be repeated for each clone

- b. Task cloning must happen in sequence to account for review and revision dependencies (both task types are based on writing task IDs)
- c. Date values for each cloned task:
  - i. `created_on` = current time value
  - ii. `due_date` = difference in days between original course start and `due_date`
    - 1. Find offset in days between `module.start_date` and `task.due_date`
    - 2. `Cloned task.due_date` = `clonedmodule.start_date` + offset
    - 3. Keep original time value (only day/month/year modified)
  - iii. `archived` = 0 (ensures "archived" status from original not inherited); scope:
    - 1. `assignment_reviewable.archived`
    - 2. `review_activity.archived`
    - 3. `revision_task.archived`
- d. Writing tasks (must create first so dependent tasks can reference)
  - i. *Get all assignments*: `select * from assignment where id=X;`
  - ii. *Get all reviewables*: `select * from assignment_reviewable where assignment_id IN ()`
  - iii. *Get all deliverables*: `select * from assignment_deliverable where assignment_reviewable_id IN ()`
- e. Review tasks (maintaining relationships to new writing tasks)
  - i. *Get all reviews*: `select * from review_activity where module_id="X"`
  - ii. *Get all review targets*: `select * from review_activity_has_assignment_reviewable where review_activity_id="9888"`
  - iii. *Get all components*: `select * from feedback_component where review_activity_id="X"`
  - iv. Reviewer group info from original should not follow the clone; cloned reviews should have no groups
- f. Revision tasks (maintaining relationships to new writing tasks)
  - i. *Get all revision*: `select * from revision_task where module_id="X"`
  - ii. Resubmit tasks should be covered under `assignment_reviewable.revision_of` - that field must be updated to reflect the new `assignment_reviewable` that would be revised as part of this task

## User Experience

After procedure completed:

1. If only one course, take user to course homepage for new copy course
2. If multiple courses, display new view
  - Must be a new view, like the customize clone view (or still in that one)
  - Table of process outcomes
    - i. One row for the parent course

- ii. One row for each new course created
- iii. Columns: [Parent | Clone], module.id, module.title [links to course], module.number, co-instructors (show as list), module.passcode
- Option to download table as CSV (“print for your records”)
- Screenshot below; full markup for this view is available in the [course cloning resources folder](#) (file *clone-report-markup.html*)

**Instructor Dashboard**

Instructor Dashboard
Student Dashboard
Subscription Manager
System Administrator
Customer Support

### Course Cloning Complete

You have successfully created **5 clones** of the course **Name of Parent Course** [id #16273]. For additional details on how tasks were created for these cloned courses, see the [Cloning Courses](#) section of the Instructor Guide.

[Download cloned course info in a CSV](#)

Source	ID	Name of Cloned Course	Section	Co-Instructors	Passcode
Parent	41543	<a href="#">Introduction to Astrophysics</a>	AST 101-803	<ul style="list-style-type: none"> <li>Kathryn Janeway</li> <li>Benjamin Sisko</li> </ul>	monkey908dishwasher
Clone	83798	<a href="#">Introduction to Astrophysics</a>	AST 101-907	None	turtle901panda
Clone	91893	<a href="#">Introduction to Astrophysics</a>	AST 101-901	<ul style="list-style-type: none"> <li>James Kirk</li> <li>Jean-Luc Picard</li> </ul>	apple901orange
Clone	78142	<a href="#">Introduction to Astrophysics</a>	AST 101-391	<ul style="list-style-type: none"> <li>Jonathan Archer</li> <li>Jadzia Dax</li> </ul>	droid645camera
Clone	13471	<a href="#">Introduction to Astrophysics</a>	AST 101-801	<ul style="list-style-type: none"> <li>Worf</li> <li>Data</li> </ul>	pen148pencil

**Note:** the navigation scheme in the mockup reflects the instructor dashboard navigation, but the report should show course navigation. Since the user initiated cloning from a course homepage, the completion report should represent the navigation structure for that original course.

## Workflow Diagram

