Courseware Account Organization Checklist

Courseware

Keep your Courseware account organized and up to date!

Use this checklist to ensure your Courseware account is ready for students and staff to use when a new school year or semester begins.

This checklist is not intended for accounts integrating data through a student-management system

Administrative Tasks

Prior to a New School Year	
☐	Review program and platform updates on the What's New page.
☐	Export users, update students' system grades, and add new users, both staff and students. Save the file for import.
☐	Import the CSV file with updated and new users through Batch Processing.
☐	Review Custom Courses for possible revision based on updated course releases.
☐	Review Account Settings, Gradebook Permissions, and Track Credit in the Administration Center.
☐	Manage your Program Pacing Calendar.

End of Year	
☐	Ensure instructors have completed the End of Semester checklist (below).
☐	Generate and download any reports needed to close out the year, like the Courseware Audit Report.
☐	Review Custom Courses for possible revision using the most current course available.
☐	Archive deactivated Classes, Programs, and past versions of Custom Courses.

Instructor Tasks

	End of Semester
☐	Send an alert to remind all students of the course section end-date
☐	Verify that all *Ready to Score* items have been graded.
☐	Export Gradebook, including all students. Generate and download any necessary reports.
☐	Approve course credit once students have finished the course and all local requirements are satisfied.
☐	Complete all students at the course end date. *If students have not finished the course, transfer students to the next semester's section, or extend the section end date.
☐	Deactivate finalized course sections and Flex Assignments.
☐	Review program and platform updates on the What's New page.
☐	Create new course sections for the next semester and add students to the new course section.

Help and Support

- **Courseware Getting Started Resources** – Access step-by-step onboarding resources, including orientation videos, implementation plans, and more!
  - **Help Center** – When in doubt, visit the Help Center! The Help Center is a purple button often found in the top right of your account screen. Here you'll find quick on-demand resources, how-to tours, and other helpful links (including the Learn & Support site).

  - **Customer Support** – Have a question? Need assistance? Contact our award-winning Customer Support Team Monday–Friday, 7 am–6 pm Central at 800.447.5286 or support@edmentum.com.

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