



## Courseware Back to School Checklist

Start the school year with an organized and up to date Courseware account! Completing this checklist will ensure that your school's account is ready for educators and students to use right away.

- Review program and platform updates on the What's New page
- Export users and update the file, then import updated users with the Batch Import feature.
- Archive old programs and classes
- Archive Flex Assignments
- Review Custom Courses for possible revision and archive unneeded Custom Courses
- Register new users

### WHAT'S NEW IN COURSEWARE

This summer and fall we are rolling out many exciting new features based on your feedback, including new home pages with pacing and progress monitoring views, new courses, and a brand new gradebook. For details on these enhancements check out the [What's New](#) page.

### UPDATING USERS

Using the Export and Batch Import features, Administrators can easily update users, including removing graduating students and promoting current students to the next grade.

### TO EXPORT USERS

- Log into Courseware and click **ADMINISTRATION CENTER** in the app switcher bar.
- Hover over **USERS** and click **MANAGE**.
- To select all users, place a check in the box at the top of the user list or place a check(s) in the box(es) next to the appropriate user(s).
- Click **EXPORT** at the top of the list.
- Open the file and make the necessary changes. Keep in mind that required fields to batch import a file include: First Name, Last Name, Plato Name, Password, Role, Status, and Grade.
- Save the file as a .CSV file.

## TO BATCH IMPORT USERS

- Log into Courseware and click **ADMINISTRATION CENTER** in the app switcher bar.
- Hover over the **USERS** tab and click **BATCH PROCESSING**.
- Browse for and open the appropriate file.
- Click **UPLOAD**.
- Browse for and select your file. Click **IMPORT**.
- Click the **HISTORY** tab to view the processing status.

## ARCHIVING PROGRAMS, CLASSES, FLEX ASSIGNMENTS, AND CUSTOM COURSES

### TO ARCHIVE PROGRAMS

- Log into Courseware and click **ADMINISTRATION CENTER** in the app switcher bar.
- Hover over the **SETTINGS** tab and click **ARCHIVE**.
- Click the **PROGRAMS** tab.
- Locate the program that needs to be removed and click the **ARCHIVE** button to the right of the program name.
- A dialog box asking if you would like to proceed will appear. Click **YES** to confirm.

### TO ARCHIVE CLASSES

Classes can be archived once they have been completed and/or if there are no longer learners working in the classes. Reports for classes and assignments can still be run for assignments in archived classes and programs. As long as the program that archived classes are in is still active, archived classes can be reactivated.

- Log into Courseware and click **ADMINISTRATION CENTER** in the app switcher bar.
- Hover over the **SETTINGS** tab and click **ARCHIVE**.
- Click the **CLASSES** tab.
- Locate the class that needs to be removed and click the **ARCHIVE** button to the far right of the class name. To archive multiple classes at once, place a check in the box next to each class then click **GROUP ACTIONS** and click **ARCHIVE SELECTED CLASSES**.
- A dialog box asking if you would like to proceed will appear. Click **YES** to confirm.

### TO ARCHIVE FLEX ASSIGNMENTS

Archiving Flex Assignments allows accounts to maintain a clean and organized Flex Assignment application. Report for Flex classes and assignments can still be run for assignments in archived classes and programs.

- Log into Courseware and click **ADMINISTRATION CENTER** in the app switcher bar.
- Hover over the **SETTINGS** tab and click **ARCHIVE**.
- Click the **CLASSES** tab.
- Using the filters on the left side of the screen, choose **FLEX ASSIGNMENTS** from the **PROGRAM** dropdown and click **APPLY FILTERS**.
- Locate the class that needs to be removed and click the **ARCHIVE** button to the far right of the class name. To archive multiple classes at once, place a check in the box next to each class then click **GROUP ACTIONS** and click **ARCHIVE SELECTED CLASSES**.
- A dialog box asking if you would like to proceed will appear. Click **YES** to confirm.

## TO ARCHIVE CUSTOM COURSES

Account Administrators can archive Custom Courses in order to clean up their Course Catalog. Once Custom Courses are archived, they will be treated like any Retired Plato Course. This means references to the Custom Course may be visible in some parts of Courseware if there are still Active Classes under it. Reports for classes and assignments can still be run for assignments in archived classes and programs.

- Log into Courseware and click **ADMINISTRATION CENTER** in the app switcher bar.
- Hover over the **SETTINGS** tab and click **ARCHIVE**.
- Click the **CUSTOM COURSES** tab.
- Locate the desired course and click the **ARCHIVE** button to the far right of the course name.
- A dialog box asking if you would like to proceed will appear. Click **YES** to confirm.

## TO BATCH IMPORT NEW USERS

- Click **ADMINISTRATION CENTER** in the app switcher bar.
- Hover over **USERS** and click **BATCH PROCESSING**.
- Click the **FILE FORMAT SPECIFICATIONS** tab to view data specifications and to download a **SAMPLE FILE**.
- To begin the import process click the **UPLOAD** tab.
- **BROWSE** for the file.
- Click **IMPORT THE SELECTED FILE**.
- Click the **HISTORY** tab to view the processing status.

## HELP AND SUPPORT

Have a question? Need assistance? Contact our award-winning Support team Monday-Friday, 7am to 6pm Central at 800.447.5286 or [support@edmentum.com](mailto:support@edmentum.com). For how-to guides and program information, visit <https://support.edmentum.com/>