

# BEGINNING- AND END-OF-COURSE CHECKLISTS

These checklists are created by the Training Services Department at Instructure. They are based on the collective experiences of the team members in education and their deep knowledge of Canvas. The Beginning-of-Course Checklist is a starting point for ensuring your course is ready to go for student access at the start of a new course term. The End-of-Course Checklist is helpful to review when you are nearing the end of your course term.

## How To Use

A ★ is an **Essential** practice and a ★★ rating indicates a **Best Practice** criteria. Features that may or may not be utilized at the Institution will also be listed as **If Applicable**. Relevant help guides are linked throughout the text.

We know each institution has unique requirements for their courses, so we hope this document will serve as a great resource or starting point. *We'd love to hear how you're using this checklist. Please leave comments in the [Canvas Community - Beginning- and End-of-Course Checklist Post](#)*

## Beginning of Course Practices

Essential ★	
Yes ✓	Practice
<input type="checkbox"/> ★	<p><b>Set Up Account Notifications</b></p> <p>To ensure you receive communication from Canvas, set up your <a href="#">Notification Preferences</a> and contact method in your Canvas Account.</p> <p>→ <b>Trainer Tip:</b> Show students how to set their notification preferences</p>
<input type="checkbox"/> ★	<p><b>Customize Course Detail Settings</b></p> <p>It is important to be aware of the many different options residing under <a href="#">Course Details</a> in Course Settings. Selecting More Options will open up a menu of extra features to turn on and off, such as allowing students to post their own discussion threads.</p> <p>→ <b>Trainer Tip:</b> Don't forget to select <i>Update Course Details</i> at the bottom once you update the settings</p>
<input type="checkbox"/> ★	<p><b>Simplify Course Navigation</b></p> <p>For optimum course experience, hide unnecessary <a href="#">course navigation</a> links.</p> <p>→ <b>Trainer Tip:</b> <i>The fewer the better</i></p>
<input type="checkbox"/> ★	<p><b>Choose Home Page</b></p> <p>The Home Page is the first impression of a course. Select the <a href="#">Home Page</a> option that best fits the needs of your course.</p> <p>→ <b>Trainer Tip:</b> <i>Include visuals to engage your students and incorporate important information about your course</i></p>
<input type="checkbox"/> ★	<p><b>Verify Students in the People Link</b></p> <p>Select <a href="#">People</a> to verify your Canvas roster (teacher, student, TA, etc.) for accuracy.</p> <p>→ <b>Trainer Tip:</b> <i>The People link also displays course sections (if applicable)</i></p>
<input type="checkbox"/> ★	<p><b>Publish Course and Content</b></p> <p>Check visibility of individual items and Modules as a whole. Don't forget to <a href="#">publish your course</a>.</p>

	→ <b>Trainer Tip:</b> You can unpublish any items you don't want students to see
<input type="checkbox"/> ★	<p><b>Review Course in Student View</b></p> <p>Review your course content from <a href="#">Student View</a> to experience your course from a student perspective.</p> <p>* <b>Note:</b> Some third party tools may not have student view functionality</p> <p>→ <b>Trainer Tip:</b> Student View adds a test student to Grades. After participating in Student View, enter your Gradebook as a teacher to view any Test Student entries</p> <p>→ <b>Trainer Tip:</b> You may want to select <a href="#">Validate Links</a> in your Course Settings to ensure there are no broken links</p>
<b>Best Practices ★★</b>	
Yes ✓	Practice
<input type="checkbox"/> ★★	<p><b>Select Favorite Courses</b></p> <p>Customize which course cards are displayed on the Dashboard by “<a href="#">Favoriting</a>” courses based on preference, current term, quarter, semester, etc.</p> <p>→ <b>Trainer Tip:</b> Once courses are displayed, you can also give the course a “<a href="#">Nickname</a>” visible only to you</p>
<input type="checkbox"/> ★★	<p><b>Add Syllabus</b></p> <p>Add the current syllabus to your course.</p> <p>→ <b>Trainer Tip:</b> You can add it to the <a href="#">Course Syllabus</a> tool, as a File link in your course, onto a Course Page and any other way you would find useful</p>
<input type="checkbox"/> ★★	<p><b>Manage Files</b></p> <p><a href="#">Upload</a> and review course folders and files. <a href="#">Manage the visibility</a> of content by <i>Publishing, Unpublishing or Restricting Access</i> to folders and files.</p> <p>→ <b>Trainer Tip:</b> You can <a href="#">bulk upload</a> files</p>
<input type="checkbox"/> ★★	<p><b>Set Up Grades</b></p> <p>Verify the Gradebook is <a href="#">arranged</a> according to your grading policy and your syllabus.</p> <p>→ <b>Trainer Tip:</b> You can <a href="#">move the “Total” column</a> from the far right position to the far left position next to the student list</p> <p>→ <b>Trainer Tip:</b> You can change your Total column to display as Points, if needed</p> <p>→ <b>Trainer Tip:</b> You can set <a href="#">Late Submission</a> or <a href="#">Missing Submission</a> policies</p>
<input type="checkbox"/> ★★	<p><b>Set Up Assignment Groups (If Applicable)</b></p> <p>If you use weighted grading categories for your final grade calculations, you will want to <a href="#">add Assignment Groups</a> to the Assignments Index Page and <a href="#">assign weights</a> to each Group.</p> <p>→ <b>Trainer Tip:</b> You have the ability to add drop rules to each Assignment Group</p>
<input type="checkbox"/> ★★	<p><b>Adjust Course Settings (If Applicable)</b></p> <p>Visit the course <a href="#">Settings</a> to check your Course Details, Sections, <a href="#">Apps</a> and <a href="#">Feature Options</a>. Feature options allow you to choose when you want to enable new feature releases.</p> <p>→ <b>Trainer Tip:</b> Under the “Course Details” tab, scroll to the bottom and select “More Options” to access many more settings options</p> <p>→ <b>Trainer Tip:</b> If your institution is using a Student Information System (SIS), cross-listing might be automatic. You can also cross-list your own courses under the “Sections” tab</p> <p>→ <b>Trainer Tip:</b> Adding a <a href="#">course card image</a> is a great visual cue for quickly identifying courses</p> <p>→ <b>Trainer Tip:</b> Integrating 3rd party LTI Tools (apps) with your course allows students to work with applications without leaving the Canvas platform</p>
<input type="checkbox"/> ★★	<p><b>Authenticate Third Party Tools (If Applicable)</b></p> <p>Third party tools, such as Google Apps or Office 365, must associate with an email address. Ensure that you have logged in, <a href="#">authenticated</a>, and tested these tools before assigning activities with these integrations.</p> <p>→ <b>Trainer Tip:</b> Authentication is an easier process if you are logged in to the email address with which you plan</p>

	<i>to authenticate in another browser tab or window</i>
<input type="checkbox"/> ★★	<p><b>Import Content (If Applicable)</b>  You may need to manually <a href="#">copy course content</a> from another LMS, another course, a previous term or the Canvas Commons.  → <b>Trainer Tip:</b> Make sure to check “include completed courses” to copy from previous terms</p>
<input type="checkbox"/> ★★	<p><b>Clean Up Migrated Content (If Applicable)</b>  If migrating content from a prior LMS or another course, you need to review individual items, check course settings, organize content, and remove unneeded content before publishing your course. Review the Files, Modules, Pages, Quizzes, Assignments, and Discussions index pages.  * <b>Note:</b> Removing items from a module does not delete the items from your course. If you need to delete an item go to the index page  → <b>Trainer Tip:</b> Verify settings for Assignments, Discussions and Quizzes. Keep in mind some items may already come into Canvas published. Unpublish items as needed  → <b>Trainer Tip:</b> You may want to check out the <a href="#">Instructor Canvas Guides</a> and the <a href="#">LMS Migration Strategies</a> Group in the Canvas Community</p>
<input type="checkbox"/> ★★	<p><b>Verify Calendar (If Applicable)</b>  Check the <a href="#">Calendar</a> tool to verify Assignment due dates and Events scheduled for your course.  * <b>Note:</b> The Calendar displays graded/published Assignments, Quizzes, Discussions and Events with due dates  → <b>Trainer Tip:</b> The Calendar tool allows for drag-and-drop options to easily manipulate and change due dates</p>
<input type="checkbox"/> ★★	<p><b>Set a Profile Pic (If Applicable)</b>  <a href="#">Set a profile picture</a> that represents yourself in your Canvas Account. Students will be able to see the image displayed in the Inbox, Announcements, Discussions, and People tab.  * <b>Note:</b> This is an account setting that may not be enabled at your Institution  → <b>Trainer Tip:</b> You may want to choose a professional headshot to model appropriate photos for students</p>

## End of Course Practices

Essential ★	
Yes ✓	Practice
<input type="checkbox"/> ★	<p><b>Verify Grades (If Applicable)</b>  It is important to verify grades if Canvas is the gradebook of record. Any changes made will affect student final grades.  → <b>Trainer Tip:</b> Verify that the Canvas Gradebook matches the grading policy set up in your syllabus  → <b>Trainer Tip:</b> You can turn all missing entries to zeros through the <a href="#">late policy options</a>  → <b>Trainer Tip:</b> Remember to check out more about <a href="#">Assignment Groups</a> if using weighted grading categories</p>
Best Practices ★★	
Yes ✓	Practice
<input type="checkbox"/> ★★	<p><b>Export Grades</b>  From the Grades tab in a Canvas course, use the Export button to download a CSV file of your final grades.  → <b>Trainer Tip:</b> You may want to save the download as an Excel file</p>
<input type="checkbox"/> ★★	<p><b>Export or Copy Content</b>  Using the <a href="#">Export Course Content</a> tool in Course Settings will allow you to save a file export</p>

	<p>package of your Course outside of Canvas.  <b>→ Trainer Tip:</b> You may have a <a href="#">Copy this Course</a> button that allows you to copy content to a new course shell</p>
<input type="checkbox"/> ★★	<p><b>Settings (If Applicable)</b>  Unless advised by your admin, avoid making changes to your Course Settings. This can include selecting options such as concluding a course, removing a student or changing course start and end dates.  <i>*Note:</i> Your institution may not have all of these options  <b>→ Trainer Tip:</b> Changing settings without the advice of your Canvas Admin can affect student/course data</p>
<input type="checkbox"/> ★★	<p><b>Download Additional Data (If Applicable)</b>  Student data can be downloaded in several areas of a course in addition to the Gradebook. The Learning Mastery Gradebook has an export of student Outcomes. Quizzes include <a href="#">Statistics</a> with both student analysis and item analysis reports.  <b>→ Trainer Tip:</b> Quiz Statistics can only be downloaded per quiz, not entire course</p>

## ABOUT

The Training Services Department at Instructure is committed to supporting any training needs at your Institution. Reach out to your CSM if you are interested in learning more about this resource, additional resources or any of our training offerings.

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