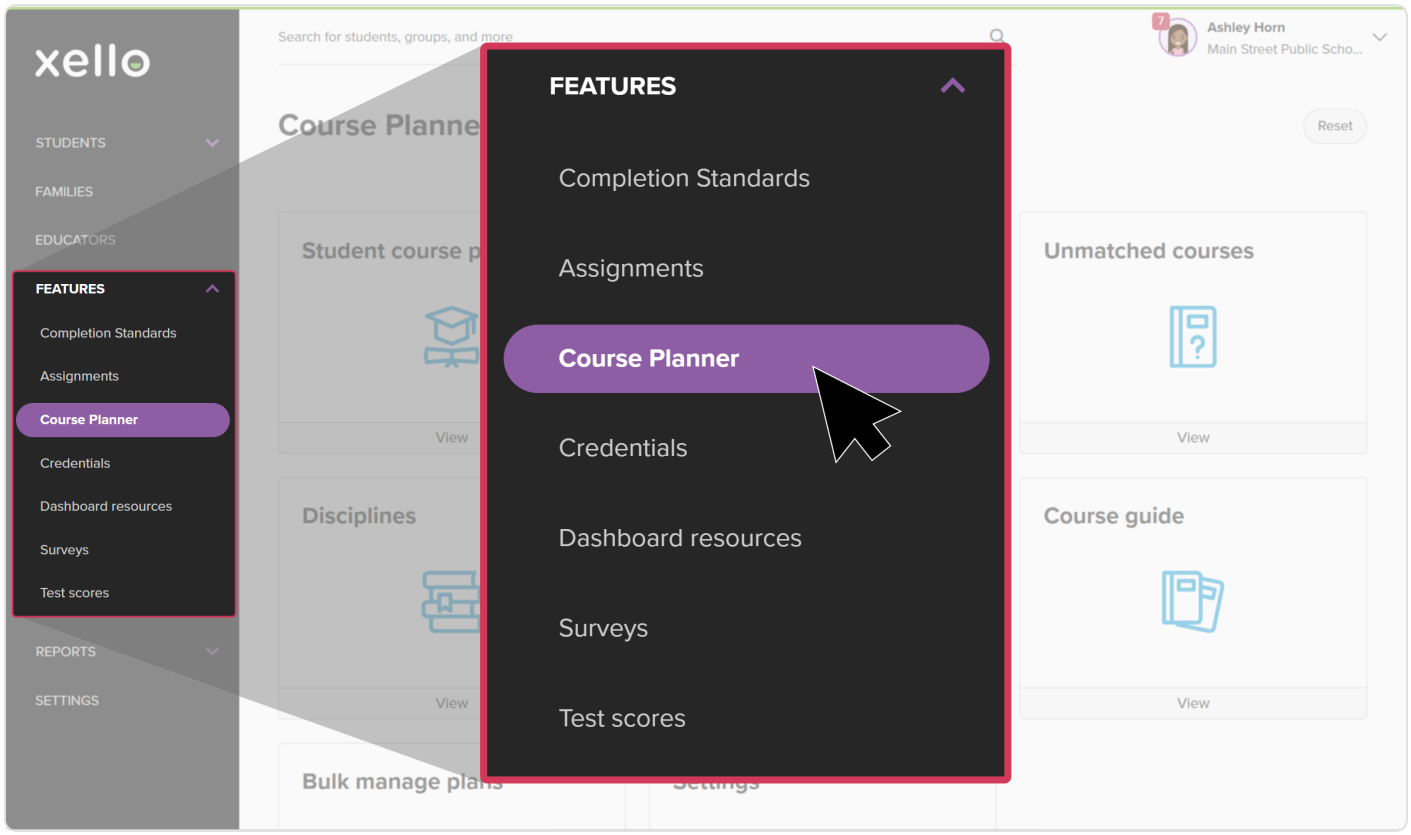
Course Planner:
7-step setup for Xello Administrators

As your district's course planner Xello Administrator, you'll be completing the 7-step setup for **Course Planner**. This will ensure your disciplines, courses, diplomas, and student course history have been imported to Xello accurately. Watch the 7-Step Course Planner review video and use this guide as you complete these important steps and get the planner up and running for educators and students.

Note: Depending on the configuration of your **Course Planner**, it may be possible for **Settings**, including **Important dates**, to be updated by school account level Xello Administrators.

To begin, log in to your educator account in Xello, click **Features**, and select **Course Planner**.

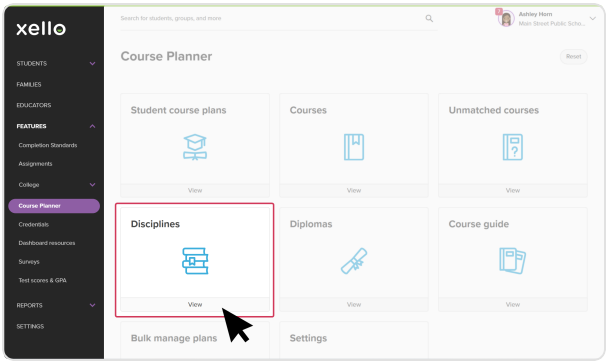


If any time you need help, don't hesitate to email us at help@xello.world or visit the Xello Support site to find answers to all your course planner questions.

Course Planner: 7-step setup for Xello Administrators

1. Review disciplines

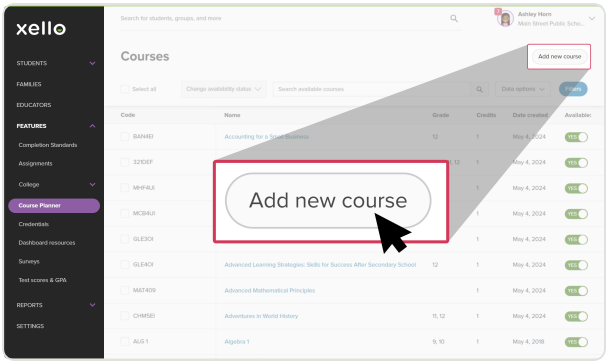
Disciplines provide a handy way to organize courses. Make sure they are all listed and those currently offered are visible to students. Do a quick spot check to ensure all information is accurate.



2. Review courses

Courses are the backbone of diplomas. An accurate course list is essential. Are all the courses available to your students listed? Any outdated or inaccurate courses should be made unavailable.

If you've noticed a course is missing, you can add it by clicking **Add new course**.

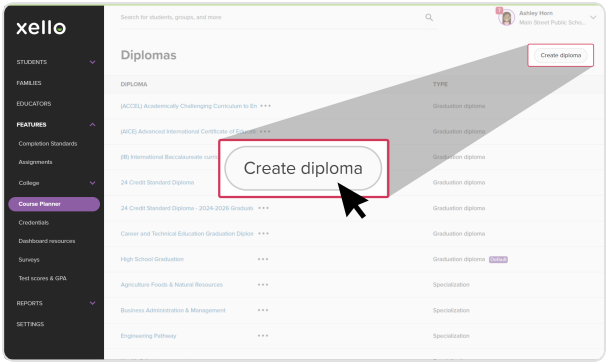


FYI: To ensure a course fulfills any diploma requirements, link it via the **Diplomas** tab. Click the diploma name and select the related requirement.

3. Ensure diplomas are accurate

Diplomas lay out the rules for graduation requirements. Review this information to ensure all diplomas are listed and course requirements associated with them are up to date and accurate.

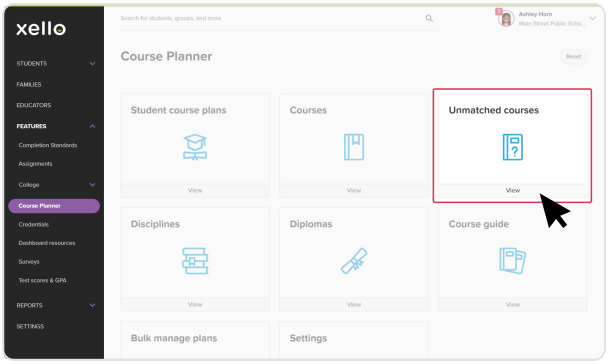
If you need to create a new diploma, click **Create diploma**. Or you can click the three-dot menu next to an existing diploma and copy it before making edits.



Note: For districts with **Course Planner** from 5th to 12th grades, you'll need two different diplomas: one for middle school and one for high school.

You can assign graduation diplomas to new students and change students' assigned diplomas if needed.

4. Reconcile unmatched courses

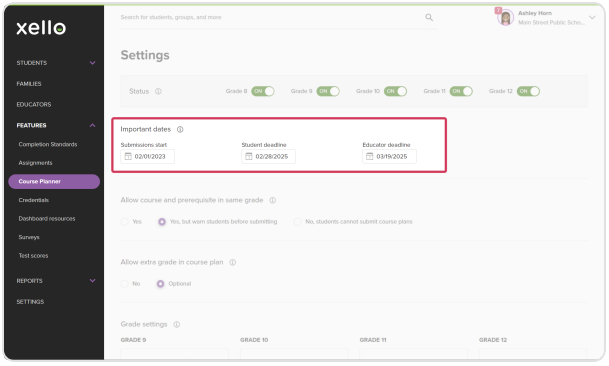


Now that your disciplines, courses, and diplomas are ready for the academic year, it's time to dive into **Unmatched courses**. Make sure student course credits transfer appropriately by dealing with courses that don't have matches at your school.

Only match courses that fulfill diploma requirements. Elective courses will still count towards graduation even if they haven't been matched.

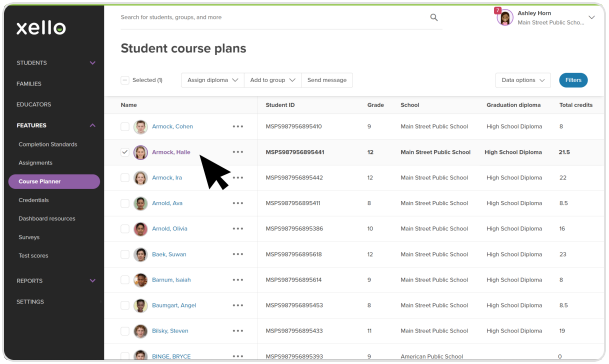
Tip: If there are any middle school courses (e.g. Pre-Algebra) that could earn a high school credit, share this with your Course Planner Specialist and they'll program these courses so students can get the credit towards their high school graduation.

5. Set important dates



Set the date when students can begin planning and submitting course requests. And set a deadline for educators to review submitted plans for critical alerts or incomplete plans. You can also control which grades see **Course Planner** using the status toggles. Turn them on for the grades to support educator training or when you're ready to launch to students.

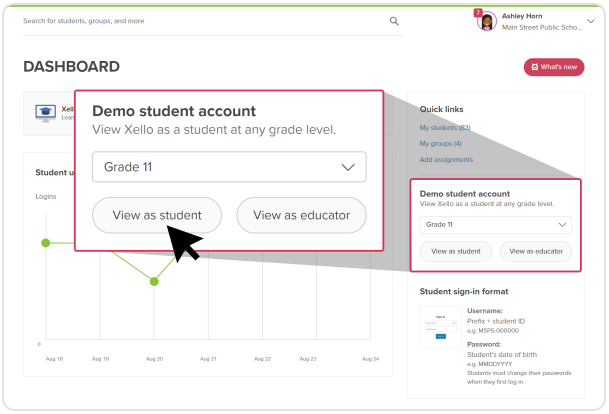
6. Review your changes



Test any changes you've made by spot-checking student plans.

- Check some student course history. Click on the names of a few students from each grade to open their planner. Make sure previous courses are visible and that course names are correct.
- Check that the remaining requirements are accurate, and that the progress bar is updated. Ensure any changes you made earlier in courses, disciplines, or diplomas are reflected in the student course plans.

7. Launch to students



Once you've completed the **7 Steps** and feel confident all information is correct, it's time to launch and let everyone know!

Click **Launch** to turn on **Course Planner**.

Get educators ready

Tell your admins and educators that **Course Planner** is set up and ready to introduce to students.

Get them to dive in and explore by viewing as a student from their educator account dashboard. Or have them take the **Xello Academy** course: Course Planner for high school counselors. You can also invite them to share their Xello course guide with students and families.

Get students ready

Use the below resources to help introduce **Course Planner** to your students:

- Plan your courses in Xello - short video
- Course Planner for high school - student guide (also available in Spanish)
- Course Planner for middle school - student guide (also available in Spanish)
- Add your courses - 5th grade student guide (also available in Spanish)

Get parents and guardians ready

When the course plans are ready, share the below guides with parents and guardians to help them review and approve their students' plan.

- Middle school Course Planner parent/guardian approval (also available in Spanish)
- High school Course Planner parent/guardian approval (also available in Spanish)

Congratulations! Your 7-step setup is complete!