

# SAKAI 19 ADMINISTRATOR GUIDE (ENGLISH)

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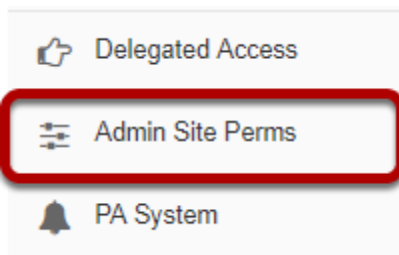
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# Admin Site Perms

# What is the Admin Site Perms tool?

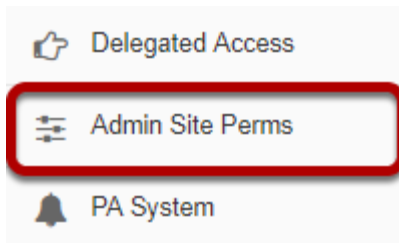
The Admin Site Perms tool allows admin users to add or remove permissions across all sites for specified roles. If you would like to modify the permissions for existing roles in your instance, this tool makes it easy to implement the change system-wide.

**To access this tool, select Admin Site Perms from the Tool Menu in the Administration Workspace.**



# How do I add site role permissions for all sites?

Go to Admin Site Perms.



Select the **Admin Site Perms** tool from the Tool Menu in the Administration Workspace.

Select the site type, role, and permissions to be added.

## Control Site Role Permissions for all sites

This will add or remove the selected permissions in all sites of the types selected and all roles selected. You must select at least one permission, one site type, and one role to do an update. This can be somewhat slow when updating a very large number of sites and will do the processing in a separate thread.

Add Permissions

Remove Permissions

### Site Types

Select the site types to change the permissions in

☒ course  
☐ project

### Site Roles

Select the roles to apply the permission changes to

☐ Instructor  
☐ Student  
☒ Teaching Assistant  
☐ access  
☐ maintain

---

☐ Internal users  
☐ Provided users

---

☐ All Staff

### Permissions

Select the permissions to add or remove

☐ alias.add  
☐ alias.del  
☐ alias.upd  
☐ annc.all.groups  
☐ annc.delete.any  
☐ annc.delete.own  
☐ annc.new  
☐ annc.read  
☐ annc.read.drafts  
☐ annc.revise.any  
☐ annc.revise.own  
☐ asn.all.groups  
☐ asn.delete  
☐ asn.grade  
☒ asn.new  
☐ asn.read  
☐ asn.receive.notifications  
☐ asn.revise  
☐ asn.share.drafts  
☐ asn.submit  
☐ assessment.createAssessment  
☐ assessment.deleteAssessment.any

*Note: You must select at least one site type, role, and permission.*

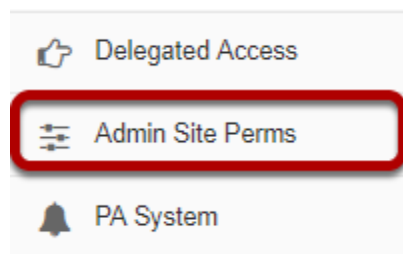
## Click Add Permissions.



Scroll to the bottom of the page and click the **Add Permissions** button to save your changes.

# How do I remove site role permissions for all sites?

## Go to Admin Site Perms.



Select the **Admin Site Perms** tool from the Tool Menu in the Administration Workspace.

## Select the site type, role, and permissions to be removed.

### Control Site Role Permissions for all sites

This will add or remove the selected permissions in all sites of the types selected and all roles selected. You must select at least one permission, one site type, and one role to do an update. This can be somewhat slow when updating a very large number of sites and will do the processing in a separate thread.

Add Permissions

Remove Permissions

#### Site Types

Select the site types to change the permissions in

☒ course  
☐ project

#### Site Roles

Select the roles to apply the permission changes to

☐ Instructor  
☐ Student  
☒ Teaching Assistant  
☐ access  
☐ maintain

---

☐ Internal users  
☐ Provided users

---

☐ All Staff  
☐ All Students  
☐ All Users

#### Permissions

Select the permissions to add or remove

☐ alias.add  
☐ alias.del  
☐ alias.upd  
☐ annc.all.groups  
☐ annc.delete.any  
☐ annc.delete.own  
☐ annc.new  
☐ annc.read  
☐ annc.read.drafts  
☐ annc.revise.any  
☐ annc.revise.own  
☐ asn.all.groups  
☐ asn.delete  
☐ asn.grade  
☒ asn.new  
☐ asn.read  
☐ asn.receive.notifications  
☐ asn.revise  
☐ asn.share.drafts  
☐ asn.submit  
☒ assessment.createAssessment  
☐ assessment.deleteAssessment.any  
☐ assessment.deleteAssessment.own  
☐ assessment.editAssessment.any  
☐ assessment.editAssessment.own  
☐ assessment.gradeAssessment.any

*Note: You must select at least one site type, role, and permission.*

## Click Remove Permissions.



Scroll to the bottom of the page and click the **Remove Permissions** button to save your changes.

# Aliases

# What are Aliases?

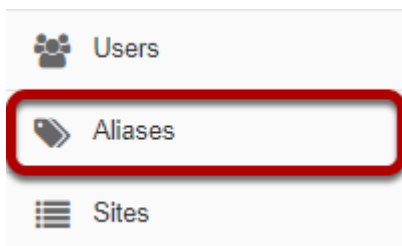
The Alias service supports the mapping of alias strings to a target. This is useful when things like sites have a long, cryptic name (such as a GUID).

For example, a Sakai alias can be used instead of the site id when emailing to the site **test@sakai.edu** rather than **6ade75f9-aeef-4338-80ae-62e391045975@sakai.edu**.

It can also be used in place of the site id for access URLs, such as **/access/content/group/test** instead of **/access/content/group/6ade75f9-aeef-4338-80ae-62e391045975**.

The Aliases admin tool provides methods to get the target of aliases in the system, create new ones, edit them and delete them.

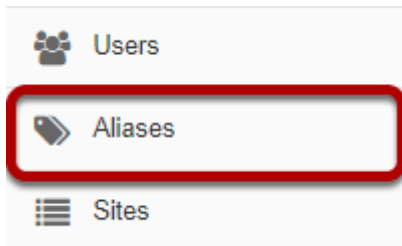
**To access this tool, select Aliases from the Tool Menu in the Administration Workspace.**



# How do I add an alias?

Aliases may be added in several ways: using the Aliases tool, when creating or editing a site in Sites, or when adding the Email Archive tool. All existing aliases in the system will appear listed in the Aliases tool, regardless of how they were added.

## Adding an alias from the Aliases tool.



Select the **Aliases** tool from the Tool Menu in the Administration Workspace.

## Click New Alias.



## Enter the alias and its target.

### Alias

Review and modify this Alias. Alias ID is restricted to 99 chars or less here, 40 chars in user UI.

\* Alias (99 chars max):

coursereview

Target (255 chars max):

/site/5b82bd8e-de65-4536-!

Save

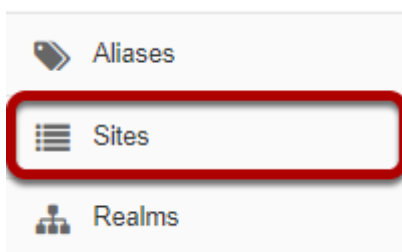
Cancel

Enter the alias you would like to create, as well as the target site for which it will be used. Then click **Save**.

For example, to create an alias named `coursereview` for a site with a site id of `5b82bd8e-de65-4536-9567-90b58813cead`, you would enter:


- Alias = `coursereview`
- Target = `/site/5b82bd8e-de65-4536-9567-90b58813cead`

## Creating an alias from the Sites tool.



Select the **Sites** tool from the Tool Menu in the Administration Workspace.

# Select a site to edit.

 SITES

New Site

Search5b82bd8e-de65-4536Site IDClear SearchUser ID

Link

Help

Sites

These are the Sites defined within the system that meet the search criteria. Click on an Id to edit.

You are viewing 1 - 1 of 1 results.

|<<

show 20 items...

>>|

Site Id	Title	Published	Joinable?	Type	Description, URLs
<a href="#">5b82bd8e-de65-4536-9567-90b58813cead</a>	Course Review	✓		project	<b>Created:</b> Aug 11, 2017 1:44 pm Sakai Administrator

Select either **New site** or click on the site id link for an existing site to edit.

## Enter the alias.

SITES

Remove Site

Save As

Link

Help

Edit: Site 5b82bd8e-de65-4536-9567-90b58813cead

Review and modify this Site's information.

Site

Site Id: 5b82bd8e-de65-4536-9567-90b58813cead

Title: Course Review

Site URL Alias: https://trunk.mysql.nightly.cakapoint.org/poda/site/coursereview

Type: project

Short Description:

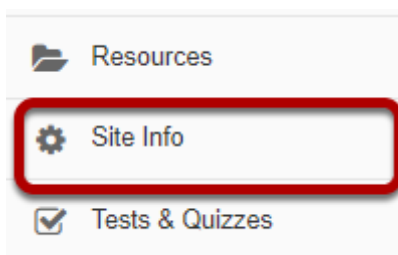
Description:

When creating or editing a site, you have the option to enter an alias in the Site URL Alias field provided.

## Creating an email alias for the Email Archive tool within a site.

When the Email Archive tool is added to a site, the site manager is prompted to enter an alias that will serve as the email archive address.

## Go to Site Info.



Select the **Site Info** tool from the Tool Menu within your site.

# Click Manage Tools.

Edit Site Information	Manage Tools	Tool Order	Add Participants	Manage Groups	Link to Parent Site	External Tools	Manage Access	Import from Site
Import from Archive File	User Audit Log							

# Select the Email Archive tool.

Choose tools to include on your site...

General12

☒ Overview

For viewing description of the site. May include recent announcements, discussion, and chat items.

☒ Announcements

For posting current, time-critical information

☒ Assignments

For posting, submitting and grading assignment(s) online

☒ Calendar

For posting and viewing deadlines, events, etc.

☐ Chat Room

For real-time conversations in written form

☐ Contact Us

A site content and functionality reporting tool.

☐ Drop Box

For private file sharing between instructor and student

☐ Email

Send mail to select participants in your site.

☒ Email Archive

For viewing email sent to the site

☐ External Tool

Launch external tools using IMS Learning Tools Interoperability.

Selected toolsRemove

Overview

X

Announcements

X

Assignments

X

Calendar

X

Email Archive

X

Forums

X

Gradebook

X

Lessons

X

Messages

X

Resources

X

Site Info

Tests & Quizzes

X

Enable MathJax for automatic rendering of LaTeX and AsciiMath in this site. [Learn More.](#)

OFF

# Scroll down and click Continue.

Continue

Cancel

## Enter the email alias and click Continue.

### SITE INFO

[Link](#)[? Help](#)

#### Customize tool instances

You can make configuration adjustments later using the configuration capabilities for each tool.

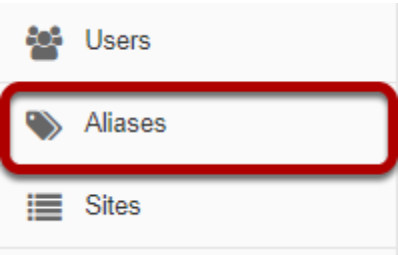
#### Email Archive

\* Site email address @trunk-mysql.nightly.sakaiproject.org

[Continue](#)[Back](#)[Cancel](#)

# How do I delete an alias?

Go to the Aliases tool.



Select the **Aliases** tool from the Tool Menu in the Administration Workspace.

Click on the alias you would like delete.

ALIASES

New Alias

Search

Link

Help

Aliases

These are the Aliases defined within the system. Click an Alias Id to edit or view detail.

You are viewing 1 - 5 of 5 results.

|<

<

show 20 items...

>

>|

Alias	Target
<a href="#">courseview</a>	/site/5b82bd8e-de65-4536-9567-90b58813cead
<a href="#">edu101</a>	/site/DAC-EDUCATION-DEPT1-SUBJ1-101
<a href="#">edu126</a>	/site/DAC-EDUCATION-DEPT1-SUBJ1-126
<a href="#">edu151</a>	/site/DAC-EDUCATION-DEPT1-SUBJ1-151
<a href="#">mercury</a>	/site/mercury

# Click Remove Alias.

ALIASES

Remove Alias

Link

Help

Alias

Review and modify this Alias. Alias ID is restricted to 99 chars or less here, 40 chars in user UI.

Alias (99 chars max):

edu151

Target (255 chars max):

/site/DAC-EDUCATION-DE

Created By:

Sakai Administrator

Created:

Aug 11, 2017 2:07 pm

Modified By:

Sakai Administrator

Modified:

Aug 11, 2017 2:07 pm

Save

Cancel

# Confirm alias removal.

Remove Alias

Are you sure you want to remove the following Alias:

Alias	Target
edu151	/site/DAC-EDUCATION-DEPT1-SUBJ1-151

Remove

Cancel

Click **Remove** again when prompted to confirm the deletion of the alias.

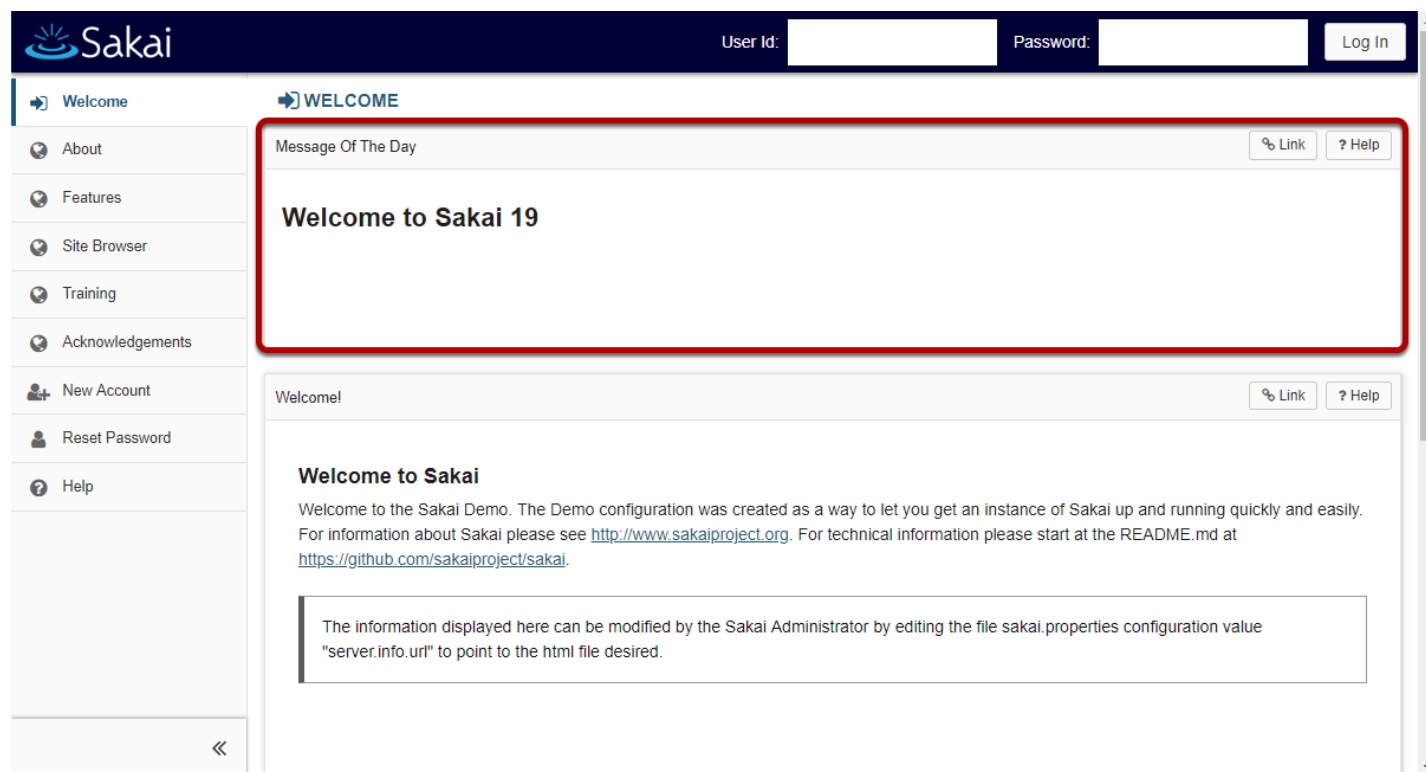
# **Announcements (or Message of the Day)**

# What is the admin Announcements tool or Message of the Day (MOTD)?

On the Gateway login page and in the Home user landing page upon login, you will see announcements from your system administrator displayed as the "Message of the Day" (MOTD). The MOTD is typically used for system-wide announcements to inform users about upcoming events or important information.

System administrators access the MOTD functions using the Announcements tool in the Administration Workspace.

## View the MOTD on Gateway login page.



The screenshot shows the Sakai Gateway login page. The top navigation bar includes the Sakai logo, a 'User Id' field, a 'Password' field, and a 'Log In' button. A left sidebar contains links for 'Welcome', 'About', 'Features', 'Site Browser', 'Training', 'Acknowledgements', 'New Account', 'Reset Password', and 'Help'. The main content area is titled 'WELCOME' and contains a 'Message Of The Day' section, which is highlighted with a red box. This section displays 'Welcome to Sakai 19' and includes links for 'Link' and 'Help'. Below this, there is a 'Welcome!' section with a 'Link' and 'Help' button, and a 'Welcome to Sakai' section with a paragraph of text and a link to the Sakai project website. A footer note mentions that the information can be modified by the Sakai Administrator.

**Message Of The Day** [Link](#) [? Help](#)

**Welcome to Sakai 19**

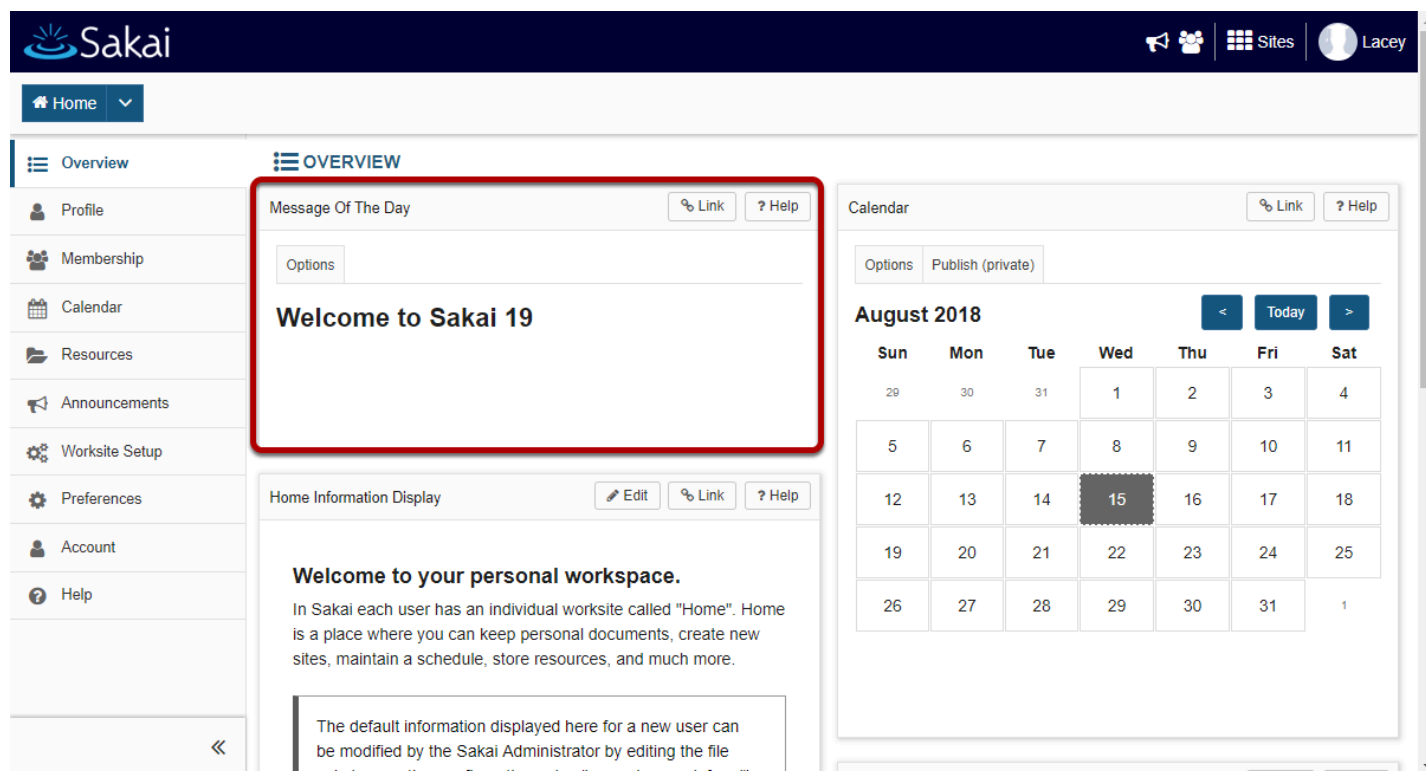
**Welcome!** [Link](#) [? Help](#)

**Welcome to Sakai**

Welcome to the Sakai Demo. The Demo configuration was created as a way to let you get an instance of Sakai up and running quickly and easily. For information about Sakai please see <http://www.sakaiproject.org>. For technical information please start at the README.md at <https://github.com/sakaiproject/sakai>.

The information displayed here can be modified by the Sakai Administrator by editing the file sakai.properties configuration value "server.info.url" to point to the html file desired.

## View the MOTD in Home.



The screenshot shows the Sakai Home page. The top navigation bar includes the Sakai logo, a 'Home' dropdown menu, and a user profile icon labeled 'Lacey'. A left sidebar contains links for 'Overview', 'Profile', 'Membership', 'Calendar', 'Resources', 'Announcements', 'Workspace Setup', 'Preferences', 'Account', and 'Help'. The main content area is titled 'OVERVIEW' and contains a 'Message Of The Day' section, which is highlighted with a red box. This section displays 'Welcome to Sakai 19' and includes links for 'Link' and 'Help'. Below this, there is a 'Home Information Display' section with an 'Edit' button, a 'Link' button, and a 'Help' button. This section displays 'Welcome to your personal workspace.' and a paragraph of text. A footer note mentions that the default information displayed here for a new user can be modified by the Sakai Administrator. To the right of the MOTD section is a 'Calendar' section with a 'Link' and 'Help' button, showing a calendar for August 2018.

**Message Of The Day** [Link](#) [? Help](#)

**Welcome to Sakai 19**

**Home Information Display** [Edit](#) [Link](#) [? Help](#)

**Welcome to your personal workspace.**

In Sakai each user has an individual worksite called "Home". Home is a place where you can keep personal documents, create new sites, maintain a schedule, store resources, and much more.

The default information displayed here for a new user can be modified by the Sakai Administrator by editing the file sakai.properties configuration value "myworkspace.info.url"

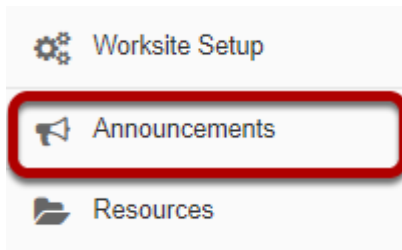
**Calendar** [Link](#) [? Help](#)

Options Publish (private)

**August 2018** [<](#) [Today](#) [>](#)

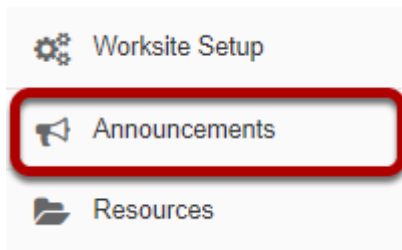
Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1

**To access this tool, select Announcements from the Tool Menu in the Administration Workspace. (Admin users only)**



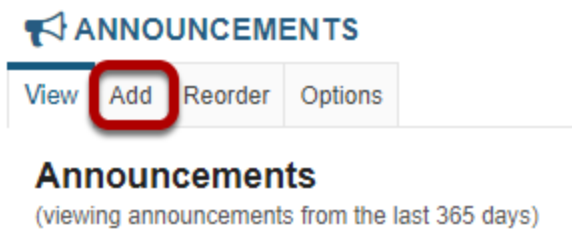
# How do I add an MOTD announcement?

**Go to Announcements.**



Select the **Announcements** tool from the Tool Menu in the Administration Workspace.

**Click Add.**



# Title your announcement and add content.

## Post Announcement

Complete the form, then choose the appropriate button at the bottom.

Required items marked with a \*

\* Announcement title

Server Maintenance

\* Body

The server will be undergoing routine maintenance between 12AM and 3AM.

body p Words: 11, Characters (with HTML): 79/1000000

Give your announcement a title, and then enter the content of the announcement into the rich text editor. You may use the formatting options in the editor to modify the font size or color, add images or links, or embed other content.

## Access.

By default, all MOTD announcements are publicly viewable. This option cannot be changed.

# Select when the announcement will be displayed.

## Availability


- ☒ Show - (**Post** and display this announcement immediately)
- ☐ Hide - (**Draft mode** - Do not display this announcement at this time)
- ☐ Specify Dates - (**Choose when** this announcement will be displayed)


By default, the announcement is displayed immediately upon posting. You can also choose to hide it (saving as a draft until you are ready to post it), or you may specify dates when the announcement will be available.

## Select availability dates. (Optional)

### Availability

- ☐ Show - (**Post** and display this announcement immediately)
- ☐ Hide - (**Draft mode** - Do not display this announcement at this time)
- ☒ Specify Dates - (**Choose when** this announcement will be displayed)

☒ Beginning Date: 08/11/2017 02:15 pm 


☒ Ending Date: 08/18/2017 02:15 pm 

If you want the announcement to display during a specific time frame, choose **Specify Dates**. Select the box beside **Beginning** and/or **Ending** and click the calendar icon to insert the properly formatted date and time when the announcement will begin and/or end.

## Use calendar icon to insert date and time.

### Availability

- ☐ Show - (**Post** and display this announcement immediately)
- ☐ Hide - (**Draft mode** - Do not display this announcement at this time)
- ☒ Specify Dates - (**Choose when** this announcement will be displayed)

☒ Beginning Date: 08/11/2017 02:15 pm 

☒ Ending Date:

### Attachments

No Attachments Yet

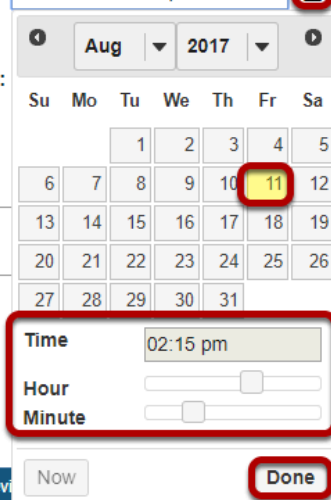
Add Attachments

Post Announcement

Prev

Now

Done



Aug 2017

Su	Mo	Tu	We	Th	Fr	Sa
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

Time 02:15 pm

Hour

Minute

Click the date on the calendar, and use the sliders to select the time. Then click **Done**.

## Add attachments. (Optional)

### Attachments

No Attachments Yet

Add Attachments

Click the **Add Attachments** button.

*Note: Remember that if you include any attachments, the item must be in a publicly accessible location in order for users to be able to view the attachment. See [What Resources are specific to admin users?](#) for more information.*

## Click Post Announcement.

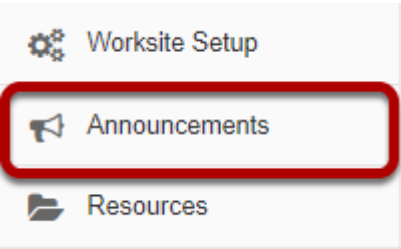
Post Announcement

Preview

Cancel

# How do I edit an MOTD announcement?

## Go to Announcements.



Select the **Announcements** tool from the Tool Menu of the Administration Workspace.

## Click Edit.

ANNOUNCEMENTS

Link

Help

View

Add

Reorder

Options

Announcements

(viewing announcements from the last 365 days)

View

All

Viewing 1 - 2 of 2 items

|<

<

show 10 items...

>

>|

Subject	Saved By	Modified Date	For	Beginning Date	Ending Date	Remove?
<div>Server Maintenance</div> <div>Edit</div>	Sakai Administrator	Aug 11, 2017 2:28 pm	public	Aug 11, 2017 2:25 pm	Aug 18, 2017 2:25 pm	<input type="checkbox"/>
<div>Welcome</div> <div>Edit</div>	Sakai Administrator	Aug 11, 2017 2:11 pm	public			<input type="checkbox"/>

Click the **Edit** link below the announcement you want to modify.

## Edit the announcement.

# ANNOUNCEMENTS

ViewAddReorderOptions

---

## Edit Announcement

Update the form, then choose the appropriate button at the bottom.

Required items marked with a \*

\* Announcement title Server Maintenance

\* Body

?Source

B I U S X A'

Styles - Normal - Font - Size - A- A+

The server will be undergoing routine maintenance between 12AM and 3AM on August 19th

body pWords: 14, Characters (with HTML): 941|000000

### Access

- ☒ This announcement is publicly viewable

### Availability

- ☐ Show - (Post and display this announcement immediately)
- ☐ Hide - (Draft mode - Do not display this announcement at this time)
- ☒ Specify Dates - (Choose when this announcement will be displayed)
 

☒ Beginning Date: 06/11/2017 02:25 pm
 ☒ Ending Date: 06/18/2017 02:25 pm

### Attachments

No Attachments Yet

Add Attachment

See revision history

Save ChangesPreviewCancel

**(Optional) View Revision History.**

[See revision history](#)

Date revised	Notification setting	Availability setting
Aug 11, 2017 2:28 pm	Low priority	
Aug 11, 2017 2:28 pm	Low priority	
Aug 11, 2017 2:30 pm	Low priority	

Save ChangesPreviewCancel

If you would like to see information about previous revisions of this announcement, click the **See revision history** link.

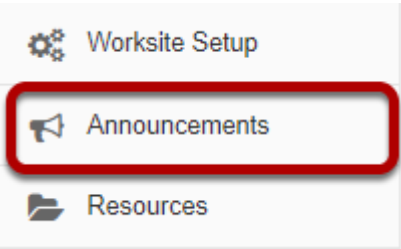
## Click Save Changes.



When you have finished your edits, click the **Save Changes** button to save your work.

# How do I delete an MOTD announcement?

## Go to Announcements.



Select the **Announcements** tool from the Tool Menu in the Administration Workspace.

## Select the announcement.

ANNOUNCEMENTS

View

Add

Reorder

Options

Link

Help

Announcements

(viewing announcements from the last 365 days)

View

All

Viewing 1 - 1 of 1 items

|<

<

show 10 items...

>

>|

Subject	Saved By	Modified Date	For	Beginning Date	Ending Date	Remove?
<div>Welcome</div> <div>Edit</div>	Sakai Administrator	Aug 15, 2018 3:24 pm	public			<input checked="" type="checkbox"/>

Remove

Clear Selections

Select the check box in the **"Remove?"** column for the announcement you would like to delete.

# Click Remove.

ANNOUNCEMENTS

View

Add

Reorder

Options

Link

Help

Announcements

(viewing announcements from the last 365 days)

View

All

Viewing 1 - 1 of 1 items

show 10 items...

<

>

Subject	Saved By	Modified Date	For	Beginning Date	Ending Date	Remove?
Welcome	Sakai Administrator	Aug 15, 2018 3:24 pm	public			<input checked="" type="checkbox"/>

Remove

Clear Selections

# Click Remove again.

Deleting announcements...

Are you sure you want to delete the following announcements?

Subject	Saved By	Modified Date	For
Welcome	Sakai Administrator	Aug 15, 2018 3:24 pm	public

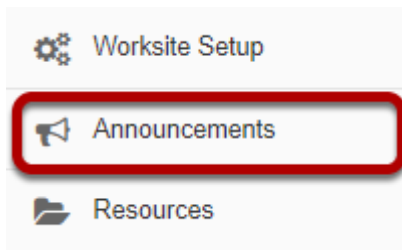
Remove

Cancel

Click the **Remove** button to confirm deletion.

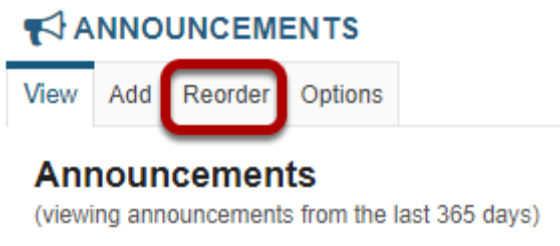
# How do I reorder MOTD announcements?

## Go to Announcements.



Select the **Announcements** tool from the Tool Menu in the Administration Workspace.

## Click Reorder.



## Drag and drop to re-order announcements.

### Reorder Announcements

To reorder, drag and drop list items, or use the keyboard U and D keys, and then click Update.

Undo last | Undo all

<a href="#">Sort by subject</a>	<a href="#">Sort by author</a>	<a href="#">Sort by beginning date</a>	<a href="#">Sort by ending date</a>	<a href="#">Sort by modified date</a>
Welcome	Sakai Administrator	Oct 27, 2017 5:38 pm		
Server Maintenance	Sakai Administrator	Dec 5, 2017 2:29 pm		

UpdateCancel

The announcement that you have selected will be green until it is dropped in its new location. It will turn blue for a few seconds before it reverts to the default gray color.

## Auto-Sort Options.

1 <a href="#">Sort by subject</a>	2 <a href="#">Sort by author</a>	3 <a href="#">Sort by beginning date</a>	4 <a href="#">Sort by ending date</a>	5 <a href="#">Sort by modified date</a>
Welcome	Sakai Administrator	Oct 27, 2017 5:38 pm		
Server Maintenance	Sakai Administrator	Dec 5, 2017 2:29 pm		

[Update](#) [Cancel](#)

There are also three options that allow you to auto-sort the Announcements:

1. Sort by subject - orders the announcements in alphabetical order according to the subject line
2. Sort by author - orders the announcements in alphabetical order according to the author of the announcement
3. Sort by beginning date - orders the announcements by their beginning date (for announcement which specify specific dates)
4. Sort by ending date - orders the announcements by their ending date (for announcement which specify specific dates)
5. Sort by modified date - orders the announcements in order based the creation (or most recent modification) date.

When you click the columns heading link, an icon appears beside it showing if the list is sorted smallest to largest, or largest to smallest. In the above illustration, the announcements are sorted by subject in A - Z order. If the subject heading is clicked again, the icon will point down showing that sort order has changed to Z - A.

# Click Update.

## Reorder Announcements

To reorder, drag and drop list items, or use the keyboard U and D keys, and then click Update.

[Undo last](#) | [Undo all](#)

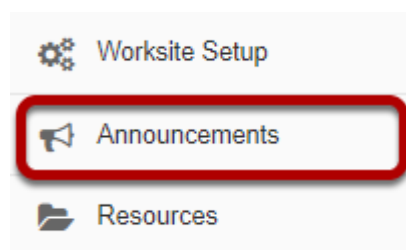
<a href="#">Sort by subject</a>	<a href="#">Sort by author</a>	<a href="#">Sort by beginning date</a>	<a href="#">Sort by ending date</a>	<a href="#">Sort by modified date</a>
Welcome	Sakai Administrator	Oct 27, 2017 5:38 pm		
Server Maintenance	Sakai Administrator	Dec 5, 2017 2:29 pm		

**Update** Cancel

Once you have placed the announcements into the desired order, click the **Update** button to save.

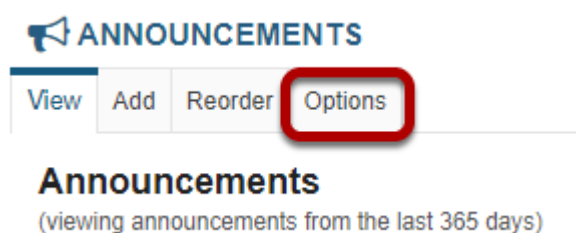
# How do I configure MOTD announcement options?

## Go to Announcements.



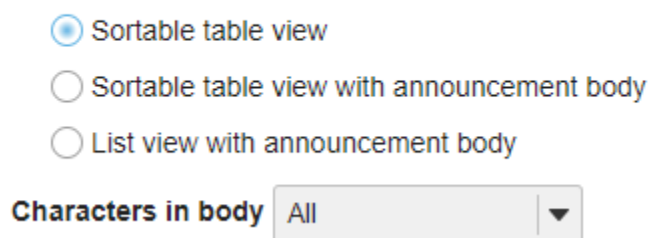
Select the **Announcements** tool from the Tool Menu in the Administration Workspace.

## Click Options.



## Display options.

### Display Options



These display options control the table/list view settings for the admin user when editing announcements.

## RSS Feed Options.

### RSS Feed Options *public announcements only*

---

RSS Alias (40 chars  
max)

RSS URL

<https://trunk-mysql.nightly.sakaiproject.org/access/announcement/rss/admin>

If you would like to subscribe to an RSS feed containing all the public announcements for this site, you may use the URL listed here to subscribe. You may also specify an RSS Alias to make the URL easier to remember.

## Display Limits.

### Display Limits

---

Number of days in  
the past

Number of  
announcements

The display limits entered here control the default display limits for all users in the system. Individual users may override the default settings if they choose.

## Click Update.

Once you have completed your option settings, click the **Update** button to save.

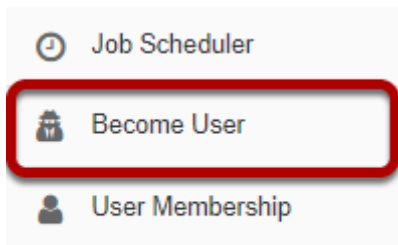
# Become User

# What is Become User?

The Become User tool is an administrative tool to allow a user to log in as another user without needing a password. Logging in as another user is useful for support situations, since you'll be able to see the system from the point of view of that user.

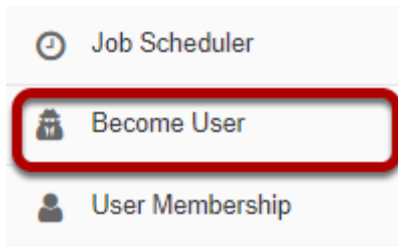
When you log out after using the Become User tool to impersonate/masquerade as a user, you will automatically revert back to your admin account.

**To access this tool, select Become User from the Tool Menu in the Administration Workspace.**



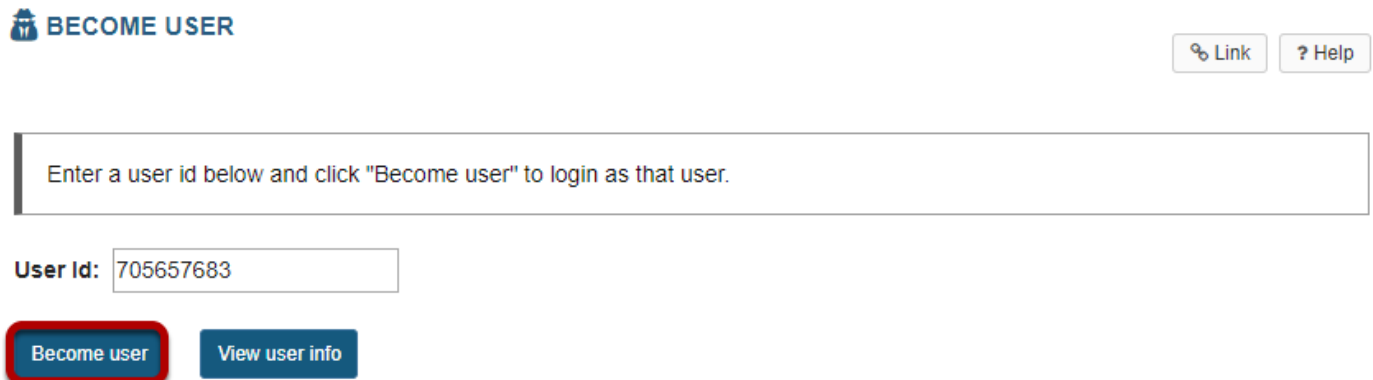
# How do I log in as another user?

Go to the **Become User** tool.



Select **Become User** in the Administration Workspace Tool Menu.

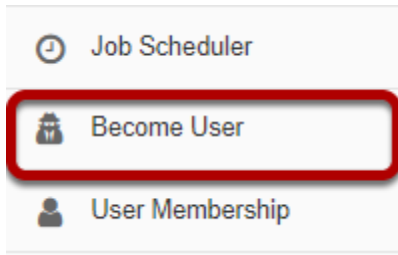
Enter a user id and click **Become user**.

A screenshot of the 'BECOME USER' tool interface. At the top left is a blue icon of a person and the text 'BECOME USER'. At the top right are two buttons: 'Link' and 'Help'. Below this is a large text box containing the instruction: 'Enter a user id below and click "Become user" to login as that user.' Below the text box is a 'User Id:' label followed by a text input field containing the value '705657683'. At the bottom are two buttons: 'Become user' (highlighted with a red box) and 'View user info'.

Enter the user id for the user you would like to log in as, and then click the **Become user** button.

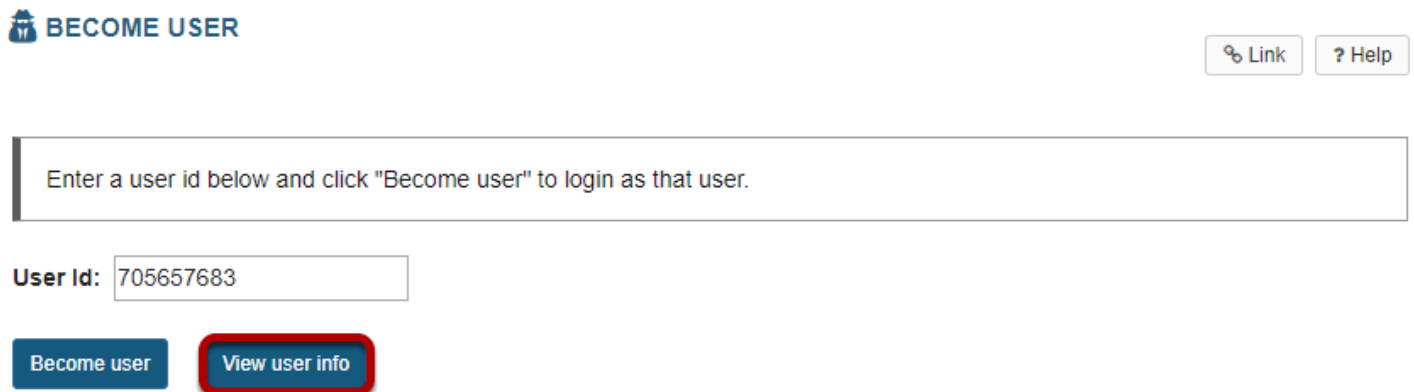
# How do I view user info?

Go to the **Become User** tool.



Select **Become User** in the Administration Workspace Tool Menu.

Enter a user id and click **View user info**.

A screenshot of the 'BECOME USER' tool interface. At the top left is the title 'BECOME USER' with a person icon. To the right are two buttons: 'Link' and 'Help'. Below this is a large text box containing the instruction: 'Enter a user id below and click "Become user" to login as that user.' Underneath the text box is a 'User Id:' label followed by a text input field containing the value '705657683'. At the bottom are two buttons: 'Become user' and 'View user info'. The 'View user info' button is highlighted with a red rounded rectangle.

Enter the user id for the user you would like to log in as, and then click the **View user info** button.

## User info will be displayed.

Enter a user id below and click "Become user" to login as that user.

### User Information

**Name:** Lucy Buckridge  
**Email:** 705657683@nowhere.com  
**User Id:** 705657683  
**Internal Id:** 0389406e-5bc3-40c1-8eb8-25b104787c58  
**Type:** registered  
**Created:** Aug 14, 2017 12:53 am

**User Id:**

Become user

View user info

The user's name, email, user id, internal id, type, and account creation date will be displayed.

# Delegated Access

# What is Delegated Access?

The delegated access tool controls both delegating access to users outside of the site membership realm as well as setting up and controlling site shopping period information.

It is most easily described by breaking it down into two related functions: “Delegated Access” and “Shopping Period.”

## Delegated Access:

The delegated access tool has five primary functions:

1. Provide a friendly interface for administrators to delegated user access to specific sites or department levels.
2. Provide a friendly interface for administrators to delegated shopping period admin privileges for users at the site or departments level.
3. Provide a friendly interface for delegated users to view, search and access their delegated sites.
4. Provide a friendly interface for delegated shopping period admins to adjust shopping period data within their scope of privileges.
5. Allow a user, that has been granted access to sites, to use the direct URL for the site to access it.

The delegated access tool allows administrators to search for users and delegate site, role, and shopping period admin access. It also allows you to select specific tools the user should not have access to.

The easiest way to think of how the tool works is liking it to the Role Swap feature in Sakai. Instead of just swapping the role, you can specify the realm and role the user will receive for that particular site or node in the hierarchy. All child nodes will inherit the parent settings unless overridden.

## Shopping Period:

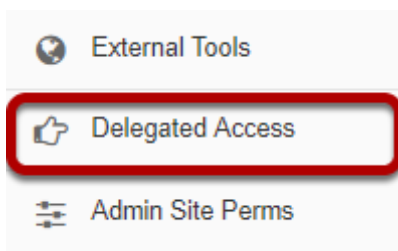
The shopping period tool is just a special use case of the Delegated Access Tool from the perspective of shopping consumer. In another words, it treats the .anon or .auth role as a delegated user and then can determine what role that user will inherit when he or she enters a site. There are three user cases that the shopping period section handles:

1. **Administrator:** When a user that has been granted shopping period administrative privileges goes into the delegated access tool, they will see a link for “Shopping Period Admin”. Here they can modify what role a .anon or .auth (public/logged in) user will

inherit when they enter. They can also choose which tools are open as well as the open and close date for the shopping period for that site or department.

2. **Instructor:** If you enable the instructor to override shopping settings, then the instructor will have an interface in the "Site Info" tool under the link "Manage Access" where he/she can modify their course's shopping settings. This allows an instructor to opt in or out of the shopping period.
3. **Shopper:** When a user that wants to shop for a particular site goes to the Shopping Period tool, they will see a node structure and a search box to look for a particular site they want to test out. This tool, for example, can be added to Sakai's !Gateway site so unauthorized users can view it. When the user finds the site they want, they just click the link and go to the site.

## To access this tool, select Delegated Access from the Tool Menu in the Administration Workspace.

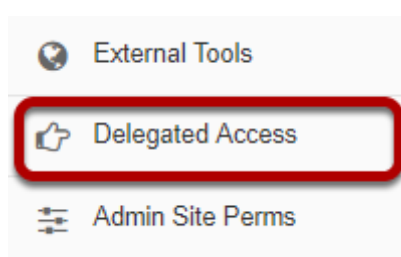


You may also see the Delegated Access tool in the Home Tool Menu if it has been added to your user account.

# How do I let a non-admin manage delegated access?

You may want to let a non-admin user manage delegated access for other users. To do so, you can add this capability to the Delegated Access tool you make available in the non-admin user's Home area.

## Go to Delegated Access tool.



Select **Delegated Access** from the Tool Menu in the Administration Workspace.

## Find and select user



1. Click the **Search by User** button\*
2. Enter the user name or user ID and click **Submit** (or hit "enter" key).
3. Click the **Edit** link for the user.

*Tip: You can also search for a user by clicking the **Search by Access** button. See [How do I search users in Delegated Access?](#)*

# Expand hierarchy nodes.

Edit Permission for: DA Test ⓘ

[Expand All Nodes](#)

Filter By: Hierarchy Level: 

Choose One ▼

Filter

Clear

	Access Admin	Shopping Admin	Site Access	User Becomes	Restricted Tools	Advanced
[-] Sakai	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] EDUCATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] MEDICINE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] MUSIC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] DEPT1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] SUBJ1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] DAC-MUSIC-DEPT1-SUBJ1-101	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] DAC-MUSIC-DEPT1-SUBJ1-126	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] DAC-MUSIC-DEPT1-SUBJ1-151	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] DAC-MUSIC-DEPT1-SUBJ1-176	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] DAC-MUSIC-DEPT1-SUBJ1-201	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] DAC-MUSIC-DEPT1-SUBJ1-226	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] DAC-MUSIC-DEPT1-SUBJ1-251	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited

Save

Cancel

If you want to provide the user with admin capability for all hierarchy nodes, you can skip this step. Otherwise, click the **Expand All Nodes** link (or click the root node). Continue expanding nodes to access the appropriate node.

*Note: Settings you select for a node will apply to all its "child" (lower-level) nodes, but not to any other nodes at the same level in the hierarchy. You can always override settings that a lower-level node inherits from a higher node.*

# Set admin capability.

Edit Permission for: DA Test ⓘ

[Collapse All Nodes](#)

Filter By: Hierarchy Level: 

Choose One ▼

Filter

Clear

	Access Admin	Shopping Admin	Site Access	User Becomes	Restricted Tools	Advanced
[-] Sakai	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] EDUCATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] MEDICINE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] MUSIC	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited

For a particular node, check **Access Admin**.

## Save settings



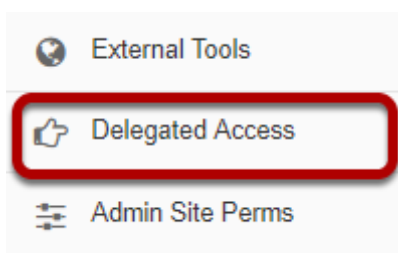
Click **Save**. A "Successfully saved" message displays.

If the user has no previous delegated access permissions enabled, the *Delegated Access* tool gets added to the user's My Workspace. In the tool, the user will see *Search by User* and *Search by Access* buttons for managing delegated access for other users.

# How do I let a non-admin manage shopping period access?

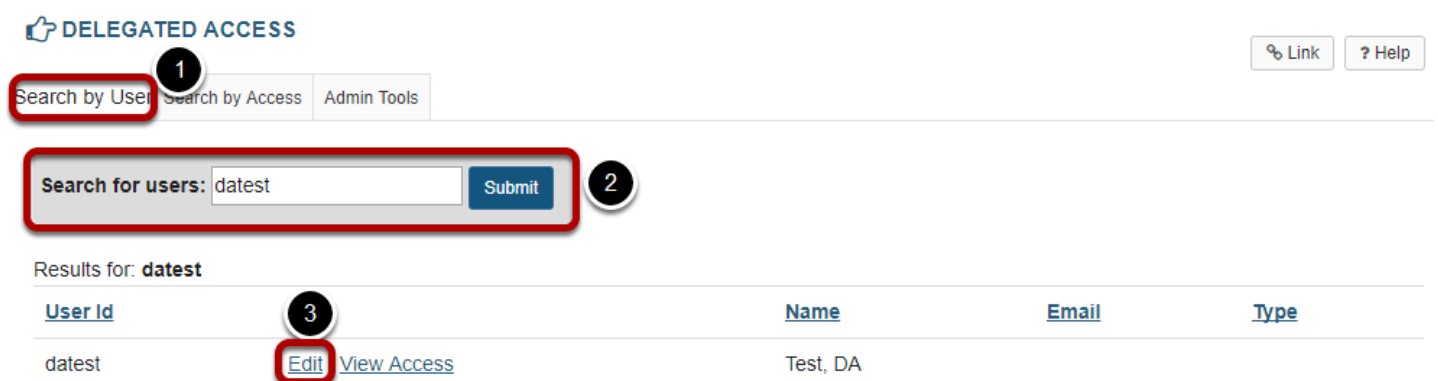
You may want to let a non-admin user manage shopping period access for other users. To do so, you can add this capability to the Delegated Access tool you make available in the non-admin user's Home area.

## Go to Delegated Access tool.



Select **Delegated Access** from the Tool Menu of the Administration Workspace or in your own Home area.

## Find and select user



1. Click the **Search by User** button\*
2. Enter the user name or user ID and click **Submit** (or hit "enter" key).
3. Click the **Edit** link for the user.

*Tip: You can also search for a user by clicking the **Search by Access** button. See [How do I search users in Delegated Access?](#)*

# Expand hierarchy nodes.

Edit Permission for: DA Test ⓘ

[Collapse All Nodes](#)

Filter By: Hierarchy Level: 

Choose One ▼

Filter

Clear

	Access Admin	Shopping Admin	Site Access	User Becomes	Restricted Tools	Advanced
[-] Sakai	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] EDUCATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] MEDICINE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] MUSIC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited

If you want to provide the user with admin capability for all hierarchy nodes, you can skip this step. Otherwise, click the **Expand All Nodes** link (or click the root node). Continue expanding nodes to access the appropriate node.

*Note: Settings you select for a node will apply to all its "child" (lower-level) nodes, but not to any other nodes at the same level in the hierarchy. You can always override settings that a lower-level node inherits from a higher node.*

# Set shopping admin capability.

Edit Permission for: DA Test ⓘ

[Collapse All Nodes](#)

Filter By: Hierarchy Level: 

Choose One ▼

Filter

Clear

	Access Admin	Shopping Admin	Site Access	User Becomes	Restricted Tools	Advanced
[-] Sakai	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] EDUCATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] MEDICINE	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] MUSIC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited

For a particular node, check **Shopping Admin**.

# Save settings.

Save

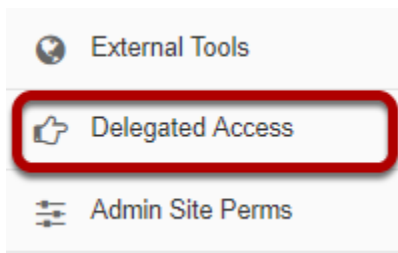
Cancel

Click **Save**. A "Successfully saved" message displays.

If the user has no previous delegated access permissions enabled, the *Delegated Access* tool gets added to the user's My Workspace. In the tool, the user will see *Shopping Admin* and *Shopping List* buttons for managing shopping period access for other users.

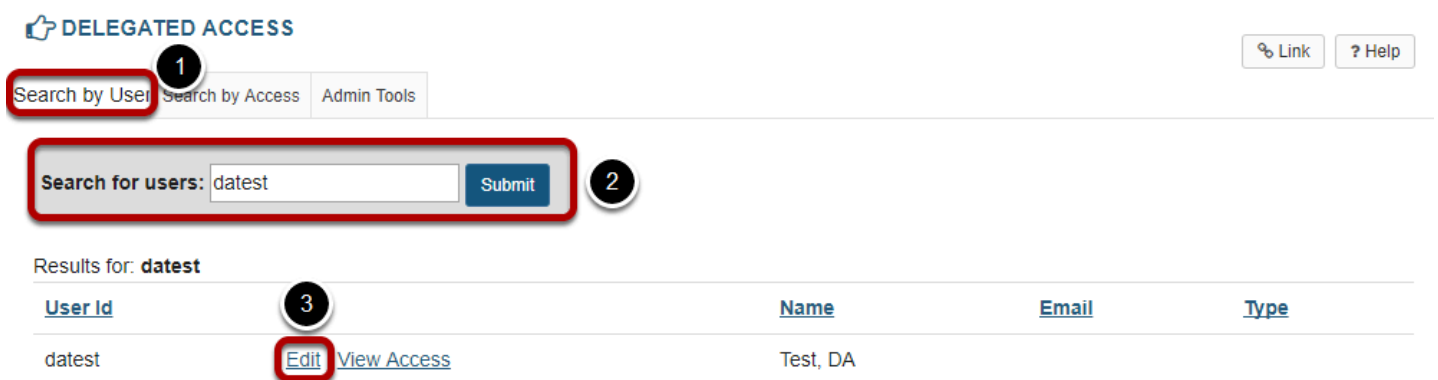
# How do I delegate site access to a user?

## Go to Delegated Access tool.



Select **Delegated Access** from the Tool Menu of the Administration Workspace or in your own Home area.

## Find and select user



1. Click the **Search by User** button\*
2. Enter the user name or user ID and click **Submit** (or hit "enter" key).
3. Click the **Edit** link for the user.

*Tip: You can also search for a user by clicking the **Search by Access** button. See [How do I search users in Delegated Access?](#)*

# Expand hierarchy nodes.

Edit Permission for: DA Test ⓘ

[Collapse All Nodes](#)

Filter By: Hierarchy Level: 

Choose One ▼

Filter

Clear

	Access Admin	Shopping Admin	Site Access	User Becomes	Restricted Tools	Advanced
📁 Sakai	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
📁 EDUCATION	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
📁 MEDICINE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
📁 MUSIC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited

If you want to provide the user with admin capability for all hierarchy nodes, you can skip this step. Otherwise, click the **Expand All Nodes** link (or click the root node). Continue expanding nodes to access the appropriate node.

*Note: Settings you select for a node will apply to all its "child" (lower-level) nodes, but not to any other nodes at the same level in the hierarchy. You can always override settings that a lower-level node inherits from a higher node.*

## Set access and role

Edit Permission for: DA Test ⓘ

[Collapse All Nodes](#)

Filter By: Hierarchy Level: 

Choose One ▼

Filter

Clear

	Access Admin	Shopping Admin	Site Access	User Becomes	Restricted Tools	Advanced
📁 Sakai	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
📁 EDUCATION	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>		Restricted Tools	Advanced
📁 MEDICINE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
📁 MUSIC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited

Save

Cancel

Choose One ▼

Choose One

.anon

.auth

.default

access (!site.template)

access (!site.user)

Administrator

Alumni

Faculty

Guest

Instructor (!site.template.course)

Instructor (!site.template.iti)

Learner

maintain (!site.helper)

maintain (!site.template)

maintain (!site.user)

Member

Mentor

Observer

Other

For a particular node:

1. Check **Site Access**.

2. Select a role from the *User Becomes* menu. The user will have the permissions for the selected role when accessing sites.

## Set tool restrictions. (Optional)

Edit Permission for: DA Test ⓘ

[Collapse All Nodes](#)

Filter By: Hierarchy Level:

Choose One ▼

Filter

Clear

	Access Admin	Shopping Admin	Site Access	User Becomes	Restricted Tools	Advanced
[-] Sakai	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] EDUCATION	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Faculty ▼	Restricted Tools	Advanced
[-] MEDICINE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] MUSIC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited

If you would like to restrict access to specific tools within a node or site, click **Restricted Tools**.

**Select the tool/s you want to restrict, then click Done.**

EDUCATION

Done

### Choose Tools to Restrict

Choosing a tool in the list will hide the tool for this user. This node and all children will inherit this list. A child can overwrite this list by selecting it's own restricted tools list.

☐  
☐ Account  
☐ Account Validator  
☒ Add Gradebook Items

## Add Become User tool. (Optional)

Edit Permission for: DA Test ⓘ

[Collapse All Nodes](#)

Filter By: Hierarchy Level:

Choose One ▼

Filter

Clear

	Access Admin	Shopping Admin	Site Access	User Becomes	Restricted Tools	Advanced
[-] Sakai	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] EDUCATION	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Faculty ▼	Restricted Tools	Advanced
[-] MEDICINE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] MUSIC	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited

If you would like to enable access to the *Become User* tool, click **Advanced**.

## Enable Become User tool, then click Done.

EDUCATION

Done

### Advanced Options

All children will inherit these settings unless overridden.

☒ Allow user to use Become User tool for users in these sites

In the window that displays, enable the **Allow user to use Become User tool for users in the these sites** setting. Then, click **Done**. The Become User tool will be added to the user's system landing page.

*Note: The Become User tool will only function for the sites to which the user has been granted access.*

## Save settings

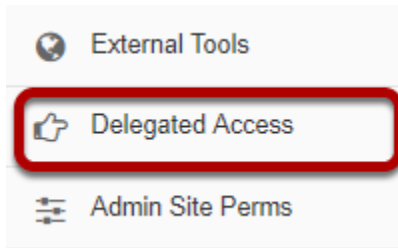


Click **Save**. A "Successfully saved" message displays.

If the user has no previous delegated access permissions enabled, the *Delegated Access* tool gets added to the user's My Workspace, along with *Become User* if you also enabled access to that tool.

# How do I edit user permissions in Delegated Access?

Go to Delegated Access tool.



Select **Delegated Access** from the Tool Menu of the Administration Workspace or in your own Home area.

## Find and select user

A screenshot of the 'DELEGATED ACCESS' tool interface. At the top, there's a header with a thumbs-up icon and the text 'DELEGATED ACCESS'. To the right are 'Link' and 'Help' buttons. Below the header are three tabs: 'Search by User' (highlighted with a red box and a circled '1'), 'Search by Access', and 'Admin Tools'. Under the 'Search by User' tab, there's a search box labeled 'Search for users:' containing the text 'datest', a 'Submit' button (highlighted with a red box and a circled '2'), and a 'Results for: datest' label. Below the search box is a table with columns: 'User Id', 'Name', 'Email', and 'Type'. The table has one row with 'datest' in the 'User Id' column, 'Test, DA' in the 'Name' column, and empty cells for 'Email' and 'Type'. The 'Edit' link under 'datest' is highlighted with a red box and a circled '3'.

User Id	Name	Email	Type
datest	Test, DA		

1. Click the **Search by User** button\*
2. Enter the user name or user ID and click **Submit** (or hit "enter" key).
3. Click the **Edit** link for the user.

*Tip: You can also search for a user by clicking the **Search by Access** button. See [How do I search users in Delegated Access?](#)*

# Expand hierarchy nodes.

Edit Permission for: DA Test ⓘ

[Collapse All Nodes](#)

Filter By: Hierarchy Level: 

Choose One ▼

Filter

Clear

	Access Admin	Shopping Admin	Site Access	User Becomes	Restricted Tools	Advanced
[-] Sakai	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] EDUCATION	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Faculty ▼	Restricted Tools	Advanced
[-] MEDICINE	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] MUSIC	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] DEPT1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] SUBJ1	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Instructor (!site.template.course) ▼	Restricted Tools	Advanced
[-] SUBJ2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] SUBJ3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] DEPT2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited
[-] DEPT3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		Inherited	Inherited

Save

Cancel

If you want to edit user permissions that apply to all sites in your Sakai instance, you can skip this step. Otherwise, click the **Expand All Nodes** link (or click the root node). Continue expanding nodes to access the appropriate node(s).

*Note: Settings you select for a node will apply to all its "child" (lower-level) nodes, but not to any other nodes at the same level in the hierarchy. You can always override settings that a lower-level node inherits from a higher node.*

## Edit permissions.

For the appropriate node(s), make changes as appropriate.

## Save changes.

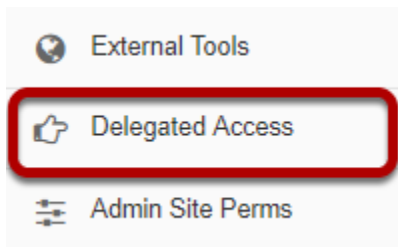
Save

Cancel

Click **Save**. A "Successfully saved" message displays.

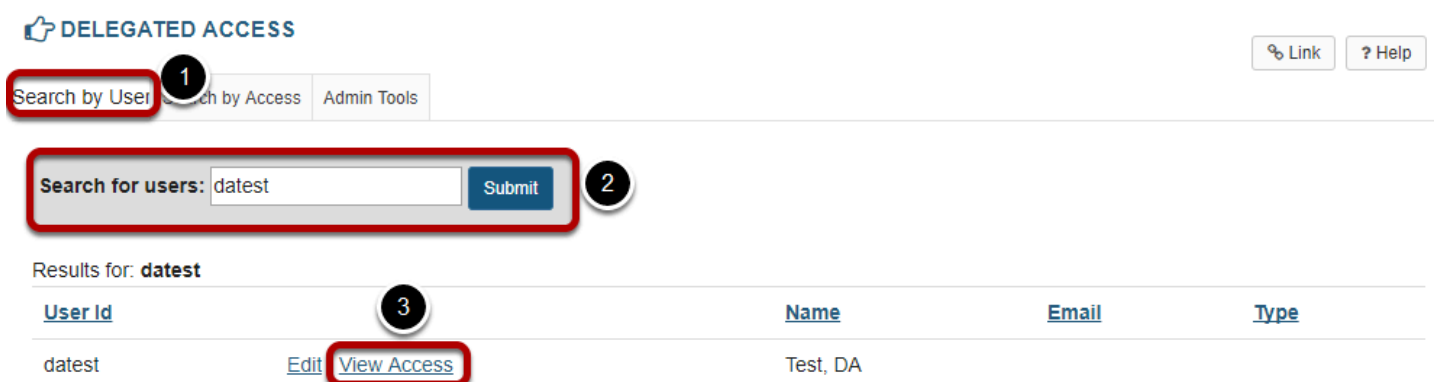
# How do I remove user permissions in Delegated Access?

Go to Delegated Access tool.



Select **Delegated Access** from the Tool Menu of the Administration Workspace or in your own Home area.

## Find and select user



1. Click the **Search by User** button\*
2. Enter the user name or user ID and click **Submit** (or hit "enter" key).
3. Click the **View Access** link for the user.

*Tip: You can also search for a user by clicking the **Search by Access** button. See [How do I search users in Delegated Access?](#)*

# Remove permissions

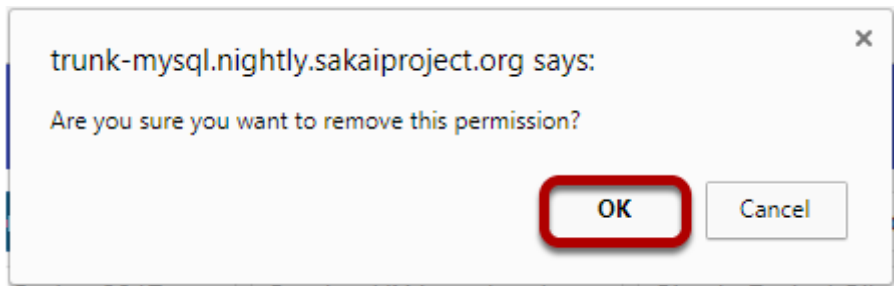
DA Test [Edit](#) [Remove All Permissions](#)

Type	Access	Restricted Tools	Level	Hierarchy	
Access	!site.template.course:Instructor		Subject	-Sakai  --MUSIC  ---DEPT1  ----SUBJ1	<a href="#">Remove</a>
Access	!site.template.lti:Faculty		School	-Sakai  --EDUCATION	<a href="#">Remove</a>
Shopping Admin			School	-Sakai  --MUSIC	<a href="#">Remove</a>
Access Admin			School	-Sakai  --MUSIC	<a href="#">Remove</a>

Click **Remove All Permissions** to remove access permissions for all hierarchy nodes.

Or, click the **Remove** link for a particular hierarchy node to remove access permissions for that node.

## Confirm removal



You will see a dialog box confirming the permission(s) removal.

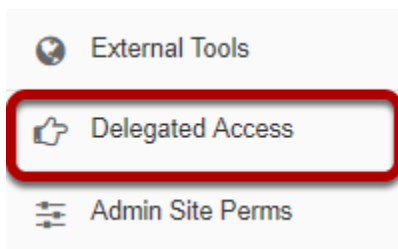
To continue with removal, click the **OK** button.

# How do I search users in Delegated Access?

In the Delegated Access tool, you can search for any user in your Sakai instance, so you can then add, edit, or remove access permissions for a particular user. There are two ways to search for users:

- **Search by user**--search by user name or user ID
- **Search by hierarchy**--search all users by access permissions for particular hierarchy nodes

## Go to Delegated Access tool.



Select **Delegated Access** from the Tool Menu of the Administration Workspace or in your own Home area.

## Search by user.

A screenshot of the 'DELEGATED ACCESS' tool interface. At the top left is a thumbs-up icon and the text 'DELEGATED ACCESS'. To the right are 'Link' and 'Help' buttons. Below the title is a tabbed interface with three tabs: 'Search by User' (highlighted with a red rectangle and a circled '1'), 'Search by Access', and 'Admin Tools'. Below the tabs is a search form with a text input field containing 'datest' and a 'Submit' button (highlighted with a red rectangle and a circled '2'). Below the form, it says 'Results for: datest'. At the bottom is a table with four columns: 'User Id', 'Name', 'Email', and 'Type'. The table contains one row for the user 'datest' with the name 'Test, DA'. The 'User Id' and 'Name' columns have links 'Edit' and 'View Access' respectively.

1. Click the **Search by User** button.
2. Enter a user name, user ID, or email address. Click **Submit Query** or hit "enter" key.

Tip: Alternatively, click the **Search by Access** button and then select **user id**. Enter the user ID (user name will not yield results). Click **Submit Query** or hit the "enter" key.

## View user settings.

DA Test [Edit](#) | [Remove All Permissions](#)

Type	Access	Restricted Tools	Level	Hierarchy	
Access	Isite.template.Iti:Faculty		School	-Sakai  --EDUCATION	<a href="#">Remove</a>
Access	Isite.template.course:Instructor		Subject	-Sakai  --MUSIC  ---DEPT1  ----SUBJ1	<a href="#">Remove</a>
Shopping Admin			School	-Sakai  --MUSIC	<a href="#">Remove</a>
Access Admin			School	-Sakai  --MUSIC	<a href="#">Remove</a>

To view all access settings for a user you have searched for, click the **View Access** link for that user.

## Search by hierarchy.

DELEGATED ACCESS

1 Search by User Search by Access Admin Tools

2 Search by ☒ hierarchy ☐ user id

3 EDUCATION DEPT1

4 ☒ Include lower levels Submit

1. Click **Search by Access**.
2. Select **hierarchy** (default selection).
3. Drill down to specific hierarchy node levels, as appropriate. With each hierarchy node you select, another menu displays for selecting that node's "child" nodes. Check the box for **Include lower levels** to view all child nodes for a particular node.
4. Click **Submit**.

## View access by hierarchy

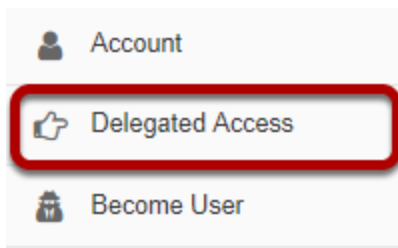
Search by <input checked="" type="radio"/> hierarchy <input type="radio"/> user id EDUCATION DEPT1 <input type="checkbox"/> Include lower levels <input type="button" value="Submit"/>								
1	2	3	4	5	6	7	8	9
User Id	Name	Type	Access	Restricted Tools	Level	Hierarchy		
753765469	Beatty, Conner	Access	Isite.template.Iti:Faculty		School	-Sakai   -EDUCATION	<a href="#">View Access</a>	<a href="#">Edit</a>   <a href="#">Remove</a>
datest	Test, DA	Access	Isite.template.Iti:Faculty		School	-Sakai   -EDUCATION	<a href="#">View Access</a>	<a href="#">Edit</a>   <a href="#">Remove</a>

Your search results will include the following information:

1. User ID
2. User name
3. Type of access permission (Access Admin, Shopping Admin, Site Access)
4. Site role when accessing site
5. Restricted tools when accessing site
6. Hierarchy node level for access permission
7. All parent hierarchy nodes
8. Links for viewing, editing, removing access permissions

# How do I access a site via delegated access?

## Go to Delegated Access tool.



Select **Delegated Access** from the Tool Menu.

## Find site.

You can find a site in two ways:

1. Search by site, user, or term
2. Expand hierarchy nodes

*Note: You must have Admin or Site Access in order to see this option.*

## Search for the site.

Delegated Access ⓘ

### Search Sites

Site:

User:  ☒ Instructor ☐ Member

Term:

School:

Department:

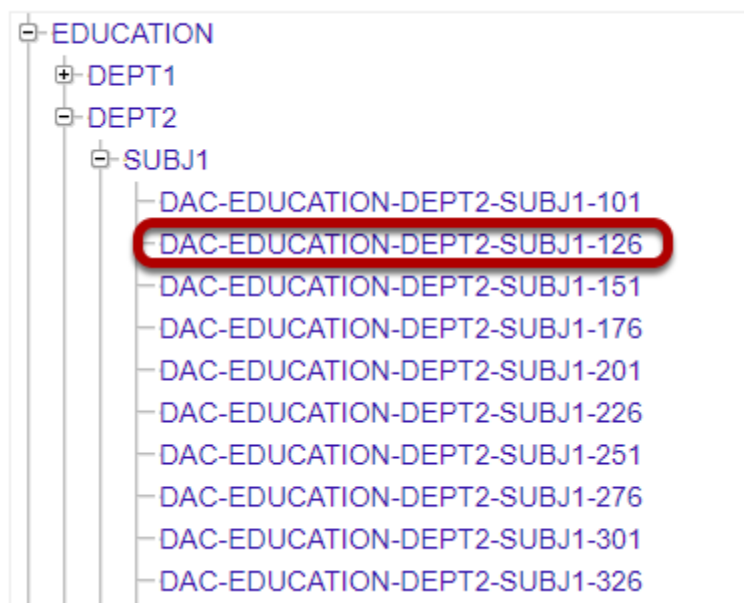
Subject:

⊕ EDUCATION  
⊕ MUSIC

If you have a large number of sites, you may want to search for the specific site. You may search by site, user, term, school, department, or subject.

After providing search information for the desired site, click **Submit**.

## Expand hierarchy nodes.



You may also expand the appropriate hierarchy nodes to locate the site in the list manually.

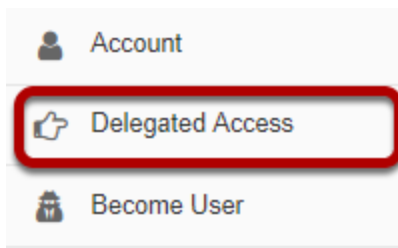
## Access site

Once you have found the appropriate site, click on it. The site will open in a new tab/window.

*Note: The tools and capabilities available to you in a site will depend on how your particular delegated access has been configured. For more information, see [How do I delegate site access to a user?](#)*

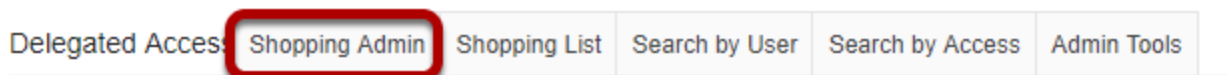
# How do I set a shopping period?

## Go to Delegated Access tool



Select the **Delegated Access** too from the Tool Menu.

## Go to shopping period settings



Click the **Shopping Admin** button.

*Note: You must have Shopping Admin access in order to see this option.*

# Select hierarchy nodes

## Edit Shopping Period Settings












[Bulk Add, Update, or Delete](#)

Filter By: Hierarchy Level: 

Choose One

Filter

Clear

		Shoppers Become	Start Date	End Date	Show Tools	Advanced
<input type="checkbox"/>	 Sakai				Inherited	Inherited
<input type="checkbox"/>	 EDUCATION				Inherited	Inherited
<input type="checkbox"/>	 MEDICINE				Inherited	Inherited
<input type="checkbox"/>	 MUSIC				Inherited	Inherited
<input type="checkbox"/>	 DEPT1				Inherited	Inherited
<input type="checkbox"/>	 DEPT2				Inherited	Inherited
<input checked="" type="checkbox"/>	 SUBJ1	<div>Choose One</div>			Show Tools 	Advanced
<input type="checkbox"/>	 SUBJ2				Inherited	Inherited
<input type="checkbox"/>	 SUBJ3				Inherited	Inherited
<input type="checkbox"/>	 DEPT3				Inherited	Inherited

Click on the root node and continue expanding nodes to select the appropriate node(s) and/or site(s). If you want to configure a single shopping period for all sites in your Sakai instance, you can skip this step.

### Important Notes:

- Settings you select for a node will apply to all its "child" (lower-level) nodes, but not to any other nodes at the same level in the hierarchy. You can always override settings that a lower-level node inherits from a higher node.
- While you can select multiple nodes and sites, you will have to configure a shopping period for each node/site separately.
- Keep in mind that you can only choose a single site role for a particular node. Be sure to confirm that all sites in a node include the role you select.

## Set shopping role and duration

		Shoppers Become	Start Date	End Date	Show Tools	Advanced
<input type="checkbox"/>	Sakai				Inherited	Inherited
<input type="checkbox"/>	EDUCATION				Inherited	Inherited
<input type="checkbox"/>	MEDICINE				Inherited	Inherited
<input type="checkbox"/>	MUSIC				Inherited	Inherited
<input type="checkbox"/>	DEPT1				Inherited	Inherited
<input type="checkbox"/>	DEPT2				Inherited	Inherited
<input checked="" type="checkbox"/>	SUBJ1	Guest	08/28/2017	09/04/2017	Show Tools	Advanced
<input type="checkbox"/>	SUBJ2				Inherited	Inherited
<input type="checkbox"/>	SUBJ3				Inherited	Inherited
<input type="checkbox"/>	DEPT3				Inherited	Inherited

1. Choose site role for shoppers.
2. Provide start/end date.

## Set tool access

	Shoppers Become	Start Date	End Date	Show Tools	Advanced
<input type="checkbox"/>	Sakai			Inherited	Inherited
<input type="checkbox"/>	EDUCATION			Inherited	Inherited
<input type="checkbox"/>	MEDICINE			Inherited	Inherited
<input type="checkbox"/>	MUSIC			Inherited	Inherited
<input type="checkbox"/>	DEPT1			Inherited	Inherited
<input type="checkbox"/>	DEPT2			Inherited	Inherited
<input checked="" type="checkbox"/>	SUBJ1	Guest	08/28/2017	09/04/2017	Show Tools
<input type="checkbox"/>	SUBJ2			Inherited	Advanced
<input type="checkbox"/>	SUBJ3			Inherited	Inherited
<input type="checkbox"/>	DEPT3			Inherited	Inherited

**Legend**  

Hierarchy Node
  Site
  Inactive
  Instructor Edited

SUBJ1

Choose Tools to Show

Choosing a tool in the list will show the tool for this user. This node and all children will inherit this list. A child can overwrite this list by it's own tools to show.

Public	Logged In	Tool
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	Account
<input type="checkbox"/>	<input type="checkbox"/>	Account Validator

Done

1. Click the **Show Tools** link for the shopping period.
2. Select the appropriate tool(s) for non-authorized ("Public") and/or authorized ("Logged In") users.
3. Click **Done**.

## Set advanced options

		Shoppers Become	Start Date	End Date	Show Tools	Advanced
<input type="checkbox"/>	Sakai				Inherited	Inherited
<input type="checkbox"/>	EDUCATION				Inherited	Inherited
<input type="checkbox"/>	MEDICINE				Inherited	Inherited
<input type="checkbox"/>	MUSIC				Inherited	Inherited
<input type="checkbox"/>	DEPT1				Inherited	Inherited
<input type="checkbox"/>	DEPT2				Inherited	Inherited
<input checked="" type="checkbox"/>	SUBJ1	Guest	08/28/2017	09/04/2017	Show Tools	Advanced
<input type="checkbox"/>	SUBJ2				Inherited	Inherited
<input type="checkbox"/>	SUBJ3				Inherited	Inherited
<input type="checkbox"/>	DEPT3				Inherited	Inherited

**Legend**

- Hierarchy Node
- Site
- Inactive
- Instructor Edited

**Advanced Options**

All children will inherit these settings unless overridden.

**Instructor Settings**

- ☒ Disable Instructor Override
- ☒ Disable "Public" option

**Buttons:** Save, Cancel, Done

Optionally, set advanced options for the shopping period.

1. Click the **Advanced** link for the shopping period.
2. Select **Disable Instructor Override** to prevent a site maintainer from overriding shopping period access for a site.
3. Select **Disable "Public" option** to prevent a site maintainer from making a site public.
4. Click **Done**.

## Save your work



Once you have configured all settings, click **Save**.

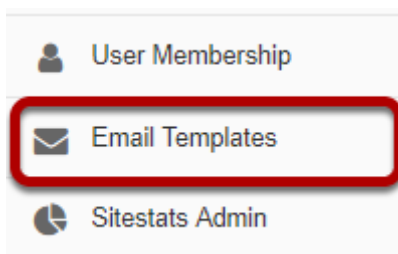
# Email Templates

# What is the Email Templates tool?

The Email Templates tool is an administrative tool for providing localized and internationalized email templates for Sakai Applications. It allows admin users to create customized email notifications for users in their local instance.

For example, if your institution has modified the name of Sakai to a different local system name (i.e. UVaCollab, Isidore, etc.) you may modify the existing email templates to use your local system name and inform users about institution-specific resources.

## Go to the Email Templates tool.



Select the **Email Templates** tool from the Administration Workspace Tool Menu.

## View existing template keys and locales.

### EMAIL TEMPLATES

[Link](#)[? Help](#)[New template](#)

1 template key	2 locale	edit
acknowledge.passwordReset	default	<a href="#">edit</a>
polls.notifyDeletedOption	default	<a href="#">edit</a>
polls.notifyDeletedOption	zh_CN	<a href="#">edit</a>
profile2.connectionConfirm	default	<a href="#">edit</a>
profile2.connectionConfirm	es_ES	<a href="#">edit</a>
profile2.connectionConfirm	sv_SE	<a href="#">edit</a>
profile2.connectionConfirm	zh_CN	<a href="#">edit</a>
profile2.connectionRequest	default	<a href="#">edit</a>
profile2.connectionRequest	es_ES	<a href="#">edit</a>

A listing of all existing template keys and locales will be displayed.

1. The **template key** is typically defined by the tools that have email templates in the system. You may see multiple template keys for different locales.
2. The **locale** of a template typically refers to the language, or language+region, of the message. It may also refer to a custom local instance.

# Example Custom Template

UCT

sitemange.notifyAddedParticipant

subject:

`${productionSiteName} Site Notification: ${siteName}`

Body:

Dear \${userName},

You have been added to the following \${localSakaiName} site:  
\${siteName}  
by \${currentUserName} (\${currentUserEmail}).

To go to [this](#) site, login to \${localSakaiName} at [\\${localSakaiUrl}](#) with your username ([\\${userEid}](#)) and password.

You can then access the site by clicking on the site name, which appears as a tab in a row across the top part of the page, or by clicking on "My Active Sites" on the top right.

If you cannot login to [\\${localSakaiName}](#), please see <http://vula.uct.ac.za/password/> for details on how to reset your password.

If you have any further questions about [\\${localSakaiName}](#) or how to access [this](#) site, please feel free to contact the [\\${localSakaiName}](#) helpdesk by replying to [this](#) email or emailing [help@vula.uct.ac.za](mailto:help@vula.uct.ac.za).

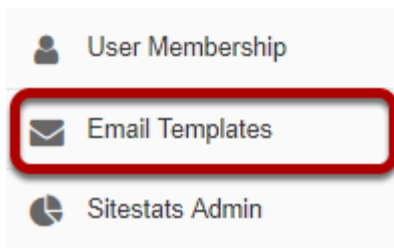
Online help is also available by clicking on the Help link in any page.

Regards  
The Vula Team, University of Cape Town

The image above shows an example of a custom template. To view this example and others on Confluence, go to: <https://confluence.sakaiproject.org/display/ETS/example+templates>


# How do I edit an email template?

Go to the Email Templates tool.



Select the **Email Templates** tool from the Administration Workspace Tool Menu.

Select the Edit link for the template you would like to modify.

 **EMAIL TEMPLATES**

[Link](#) [? Help](#)

New template

template key	locale	edit
acknowledge.passwordReset	default	<a href="#">edit</a>
polls.notifyDeletedOption	default	<a href="#">edit</a>
polls.notifyDeletedOption	zh_CN	<a href="#">edit</a>
profile2.connectionConfirm	default	<a href="#">edit</a>

# Edit the template as needed.

## Edit acknowledge.passwordReset (default) email template

Edit the suggested text for the email template. Please note when sending the email the key values will be substituted with actual values. You may use these values in your email template.

`${localSakaiName}` - the local title of the Course Management System (e.g., Sakai, CamTools, CTools)  
`${localSakaiURL}` - the URL of the Course Management System  
`${localSupportMail}` - the email address for the Course Management System support  
`${currentUserEmail}` - current user's email address  
`${currentUserFirstName}` - current user's first name  
`${currentUserLastName}` - current user's last name  
`${currentUserDisplayName}` - current user's display name  
`${currentUserDisplayId}` - current user's user id

**Subject:**

**From:**

**Key:**

**Locale:**

**Plain Text:**

Your password for \${localSakaiName} has been changed successfully. If you did not change your password, please contact \${localSupportMail}

**HTML Text:**

**Save Changes**

1. Edit the email template as needed.
2. Click the **Save Changes** button to save your modifications.

*Note: The following values may be substituted for real values in the system:*

*`${localSakaiName}` - the local title of the Course Management System (e.g., CamTools, CTools)*

*`${currentUserEmail}` - current user's email address*

*`${currentUserFirstName}` - current user's first name*

*`${currentUserLastName}` - current user's last name*

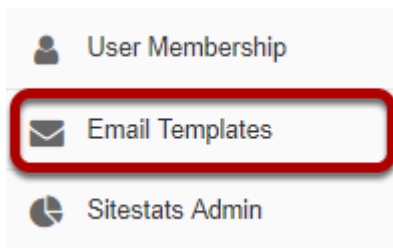
*`${currentUserDisplayName}` - current user's display name*

*`${currentUserDisplayId}` - current user's user id*

# How do I add a new email template?

*Note: Tools must already be configured to use the template service in order to be added here. You may add additional templates for existing keys using this tool. However, adding new template keys to the system would require custom code development.*

## Go to the Email Templates tool.



Select the **Email Templates** tool from the Administration Workspace Tool Menu.

## Click New template.

 **EMAIL TEMPLATES**

[Link](#) [Help](#)

New template

template key	locale	edit
acknowledge.passwordReset	default	<a href="#">edit</a>
polls.notifyDeletedOption	default	<a href="#">edit</a>
polls.notifyDeletedOption	zh_CN	<a href="#">edit</a>

# Enter template information into the fields provided and Save.

**New email template**

---

Edit the suggested text for the email template. Please note when sending the email the key values will be substituted with actual values. You may use these values in your email template.

`${localSakaiName}` - the local title of the Course Management System (e.g., Sakai, CamTools, CTools)  
`${localSakaiURL}` - the URL of the Course Management System  
`${localSupportMail}` - the email address for the Course Management System support  
`${currentUserEmail}` - current user's email address  
`${currentUserFirstName}` - current user's first name  
`${currentUserLastName}` - current user's last name  
`${currentUserDisplayName}` - current user's display name  
`${currentUserDisplayId}` - current user's user id

1 Subject:

2 From:

3 Key:

4 Locale:

5 Plain Text:

6 HTML Text:

7

Enter the email template information into the blank text fields provided.

1. The **Subject** will be the subject line of the email message received by end users.
2. The **From** line will indicate the sender of the email message.
3. The **Key** is one of the template keys already defined in the system. View the list of existing templates to see the current keys available.
4. The **Locale** typically indicates the language of the system. This is usually a two-letter code for a language, or sometimes the extended syntax for a language+region. Refer to the list of standard W3C language tags at the following link for more information: <http://www.w3.org/International/articles/language-tags/>
5. The **Plain Text** field is where you enter the text of your message.
6. You may also provide an **HTML Text** version of the message if desired. This allows you to include additional formatting for the body of the message.
7. Click **Save Changes** when complete.

*Note: Remember that you may use the following items to substitute for real values in the system:*

*`${localSakaiName}` - the local title of the Course Management System (e.g., CamTools, CTools)*

*`${currentUserEmail}` - current user's email address*

*`${currentUserFirstName}` - current user's first name*

*`${currentUserLastName}` - current user's last name*

*`${currentUserDisplayName}` - current user's display name*

*`${currentUserDisplayId}` - current user's user id*

# Events

# What are the Test and Quizzes user events logged by the system?

## Tests & Quizzes (Samigo)

Samigo logs events associated with the following activities:

1. [Accessing and Taking Assessments](#)
2. [Submitting Assessments](#)
3. [Reviewing Feedback](#)

## Accessing and Taking Assessments

Event	What the event means
sam.assessment.take	The user accesses the assessment and selects the <b>Begin Assessment</b> button.
sam.assessment.take.via_url	The user accesses the assessment via a link, e.g., the <i>Published Assessment URL</i> or a link on a <i>Lessons</i> page, and selects the <b>Begin Assessment</b> button.
<b>SAMIGO_TIMED_ASSESSMENT:QUEUE:NEWTIMER:SUCCESS</b>	A timer thread starts running on the server at the start of a timed assessment.
sam.assessment.resume	<p>The user exits the assessment, returns to it, and selects the <b>Continue Assessment</b> button.</p> <p><b>NOTE:</b> This event will NOT display for assessments accessed VIA URL - the ONLY button on that screen is <b>Begin Assessment</b>. All attempts to access an assessment via a URL will be logged as if they were new takes.</p>

Event	What the event means
<b>Post buffer bypass CTI=sakai.samigo [...]</b> <b>getTimerStrings?_=[timervalue]</b>	A timed assessment is open in a browser window and the browser is getting the time remaining (happens every few seconds, so lots of these events spam the logs while a user has an assessment open).

## Submitting Assessments

Event	What the event means
sam.submit.from_toc	The user is on the <b>Table of Contents</b> screen and selects the <b>Submit for Grading</b> button. So now, the user would be on the <i>Assessment Submission Warning</i> page. They still have the <b>Submit for Grading</b> and <b>Previous</b> buttons available to them. They did not officially submit yet.
sam.submit.from_last_page	The user is on last page of the assessment and selects the <b>Submit for Grading</b> button. So now, the user would be on the <i>Assessment Submission Warning</i> page. They still have the <b>Submit for Grading</b> and <b>Previous</b> buttons available to them. They did not officially submit yet.
sam.assessment.submit.click_sub	The user selects the <b>Submit for Grading</b> button on the <i>Assessment Submission Warning</i> page.  <i>Not sure if this is the correct meaning, or if this belongs with the event below instead?</i>
sam.assessment.submit	This is also logged with a manual submission.  <i>Not sure what it means?</i>

Event	What the event means
sam.assessment.submit.checked	The user is on the page with the submission confirmation number.  <i>Not sure this is the correct meaning?</i>
<b>SAMIGO_TIMED_ASSESSMENT:QUEUE:REMOVE</b>	A timer thread is removed from the queue when a timed assessment is submitted by any method (manual or automatic).
sam.assessment.thread_submit	A timed assessment is submitted by the expiration of the timer.
sam.assessmentTimedSubmitted	This provides the confirmation information for a timed assessment that was automatically submitted by the expiration of the timer.
<b>SAMIGO_TIMED_ASSESSMENT:SUBMIT:FORGRADE</b>	This also indicates the expiration of the timer thread submitting the assessment.
gradebook.updateItemScore	If the assessment settings included the option to send the score to the Gradebook, the score is being updated in the <i>Gradebook</i> tool.
transportMessage: headers[ From: "Server Name" <server email> To: "User" <user email> Subject: Notification for assessment submission	An email notification for submission is sent to a user. The email subject varies slightly depending on how it was submitted (timer, auto, user submit).

## Reviewing Feedback

Event	What the event means
sam.assessment.review	The user selects a <b>Feedback</b> link to access assessment feedback.

# External Tools

# What are External Tools?

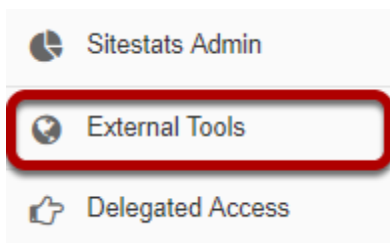
If you're a functional administrator, External Tools lets you configure integration with an external solution that utilizes [LTI](#), an independent standard for web-based applications developed by [IMS](#). You can integrate solutions that are compliant with either of the following LTI standards:

- [LTI 1.1](#)
- [LTI 1.3 or LTI Advantage](#)

You can make the external tool available in a specific site or in all sites. Site owners add the tool via Manage Tools or External Tools in [Site Info](#).

External Tools lets you determine tool configuration options for site owners. You may provide no options, so site owners can only add the external tool. Or, you may allow site owners to change a variety of parameters, such as the tool name that displays in a site's Tool Menu or the tool's frame height.

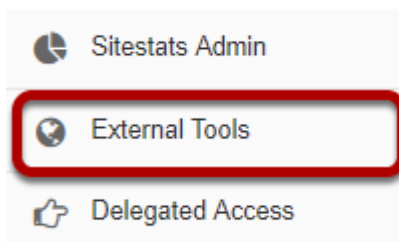
**To access this tool, select External Tools from the Tool Menu of the Administration Workspace.**



# How do I make an LTI tool available to site owners?

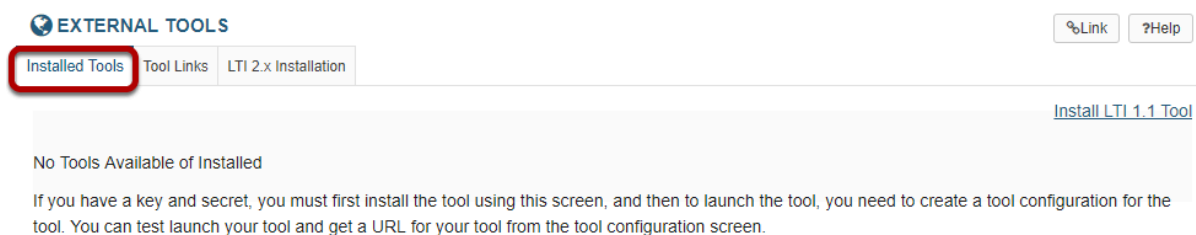
*Note: Configuration of an external tool requires information unique to the external solution being integrated. In addition, integration with a solution from a third-party vendor may require an account with that vendor. Be sure to confirm all necessary information for an external solution before configuration.*

## Go to External Tools.



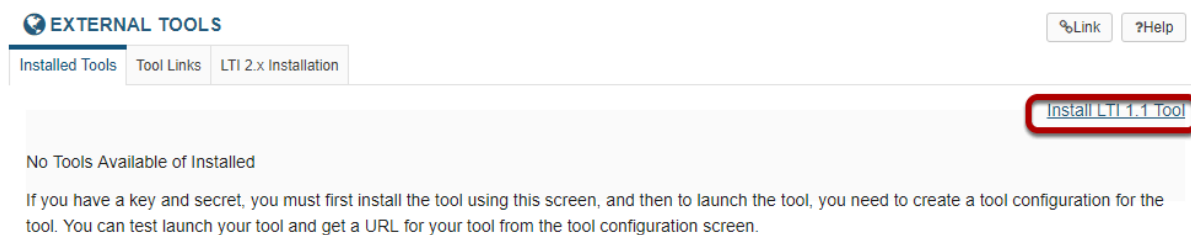
Select **External Tools** from the Tool Menu in the Administration Workspace.

## View Installed Tools.



Click **Installed Tools**. If any external tools have been configured and made available in your instance, you'll see them listed.

# Install LTI 1.1 tool.



Click **Install LTI 1.1 Tool**. The *External Tool* page displays.

## Configure LTI tool

On the *External Tool* page, select settings and provide information as appropriate.

### Site ID

#### External Tool

**Site Id** (Leave blank to make tool available in all sites)

Enter the appropriate site ID in the **Site Id** field if you want the external tool to be available **ONLY** in that site. If you want the external tool to be available in all sites, be sure to leave this field blank.

# Title/description


1 **\*Tool Title (Above the tool)**

2 **Allow tool title to be changed**

☒ Do not allow

☐ Allow

3 **Choose a custom icon (leave empty to use the default icon)**



4 **Allow custom icon to be changed**

☒ Do not allow

☐ Allow

**\*Button Text (Text in tool menu)**

5 **Allow button text to be changed**

☒ Do not allow

☐ Allow

6 **Description**

1. Enter text in the **Tool Title** field. When users access the tool in a site, this text displays at the top of the frame.
2. Choose either **Do not Allow** or **Allow** editing of the title by site owners.
3. (Optional) Select a custom icon from the drop-down menu.
4. Choose either **Do not Allow** or **Allow** editing of the icon by site owners.
5. Enter text in the **Button Text** field. When users access the tool in a site, they'll see this text in the Tool Menu.
6. Choose either **Do not Allow** or **Allow** editing of the button text by site owners.
7. (Optional) Enter text in the **Description** field. This description will display to site owners when they select the tool via Site Info.

## Status/visibility

**1** Tool Status

☒ Enabled

☐ Disabled

**2** Tool Visibility

☒ Visible

☐ Stealthed

1. For tool status, select **Enabled** or **Disabled**. Enabled means that it is available for use in the system. Disabled means it is not available for use.
2. For tool visibility, select **Visible** or **Stealthed**. Visible means that site owners can select it from Site Info > Manage Tools to add it to a site. Stealthed means that it does not appear in Site Info > Manage Tools and only admin users can add it to a site.

## Launch settings

**1** \*Launch URL

Allow launch URL to be changed

☒ Do not allow

☐ Allow

**2** Launch Key

Allow launch key to be changed

☒ Do not allow

☐ Allow

**3** Launch Secret

Allow launch secret to be changed

☒ Do not allow

☐ Allow

*Note: The following settings are unique to each external solution. If the solution being integrated is from a third-party vendor, the vendor typically provides this information.*

1. Enter the URL in the **Launch URL\*** field.
2. Enter the LTI key in the **Launch Key\*** field.
3. Enter the LTI secret in the **Launch Secret\*** field.

(Optional) Select the **Allow** radio button for any of these items to let site owners edit this information.

## Frame height

**Frame Height**

**Allow frame height to be changed**

☒ **Do not allow**

☐ **Allow**

To specify a height for the tool frame in a site, enter a value (in pixels) in the **Frame Height** field. Choose **Allow** to let site owners edit this value.

## Tool Order

**Tool Order (Only valid for tools placed in all sites)**

To specify the default order of the tool in the Tool Menu, specify a number in the list. This option is only available for LTI that are available in all sites.

## Configuration dialog

**Configuration dialog when tool is selected**

☒ **Bypass configuration dialog**

☐ **Show configuration dialog**

## Privacy settings/services

### Privacy Settings:

- ☐ Send User Names to External Tool
- ☐ Send Email Addresses to External Tool

### Services:

- ☐ Allow External Tool to return grades
- ☐ Provide Roster to External Tool
- ☐ Allow External Tool to store setting data

Determine the site information you want provided to the external solution, and whether the solution will return grades for Gradebook integration. Select settings as appropriate.

## Content Item Selection launches.

Indicate the following types of Content Item/Deep Link Selection launches this tool can handle. Not all tools can handle types of launches. If you enable a tool which is not capable of responding to a particular request, it will likely fail when you try to use it.

- ☐ Allow the tool to be launched as a link (this is typically true for most tools)
- ☐ Allow external tool to configure itself (the tool must support the IMS Content-Item or Deep-Link message)
- ☐ Allow the tool to be used from the rich content editor to select content (the tool must support the IMS Content-Item or Deep-Link message)
- ☐ Allow the tool to provide a common cartridge (usually to be imported into a tool like Lessons)
- ☐ Allow the tool to provide a file (usually as part of a file picker)
- ☐ Allow the tool to be one of the assessment types

Select the ways in which you would like this tool to be able to launch within a site.

# Popup/debug

## Launch in Popup

- ☒ **Never launch in Popup**
- ☐ **Always launch in Popup**
- ☐ **Allow popup to be changed**

## Debug Launch

- ☒ **Never launch in debug mode**
- ☐ **Always launch in debug mode**
- ☐ **Allow debug mode to be changed**

Choose how the external solution displays when it launches.

- Click **Never launch in Popup** if you want it to display in a frame within the site.
- Click **Always launch in Popup** if you want it to display in a separate popup window or new browser tab/window.

Click **Allow popup to be changed** to let site owners edit this setting.

Choose whether debug data will display to site owners when the external solution launches.  
Click **Allow debug mode to be changed** to let site owners edit this setting.

## (Optional) Custom parameters

### 1 Custom Parameters (key=value on separate lines)

A large, empty rectangular text area with a thin border and a small diagonal line in the bottom right corner, intended for entering custom parameters.

### 2 Manually map Sakai roles to IMS roles. Example: maintain:Learner;access:Learner

A large, empty rectangular text area with a thin border and a small diagonal line in the bottom right corner, intended for manually mapping Sakai roles to IMS roles.

### 3 ☐ Allow additional custom parameters

1. Provide additional parameters in the **Custom Parameters** field, as appropriate. Be sure to list each parameter on a separate line. A parameter should be in the following format: *key=value*
2. If you would like to manually map Sakai roles to specific IMS roles, enter the mapping here in the following format: *instructor:Learner;student:Learner*
3. Click **Allow additional custom parameters** to let site owners enter more parameters.

## Splash screen

**Splash Screen** (If this is non-blank it is shown before the tool is launched)

A large, empty rectangular text area with a thin border and a small diagonal line in the bottom right corner, intended for entering the splash screen text.

Enter text in the **Splash Screen** field, as appropriate. This text will display to all users before the external tool launches.

## LTI 1.3 information

If you select LTI 1.3 support, your configuration information should be immediately viewed once the tool record has been inserted. If your tool has provided a public key or keyset for LTI 1.3 enter it, otherwise leave both fields blank and public and private keys will be provided for you. If we generate a private key for the tool, you need to view it and communicate it to the tool immediately because it will be deleted shortly after it is created.

☒ Tool does not support LTI 1.3

☐ Tool supports LTI 1.3

LTI 1.3 Tool OpenID Connect/Initialization Endpoint (provided by the tool)

LTI 1.3 Tool Redirect Endpoint(s) (comma separated and provided by the tool)

If you are configuring an LTI 1.1 tool, leave the default selection of **Tool does not support LTI 1.3**.

If you are configuring an LTI 1.3 or LTI Advantage tool, select **Tool supports LTI 1.3**.

For LTI 1.3 tools, enter the **Tool OpenID Connect/Initialization Endpoint** and **Tool Redirect Endpoint(s)** into the two fields provided.

## Save your work

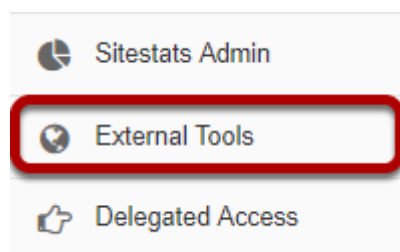
 

Click the **Save** button. You'll see the external tool listed with other external tools available in the system.

# How do I view currently installed LTI 1.1 tools in the system?

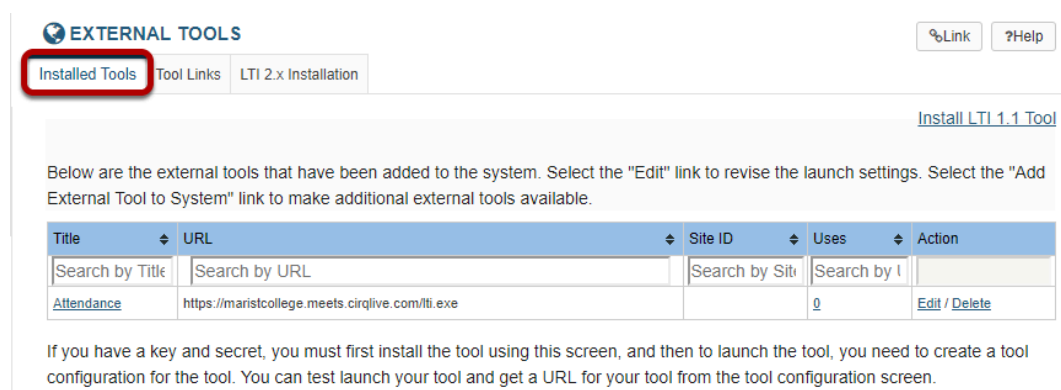
*Note: Configuration of an external tool requires information unique to the external solution being integrated. In addition, integration with a solution from a third-party vendor may require an account with that vendor. Be sure to confirm all necessary information for an external solution before configuration.*

## Go to External Tools.



Select **External Tools** from the Tool Menu in the Administration Workspace.

## View Installed Tools.

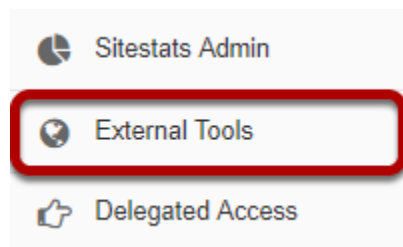
A screenshot of the Sakai 'EXTERNAL TOOLS' page. At the top, there's a header 'EXTERNAL TOOLS' with a gear icon. Below it are three tabs: 'Installed Tools' (highlighted with a red rectangle), 'Tool Links', and 'LTI 2.x Installation'. To the right of the tabs are two buttons: '%Link' and '?Help'. Below the tabs, there's a link 'Install LTI 1.1 Tool'. A paragraph of text explains that below are the external tools added to the system and provides instructions on using the 'Edit' and 'Add External Tool to System' links. Below this is a table with columns: Title, URL, Site ID, Uses, and Action. The table contains one row for a tool titled 'Attendance' with the URL 'https://maristcollege.meets.cirqlive.com/lti.exe'. The 'Action' column for this row has links for 'Edit / Delete'.

Title	URL	Site ID	Uses	Action
Attendance	https://maristcollege.meets.cirqlive.com/lti.exe		0	<a href="#">Edit / Delete</a>

Click **Installed Tools**. If any external tools have been configured and made available in your Sakai instance, you'll see them listed here.

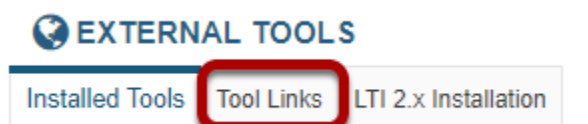
# How do I add an LTI tool to a site as an admin?

## Go to External Tools.

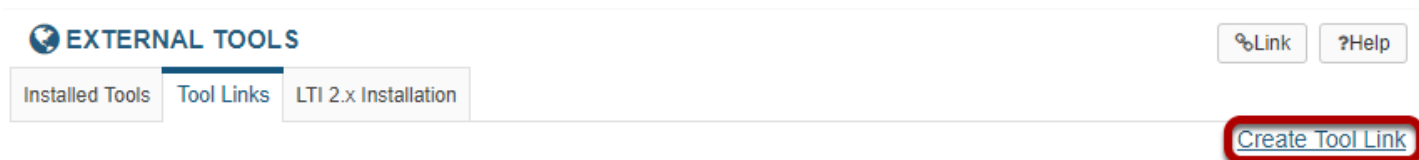


Select the **External Tools** link from the Tool Menu in the Administration Workspace.

## Click Tool Links.



## Click the Create Tool Link.



Below are the external tools that have links within a site. One installed tool may have many links. Select "Edit" to revise the settings for a particular link. Select the "Create Tool Link" to add a new link.

No Tool Link Found

If you have a url, key, and secret you need to install a new tool, and then come back and place that tool to be launched in this screen.

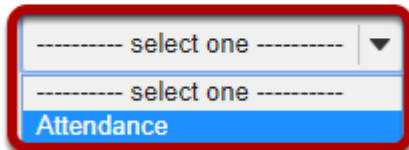
Note: All tool links need to have a non-null SITE\_ID in order to be launched.

## Select a tool from the drop-down list.

### EXTERNAL TOOLS

#### Create Tool Link

\* Select Tool



*Note: Only previously installed tools will appear in this list. If the LTI tool you would like to add does not show up in the list, you need to install the LTI 1.1 or LTI 2.x tool first.*

## Enter the site information and save.

#### Create Tool Link

\* Select Tool

Attendance ▼

\* Site ID

1

Choose a custom icon (leave empty to use the default icon)

2  ▼

Resource Handler

3

4 ☒ Add Site Link

5

Note: All tool links need to have a non-null SITE\_ID in order to be launched.

1. The **Site ID** is required.
2. (Optional) Select a **Custom Icon** for the tool.
3. (Optional) Specify a **Resource Handler** for the tool.

- (Optional) Check the box to **Add Site Link**. This will place a link to the tool in the destination site's Tool Menu.
- Click **Save** to save your settings.

## View tool links to sites.

EXTERNAL TOOLS

Installed Tools

Tool Links

LTI 2.x Installation

Link

Help

[Create Tool Link](#)

Below are the external tools that have links within a site. One installed tool may have many links. Select "Edit" to revise the settings for a particular link. Select the "Create Tool Link" to add a new link.

Export to CSV

Export to Excel

1 - 1 (1)

50

Title	URL	Site Title	Added On	Site Owner	Site Contact	Department	Action
Search by Title	Search by URL	Search by Site	Search by Ac	Search by Sil	Search by Sit	Show A	
Attendance	<a href="https://maristcollege.meets.cirqlive.com/lti.exe">https://maristcollege.meets.cirqlive.com/lti.exe</a>	DAC-EDUCATION- DEPT1-SUBJ1-126	Oct 2, 2017 2:49:25 PM			DEPT1	<a href="#">Edit</a> / <a href="#">Delete</a>

If you have a url, key, and secret you need to install a new tool, and then come back and place that tool to be launched in this screen.

Note: All tool links need to have a non-null SITE\_ID in order to be launched.

Once you have added the tool link, you will see it in the list of tool links to sites in the system. One tool may have many links if it has been added to several sites.

# Job Scheduler

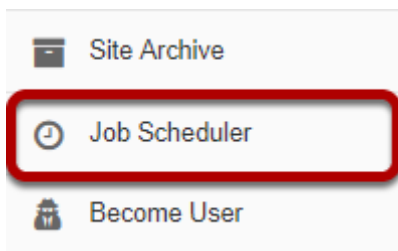
# What is the Job Scheduler?

The Job Scheduler tool (or Quartz) in Sakai is a full-featured, open source job scheduling system that can be integrated with, or used along side virtually any J2EE or J2SE application - from the smallest stand-alone application to the largest e-commerce system. Quartz can be used to create simple or complex schedules for executing tens, hundreds, or even tens-of-thousands of jobs; jobs whose tasks are defined as standard Java components or EJBs. The Quartz Job Scheduler includes many enterprise-class features, such as JTA transactions and clustering.

For more information on creating custom jobs, please visit the Confluence wiki:

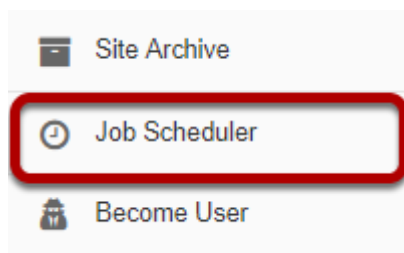
<https://confluence.sakaiproject.org/display/BOOT/Quartz+in+Sakai>

**To access this tool, select Job Scheduler from the Tool Menu in the Administration Workspace.**



# How do I view the event log?


Go to the Job Scheduler tool.



Select the **Job Scheduler** tool from the Tool Menu in the Administration Workspace.

## Viewing the event log.

**JOB SCHEDULER** [Link](#) [Help](#)



[View All Events](#) [Jobs](#) [Running Jobs](#)

### Event Log

[Filter Events](#)

Viewing 1 to 28 of 28 events

[|<](#) [<](#) [Show 100](#) [>](#) [>|](#)

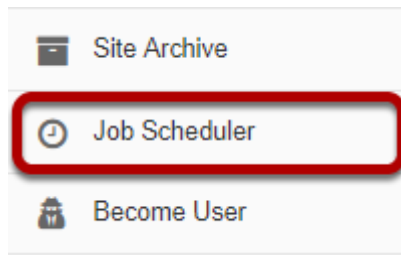
Job Name:	Event type	Timestamps	Message:	Server
Create sites, users and content for testing.	COMPLETE	18/08/17 12:48:35	Trigger complete	ip-172-31-6-159
Import Job	COMPLETE	18/08/17 12:48:03	Trigger complete	ip-172-31-6-159
Import Job	COMPLETE	18/08/17 12:48:01	Trigger complete	ip-172-31-6-159
Get Archives	COMPLETE	18/08/17 12:47:48	Trigger complete	ip-172-31-6-159
Import Job	COMPLETE	18/08/17 12:47:48	Trigger complete	ip-172-31-6-159
Import Job	COMPLETE	18/08/17 12:47:48	Trigger complete	ip-172-31-6-159

The landing page for the tool takes you to a view showing **All Events**.

*Note: If you would like to view only events logged from a current date range, you may [Filter Events](#) by date.*

# How do I filter events?

Go to the Job Scheduler tool.



Select the **Job Scheduler** tool from the Tool Menu in the Administration Workspace.

Click **Filter Events**.



# Set the desired filters.



## Trigger Event Filters

To filter the events shown in the event log fill in the form below and click "Set Filters". All filters will be reset and the entire log will be shown if you click "Clear Filters".

### Event Dates

Set the beginning and ending date of the events to show. Events will be filtered before or after midnight of the dates you select.

#### Events Before Date

mm/dd/yyyy 08/18/2017

#### Events After Date

mm/dd/yyyy 08/04/2017

### Jobs

Select the specific jobs for which you would like to see events.

Event Log Purge

### Event Types

Select the event types you would like to see.

- ☒ FIRED
- ☒ COMPLETE
- ☒ INFO
- ☒ DEBUG
- ☒ ERROR

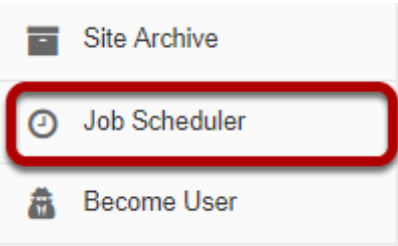
**Set Event Filters** **Clear Event Filters**

Choose the filters you would like to apply in order to limit your view of the event log to the desired items. You may filter events by date, job, or type.

Click the **Set Event Filters** button after you have entered your criteria to save and apply the filter.

# How do I view jobs?

Go to the Job Scheduler tool.

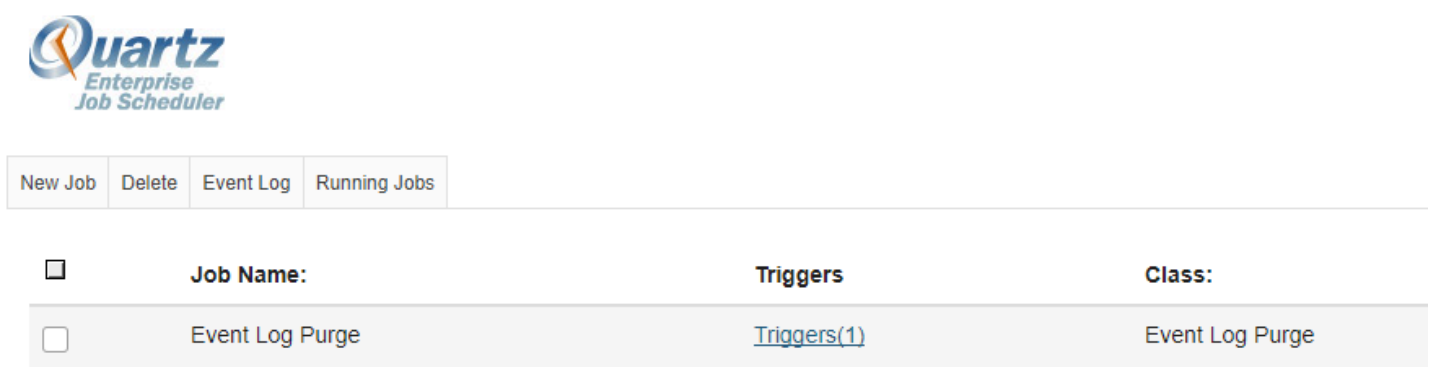


Select the **Job Scheduler** tool from the Tool Menu in the Administration Workspace.

Click the Jobs button.

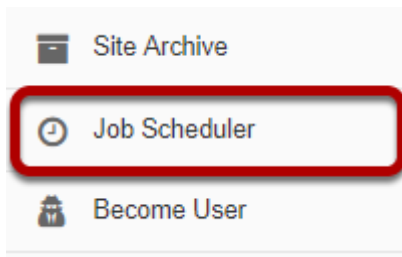


View the list of currently scheduled jobs.



# How do I schedule a new job?

Go to the Job Scheduler tool.

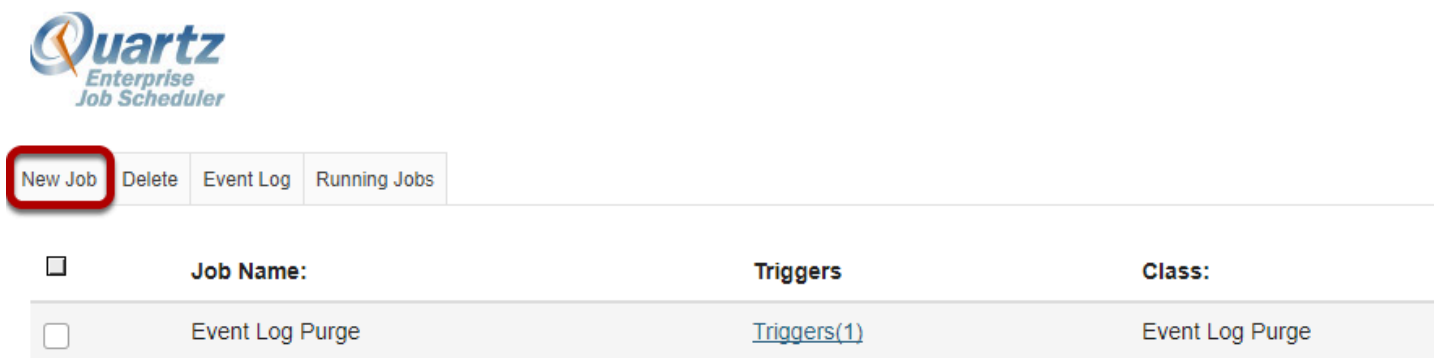


Select the **Job Scheduler** tool from the Tool Menu in the Administration Workspace.

Click the Jobs button.



Click the New Job button.



**Give the job a name.**



## Create Job

Job Name:

Type:

Post

Cancel

**Select the job type from the drop-down menu.**



## Create Job

Job Name:

Type:

- Account Validation Job
- Account Validation Job
- Auto Submit Assessments Job
- Backfill Samigo Item Hashes Job
- Backfill roles from templates
- Backfill tools to sites
- Check Validation Job
- Check content in DB/Filesystem.
- Configurable Job Test
- Content Cleanup of deleted files
- Course Management CSV Synchronization
- Course Site Publish**
- Course Site Removal
- Create sites, users and content for testing.
- Delegated Access Shopping Period Job
- Delegated Access Site Hierarchy Job
- Event Log Purge
- Expunge softly deleted sites
- Fix Public Syllabus Attachments Job
- Generic Tags Update
- Generic Tags Update (Full Collection Import)

Post

Click Post.



## Create Job

Job Name:

Type:

**Post**

Cancel

Select the Triggers link to add a trigger.



[New Job](#) [Delete](#) [Event Log](#) [Running Jobs](#)

<input type="checkbox"/>	Job Name:	Triggers	Class:
<input type="checkbox"/>	Course Site Publish - Fall 2017	<a href="#">Triggers(0)</a>	Course Site Publish
<input type="checkbox"/>	Event Log Purge	<a href="#">Triggers(1)</a>	Event Log Purge

Click Run Job Now to run the job manually.



## Currently editing triqqers for job: Course Site Publish - Fall 2017

[New Trigger](#) [Run Job Now](#) [Return\\_to\\_Jobs](#)

Click Run Now to confirm.



## Run Job Now Confirmation: Course Site Publish - Fall 2017

Are you sure you would like to run the job now?

Or, to automate the job, click New Trigger.



## Currently editing triggers for job: Course Site Publish - Fall 2017

Enter a Trigger Name and Cron Expression.



## Create Trigger

Trigger Name:

Cron Expression:  [Help](#)

A cron expression is a string comprised of 6 or 7 fields separated by white space. Fields can contain any of the allowed values, along with various combinations of the allowed special characters for that field. The fields are as follows:

**Field Name Mandatory Allowed Values Allowed Special Characters**

Seconds YES 0-59 , - \* /

Minutes YES 0-59 , - \* /

Hours YES 0-23 , - \* /

Day of month YES 1-31 , - \* ? / L W

Month YES 1-12 or JAN-DEC , - \* /

Day of week YES 1-7 or SUN-SAT , - \* ? / L #

Year NO empty, 1970-2099 , - \* /

So cron expressions can be as simple as this: \* \* \* \* ? \*

or more complex, like this: 0/5 14,18,3-39,52 \* ? JAN,MAR,SEP MON-FRI 2002-2010

For more information on cron expressions, see [How do I create cron expressions?](#)

**Click Post.**



**Create Trigger**

Trigger Name:	<input type="text" value="Nightly Course Publish Trigger"/>
Cron Expression:	<input type="text" value="0 0 0 * * ? *"/> <a href="#">Help</a>

<input type="button" value="Post"/>	<input type="button" value="Cancel"/>
-------------------------------------	---------------------------------------

## View the list of triggers for that job.



### Currently editing triggers for job: Course Site Publish - Fall 2017

New Trigger	Delete	Run Job Now	Return_to_Jobs
<input type="checkbox"/>	Trigger Name:	Cron Expression:	Next Run:
<input type="checkbox"/>	Nightly Course Publish Trigger	0 0 0 * * ? *	19/08/17 00:00:00

You will see a list of triggers for the current job, along with an indication of when it is next scheduled to run.

You may add additional triggers if desired.

## Deleting a trigger.



### Currently editing triggers for job: Course Site Publish - Fall 2017

New Trigger	Delete	Run Job Now	Return_to_Jobs
<input type="checkbox"/>	Trigger Name:	Cron Expression:	Next Run:
<input checked="" type="checkbox"/>	Nightly Course Publish Trigger	0 0 0 * * ? *	19/08/17 00:00:00

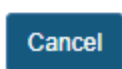
To remove an existing trigger, select the check box next to the item and then click the **Delete** button.

**Click OK to confirm the deletion.**



**The following triggers will be deleted.**

Nightly Course Publish Trigger (0 0 0 \* \* ? \*)



# How do I create cron expressions?

For more information about cron expressions, go to: <http://www.quartz-scheduler.org/documentation/quartz-2.1.x/tutorials/crontrigger.html>

## Introduction

cron is a UNIX tool that has been around for a long time, so its scheduling capabilities are powerful and proven. The CronTrigger class is based on the scheduling capabilities of cron.

CronTrigger uses “cron expressions”, which are able to create firing schedules such as: “At 8:00am every Monday through Friday” or “At 1:30am every last Friday of the month”.

## Format

A cron expression is a string comprised of 6 or 7 fields separated by white space. Fields can contain any of the allowed values, along with various combinations of the allowed special characters for that field. The fields are as follows:

### Field Name Mandatory Allowed Values Allowed Special Characters

Seconds YES 0-59 , - \* /

Minutes YES 0-59 , - \* /

Hours YES 0-23 , - \* /

Day of month YES 1-31 , - \* ? / L W

Month YES 1-12 or JAN-DEC , - \* /

Day of week YES 1-7 or SUN-SAT , - \* ? / L #

Year NO empty, 1970-2099 , - \* /

So cron expressions can be as simple as this: \* \* \* \* ? \*

or more complex, like this: 0/5 14,18,3-39,52 \* ? JAN,MAR,SEP MON-FRI 2002-2010

## Special characters

\* (“all values”) - used to select all values within a field. For example, “\*” in the minute field means “every minute”.

? ("no specific value") - useful when you need to specify something in one of the two fields in which the character is allowed, but not the other. For example, if I want my trigger to fire on a particular day of the month (say, the 10th), but don't care what day of the week that happens to be, I would put "10" in the day-of-month field, and "?" in the day-of-week field. See the examples below for clarification.

- - used to specify ranges. For example, "10-12" in the hour field means "the hours 10, 11 and 12".

, - used to specify additional values. For example, "MON,WED,FRI" in the day-of-week field means "the days Monday, Wednesday, and Friday".

/ - used to specify increments. For example, "0/15" in the seconds field means "the seconds 0, 15, 30, and 45". And "5/15" in the seconds field means "the seconds 5, 20, 35, and 50". You can also specify '/' after the " character - in this case " is equivalent to having '0' before the '/'. '1/3' in the day-of-month field means "fire every 3 days starting on the first day of the month".

L ("last") - has different meaning in each of the two fields in which it is allowed. For example, the value "L" in the day-of-month field means "the last day of the month" - day 31 for January, day 28 for February on non-leap years. If used in the day-of-week field by itself, it simply means "7" or "SAT". But if used in the day-of-week field after another value, it means "the last xxx day of the month" - for example "6L" means "the last friday of the month". You can also specify an offset from the last day of the month, such as "L-3" which would mean the third-to-last day of the calendar month. When using the 'L' option, it is important not to specify lists, or ranges of values, as you'll get confusing/unexpected results.

W ("weekday") - used to specify the weekday (Monday-Friday) nearest the given day. As an example, if you were to specify "15W" as the value for the day-of-month field, the meaning is: "the nearest weekday to the 15th of the month". So if the 15th is a Saturday, the trigger will fire on Friday the 14th. If the 15th is a Sunday, the trigger will fire on Monday the 16th. If the 15th is a Tuesday, then it will fire on Tuesday the 15th. However if you specify "1W" as the value for day-of-month, and the 1st is a Saturday, the trigger will fire on Monday the 3rd, as it will not 'jump' over the boundary of a month's days. The 'W' character can only be specified when the day-of-month is a single day, not a range or list of days.

The 'L' and 'W' characters can also be combined in the day-of-month field to yield 'LW', which translates to "\*"last weekday of the month".

# - used to specify "the nth" XXX day of the month. For example, the value of "6#3" in the day-of-week field means "the third Friday of the month" (day 6 = Friday and "#3" = the 3rd one in the month). Other examples: "2#1" = the first Monday of the month and "4#5" = the fifth Wednesday of the month. Note that if you specify "#5" and there is not 5 of the given day-of-week in the month, then no firing will occur that month.

The legal characters and the names of months and days of the week are not case sensitive. MON is the same as mon.

## Examples

Here are some full examples:

**\*\*Expression\*\*   \*\*Meaning\*\***

0 0 12 \* \* ? Fire at 12pm (noon) every day

0 15 10 \* \* ? 2005 Fire at 10:15am every day during the year 2005

0 \* 14 \* \* ? Fire every minute starting at 2pm and ending at 2:59pm, every day

0 0/5 14 \* \* ? Fire every 5 minutes starting at 2pm and ending at 2:55pm, every day

0 0/5 14,18 \* \* ? Fire every 5 minutes starting at 2pm and ending at 2:55pm, AND fire every 5 minutes starting at 6pm and ending at 6:55pm, every day

0 0-5 14 \* \* ? Fire every minute starting at 2pm and ending at 2:05pm, every day

0 10,44 14 ? 3 WED Fire at 2:10pm and at 2:44pm every Wednesday in the month of March.

0 15 10 ? \* MON-FRI Fire at 10:15am every Monday, Tuesday, Wednesday, Thursday and Friday

0 15 10 15 \* ? Fire at 10:15am on the 15th day of every month

0 15 10 L \* ? Fire at 10:15am on the last day of every month

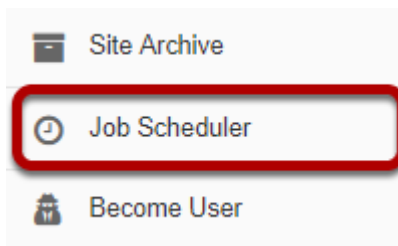
0 15 10 L-2 \* ? Fire at 10:15am on the 2nd-to-last last day of every month

0 11 11 11 11 ? Fire every November 11th at 11:11am.

Pay attention to the effects of '?' and '\*' in the day-of-week and day-of-month fields!

# How do I delete a job?

Go to the Job Scheduler tool.

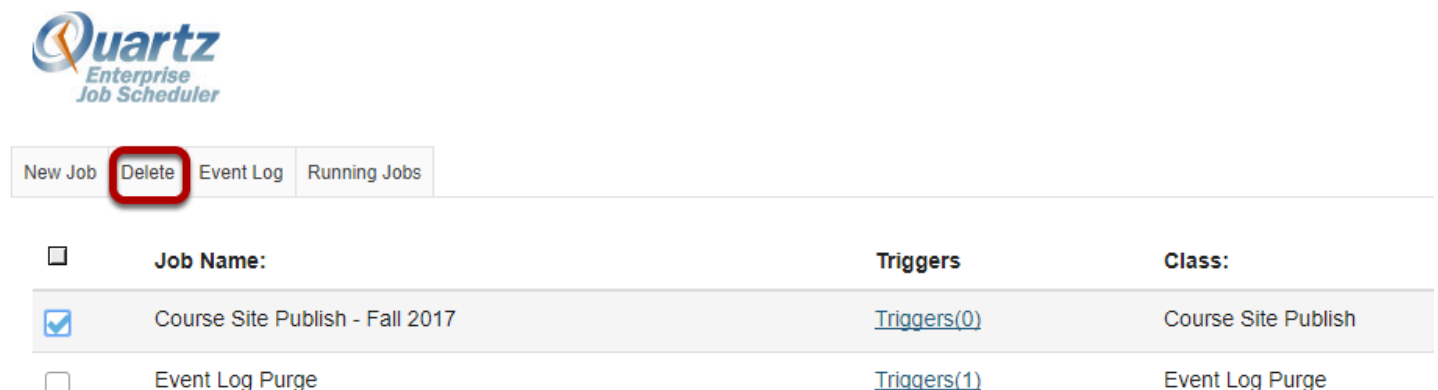


Select the **Job Scheduler** tool from the Tool Menu in the Administration Workspace.

Click the Jobs button.



Select the job you want to remove and click Delete.



**Click OK to confirm the deletion.**



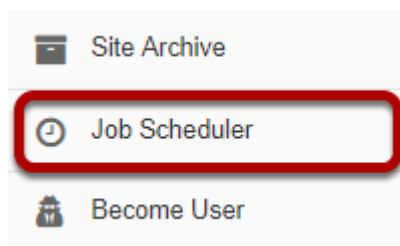
The following jobs (and associated triggers) will be deleted.

Course Site Publish - Fall 2017



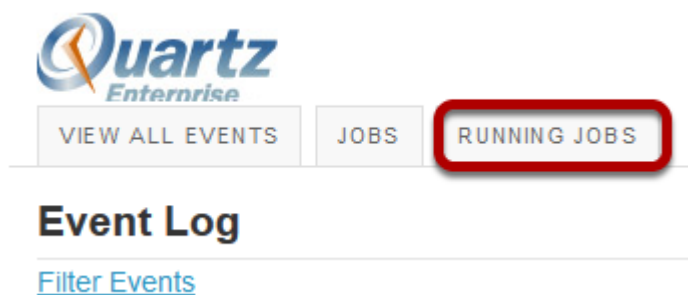
# How do I view running jobs?

Go to the Job Scheduler tool.

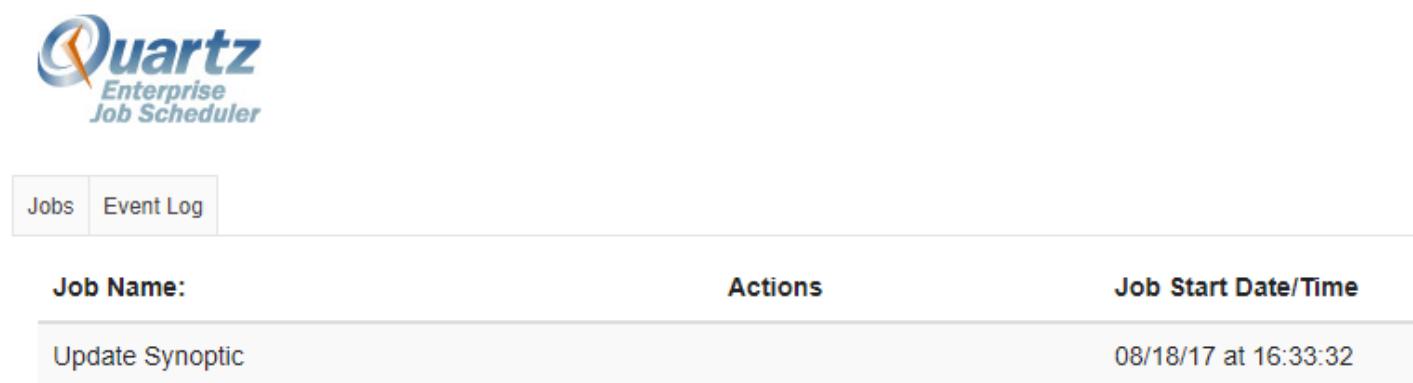


Select the **Job Scheduler** tool from the Tool Menu in the Administration Workspace.

Click the Running Jobs button.



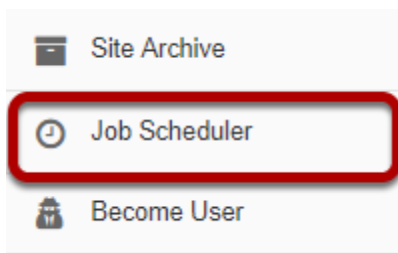
View the list of currently running jobs.



# How do I purge softly deleted sites?

Softly deleted sites are no longer accessible to users, but their files and tool content still remain on the server. To completely remove these sites and all of their data from the system, the administrator may run a Quartz job to expunge softly deleted sites.

## Go to Job Scheduler.



Select the **Job Scheduler** tool from the Tool Menu in the Administrative Workspace.

## Click Jobs.



## Click New Job.



**New Job** Delete Event Log Running Jobs

<input type="checkbox"/>	Job Name:	Triggers	Class:
<input type="checkbox"/>	Update Synoptic	<a href="#">Triggers(0)</a>	Update Synoptic Message Counts Job
<input type="checkbox"/>	Event Log Purge	<a href="#">Triggers(1)</a>	Event Log Purge

## Give your new job a name.



### Create Job

Job Name:

Type:

In this example, we have named the job "Purge Soft Deletes."

## Select Expunge Softly Deleted Sites from the Type drop-down menu.



### Create Job

Job Name:

Type: 

Account Validation Job

Account Validation Job

Auto Submit Assessments Job

Backfill Samigo Item Hashes Job

Backfill roles from templates

Backfill tools to sites

Check Validation Job

Check content in DB/Filesystem.

Configurable Job Test

Content Cleanup of deleted files

Course Management CSV Synchronization

Course Site Publish

Course Site Removal

Create sites, users and content for testing.

Delegated Access Shopping Period Job

Delegated Access Site Hierarchy Job

Event Log Purge

Expunge softly deleted sites

Fix Public Syllabus Attachments Job

Generic Tags Update

Generic Tags Update (Full Collection Import)

## Click Post.



### Create Job

Job Name:

Type: 

Expunge softly deleted sites

Click on the Triggers link for the job.



<input type="checkbox"/>	Job Name:	Triggers	Class:
<input type="checkbox"/>	Update Synoptic	<a href="#">Triggers(0)</a>	Update Synoptic Message Counts Job
<input type="checkbox"/>	Purge Soft Deletes	<a href="#">Triggers(0)</a>	Expunge softly deleted sites
<input type="checkbox"/>	Event Log Purge	<a href="#">Triggers(1)</a>	Event Log Purge

Click Run Job Now.



Currently editing triggers for job: Purge Soft Deletes

New Trigger	Run Job Now	Return_to_Jobs
-------------	-------------	----------------

This will immediately begin the job to purge any softly deleted sites in the system.

Click Run Now again to confirm.



Run Job Now Confirmation: Purge Soft Deletes

Are you sure you would like to run the job now?

Run Now

Cancel

Click on Event Log to view the log.



New Job

Delete

Event Log

Running Jobs

<input type="checkbox"/>	Job Name:	Triggers	Class:
<input type="checkbox"/>	Update Synoptic	<a href="#">Triggers(0)</a>	Update Synoptic Message Counts Job
<input type="checkbox"/>	Purge Soft Deletes	<a href="#">Triggers(0)</a>	Expunge softly deleted sites
<input type="checkbox"/>	Event Log Purge	<a href="#">Triggers(1)</a>	Event Log Purge

Notice that the Purge Soft Deletes job will be listed as fired and completed.



[View All Events](#) [Jobs](#) [Running Jobs](#)

## Event Log

[Filter Events](#)

Viewing 1 to 36 of 36 events

[|<](#) [<](#) [Show 100](#) [▼](#) [>](#) [>|](#)

Job Name:	Event type	Timestamps	Message:	Server
Purge Soft Deletes	COMPLETE	18/08/17 16:44:36	Trigger complete	ip-172-31-6-159
Purge Soft Deletes	FIRED	18/08/17 16:44:36	Trigger fired	ip-172-31-6-159

Or, click New Trigger.



## Currently editing triqqers for job: Purge Soft Deletes

[New Trigger](#) [Run Job Now](#) [Return\\_to\\_Jobs](#)

If you prefer to purge the softly deleted sites on a schedule, rather than by running the job manually, click the **New Trigger** button to add a trigger for the job scheduler.

## Enter a Trigger Name and Cron Expression.



### Create Trigger

Trigger Name:	<input type="text" value="Nightly soft delete purge"/>
Cron Expression:	<input type="text" value="0 0 0 * * ? *"/> <a href="#">Help</a>

<input type="button" value="Post"/>	<input type="button" value="Cancel"/>
-------------------------------------	---------------------------------------

## Click Post.



### Create Trigger

Trigger Name:	<input type="text" value="Nightly soft delete purge"/>
Cron Expression:	<input type="text" value="0 0 0 * * ? *"/> <a href="#">Help</a>

<input type="button" value="Post"/>	<input type="button" value="Cancel"/>
-------------------------------------	---------------------------------------

The new trigger for this job will be displayed.



Currently editing triggers for job: **Purge Soft Deletes**

New Trigger	Delete	Run Job Now	Return_to_Jobs	
<input type="checkbox"/>	Trigger Name:		Cron Expression:	Next Run:
<input type="checkbox"/>	Nightly soft delete purge		0 0 0 * * ? *	19/08/17 00:00:00

# Memory

# What is the admin Memory tool?

The admin Memory tool allows administrators to view cache sizes in order to better optimize performance.

Sakai's default cache sizes and expiration settings are conservative and most likely need to be adjusted at large institutions.

All caches should be adjustable in Sakai 10.0+ with a simple modification to the sakai.properties file.

Adjust the caching of users especially if you use the JLDAP provider. This example will cache up to 50k users for up to half a day each:

- `memory.org.sakaiproject.user.api.UserDirectoryService.callCache=timeToLiveSeconds=43400,timeToLiveSeconds=43400`

Adjust the realm/role group cache to retain items in the cache for two hours:

- `memory.org.sakaiproject.authz.impl.DbAuthzGroupService.realmRoleGroupCache=timeToLiveSeconds=7200,timeToLiveSeconds=7200`

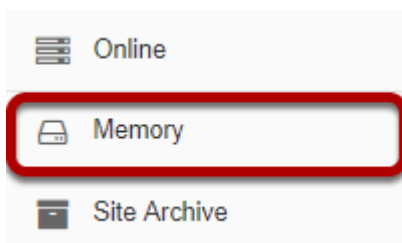
The user/site cache keeps track of the sites associated with the user:

- `memory.org.sakaiproject.site.api.SiteService.userSiteCache=timeToLiveSeconds=86400,timeToLiveSeconds=86400`

The security service cache retains information about permission requests (e.g., can user xxxx do asn.submit in /site/abc):

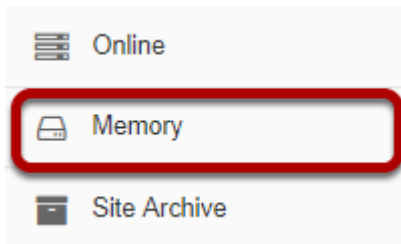
- `memory.org.sakaiproject.authz.api.SecurityService.cache=timeToLiveSeconds=86400,timeToLiveSeconds=86400`

**To access this tool, select Memory from the Tool Menu in the Administration Workspace.**



# How do I view Memory Status?

## Go to the Memory tool



Select the **Memory** tool from the Tool Menu of the Administration Workspace.

## Click Status.

### Memory

Available Memory: 189879584

Reset All Caches

Evict Expired Members

Status

# The memory report will display.

## Memory

\*\* Memory report

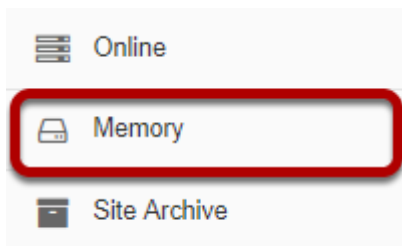
freeMemory: 112105360 totalMemory: 959971328 maxMemory: 959971328

org.hibernate.cache.StandardQueryCache Ehcache: count:0 hits:0 misses:0 hit%:0  
org.hibernate.cache.UpdateTimestampsCache Ehcache: count:0 hits:0 misses:0 hit%:0  
org.sakaiproject.authz.api.SecurityService.cache Ehcache: count:498 hits:61412 misses:1608 hit%:97  
org.sakaiproject.authz.api.SecurityService.contentCache Ehcache: count:68 hits:201 misses:97 hit%:67  
org.sakaiproject.authz.api.SecurityService.superCache Ehcache: count:14 hits:145059 misses:69 hit%:99  
org.sakaiproject.authz.impl.DbAuthzGroupService.authzUserGroupIdsCache Ehcache: count:1 hits:9 misses:1 hit%:90  
org.sakaiproject.authz.impl.DbAuthzGroupService.maintainRolesCache Ehcache: count:1 hits:0 misses:0 hit%:0  
org.sakaiproject.authz.impl.DbAuthzGroupService.realmRoleGroupCache Ehcache: count:46 hits:3461 misses:162 hit%:95  
org.sakaiproject.calendar.cache Ehcache: count:46 hits:630 misses:27 hit%:95  
org.sakaiproject.citation.api.SearchManager.metasearchSessionManagerCache Ehcache: count:0 hits:0 misses:0 hit%:0  
org.sakaiproject.citation.api.SearchManager.sessionContextCache Ehcache: count:0 hits:0 misses:0 hit%:0  
org.sakaiproject.component.app.messageforums.ui.DiscussionForumManagerImpl.allowedFunctionsCache Ehcache: count:2 hits:0 misses:2 hit%:0  
org.sakaiproject.component.app.messageforums.ui.UIPermissionsManagerImpl.userGroupMembershipCache Ehcache: count:2 hits:2 misses:0 hit%:100  
org.sakaiproject.dash.cache Ehcache: count:14 hits:995 misses:185 hit%:84  
org.sakaiproject.db.BaseDbFlatStorage.SAKAI\_REALM\_PROPERTY Ehcache: count:46 hits:3461 misses:162 hit%:95  
org.sakaiproject.db.BaseDbFlatStorage.SAKAI\_SITE\_GROUP\_PROPERTY Ehcache: count:0 hits:0 misses:0 hit%:0  
org.sakaiproject.db.BaseDbFlatStorage.SAKAI\_SITE\_PAGE\_PROPERTY Ehcache: count:1251 hits:68 misses:10074 hit%:0  
org.sakaiproject.db.BaseDbFlatStorage.SAKAI\_SITE\_PROPERTY Ehcache: count:129 hits:549 misses:822 hit%:40  
org.sakaiproject.db.BaseDbFlatStorage.SAKAI\_USER\_PROPERTY Ehcache: count:13 hits:2 misses:60 hit%:3  
org.sakaiproject.delegatedaccess.logic.ProjectLogic.hierarchySearchCache Ehcache: count:0 hits:0 misses:0 hit%:0  
org.sakaiproject.delegatedaccess.logic.ProjectLogic.nodeCache Ehcache: count:0 hits:0 misses:0 hit%:0  
org.sakaiproject.delegatedaccess.logic.ProjectLogic.restrictedAuthToolsCache Ehcache: count:0 hits:0 misses:5 hit%:0  
org.sakaiproject.delegatedaccess.logic.ProjectLogic.restrictedPublicToolsCache Ehcache: count:0 hits:0 misses:5 hit%:0  
org.sakaiproject.event.api.ActivityService.userActivityCache Ehcache: count:9 hits:0 misses:0 hit%:0  
org.sakaiproject.event.api.UsageSessionService.recentUserRefresh Ehcache: count:12 hits:17 misses:44 hit%:27  
org.sakaiproject.gradebookng.cache.notifications Ehcache: count:0 hits:0 misses:0 hit%:0

# How do I locate maxed out caches?

A maxed-out cache will have a count value of 10000 or 100000. Look for these values in the Status area of the Memory tool.

## Go to the Memory tool

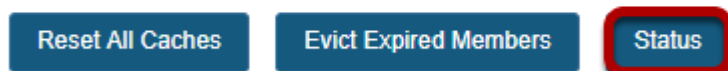


Select the **Memory** tool from the Tool Menu of the Administration Workspace.

## Click Status.

### Memory

Available Memory: 123678184



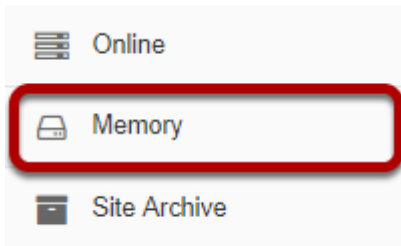
## Look for a count value of 10000 or 100000.

```
# memory.org.sakaiproject.site.impl.SiteCacheImpl.cacheTools *ALL DEFAULTS*
# memory.org.sakaiproject.sitestats.api.PrefsData *ALL DEFAULTS*
# memory.org.sakaiproject.sitestats.api.report.ReportDef *ALL DEFAULTS*
# memory.org.sakaiproject.sitestats.impl.event.EntityBrokerEventRegistry *ALL DEFAULTS*
# memory.org.sakaiproject.sitestats.impl.event.EventRegistryServiceImpl *ALL DEFAULTS*
# memory.org.sakaiproject.time.impl.BasicTimeService.userTimezoneCache *ALL DEFAULTS*
# memory.org.sakaiproject.tool.assessment.integration.helper.integrated.AssessmentGradeInfoProvider.groupedCache *ALL DEFAULTS*
# memory.org.sakaiproject.tool.assessment.integration.helper.integrated.AssessmentGradeInfoProvider.pubAssessmentCache *ALL DEFAULTS*
memory.org.sakaiproject.user.api.AuthenticationManager=maxElementsInMemory=250,timeToLiveSeconds=120,timeToldleSeconds=120
memory.org.sakaiproject.user.api.UserDirectoryService=maxElementsInMemory=100000,timeToLiveSeconds=86400,timeToldleSeconds=86400
# memory.org.sakaiproject.user.api.UserDirectoryService.callCache *ALL DEFAULTS*
# memory.org.sakaiproject.user.impl.BasePreferencesService.preferences *ALL DEFAULTS*
```

*Tip: You can click **CTRL+F** on your keyboard to use the **find on page** command in your browser.*

# How do I reset all caches?

## Go to the Memory tool



Select the **Memory** tool from the Tool Menu of the Administration Workspace.

## Click Reset All Caches.

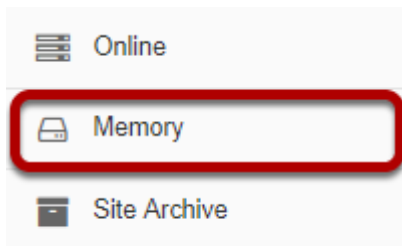
### Memory

Available Memory: 218544048



# How do I evict expired members?

## Go to the Memory tool

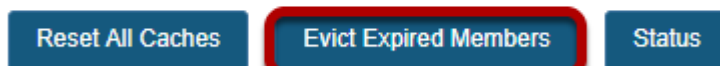


Select the **Memory** tool from the Tool Menu of the Administration Workspace.

## Click Evict Expired Members.

### Memory

Available Memory: 182896048

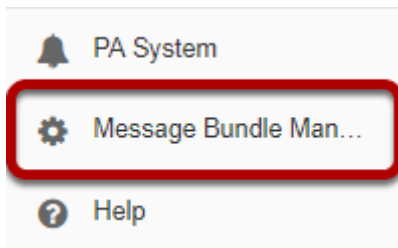


# Message Bundle Manager

# What is the Message Bundle Manager tool?

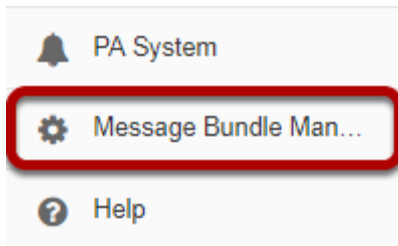
With the Message Bundle Manager, Sakai Administrators can find and edit system message properties, which define UI text for Sakai components in various languages.

**To access this tool, go to Message Bundle Manager from the Tool Menu in the Administration Workspace.**



# How do I find the number of modified messages in the system?

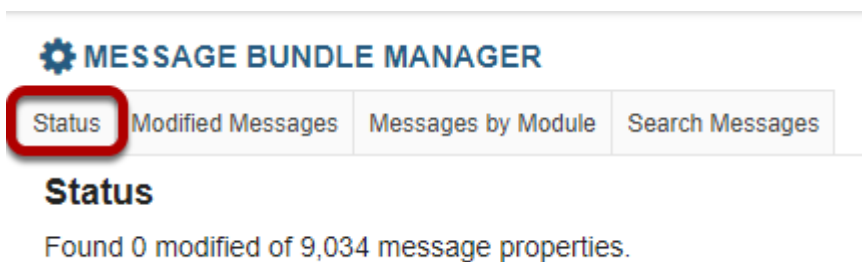
Go to Message Bundle Manager.



Select the **Message Bundle Manager** tool from the Tool Menu in the Administration Workspace.

*Note: If you do not see the Message Bundle Manager tool in the menu, you may need to add it. See [How do I add a stealthed tool to a site?](#) for more information on adding a tool to the site.*

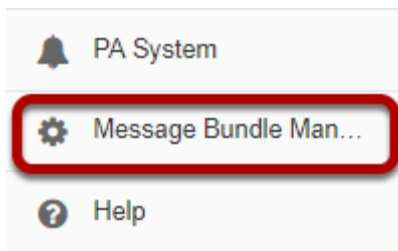
View Status.



The **Status** tab (which is also the landing page for the tool) will display the current number of modified messages as well as the total number of message properties in the system.

# How do I search system messages?

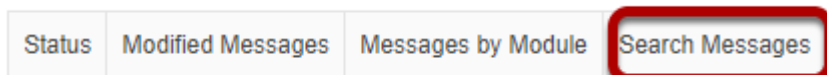
## Go to Message Bundle Manager.



Select the **Message Bundle Manager** tool from the Tool Menu in the Administration Workspace.

*Note: If you do not see the Message Bundle Manager tool in the menu, you may need to add it. See [How do I add a stealthed tool to a site?](#) for more information on adding a tool to the site.*

## Click Search Messages.



## Enter search text.

A screenshot of the 'Search Messages' form. At the top, there are four tabs: 'Status', 'Modified Messages', 'Messages by Module', and 'Search Messages'. Below the tabs, the heading 'Search Messages' is displayed. The form includes a text input field with the placeholder text 'Enter text' and the value 'username', a 'Select a Locale' dropdown menu with 'en\_US' selected, and a 'Search' button. The text input field is highlighted with a red rectangular box. Below the form, a light blue message box contains the text: 'Please enter the text to search for in the provided field.'

## Select language.

### Search Messages

Enter text  Select a Locale 

ar ▼

ar

de\_DE

en\_US

es\_ES

es\_MX

hi\_IN

ru\_RU

zh\_CN

Please enter the text to search for in the provided field.

## Click the Search button.

### Search Messages

Enter text  Select a Locale 

en\_US ▼

Please enter the text to search for in the provided field.

# View search results.

Search Messages

Enter text

username

Select a Locale

en\_US

Search

Show

10

entries

Filter Results:

	Id	Module Name	Property Name	Value	Default Value	Locale
<div>Edit</div>	667	Sakai Admin Tools	official.user.name		Official Username	en_US
<div>Edit</div>	996	sakai-site-manage-tool	man.authoriz		Authorizer's username:	en_US
<div>Edit</div>	1025	sakai-site-manage-tool	nscourse.look_up_an_username		Look up an username in the campus directory	en_US
<div>Edit</div>	1042	sakai-site-manage-tool	chrol.uniq		Username	en_US
<div>Edit</div>	1141	sakai-site-manage-tool	java.authoriz		The site request authorization email has been sent successfully to username	en_US
<div>Edit</div>	1218	sakai-site-manage-tool	java.thesiteemail		The site request authorization email could not be sent to username	en_US
<div>Edit</div>	1526	sakai-site-manage-tool	java.username		is not a valid username.	en_US
<div>Edit</div>	1644	sakai-site-manage-tool	man.notverify		At this time we cannot verify you are the instructor of record, please enter the username of a person that can verify you can create this site (e.g. department head, previous semester instructor). An email requesting authorization will be sent to this person. If there are multiple instructors for the course, please separate the usernames with comma signs.	en_US
<div>Edit</div>	1673	sakai-site-manage-tool	java.guest		Please enter username(s) or guest email address(es) to add to this site	en_US
<div>Edit</div>	1680	sakai-site-manage-tool	sitagen.removpart.username		Username	en_US

Showing 1 to 10 of 25 entries

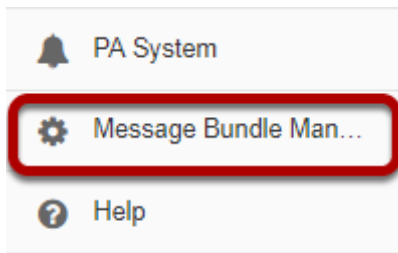
Previous

Next

All items matching your search criteria will be displayed.

# How do I view system messages by module?

## Go to Message Bundle Manager.



Select the **Message Bundle Manager** tool from the Tool Menu in the Administration Workspace.

*Note: If you do not see the Message Bundle Manager tool in the menu, you may need to add it. See [How do I add a stealthed tool to a site?](#) for more information on adding a tool to the site.*

## Click Messages by Module.



## Select the module.

Status	Modified Messages	Messages by Module	Search Messages
--------	-------------------	--------------------	-----------------

### Messages by Module

Select a Module  Select a Locale

Please select a module and a locale from the drop down lists above, and then click Filter.

- messageforums
- messageforums
- portal
- profile2
- Sakai Admin Tools
- Sakai Soap Web Service (CXF)
- sakai-announcement-tool
- sakai-chat-tool
- sakai-content-tools
- sakai-entitybroker-direct
- sakai-help
- sakai-lessonbuildertool
- sakai-message-tool
- sakai-site-manage-tool
- sakai-syllabus
- sakai.gradebookng
- sakai.message.bundle.manager
- SAM
- summary-calendar
- tool-tool-su
- xlogin

## Select the language.

Status	Modified Messages	Messages by Module	Search Messages
--------	-------------------	--------------------	-----------------

### Messages by Module

Select a Module  Select a Locale

Please select a module and a locale from the drop down lists above, and then click Filter.

# Click Filter.

Status

Modified Messages

Messages by Module

Search Messages

Messages by Module

Select a Module

profile2

Select a Locale

en\_US

Filter

Please select a module and a locale from the drop down lists above, and then click Filter.

# View module messages.

Messages by Module

Select a Module

profile2

Select a Locale

en\_US

Filter

Show

10

entries

Filter Results:

	Id	Module Name	Property Name	Value	Default Value	Locale
Edit	4943	profile2	text.privacy.mywall.tooltip		Choose who can see your wall.	en_US
Edit	4944	profile2	accessibility.profile.department.input		Enter your department	en_US
Edit	4945	profile2	error.profile.save.business.failed		Save failed	en_US
Edit	4946	profile2	text.gallery.upload.tooltip		Upload gallery images from your computer. The combined size of the images to upload should not exceed {0}MB.	en_US
Edit	4947	profile2	text.privacy.myfriends.tooltip		Choose who can view your list of connections.	en_US
Edit	4948	profile2	text.privacy.businessinfo.tooltip		Choose who can see your business information, like industry, position and business bio.	en_US
Edit	4949	profile2	heading.academic.edit		Academic Information	en_US
Edit	4950	profile2	accessibility.privacy.personal		Choose who can see your favorite books and tv shows etc.	en_US
Edit	4951	profile2	pictures.removepicture.confirm		Are you sure you want to remove this picture from your gallery?	en_US
Edit	4952	profile2	accessibility.connection.confirm		Confirm {0}'s connection request?	en_US

Showing 1 to 10 of 486 entries

PreviousNext

All system messages for that module will be displayed.

# Filter results.

Messages by Module

Select a Module

profile2

Select a Locale

en\_US

Filter

Show

10

entries

Filter Results: mywall

	Id	Module Name	Property Name	Value	Default Value	Locale
Edit	4943	profile2	text.privacy.mywall.tooltip		Choose who can see your wall.	en_US
Edit	4972	profile2	privacy.mywall		Who can see my wall and my posts to other walls?	en_US

Showing 1 to 2 of 2 entries (filtered from 486 total entries)

Previous

Next

If desired, you may filter the results further by entering a keyword into the **Filter Results** field. This will display items containing your keyword within this module.

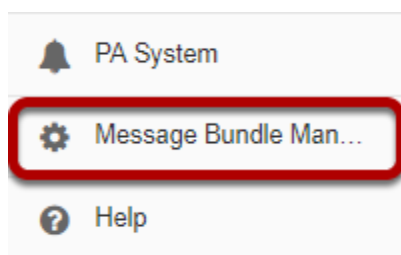
Sakai 19 Administrator Guide (English)

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# How do I customize a default system message?

## Go to Message Bundle Manager.



Select the **Message Bundle Manager** tool from the Tool Menu in the Administration Workspace.

*Note: If you do not see the Message Bundle Manager tool in the menu, you may need to add it. See [How do I add a stealthed tool to a site?](#) for more information on adding a tool to the site.*

## Locate the message that you would like to customize.

**1 Search Messages**

Enter text  Select a Locale

Show  entries Filter Results:

	Id	Module Name	Property Name	Value	Default Value	Locale
<input type="button" value="Edit"/>	667	Sakai Admin Tools	official.user.name		Official Username	en_US
<input type="button" value="Edit"/>	996	sakai-site-manage-tool	man.authoriz		Authorizer's username:	en_US
<input type="button" value="Edit"/>	1025	sakai-site-manage-tool	nscourse.look_up_an_username		Look up an username in the campus directory	en_US

**2 Messages by Module**

Select a Module  Select a Locale

Show  entries Filter Results:

	Id	Module Name	Property Name	Value	Default Value	Locale
<input type="button" value="Edit"/>	941	sakai-site-manage-tool	java.couldntdel		{0} could not be deleted, because you do not have permission.	en_US
<input type="button" value="Edit"/>	942	sakai-site-manage-tool	gen.first		Go to first	en_US
<input type="button" value="Edit"/>	943	sakai-site-manage-tool	sitetype.template.copy.content.info		<strong>Copy Content:</strong> content included in the template will be copied to your site. This may consist of material selected by your campus, school or department.	en_US

You may locate the default message by:

1. Searching for the message. (See [How do I search system messages?](#) for more information.)

2. Viewing messages by module. (See [How do I view system messages by module?](#) for more information.)

## Click Edit.

	Id	Module Name	Property Name	Value	Default Value	Locale
<input type="button" value="Edit"/>	667	Sakai Admin Tools	official.user.name		Official Username	en_US
<input type="button" value="Edit"/>	996	sakai-site-manage-tool	man.authoriz		Authorizer's username:	en_US
<input type="button" value="Edit"/>	1025	sakai-site-manage-tool	nscourse.look_up_an_username		Look up an username in the campus directory	en_US

## Enter your custom text into the Value field.

### Edit Message

Id	996
Module Name	sakai-site-manage-tool
Base Name	sitesetupgeneric
Property Name	man.authoriz
Locale	en_US
Default Value	Authorizer's username:
Value	<input type="text" value="Instructor's NetID"/>
	<input type="button" value="Save"/> <input type="button" value="Revert"/>

## Click Save.

<input type="button" value="Save"/>	<input type="button" value="Revert"/>
-------------------------------------	---------------------------------------

# The modified message information will be displayed.

Modified Messages

Show 10 entries

Filter Results:  CSV

	Id	Module Name	Property Name	Value	Default Value	Locale
<div>Edit</div>	996	sakai-site-manage-tool	man.authoriz	Instructor's NetID	Authorizer's username:	en_US

Showing 1 to 1 of 1 entries

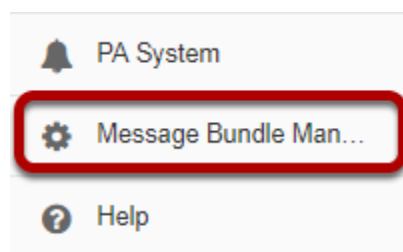
Previous

Next

Notice that the text in the Value field is now different than the text in the Default Value field.

# How do I view and edit modified messages in the system?

## Go to Message Bundle Manager.



Select the **Message Bundle Manager** tool from the Tool Menu in the Administration Workspace.

*Note: If you do not see the Message Bundle Manager tool in the menu, you may need to add it. See [How do I add a stealthed tool to a site?](#) for more information on adding a tool to the site.*

## Click Modified Messages.

Status **Modified Messages** Messages by Module Search Messages

**Modified Messages**

Show 10 entries Filter Results:  CSV

	Id	Module Name	Property Name	Value	Default Value	Locale
Edit	996	sakai-site-manage-tool	man.authoriz	Instructor's NetID	Authorizer's username:	en_US

Showing 1 to 1 of 1 entries Previous Next

All modified messages in the system will display.

*Tip: If there are a large number of messages, remember that you can enter text into the **Filter Results** field to narrow down the results and help locate a specific message.*

Click Edit.

	Id	Module Name	Property Name	Value	Default Value	Locale
<div>Edit</div>	996	sakai-site-manage-tool	man.authoriz	Instructor's NetID	Authorizer's username:	en_US

Showing 1 to 1 of 1 entries

PreviousNext

Make your changes to the text in the Value field.

Edit Message

Id

996

Module Name

sakai-site-manage-tool

Base Name

sitesetupgeneric

Property Name

man.authoriz

Locale

en\_US

Default Value

Authorizer's username:

Value

Instructor's NetID

Save

Revert

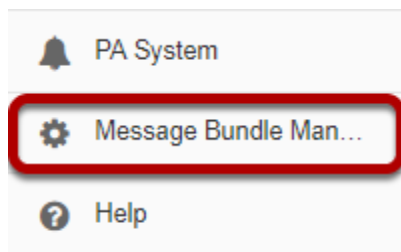
Click Save.

Save

Revert

# How do I delete a modified message and revert back to the default value?

## Go to Message Bundle Manager.



Select the **Message Bundle Manager** tool from the Tool Menu in the Administration Workspace.

*Note: If you do not see the Message Bundle Manager tool in the menu, you may need to add it. See [How do I add a stealthed tool to a site?](#) for more information on adding a tool to the site.*

## Click Modified Messages.

Status **Modified Messages** Messages by Module Search Messages

**Modified Messages**

Show 10 entries Filter Results: CSV

	Id	Module Name	Property Name	Value	Default Value	Locale
Edit	996	sakai-site-manage-tool	man.authoriz	Instructor's NetID	Authorizer's username:	en_US

Showing 1 to 1 of 1 entries Previous Next

All modified messages in the system will display.

*Tip: If there are a large number of messages, remember that you can enter text into the **Filter Results** field to narrow down the results and help locate a specific message.*

## Click Edit.

	Id	Module Name	Property Name	Value	Default Value	Locale
<a href="#">Edit</a>	996	sakai-site-manage-tool	man.authoriz	Instructor's NetID	Authorizer's username:	en_US

Showing 1 to 1 of 1 entries

◀ Previous Next ▶

## Click Revert.

### Edit Message

<b>Id</b>	996
<b>Module Name</b>	sakai-site-manage-tool
<b>Base Name</b>	sitesetupgeneric
<b>Property Name</b>	man.authoriz
<b>Locale</b>	en_US
<b>Default Value</b>	Authorizer's username:
<b>Value</b>	<input type="text" value="Instructor's NetID"/>
	<a href="#">Save</a> <a href="#">Revert</a>

## The modified message will be deleted.

### Modified Messages

Show  entries

Filter Results:  [CSV](#)

Id	Module Name	Property Name	Value	Default Value	Locale
No data available in table					

Showing 0 to 0 of 0 entries

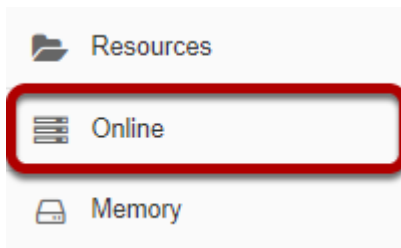
◀ Previous Next ▶

# Online

# What is the Online tool?

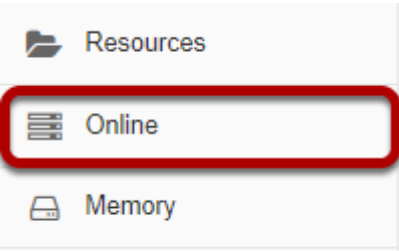
The Online admin tool provides information on currently running servers and sessions, as well as user IP address and browser information.

**To access this tool, select Online from the Tool Menu of the Administration Workspace.**



# How do I view active servers?

Go to the Online tool.



Select the **Online** tool from the Tool Menu of the Administration Workspace.

## View active servers.

Locations Sessions **Servers** Auto Refresh Refresh

Active Servers

Total sessions: 1

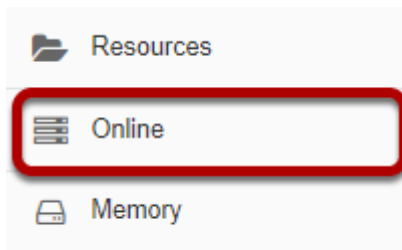
Server Id	Sessions	Status
qa01-sakai-1504598547293	1	RUNNING <button>Stop new sessions</button>

The landing page of this tool will display the current list of active servers and the number of sessions connected to each server.

*Note: You may also click on the **Servers** tab to view this information if you are in a different tab.*

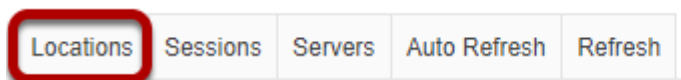
# How do I view user locations?

Go to the Online tool.



Select the **Online** tool from the Tool Menu of the Administration Workspace.

Click **Locations**.



View the locations of current users.

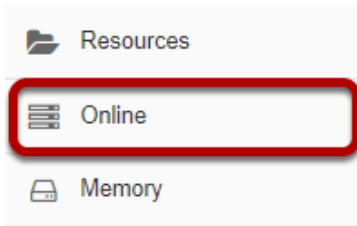
## Users present

1	at location: !admin-610				
	admin	46675b2d-fae3-43c0-bc25-16e7e7c6d872		Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/60.0.3112.113 Safari/537.36	Sep 5, 2017 3:54 pm
1	at location: !admin-presence				
	admin	46675b2d-fae3-43c0-bc25-16e7e7c6d872		Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/60.0.3112.113 Safari/537.36	Sep 5, 2017 3:54 pm

You will see a list of the current users online, along with their IP addresses, browser information, and the date and time of their connection.

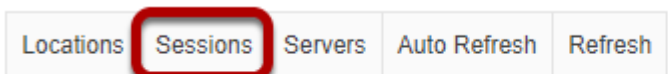
# How do I view active sessions?

Go to the Online tool.



Select the **Online** tool from the Tool Menu of the Administration Workspace.

Click Sessions.



# View a list of active sessions.

Active Sessions

Total sessions: 1

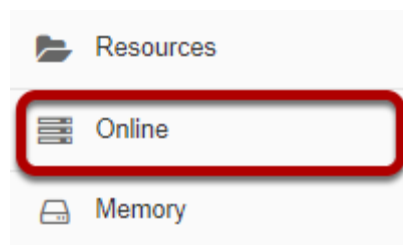
1 on: qa01-sakai-1504598547293

Session Id:	46675b2d-fae3-43c0-bc25-16e7e7c6d872
User Id:	admin
1 IP Address:	
Agent Type:	Mozilla/5.0 (Windows NT 10.0; Win64; x64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/60.0.3112.113 Safari/537.36
Started:	Sep 5, 2017 3:54 pm

You will see a list of all sessions currently connected.

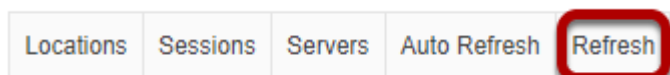
# How do I refresh location, session, and server data?

Go to the Online tool.



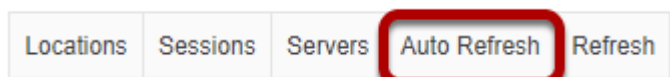
Select the **Online** tool from the Tool Menu of the Administration Workspace.

Click Refresh.



You may click the **Refresh** button to manually refresh the data displayed on screen. Manual refresh is the default setting.

Or, click **Auto Refresh** to refresh automatically.



If you select the **Auto Refresh** option, your screen should refresh automatically every few seconds.

# PA System

# What is the PA System?

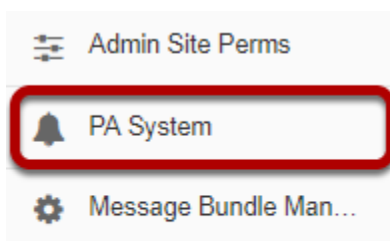
The PA System tool provides system administrators with the ability to deliver customizable system-wide or targeted alerts to users in their Sakai instance. These alerts may take the form of dismissible, rich-text popup alerts or simple text banners, color-coded by alert priority. All alerts are centrally managed through the PA System tool within the Sakai Administration Workspace and can also be controlled via a set of RESTful APIs.

Popup alerts are modal windows that users see upon logging into the system. These popups may be temporarily or permanently dismissed by the user. The content of these alerts allow for rich HTML content/formatting.

Banner alerts, similar to notification banners in mobile operating systems, appear at the top of the user interface and are designed for delivering simple and concise information to users. These alerts can be pushed to all users or a targeted subset of users. Furthermore, banner alerts can be delivered on all servers of a Sakai instance or to only selected servers. There are three different types of banners in the PA System, color-coded by alert priority:

- Blue (Low priority) - can be dismissed by the user
- Yellow (Medium priority) - can be hidden (minimized) by the user
- Red (High priority) - can be neither dismissed nor hidden by the user

**To access this tool, select PA System from the Tool Menu in the Administration Workspace.**

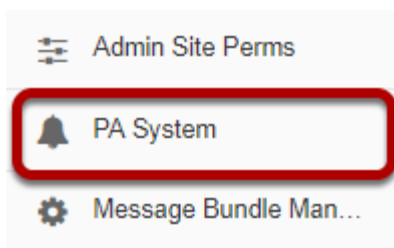


# How do I create a banner system message?

Banner alerts, similar to notification banners in mobile operating systems, appear at the top of the user interface and are designed for delivering simple and concise information to users. These alerts can be pushed to all users or a targeted subset of users. Furthermore, banner alerts can be delivered on all servers of a Sakai instance or to only selected servers. There are three different types of banners in the PA System, color-coded by alert priority:

- Blue (Low priority) - can be dismissed by the user
- Yellow (Medium priority) - can be hidden (minimized) by the user
- Red (High priority) - can be neither dismissed nor hidden by the user

## Go to PA System.



Select the **PA System** tool from the Tool Menu in the Administration Workspace.

## Click Create Banner.

**PA SYSTEM** [Link](#) [Help](#)

**Banners** [Create Banner](#)

Message	Type	Active	From	Until
---------	------	--------	------	-------

**Popups** [Download Templates](#) [Create Popup](#)

Description	Active	From	Until
-------------	--------	------	-------

**Timezone Check**

Timezone checking is **active**



## Enter the banner information.



1 **Message**


2 **Type**

Note: When a user dismisses a "Medium" alert, a small "Show System Alerts" button will remain at the top of their screen. Clicking on this button will cause all active Medium alerts to reappear for the user.

3 **Active** ☒

4 **Start Time**   

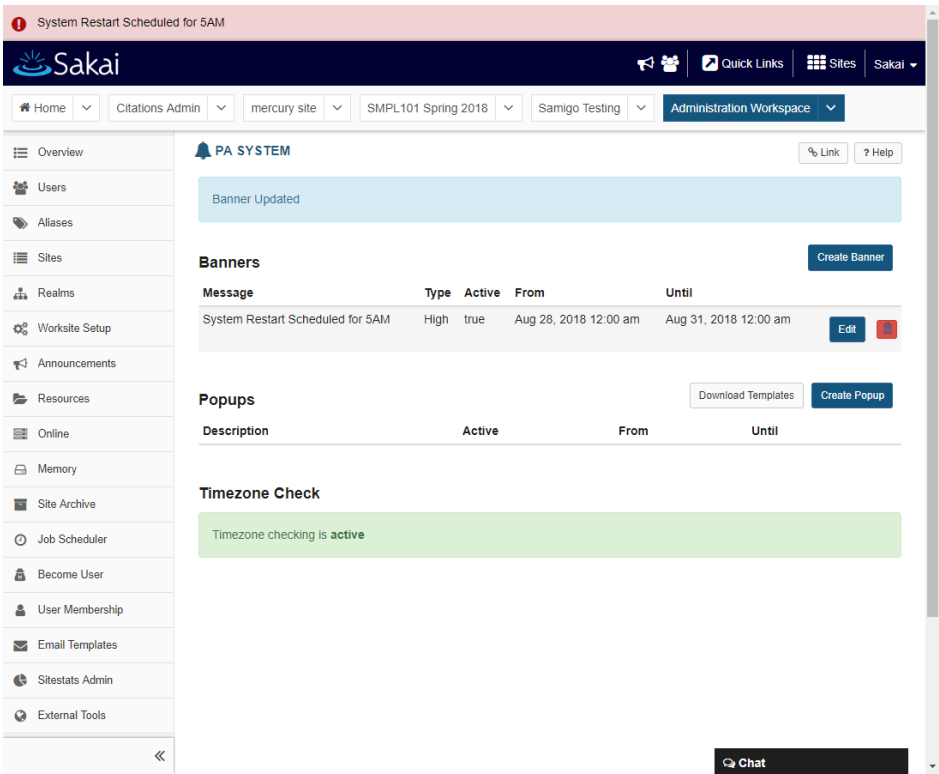
5 **End Time**   

6 **Hosts**  

7

1. **Message:** This is the text that will display in the banner across the top of the screen.
2. **Type:** Choose the type of priority for the message. High priority messages display in red and cannot be hidden or dismissed by users. Medium priority message display in green and can be hidden by users. Low priority message display in blue and can be dismissed by users.
3. **Active:** Check this box to indicate that the banner message is active. This may be used as an alternative to setting start and end dates if you plan to enable/disable the message manually.
4. **Start Time:** This is the date and time when the banner message becomes visible to users.
5. **End Time:** This is the date and time when the banner message is not longer displayed to users.
6. **Hosts:** If you would like to limit the banner message to specific servers, you may enter the host information here.
7. When you have entered all of the message information, click **Save Banner** to save your changes.

# View banner message.



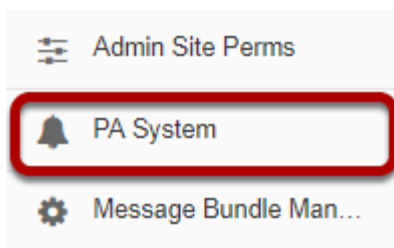
When active, the banner message will display at the top of the screen, as shown in the image above.

# How do I edit a banner system message?

Banner alerts, similar to notification banners in mobile operating systems, appear at the top of the user interface and are designed for delivering simple and concise information to users. These alerts can be pushed to all users or a targeted subset of users. Furthermore, banner alerts can be delivered on all servers of a Sakai instance or to only selected servers. There are three different types of banners in the PA System, color-coded by alert priority:


- Blue (Low priority) - can be dismissed by the user
- Yellow (Medium priority) - can be hidden (minimized) by the user
- Red (High priority) - can be neither dismissed nor hidden by the user

## Go to PA System.




Select the **PA System** tool from the Tool Menu in the Administration Workspace.

## View existing banners.

 PA SYSTEM Link Help

Banner Updated

**Banners** Create Banner

Message	Type	Active	From	Until	
System Restart Scheduled for 5AM	High	true	Aug 28, 2018 12:00 am	Aug 31, 2018 12:00 am	<span>Edit</span> 


**Popups** Download Templates Create Popup

Description	Active	From	Until
-------------	--------	------	-------

**Timezone Check**


Timezone checking is **active**

## Click Edit for the banner message you want to modify.

 PA SYSTEM Link Help

Banner Updated

**Banners** Create Banner

Message	Type	Active	From	Until	
System Restart Scheduled for 5AM	High	true	Aug 28, 2018 12:00 am	Aug 31, 2018 12:00 am	<span>Edit</span> 

**Popups** Download Templates Create Popup

Description	Active	From	Until
-------------	--------	------	-------

**Timezone Check**

Timezone checking is **active**

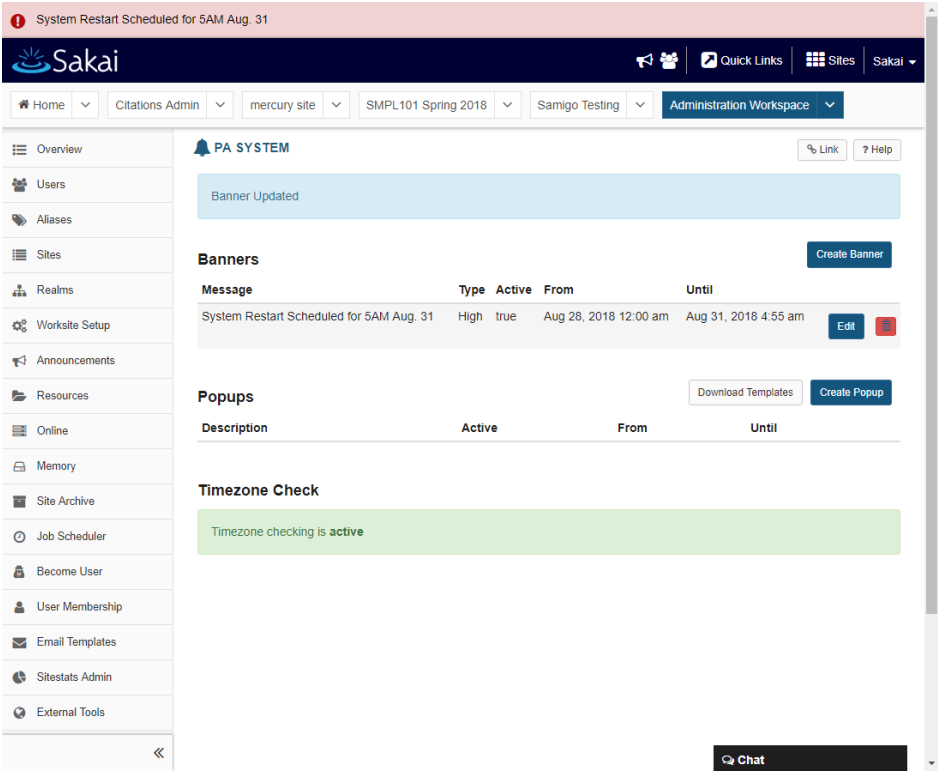
## Edit the message information as needed, and then save.

The screenshot shows a web interface for editing a banner message. It includes the following elements:

- 1 Message:** A text input field containing "System Restart Scheduled for 5AM Aug. 31".
- 2 Type:** A dropdown menu showing "High - Cannot be dismissed by user". Below it is a note: "Note: When a user dismisses a 'Medium' alert, a small 'Show System Alerts' button will remain at the top of their screen. Clicking on this button will cause all active Medium alerts to reappear for the user."
- 3 Active:** A checkbox that is checked.
- 4 Start Time:** A date/time input field showing "08/28/2018 12:00 am" with a list icon and a red close button.
- 5 End Time:** A date/time input field showing "08/31/2018 04:55 am" with a list icon and a red close button.
- 6 Hosts:** An empty text input field with a help icon.
- 7:** Two buttons at the bottom: "Save Banner" and "Cancel".

1. **Message:** This is the text that will display in the banner across the top of the screen.
2. **Type:** Choose the type of priority for the message. High priority messages display in red and cannot be hidden or dismissed by users. Medium priority message display in green and can be hidden by users. Low priority message display in blue and can be dismissed by users.
3. **Active:** Check this box to indicate that the banner message is active. This may be used as an alternative to setting start and end dates if you plan to enable/disable the message manually.
4. **Start Time:** This is the date and time when the banner message becomes visible to users.
5. **End Time:** This is the date and time when the banner message is no longer displayed to users.
6. **Hosts:** If you would like to limit the banner message to specific servers, you may enter the host information here.
7. When you have entered all of the message information, click **Save Banner** to save your changes.

# View banner message.



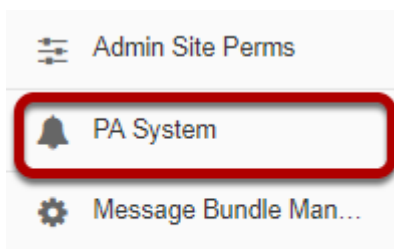
When active, the banner message will display at the top of the screen, as shown in the image above.

# How do I delete a banner system message?

Banner alerts, similar to notification banners in mobile operating systems, appear at the top of the user interface and are designed for delivering simple and concise information to users. These alerts can be pushed to all users or a targeted subset of users. Furthermore, banner alerts can be delivered on all servers of a Sakai instance or to only selected servers. There are three different types of banners in the PA System, color-coded by alert priority:


- Blue (Low priority) - can be dismissed by the user
- Yellow (Medium priority) - can be hidden (minimized) by the user
- Red (High priority) - can be neither dismissed nor hidden by the user

## Go to PA System.



Select the **PA System** tool from the Tool Menu in the Administration Workspace.

# View existing banners.

 PA SYSTEM

Link

Help

Banner Updated

Banners

Create Banner

Message	Type	Active	From	Until	
System Restart Scheduled for 5AM Aug. 31	High	true	Aug 28, 2018 12:00 am	Aug 31, 2018 4:55 am	<div><div>Edit</div><div></div></div>

Popups

Download Templates


Create Popup

Description	Active	From	Until
-------------	--------	------	-------

Timezone Check

Timezone checking is **active**

**Click the trashcan icon (Delete) for the banner message you want to delete.**


 **PA SYSTEM**

LinkHelp

Banner Updated

**Banners**

Create Banner

Message	Type	Active	From	Until	
System Restart Scheduled for 5AM Aug. 31	High	true	Aug 28, 2018 12:00 am	Aug 31, 2018 4:55 am	<div>Edit</div>

**Popups**

Download TemplatesCreate Popup

Description	Active	From	Until
-------------	--------	------	-------

**Timezone Check**

Timezone checking is **active**

**Click Delete Banner to confirm the deletion.**

**Delete Banner**

Are you sure you want to delete this banner?

Close


Delete Banner

Sakai 19 Administrator Guide (English)

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Page 171

The banner will be deleted and a confirmation message will be displayed.

 PA SYSTEM

Link

Help

Banner Deleted

Banners

Create Banner

Message	Type	Active	From	Until
---------	------	--------	------	-------

Popups

Download Templates

Create Popup

Description	Active	From	Until
-------------	--------	------	-------

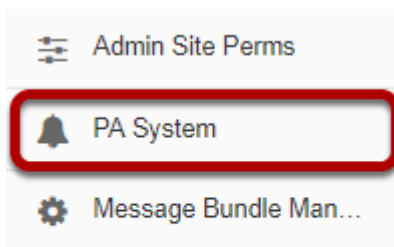
Timezone Check

Timezone checking is active

# How do I create a popup system message?

Popup alerts are modal windows that users see upon logging into the system. These popups may be temporarily or permanently dismissed by the user. The content of these alerts allow for rich HTML content/formatting.

## Go to PA System.



Select the **PA System** tool from the Tool Menu in the Administration Workspace.

## Click Create Popup.

**PA SYSTEM** %Link ?Help

Banner Deleted

**Banners** Create Banner

Message	Type	Active	From	Until
---------	------	--------	------	-------

**Popups** Download Templates Create Popup

Description	Active	From	Until
-------------	--------	------	-------

**Timezone Check**

Timezone checking is **active**

## Enter the popup information.

1 **Description** Thanksgiving Holiday

2 **Template** Choose File thanksgiving.html

3 **Start Time** 11/21/2018 12:00 am

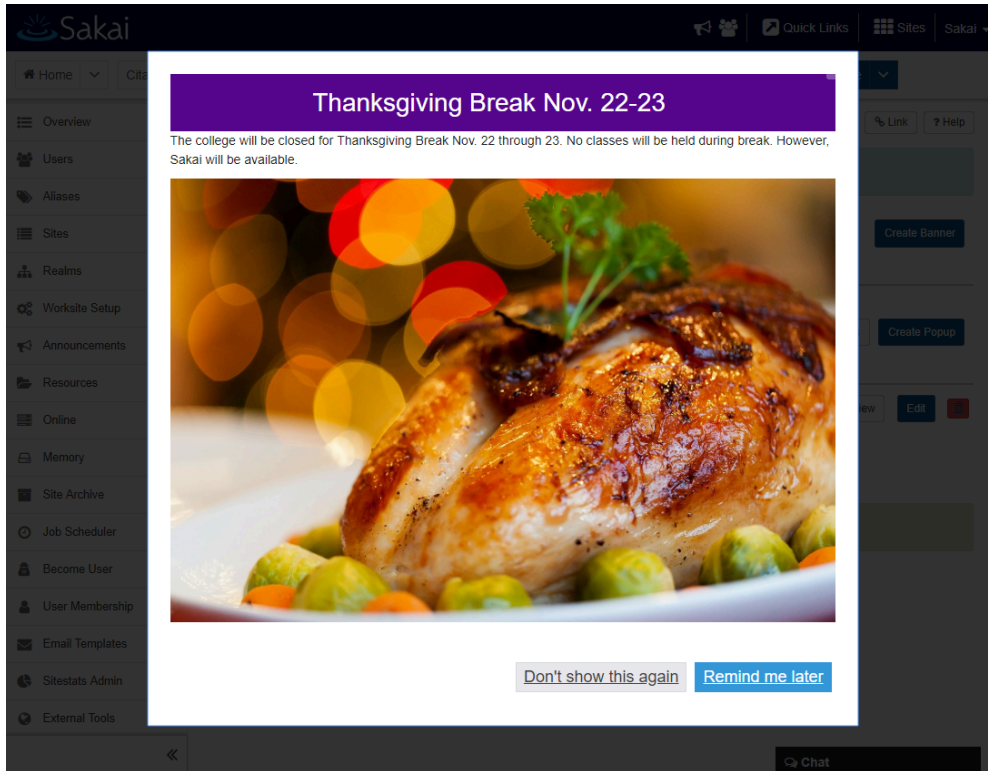
4 **End Time** 11/23/2018 11:55 pm

5 **Distribution**  
☐ Show this campaign to everyone  
☒ Show this campaign to selected users

6 **Save Popup** **Cancel**


1. **Description:** This is the description of your popup message as shown in the PA System message list.
2. **Template:** Click **Browse** to locate and select the file containing your popup message content. *(Note: Several sample templates are provided for you if you click Download Templates from the PA System landing page.)*
3. **Start Time:** This is the time and date when your popup will be visible to users.
4. **End Time:** This is the time and date when you popup will no longer be available to users.
5. **Distribution:** You may choose to **Show this campaign to everyone** or **Show this campaign to selected users**. If you choose selected users, you may enter the comma separated userids for selected users in the text field below.
6. Click **Save Popup** to save your changes.

## View the popup message.



When active, the popup message will display to users as shown in the image above.

Admin users may also click the Preview button to preview a popup message.

 PA SYSTEM

Link

Help

Popup Updated

Banners


Create Banner

Message	Type	Active	From	Until
---------	------	--------	------	-------

Popups

Download Templates

Create Popup

Description	Active	From	Until	
Thanksgiving Holiday		Nov 21, 2018 12:00 am	Nov 23, 2018 11:55 pm	<div><div>Preview</div><div>Edit</div><div></div></div>

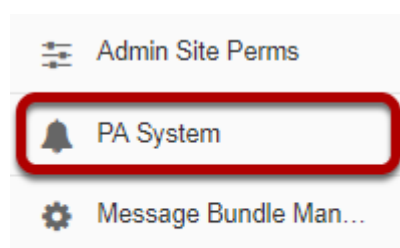
Timezone Check

Timezone checking is active

# How do I edit an existing popup system message?


Popup alerts are modal windows that users see upon logging into the system. These popups may be temporarily or permanently dismissed by the user. The content of these alerts allow for rich HTML content/formatting.

## Go to PA System.



Select the **PA System** tool from the Tool Menu in the Administration Workspace.

## View existing popup messages.


 PA SYSTEM Link Help

Popup Updated

**Banners** Create Banner

Message	Type	Active	From	Until
---------	------	--------	------	-------


**Popups** Download Templates Create Popup

Description	Active	From	Until	
Thanksgiving Holiday		Nov 21, 2018 12:00 am	Nov 23, 2018 11:55 pm	<span>Preview</span> <span>Edit</span> 

**Timezone Check**

Timezone checking is **active**

## Click Edit for the popup you want to modify.


 PA SYSTEM Link Help

Popup Updated

**Banners** Create Banner

Message	Type	Active	From	Until
---------	------	--------	------	-------

**Popups** Download Templates Create Popup

Description	Active	From	Until	
Thanksgiving Holiday		Nov 21, 2018 12:00 am	Nov 23, 2018 11:55 pm	<span>Preview</span> <span>Edit</span> 

**Timezone Check**

Timezone checking is **active**

## Edit the popup information as needed, then save.

1 **Description** Thanksgiving Holiday

2 **Template** Choose File centered\_image - edited.html

3 **Start Time** 11/01/2018 12:00 am

4 **End Time** 11/23/2018 11:55 pm

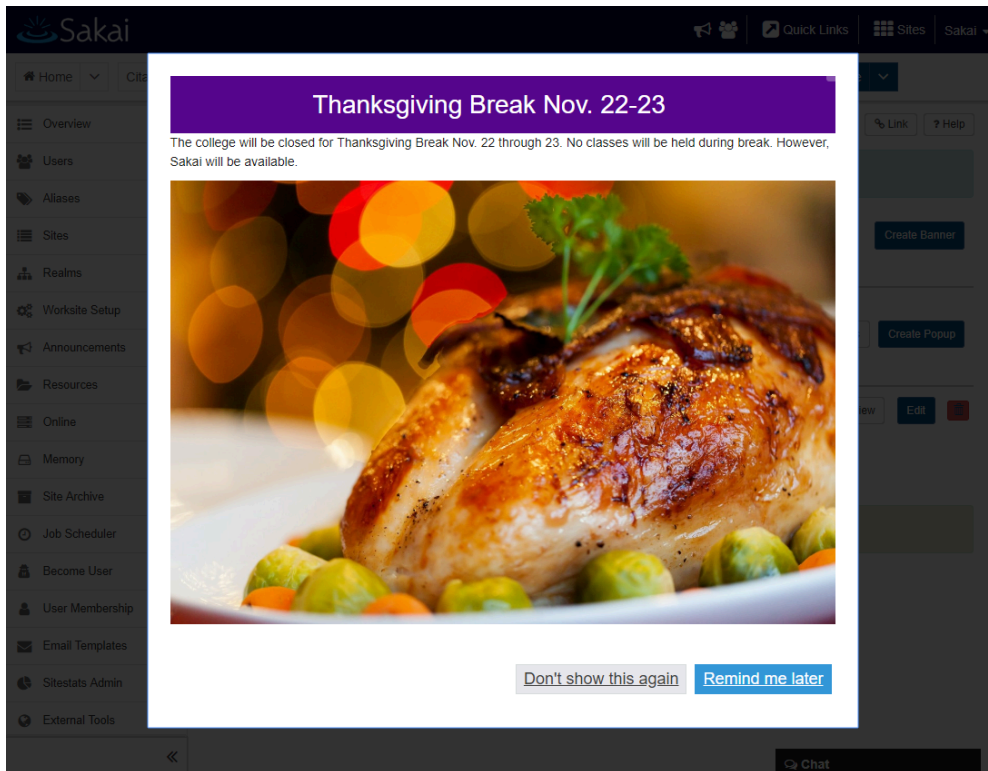
5 **Distribution**  
☐ Show this campaign to everyone  
☒ Show this campaign to selected users

6 **Save Popup** Save Popup Cancel

1. **Description:** This is the description of your popup message as shown in the PA System message list.
2. **Template:** Click **Browse** to locate and select the file containing your popup message content. *(Note: Several sample templates are provided for you if you click Download Templates from the PA System landing page.)*
3. **Start Time:** This is the time and date when your popup will be visible to users.
4. **End Time:** This is the time and date when your popup will no longer be available to users.
5. **Distribution:** You may choose to **Show this campaign to everyone** or **Show this campaign to selected users**. If you choose selected users, you may enter the comma separated userids for selected users in the text field below.
6. Click **Save Popup** to save your changes.


*Note: Remember that you will need to make your changes to the html template file before uploading the edited version. Popup message content cannot be edited online via the PA System tool.*

## View the popup message.



When active, the popup message will display to users as shown in the image above.

Admin users may also click the Preview button to preview a popup message.

 PA SYSTEM

Link

Help

Popup Updated

Banners

Create Banner

Message	Type	Active	From	Until
---------	------	--------	------	-------

Popups


Download Templates

Create Popup

Description	Active	From	Until
Thanksgiving Holiday		Nov 1, 2018 12:00 am	Nov 23, 2018 11:55 pm

Preview

Edit



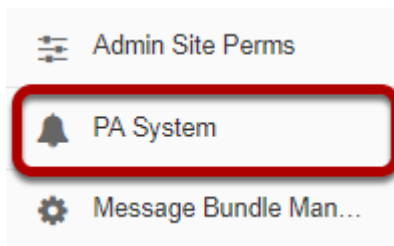
Timezone Check

Timezone checking is active

# How do I delete a popup system message?

Popup alerts are modal windows that users see upon logging into the system. These popups may be temporarily or permanently dismissed by the user. The content of these alerts allow for rich HTML content/formatting.

## Go to PA System.



Select the **PA System** tool from the Tool Menu in the Administration Workspace.

## View existing popup messages.

PA SYSTEM Link Help

Popup Updated

**Banners** Create Banner

Message	Type	Active	From	Until
---------	------	--------	------	-------

**Popups** Download Templates Create Popup


Description	Active	From	Until
Sample Popup Message		Sep 26, 2017 12:00 am	Sep 29, 2017 11:55 pm

Preview Edit

**Timezone Check**

Timezone checking is **active**

Click the trashcan icon (Delete) for the popup you want to delete.

 PA SYSTEM

 Link

 Help

Popup Updated

## Banners

Create Banner

Message

Type

Active

From

Until

## Popups

Download Templates

Create Popup

Description

Active

From

Until

Sample Popup Message

Sep 26, 2017 12:00 am

Sep 29, 2017 11:55 pm

Preview

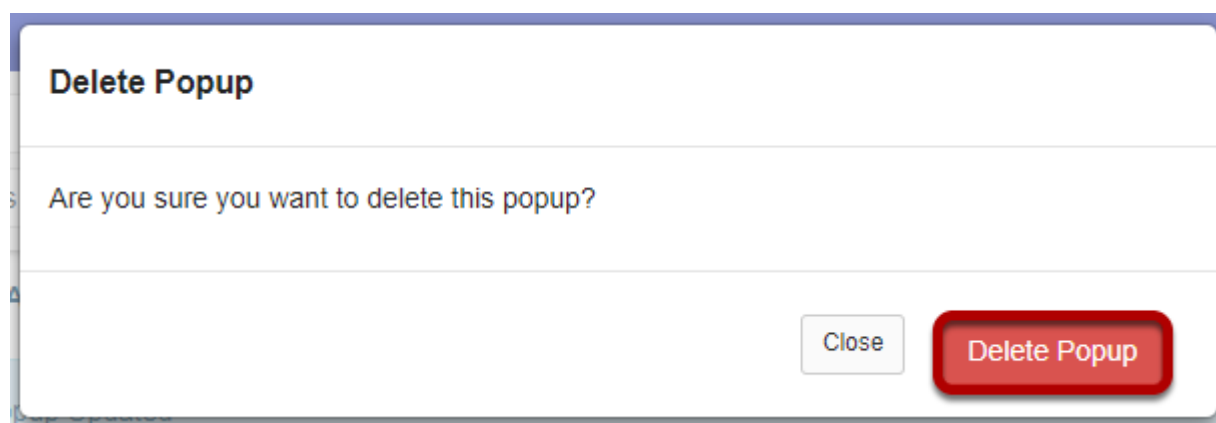
Edit




## Timezone Check

Timezone checking is **active**

Click Delete Popup to confirm deletion.



The popup message will be deleted and a confirmation message will display.

 PA SYSTEM

Link

Help

Popup Deleted

Banners

Create Banner

Message	Type	Active	From	Until
---------	------	--------	------	-------

Popups

Download Templates

Create Popup

Description	Active	From	Until
-------------	--------	------	-------

Timezone Check

Timezone checking is active

# Permissions and Roles

# What are Permissions and Roles?

## Permissions

Permissions allow users to access certain features of a course or project site, depending on their roles, and on the decisions made by the site owner and the system administrator.

## Roles

Roles are collections of permissions. Some roles allow users to simply access or read content, while other roles allow for advanced changes, such as adding participants, editing the site's content, and changing permissions for other roles.

When you create a site, or when one is created for you, you have the role with the most permissions and the broadest level of access. You can choose (within the limits established by the system administrator) which tools or functions (e.g., Forums, Calendar, Resources) you want the site to have. For many of these tools or functions, you can set permissions that allow or prevent users from seeing or performing certain tasks, depending on their roles.

Roles may vary in name, depending on the application. However, in general, the creator of a project site, or the instructor of a course site, has full permissions, and can add or delete content within a site.

A user who joins an existing site has a more limited role. The permissions of this role allow for interaction in the site (e.g., creating Chat messages), but do not allow for advanced tasks (e.g., uploading files into Resources or creating assignments).

However, each implementation of the application will be different. System administrators can decide during implementation which roles to install, and which permissions these roles will have.

Some things to remember:

- The availability of a tool in a site depends on the particular implementation of the system administrator. If you have broad rights to a site, and find that a tool is not available through Site Info, consult your administrator.
- The Resources and Drop Box tools share the same permissions set. You can modify them in the Resources tool.
- Default roles have default permissions. These defaults can be edited on the system level by the system administrator, and on the site level by anyone with full permissions to the site.
- All users are assigned the broadest role in their respective Home areas to give them editing control.

## Default participant roles

The following default roles are available in course and project sites:

### Course sites

- **Instructor:** Instructors have full permissions throughout the site, including the ability to publish the site and set its global access. Instructors can read, revise, delete, and add both content and participants to a site.
- **Teaching Assistant:** Teaching Assistants can read, add, and revise most content in their sections.
- **Student:** Students can read content, and add content to a site where appropriate.

### Project sites

- **Maintain:** The Maintain role has full permissions throughout the site, including the ability to publish the site and set its global access. The Maintain role can read, revise, delete, and add both content and participants to a site.
- **Access:** The Access role can read content and add content to a site where appropriate.

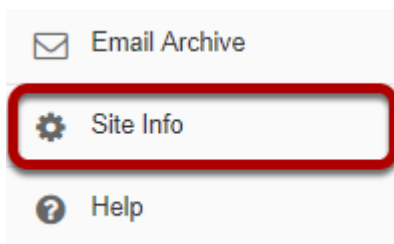
## Custom roles

Many institutions create custom roles with specific sets of permissions for their local systems. Custom roles must be created by a system administrator using the Realms tool.

# How do I change participant roles within a site?

*Note: To complete these steps, you must be assigned a role having the necessary permissions within the site.*

## Go to Site Info.



Select the **Site Info** link in the Tool Menu of your site.


# Change the role from the drop-down menu in the list of enrolled participants.

## DAC-EDUCATION-DEPT1-SUBJ1-201 Participant List (# 5)

Viewing 1 - 5 of 5 items

|< < show 200 items per page > >|

[Printable Version](#)

Name 	Id	Credits	Role	Status	<input type="checkbox"/> Remove?
Demo, Student01 ( student01 )			Student ▼	Active ▼	<input type="checkbox"/>
Demo, Student02 ( student02 )			Student ▼	Active ▼	<input type="checkbox"/>
Demo, Student03 ( student03 )			Student ▼	Active ▼	<input type="checkbox"/>
Demo, Student04 ( student04 )			Student ▼	Active ▼	<input type="checkbox"/>
Test, DA ( datest )			<div><div>Instructor ▼</div><div>Instructor Student Teaching Assistant</div></div>	Active ▼	<input type="checkbox"/>

**Update Participants**

2

Last updated Sep 26, 2017 12:49 PM EDT

Below your site's information, you will see its participant list.

1. Next to the participant(s) whose role(s) you want to change, select the appropriate role(s) from the drop-down menu(s) under "Role".
2. Click **Update Participants** to save your change.

# Realms

# What are Realms?

Realms are a combination of roles and permissions for a site. Every Sakai site has its own unique realm. When a new site is created, it is based on a template site and copies the roles and permissions from the template. Modifications to roles and permissions within a template realm will affect all new sites created from that template. However, once created, an individual, non-template site's realm can be modified to create custom roles and/or permissions within that specific realm, independent of the original template. Realms can be viewed and modified using the administrative Realms tool.

## Site Template Realms

Depending on the type of site being created, one of the following templates is used.

- If the site is a user workspace, the template used is **!site.user**.
- If the site is not a user workspace, and has a type configured, the template used will be **!site.template.<type>** where <type> is the site type (e.g. **!site.template.course**, **!site.template.project**, etc.).
- If there is no site type defined, the default template is **!site.template**.

## User Template Realms

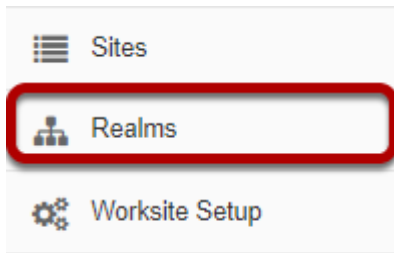
User accounts are also based on realms.

- **!user.template.<usertype>**, this realm depends on the user type. Do not confuse this with the user's role.
- **!user.template**

## Site Helper Template

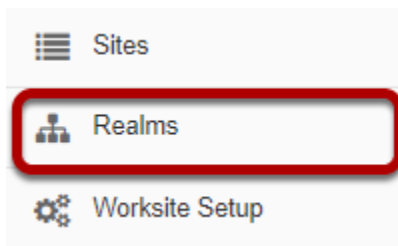
The **!site.helper** template can be used to force permissions on a role for all existing sites. This is useful if you have need to add new roles or change role permissions in all sites after many sites have been created.

**To access this tool, select Realms from the Tool Menu in the Administration Workspace.**



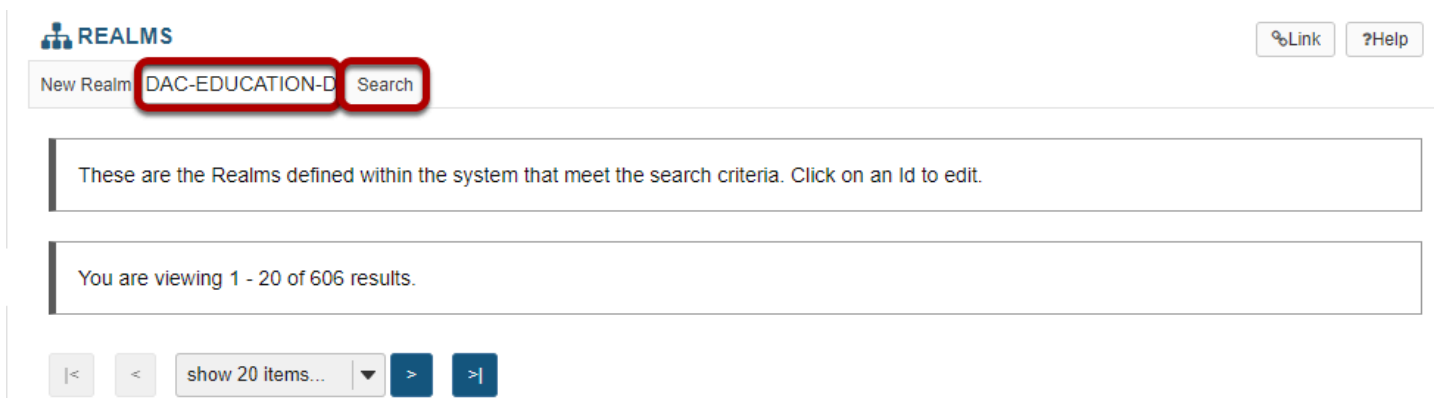
# How do I search Realms?

## Go to Realms.



Select the **Realms** tool from the Tool Menu of the Administration Workspace.


## Enter the site id for the site you are looking for and click Search.



*Tip: You can locate the site id of a course or project site by using the admin Sites tool to search for the site and view/edit its details, or by accessing the site and copying the site id from the URL displayed in your web browser. The site id is the string of characters displayed just after the /site/ portion of the URL.*

*For example, in the following URL, the site id is shown in bold: <http://qa3-us.sakaiproject.org:8086/portal/site/DAC-EDUCATION-DEPT1-SUBJ1-101>*

# Your search results will display.



[Link](#) [Help](#)

New Realm

DAC-EDUCATION-DEPT1-SUBJ1-101

Search

Clear Search

These are the Realms defined within the system that meet the search criteria. Click on an Id to edit.

You are viewing 1 - 1 of 1 results.

|<

<

show 20 items... ▼

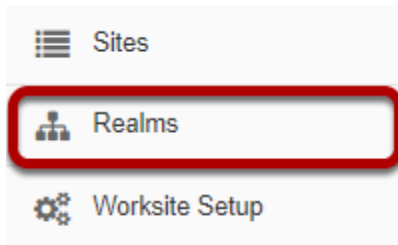
>

>|

Realm Id	Provider Id	Maintain Role
<a href="#">/site/DAC-EDUCATION-DEPT1-SUBJ1-101</a>		Instructor

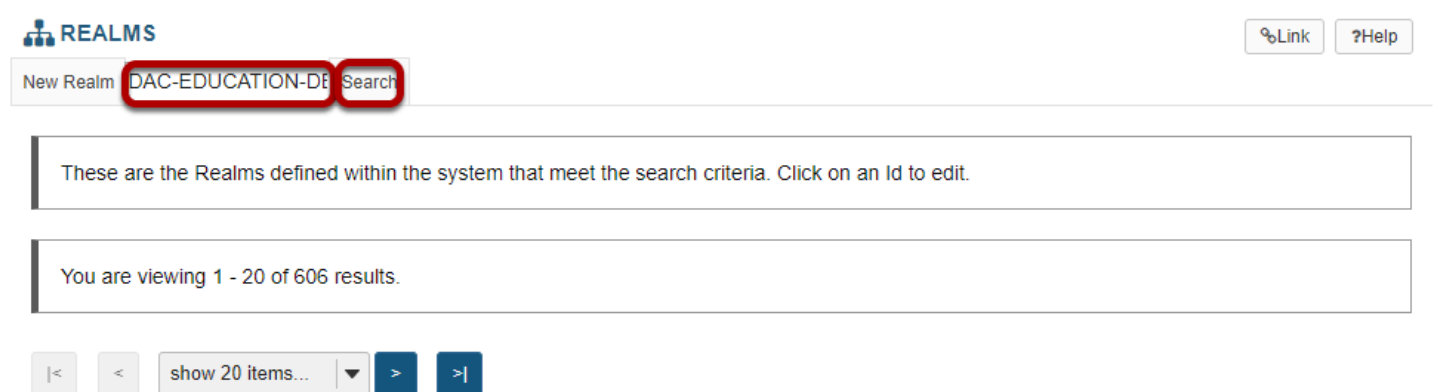
# How do I modify an existing role within a Realm?

## Go to Realms.



Select the **Realms** tool from the Tool Menu of the Administration Workspace.

## Search and locate the site you want to edit.



*Tip: You can locate the site id of a course or project site by using the admin Sites tool to search for the site and view/edit its details, or by accessing the site and copying the site id from the URL displayed in your web browser. The site id is the string of characters displayed just after the /site/ portion of the URL.*

*For example, in the following URL, the site id is shown in bold: <http://qa3-us.sakaiproject.org:8086/portal/site/DAC-EDUCATION-DEPT1-SUBJ1-101>*

# Click on the realm id.

REALMS

New Realm

DAC-EDUCATION-DE

Search

Clear Search

Link

Help

These are the Realms defined within the system that meet the search criteria. Click on an Id to edit.

You are viewing 1 - 1 of 1 results.

|<

<

show 20 items...

>

>|

Realm Id	Provider Id	Maintain Role
<a href="#">/site/DAC-EDUCATION-DEPT1-SUBJ1-201</a>		Instructor

# Click on the role id for the role you want to modify.

REALMS

Remove Realm

Add Role

Grant Ability

Save As

Link

Help

Edit: Realm /site/DAC-EDUCATION-DEPT1-SUBJ1-201

Used for Site: DAC-EDUCATION-DEPT1-SUBJ1-201 (DAC-EDUCATION-DEPT1-SUBJ1-201) Created: Aug 31, 2017 1:09 pm by DA Test (dates) DAC-EDUCATION-DEPT1-SUBJ1-201. Review and modify this Realm's information.

Realm

Realm Id: /site/DAC-EDUCATION-DEPT1-SUBJ1-201

Provider Id:

Maintain Role:

Complete the Realm Edit

Save

Cancel

Users

These are the Roles granted to individual users in this Realm. Click on an Id to edit.

User Id	Role	active	From Provider
<a href="#">student02</a>	Student	✓	
<a href="#">student04</a>	Student	✓	
<a href="#">student03</a>	Student	✓	
<a href="#">student01</a>	Student	✓	
<a href="#">datest</a>	Instructor	✓	

Complete the Realm Edit

Save

Cancel

Roles

These are the Roles defined within this Realm. Click on an Id to edit.

Role Id	Description
<a href="#">Instructor</a>	Can read, revise, delete and add both content and participants to a site.
<a href="#">Student</a>	Can read content, and add content to a site where appropriate.
<a href="#">teaching Assistant</a>	Can read, add, and revise most content in their sections.

Complete the Realm Edit

Save

Cancel

Sakai 19 Administrator Guide (English)

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# Select the desired permissions.

REALMS

Remove Role

Copy Role...

Link

Help

Set the Functions for this Role.

Edit: Realm /site/DAC-EDUCATION-DEPT1-SUBJ1-201

Used for

Site: DAC-EDUCATION-DEPT1-SUBJ1-201 (DAC-EDUCATION-DEPT1-SUBJ1-201) Created: Aug 31, 2017 1:09 pm by DA Test (datest)  
DAC-EDUCATION-DEPT1-SUBJ1-201

Role

Role Id: Teaching Assistant

Description: Can read, add, and revise r

Should this role be limited to the group provider only? ☐ yes ☒ no

Functions

☐ alias.add

☐ alias.del

☐ alias.upd

☐ annnc.all.groups

☐ annnc.delete.any

☐ annnc.delete.own

☐ annnc.new

☒ annnc.read

☐ annnc.read.drafts

☐ annnc.revise.any

You will see a long list of permissions. This list represents all of the different permissions available to users in the system.

Check the box next to the permissions you want that role to have, and deselect any permissions that you wish to remove from that role.

## Scroll down and Save.

- ☐ user.studentnumber.visible
- ☐ user.upd.any
- ☐ user.upd.own
- ☐ user.upd.own.email
- ☐ user.upd.own.name
- ☐ user.upd.own.passwd
- ☐ user.upd.own.type
- ☐ usermembership.view

**Continue Editing**

Done

**Complete the Realm Edit**

Save

Cancel

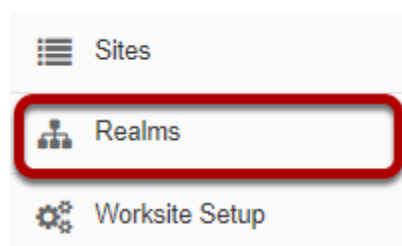
After you have made all of your permission selections, scroll down to the bottom of the page and click **Save**.

*Tip: If you need to edit additional roles within this realm, select the Done button instead to return to the realm detail page and edit other roles before saving your changes to the realm.*

# How do I create a new, or custom role within a Realm?

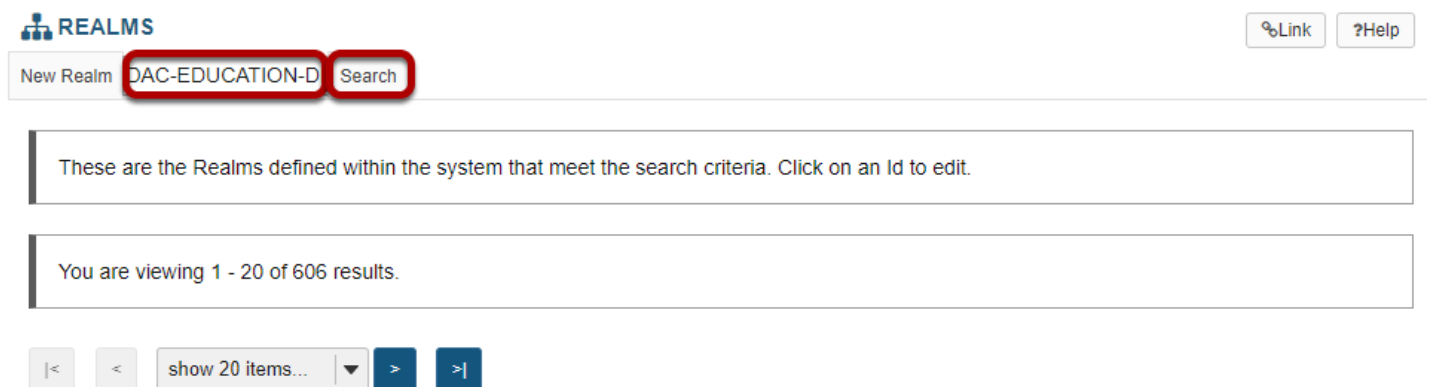
When adding a new role to a realm, it is often easiest to copy an existing role that is similar to the one you want to create, and then add or remove the permissions as required.

## Go to Realms.



Select the **Realms** tool from the Tool Menu of the Administration Workspace.

## Search and locate the site you want to edit.



*Tip: You can locate the site id of a course or project site by using the admin Sites tool to search for the site and view/edit its details, or by accessing the site and copying the site id from the URL displayed in your web browser. The site id is the string of characters displayed just after the /site/ portion of the URL.*

*For example, in the following URL, the site id is shown in bold: <http://qa3-us.sakaiproject.org:8086/portal/site/DAC-EDUCATION-DEPT1-SUBJ1-101>*

# Click on the realm id.

REALMS

LinkHelp

New Realm

DAC-EDUCATION-DE

Search

Clear Search

These are the Realms defined within the system that meet the search criteria. Click on an Id to edit.

You are viewing 1 - 1 of 1 results.

|<

<

show 20 items...

>

>|

Realm Id	Provider Id	Maintain Role
/site/DAC-EDUCATION-DEPT1-SUBJ1-101		Instructor

# Click on the role id for the role you want to modify.

Edit: Realm /site/DAC-EDUCATION-DEPT1-SUBJ1-101

Used for Site: DAC-EDUCATION-DEPT1-SUBJ1-101 (DAC-EDUCATION-DEPT1-SUBJ1-101) Created: Aug 31, 2017 1:09 pm by DA Test (latest) DAC-EDUCATION-DEPT1-SUBJ1-101: Review and modify this Realm's information.

Realm

Realm Id: /site/DAC-EDUCATION-DEPT1-SUBJ1-101

Provider Id:

Maintain Role: Instructor

Complete the Realm Edit

SaveCancel

Users

These are the Roles granted to individual users in this Realm. Click on an Id to edit.

User Id	Role	active	From Provider
<a href="#">latest</a>	Instructor	✓	

Complete the Realm Edit

SaveCancel

Roles

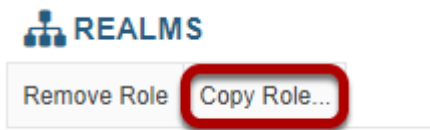
These are the Roles defined within this Realm. Click on an Id to edit.

Role Id	Description
<a href="#">Instructor</a>	Can read, revise, delete and add both content and participants to a site.
<a href="#">Student</a>	Can read content, and add content to a site where appropriate.
<a href="#">Teaching Assistant</a>	Can read, add, and revise most content in their sections.

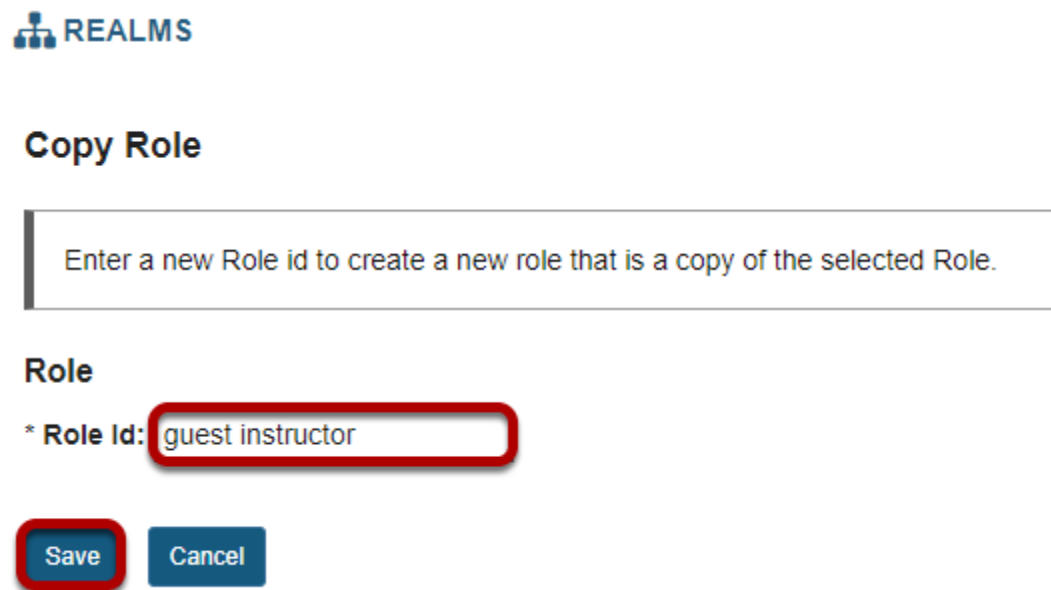
Complete the Realm Edit

SaveCancel

## Click Copy Role.



## Enter a role id for the new role and Save.

A screenshot of the 'Copy Role' form. At the top, it says 'REALMS' with a tree icon. Below that is the title 'Copy Role'. A text box contains the instruction: 'Enter a new Role id to create a new role that is a copy of the selected Role.' Below the text box is the label 'Role'. Underneath, there is a field labeled '\* Role Id:' with the text 'guest instructor' entered. The field is highlighted with a red box. At the bottom, there are two buttons: 'Save' (highlighted with a red box) and 'Cancel'.

# Click on the role id for the new role.

REALMS

Remove Realm

Add Role

Grant Ability

Save As

Link

Help

Edit: Realm /site/DAC-EDUCATION-DEPT1-SUBJ1-101

Used for Site: DAC-EDUCATION-DEPT1-SUBJ1-101 (DAC-EDUCATION-DEPT1-SUBJ1-101) Created: Aug 31, 2017 1:09 pm by DA Test (datest) DAC-EDUCATION-DEPT1-SUBJ1-101. Review and modify this Realm's information.

Realm

Realm Id: /site/DAC-EDUCATION-DEPT1-SUBJ1-101

Provider Id:

Maintain Role:

Complete the Realm Edit

Save

Cancel

Users

These are the Roles granted to individual users in this Realm. Click on an id to edit.

User Id	Role	active	From Provider
<a href="#">datest</a>	Instructor	✓	

Complete the Realm Edit

Save

Cancel

Roles

These are the Roles defined within this Realm. Click on an id to edit.

Role Id	Description
<a href="#">Instructor</a>	Can read, revise, delete and add both content and participants to a site.
<a href="#">Student</a>	Can read content, and add content to a site where appropriate.
<a href="#">Teaching Assistant</a>	Can read, add, and revise most content in their sections.
<a href="#">guest instructor</a>	Can read, revise, delete and add both content and participants to a site.

Complete the Realm Edit

Save

Cancel

# Select the desired permissions.

REALMS

Remove Role

Copy Role...

Link

Help

Set the Functions for this Role.

Edit: Realm /site/DAC-EDUCATION-DEPT1-SUBJ1-101

Used for

Site: DAC-EDUCATION-DEPT1-SUBJ1-101 (DAC-EDUCATION-DEPT1-SUBJ1-101) Created: Aug 31, 2017 1:09 pm by DA Test (datest) DAC-EDUCATION-DEPT1-SUBJ1-101

Role

Role Id: guest instructor

Description:

Should this role be limited to the group provider only? ☐ yes ☒ no

Functions

☐ alias.add

☐ alias.del

☐ alias.upd

☒ annnc.all.groups

☒ annnc.delete.any

☒ annnc.delete.own

☒ annnc.new

☒ annnc.read

☒ annnc.read.drafts

☒ annnc.revise.any

☐ annnc.revise.own

You will see a long list of permissions. This list represents all of the different permissions available to users in the system.

Check the box next to the permissions you want that role to have, and deselect any permissions that you wish to remove from that role.

## Scroll down and Save.

- ☐ user.studentnumber.visible
- ☐ user.upd.any
- ☐ user.upd.own
- ☐ user.upd.own.email
- ☐ user.upd.own.name
- ☐ user.upd.own.passwd
- ☐ user.upd.own.type
- ☐ usermembership.view

**Continue Editing**

Done

**Complete the Realm Edit**

Save

Cancel

After you have made all of your permission selections, scroll down to the bottom of the page and click **Save**.

*Tip: If you need to edit additional roles within this realm, select the Done button instead to return to the realm detail page and edit other roles before saving your changes to the realm.*

# What do the various realms in Sakai do?

Below is a listing of various realms in Sakai. This list is not an exhaustive one, since system administrators may edit existing realms or add new custom realms.

## Group template realm

The Site Group feature introduced in Sakai 2.1 introduced group templates `!group.template` and `!group.template.course`. In order for Site Groups to work properly, these templates must have the same roles defined as those in the corresponding site templates `!site.template` and `!site.template.course`. So for Sakai OOTB, `!group.template` has the roles maintain and access, and `!site.template.course` has the roles Instructor, Student, and Teaching Assistant.

## The `!site.helper` realm

Editing a template realm affects all future sites. Editing a site's realm affects the site only. It is sometimes desirable to add a permission to all existing sites. For example, a new tool is added with its set of permissions. It would be nice to add the new tool's default permission settings to roles in all sites so that if an existing site wanted to add the new tool, permissions would be setup properly for the various roles. The `!site.helper` realm provides such a capability. The `!site.helper` realm can be used to assign permissions for a particular role in all sites.

## Other realms and realm templates

A few other realms are delivered with Sakai out of the box. These have special uses as follows.

**`!group.template`** - Used to specify group related permissions for tools that are group aware for sites which do not have a corresponding `!group.template.<sitetype>` realm.

**`!group.template.course`** - Used to specify group related permissions for tools that are group aware for course sites (sites with a type value of 'course')

**`!pubview`** - Gives permissions to non-authenticated users who are viewing public content in a site. Public content includes Announcements, Resources, Syllabus items that have been specified as being public when they were created (or subsequently edited). Public content for a site can be viewed from the Site Browser tool on the Gateway page, before a user logs in. `!pubview` typically has read only permissions set so that unauthenticated users can see the public content but not add/change site content.

**`!site.helper`** - Can be used to grant permission to all sites, as a way of retroactively granting permissions when a new permission is added to the system.

**`!site.template`** - Realm template used for sites that do not have any type, or for which a corresponding `!site.template.<sitetype>` does not exist.

**!site.template.course** - Realm template for sites of type 'course'.

**!site.template.myworkspace** - Not used.

**!site.user** - Provides permissions to the user in their My Workspaces. When a user first logs in, their My Workspace inherits this realm by default.

**!user.template** - User templates are a way of granting certain permissions to users within the scope of their My Workspace based on their account type. Currently, these templates are used to grant the ability to create new sites or not via the site.new permission. If the user template has site.new checked, then the 'New' action appears in the user's Worksite Setup tool in their My Workspace. If the site.new permission is not checked, then the user cannot create new worksites since the New action will be missing from their Worksite Setup toolbar.

**!user.template** - Used for user account with no type, or accounts which have a type but for which there isn't a corresponding !user.template.<accounttype> realm.

**!user.template.guest** - Used for user accounts of type 'guest'.

**!user.template.maintain** - Used for user accounts of type 'maintain'

**!user.template.registered** - Used for user accounts of type 'registered'

**!user.template.sample** - Used for user accounts of type 'sample'

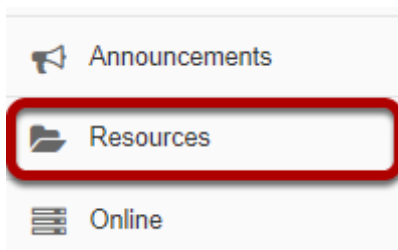
# Resources

# What Resources are specific to admin users?

The Resources tool within the Administration Workspace functions the same way as the Resources tool in other sites. However, within the Administration Workspace, Resources also provides access to files and directories in the system that non-admin users do not see.

## Go to Resources.

Select **Resources** from the Tool Menu in the Administration Workspace.



## View available directories.

**RESOURCES** [Link](#) [? Help](#)

Site Resources Trash Transfer Files  [Jump to Resource](#)

[All site files](#) / root

Show Hide [Display Columns](#)

<input type="checkbox"/> <a href="#">Title</a>	Access	<a href="#">Created By</a>	<a href="#">Modified</a>	<a href="#">Size</a>
<a href="#">root</a> <a href="#">Actions</a>				
1 <a href="#">attachment</a> <a href="#">Actions</a>	Public	Sakai Administrator	Mar 31, 2002 7:00 pm	3 items
2 <a href="#">group</a> <a href="#">Actions</a>	Entire site	Sakai Administrator	Mar 31, 2002 7:00 pm	10 items
3 <a href="#">group-user</a> <a href="#">Actions</a>	Entire site	Sakai Administrator	Mar 31, 2002 7:00 pm	5 items
4 <a href="#">private</a> <a href="#">Actions</a>	Entire site	Sakai Administrator	Mar 31, 2002 7:00 pm	1 item
5 <a href="#">public</a> <a href="#">Actions</a>	Public	Sakai Administrator	Mar 31, 2002 7:00 pm	0 items
6 <a href="#">user</a> <a href="#">Actions</a>	Entire site	Sakai Administrator	Mar 31, 2002 7:00 pm	18 items
<a href="#">Content from My Other Sites</a>				

Admin users may browse any of the following folders to view files on the system:

1. The **attachment** directory contains files uploaded within individual sites as part of a message attachment, a quiz, etc.
2. The **group** directory contains files uploaded to the Resources tool within individual sites. Sub-directories within this folder are named with the title of the site.
3. The **group-user** directory contains all of the folders and files associate with the Drop Box tool in individual sites.
4. The **private** directory contains files uploaded to the Profile tool (i.e. users' Photo Gallery or Profile Images).
5. The **public** directory contains files which can be viewed by all users in the system. Admin users should place files in this location if they wish to share them with all users in the system - for example, images to be used in Message of the Day notifications.
6. The **user** directory contains files uploaded to individual users' Home areas.

# Search

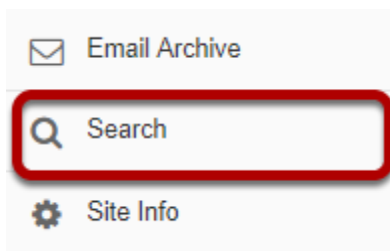
# Search Administration

*Note: To complete the procedures in this document, you need to be assigned a role that has the necessary permissions.*

Admin users are allowed to administer all aspects of the search engine. These users are allowed access to the administration page of the Search Tool. This page gives these users access to parts of the Search Engine which is used by the Search Tool.

The Administration page shows information about the indexing worker threads in the server cluster, and their state. It also shows information concerning the current index queue.

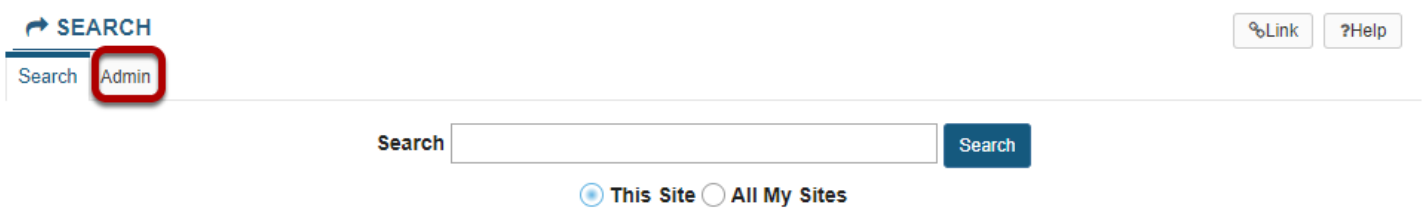
## Go to Search.



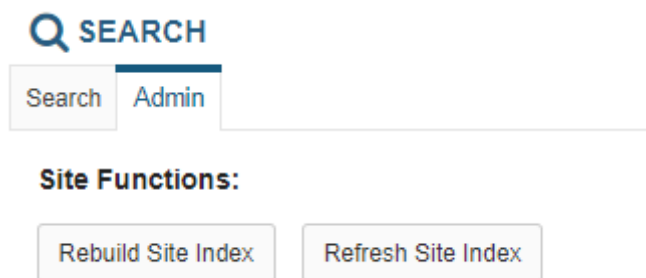
Select the **Search** tool from the Tool Menu of your site.

*Note: You must be logged in as an admin user to access the admin Search options.*

## Click Admin.



## Site Functions (Rebuild Site Index, Refresh Site Index)

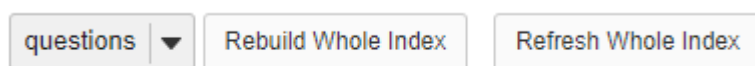


Site administrators or maintainers are allowed to issues refresh and rebuild commands against the site which they maintain.

- **Rebuild Site Index** deletes the index for the current site only, and requests that all tools in the site resubmit all content to the search engine for re-indexing. If you have a large site, this operation may take some time.
- **Refresh Site Index** takes all the content in the current site only and refreshes the index for that site. While this command is being enacted upon by the indexer threads, the search index will still contain all of the site content.

## Index Functions

Index Functions:



The index queue is a queue of indexing commands that are enacted upon by search indexer threads. These commands take 3 forms.

1. Global commands that control the whole search engine.
2. Site wide commands that control the search engine in the context of the current site.
3. Document commands that inform the search engine of items to be added or removed from the index.

## Global Commands (Rebuild Whole Index, Refresh Whole Index)

Only instance administrators are allowed to perform Global operations.

- **Rebuild Whole Index** deletes the entire index, and requests that all tools in the system resubmit all content to the search engine for re-indexing. This operation should only be

performed with caution, since a large site may take several hours to complete this operation.

- **Refresh Whole Index** is only slightly more drastic as it takes all the content known to the search engine, and refreshed the index. While this command is being enacted upon by the indexer threads, the search index will still contain all of the content.

## View Search administration information.

1

Last loaded at Tue Dec 05 10:50:39 EST 2017 in 1.512489039232E9

Being indexed by qa01-sakai expected to finish before qa01-sakai

Index contains 73 documents and 0 pending

Last loaded at Wed Dec 31 19:00:00 EST 1969 in 0.0

Being indexed by qa01-sakai expected to finish before qa01-sakai

Index contains 547 documents and 0 pending

2

Master Control Records			
Context	Operation	Current Status	Last Update
Master Control Records			
Context	Operation	Current Status	Last Update

3

Site Control Records			
Context	Operation	Current Status	Last Update

4

Indexer Workers		
Worker Thread	Due Before	Status
qa01-sakai(qa01-sakai.marist.edu)	null	Index builder: default idle. Index Size: 0.02 GB Refresh Time: 1075ms Flush Time: 56ms Merge Time: 0ms Index builder: questions idle. Index Size: 0.0 GB Refresh Time: 0ms Flush Time: 172ms Merge Time: 0ms
qa01-sakai(qa01-sakai.marist.edu)	null	Index builder: default idle. Index Size: 0.02 GB Refresh Time: 1075ms Flush Time: 56ms Merge Time: 0ms Index builder: questions idle. Index Size: 0.0 GB Refresh Time: 0ms Flush Time: 172ms Merge Time: 0ms

5

Segments		
Segment Name	Size	Last update
Index Segment Info is not implemented		

1. The first block of information informs you when the index was last loaded by the Index Searcher on the cluster node you are connected to. It also informs you of current index activity, which may be none if no indexing is being performed, or a indexer thread id and an expected time of completion if there is an index operation in progress. The final information item in this block is the state of the index and the index queue.
2. **Master Control Records** informs you of the state of any global commands in the index queue.
3. **Site Control Records** informs you of the state of any work site control records in the index queue. This will include commands from sites other than the ones that you maintain.
4. **Index Workers** provides a list of all indexer threads in the Sakai cluster. In this list is the ID of the thread, the last time a heartbeat was received, and the current state of the thread, either idle or running. If the thread its ID will be present in the first information block with an estimated time of completion.
5. Finally there is a block of information about the search index segments that are used by the search engine to store its state.

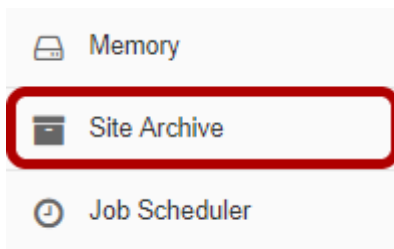
# Site Archive

# What is the Site Archive tool?

The Site Archive tool allows admin users to "back up" or archive sites within the system, as well as import sites from existing archives. The archives created via Site Archive may be kept for institutional records, or used for transferring a site from one Sakai instance to another.

*Note: The archive file contains all site content, but does NOT contain user data such as student activity, messages, assignment submissions, forum posts, etc.*

**To access this tool, go to Site Archive from the Tool Menu in the Administration Workspace.**

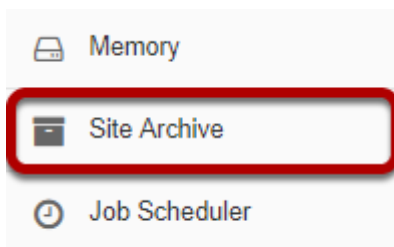


# How do I export/archive an individual site?

Exporting or archiving a site will create folder containing archive files which can be used for offline data retention or for transfer to another instance of Sakai. By default, site archives are placed on the file server in the following location: \$CATALINA\_HOME/sakai/archive/


*Note: Exporting/archiving a site copies all of the site content into an archive file, but does NOT copy user data.*

## Go to Site Archive.



Select the **Site Archive** tool from Tool Menu in the Administration Workspace.

## In the Export from site field, enter the site id.

 **SITE ARCHIVE**

Import/Export Batch Import/Export Download archives

**Archive and Import (single site)**


**Export**

from site

Zip ☐

**Archive**

Check the Zip box to create a zipped archive file for download.

 SITE ARCHIVE

Import/Export Batch Import/Export Download archives

---

Archive and Import (single site)


Export

from site

Zip ☒

Archive

Click Archive.

 SITE ARCHIVE

Import/Export Batch Import/Export Download archives

---

Archive and Import (single site)


Export

from site

Zip ☒

Archive

# Archive progress will be displayed.

 SITE ARCHIVE

Link

Help

Import/Export

Batch Import/Export

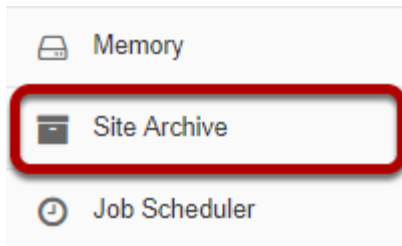
Download archives

Archive and Import (single site)

Alert: Archiving tools and contents of site DAC-EDUCATION-DEPT1-SUBJ1-101:  
archiving syllabus context /DAC-EDUCATION-DEPT1-SUBJ1-101/main.  
archiving syllabus: (0) syllabys items archived successfully.  
archiving messageforum context /DAC-EDUCATION-DEPT1-SUBJ1-101/main.  
archiving messageforum: empty messageforum DF archived.  
archiving email channel /mailarchive/channel/DAC-EDUCATION-DEPT1-SUBJ1-101/main.  
archiving Wiki Pages for DAC-EDUCATION-DEPT1-SUBJ1-101  
archiving: Completed 0 pages and 0 versions  
archiving poll context /DAC-EDUCATION-DEPT1-SUBJ1-101/main.  
Error archiving collection from site: DAC-EDUCATION-DEPT1-SUBJ1-101 org.sakaiproject.exception.IdUnusedException  
id: /group/DAC-EDUCATION-DEPT1-SUBJ1-101/  
commons: Started.  
commons: Finished. 0 post(s) archived.  
archiving basiciti DAC-EDUCATION-DEPT1-SUBJ1-101  
archiving basiciti (0) tools archived  
archiving web context /DAC-EDUCATION-DEPT1-SUBJ1-101/main.  
archiving web: (0) web content items archived successfully.  
archiving samigo

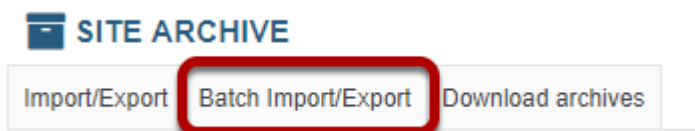
# How do I batch export or archive multiple sites?

## Go to Site Archive.



Select the **Site Archive** tool from Tool Menu in the Administration Workspace.

## Click Batch Import/Export.




## Select a term from the drop-down menu.



The term drop-down menu will be populated with the existing terms in your instance of Sakai. Click on the term you wish to archive to select it.

## Click Archive.

 SITE ARCHIVE

Import/Export Batch Import/Export Download archives


Archive and Import (batch)

Export by term

Select a term Summer 2017 ▼

Archive

## Confirm the list of sites to be archived.

 SITE ARCHIVE

Confirm batch archive

The following sites were found matching term: **Summer 2017**. Click 'Archive these sites' to begin archiving.

DAC-EDUCATION-DEPT1-SUBJ1-126 (DAC-EDUCATION-DEPT1-SUBJ1-126)

DAC-EDUCATION-DEPT1-SUBJ1-226 (DAC-EDUCATION-DEPT1-SUBJ1-226)

DAC-EDUCATION-DEPT1-SUBJ1-326 (DAC-EDUCATION-DEPT1-SUBJ1-326)

DAC-EDUCATION-DEPT1-SUBJ1-401 (DAC-EDUCATION-DEPT1-SUBJ1-401)

DAC-EDUCATION-DEPT1-SUBJ1-476 (DAC-EDUCATION-DEPT1-SUBJ1-476)

Discussion 3 SMPL202 (d35cc694-8fe2-40d9-8c59-eddcf88c9a08)

Marist SMP 101 Summer 2017 (66e5cdfa-f5ed-4558-a14e-745c48eaae64)

Archive these sites Cancel

You will see a list of all sites from the selected term. If this list is correct, click **Archive these** sites to create the site archives.

# You will see a progress indicator as site archives are created.

## SITE ARCHIVE

Import/Export   Batch Import/Export   Download archives

### Archive and Import (batch)

#### Export by term

 Archiving 7 sites for term: **Summer 2017**. 1 sites archived. 14% complete.

#### Import from file

##### Batch import file

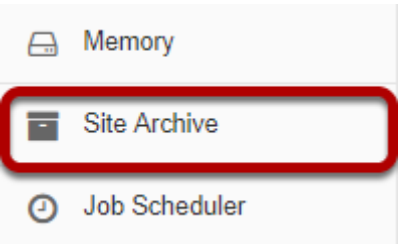
Choose File   No file chosen

Import

*Note: Depending on the number and size of the sites you have selected for archiving, this process may take a while.*

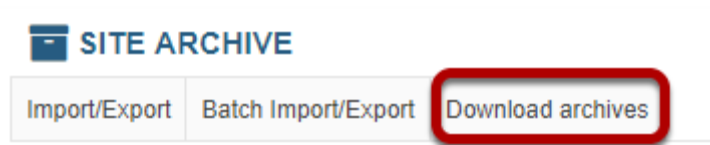
# How do I download archive files?

Go to Site Archive.



Select the **Site Archive** tool from Tool Menu in the Administration Workspace.

Click Download Archives.



Click on the site archive you want to download.

Download archives			
Site details	Date archived	Size	Hash (SHA-1)
<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-476 (DAC-EDUCATION-DEPT1-SUBJ1-476)</a>	2017-09-28 13:28:19	8 KB	da39a3ee5e6b4b0d3255bfef95601890afd80709
<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-101 (DAC-EDUCATION-DEPT1-SUBJ1-101)</a>	2017-09-28 13:17:56	7 KB	da39a3ee5e6b4b0d3255bfef95601890afd80709
<a href="#">Discussion 3 SMPL202 (d35cc694-8fe2-40d9-8c59-eddcf88c9a08)</a>	2017-09-28 13:28:19	8 KB	da39a3ee5e6b4b0d3255bfef95601890afd80709
<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-401 (DAC-EDUCATION-DEPT1-SUBJ1-401)</a>	2017-09-28 13:28:19	8 KB	da39a3ee5e6b4b0d3255bfef95601890afd80709
<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-226 (DAC-EDUCATION-DEPT1-SUBJ1-226)</a>	2017-09-28 13:28:19	8 KB	da39a3ee5e6b4b0d3255bfef95601890afd80709
<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-326 (DAC-EDUCATION-DEPT1-SUBJ1-326)</a>	2017-09-28 13:28:19	8 KB	da39a3ee5e6b4b0d3255bfef95601890afd80709
<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-126 (DAC-EDUCATION-DEPT1-SUBJ1-126)</a>	2017-09-28 13:28:19	8 KB	da39a3ee5e6b4b0d3255bfef95601890afd80709
<a href="#">Marist SMP 101 Summer 2017 (66e5cdfa-f5ed-4558-a14e-745c48eaae64)</a>	2017-09-28 13:28:20	10 KB	a7a2daba2f3a58dfb217354e3cd0f5db61f0e94c

*Note: Site archives must be downloaded individually.*

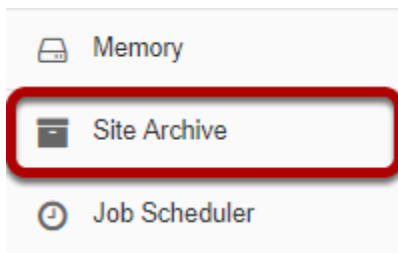
# How do I import an individual site archive?

A site archive may be imported via the Site Archive tool in the Administration Workspace, or into an existing site via Worksite Setup.

## Preparing an archive to be restored.

Unzip/uncompress the archive (depending on archive format) to a directory in \$CATALINA\_HOME/sakai/archive . This depends upon access to the server upon which Sakai is running. The "sakai" directory is the same directory that contains the properties file(s), typically saka.properties or local .properties. "archive" is a subdirectory you need to create within the sakai directory.

## Importing an archive via Site Archive.



Select the **Site Archive** tool from the Tool Menu in the Administration Workspace.

## Enter the import information and Import.

### SITE ARCHIVE

Import/Export   Batch Import/Export   Download archives

#### Archive and Import (single site)

##### Export

from site

Zip ☐

Archive

##### Import

1 file

2 to site

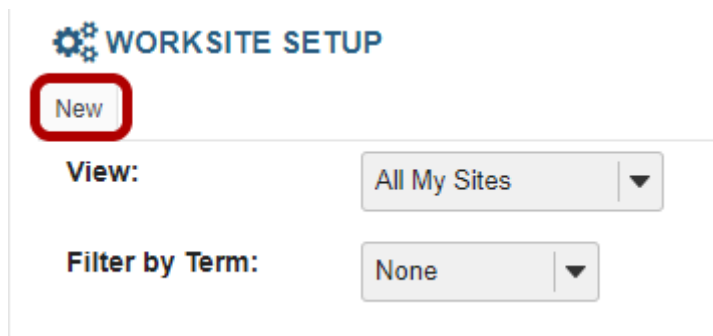
3


1. Enter the top level directory name for the archive directory on the server. The location of the directory is mentioned above in "Preparing an archive to be restored". The typical pattern for the directory name is **siteid-archive**. Please use whatever the actual directory name is.
2. Enter the site id for the destination site where the archive content will be copied. If the destination site id does not exist, a new site with the specified id will be created.
3. Click **Import**.

## Importing an archive via Worksite Setup

Select the **Worksite Setup** tool from the Tool Menu in either the Administration Workspace or My Workspace.

## Click New.



 **WORKSITE SETUP**

**New**


**View:** All My Sites ▼

**Filter by Term:** None ▼

## Select Create site from archive.

### Create Site

A site can be created in a number of different ways:

- ☐ Build your own site  
This is for experienced users and lets site owners add individual site tools.
- ☐ Create site from template  
This gives a pre-configured site which already contains a selection of hand-picked tools.
- ☒  Create site from archive  
This allows you to use an existing site archive as a base for your new site, content from the archive will be added to the new site.  
Content from the site archive will be imported into the new site.

\* New site type course site ▼

\* New site term Spring 2017 ▼

You can add or remove tools from either type of site at any time.

**Continue** **Cancel**

## Follow the series of prompts to create a new site.

After the last step in the site creation process, you will have the opportunity to upload an archive.

**Click Choose File to browse for and select the archive file.**

## WORKSITE SETUP

### Upload archive

Content from the site archive will be imported into the new site.

\* Choose archive

Choose File No file chosen

Upload archive

Back

Cancel

**Click Upload archive.**

## WORKSITE SETUP

### Upload archive

Content from the site archive will be imported into the new site.

\* Choose archive

Choose File DAC-EDUCAT...32819.zip

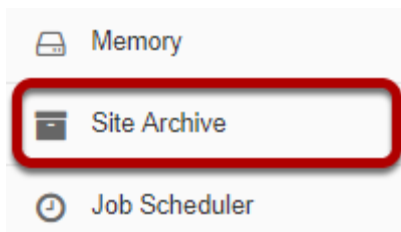
Upload archive

Back

Cancel

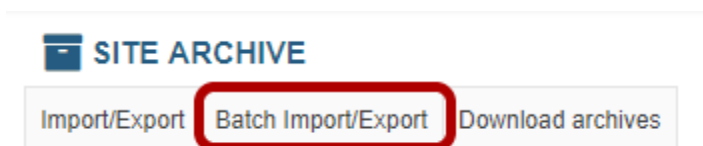
# How do I batch import multiple site archives?

## Go to Site Archive




Select the **Site Archive** tool from the Tool Menu in the Administration Workspace.

## Select Batch Import/Export.



**Click Choose File to locate your batch import file.**

 **SITE ARCHIVE**

Import/Export Batch Import/Export Download archives

---

**Archive and Import (batch)**

Export by term

Select a term


---

**Import from file**

Batch import file

No file chosen

**Once you have selected the batch import file, click Import.**

 **SITE ARCHIVE**

Import/Export Batch Import/Export Download archives

---

**Archive and Import (batch)**

Export by term

Select a term

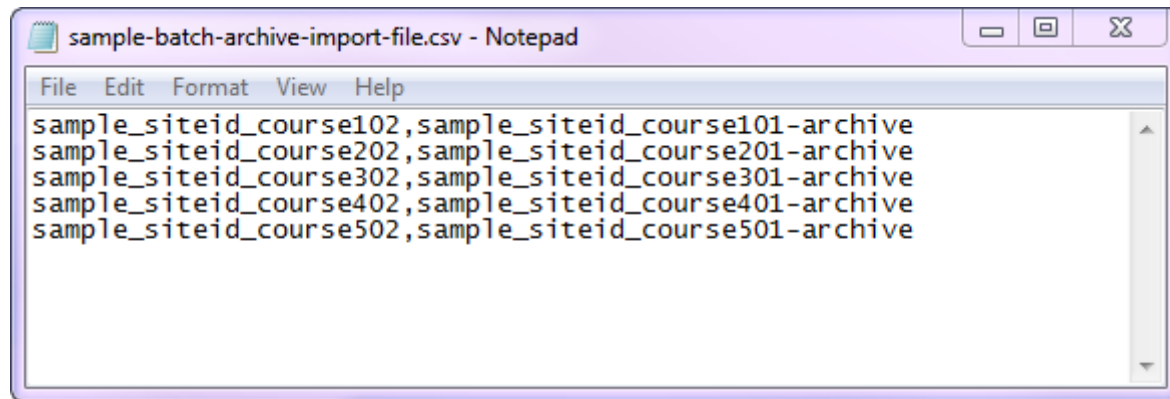
---

**Import from file**

Batch import file

sample-batch-...ort-file.csv

## Import file format.



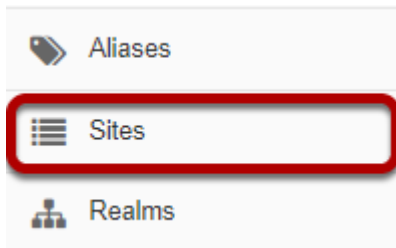
Your import file should list the target site id followed by a comma and then the archive id in the siteid-archive format, one archive per line.

# Sites

# What is the Sites tool?

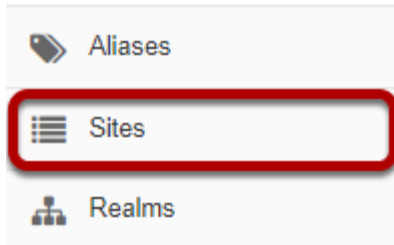
The Sites tool allows admin users to create, modify, delete, and search for course, project, and workspace sites.

**To access this tool, select Sites from the Tool Menu in the Administration Workspace.**




# How do I search for a site using the Sites tool?

Go to the Sites tool.



Select the **Sites** tool from the Tool Menu of the Administration Workspace.

Enter your search criteria.

A screenshot of the Sites tool search interface. At the top left, there is a blue icon of a list followed by the text 'SITES'. Below this, there is a search form. The form has a label 'New Site' followed by a text input field containing the number '101'. To the right of the input field is a button labeled 'Search'. The 'Search' button is highlighted with a red rectangular border. To the right of the 'Search' button are two more input fields, one labeled 'Site ID' and one labeled 'User ID'.

You may search for sites by keyword, site id, or user id (for workspace sites). Once you have entered your criteria, click on the appropriate **Search**, **Site ID**, or **User ID** button to view matching results.

# View search results.

SITES

New Site

101

Search

Clear Search

Site ID

User ID

Link

Help

Sites

These are the Sites defined within the system that meet the search criteria. Click on an Id to edit.

You are viewing 1 - 20 of 38 results.

|<

<

show 20 items...

>

>|

Site Id	Title	Published	Joinable?	Type	Description, URLs
<a href="#">  DAC-EDUCATION-DEPT1-SUBJ1-101  </a>	DAC-EDUCATION-DEPT1-SUBJ1-101	✓		course	<b>Short Description:</b> DAC-EDUCATION-DEPT1-SUBJ1-101 <b>Description:</b> DAC-EDUCATION-DEPT1-SUBJ1-101 <b>Created:</b> Aug 31, 2017 1:09 pm DA Test
<a href="#">  DAC-EDUCATION-DEPT1-SUBJ2-101  </a>	DAC-EDUCATION-DEPT1-SUBJ2-101	✓		course	<b>Short Description:</b> DAC-EDUCATION-DEPT1-SUBJ2-101 <b>Description:</b> DAC-EDUCATION-DEPT1-SUBJ2-101 <b>Created:</b> Aug 31, 2017 1:09 pm DA Test
<a href="#">  DAC-EDUCATION-DEPT1-SUBJ3-101  </a>	DAC-EDUCATION-DEPT1-SUBJ3-101	✓		course	<b>Short Description:</b> DAC-EDUCATION-DEPT1-SUBJ3-101 <b>Description:</b> DAC-EDUCATION-DEPT1-SUBJ3-101 <b>Created:</b> Aug 31, 2017 1:09 pm DA Test
<a href="#">  DAC-EDUCATION-DEPT2-SUBJ1-101  </a>	DAC-EDUCATION-DEPT2-SUBJ1-101	✓		course	<b>Short Description:</b> DAC-EDUCATION-DEPT2-SUBJ1-101 <b>Description:</b> DAC-EDUCATION-DEPT2-SUBJ1-101 <b>Created:</b> Aug 31, 2017 1:09 pm DA Test

All sites matching your criteria will be displayed in a list.

Sakai 19 Administrator Guide (English)

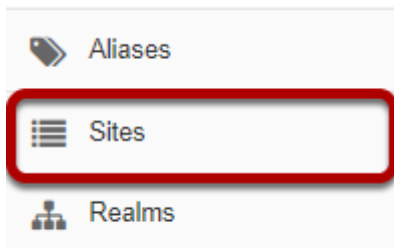
Page 232

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# How do I add a site using the Sites tool?

*Note: While it is possible to create new sites from the Sites tool, it is not the preferred way of manually creating sites because it does not automatically add tools to the site. The preferred method for manually adding new sites is using the Worksite Setup tool.*

## Go to Sites.



Select the **Sites** tool from the Tool Menu of the Administration Workspace.

## Click New Site.



# Enter the site information and Save.

**Edit: Site**

Review and modify this Site's information.

**Site**

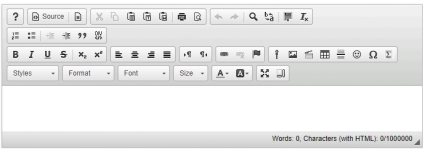
1 Site Id:

2 Title:

3 Site URL Alias:

4 Type:

5 Short Description:

6 Description: 

7 Published: ☒ unpublished ☐ published

8 Softly Deleted: ☐ yes ☒ no

9 Joinable?: ☐ yes ☒ no

10 Role to assign to joiners:

11 Worksite Icon URL:

12 Worksite Info URL:

13 Skin:

14 Public View?: ☐ yes ☒ no

15 Custom Page Order?: ☐ yes ☒ no

Continue Editing

16 [Add Edit Properties](#)

17 [Add Edit pages](#)

18 [Add Edit groups](#)

Complete the Site Edit

19 [Save](#) [Cancel](#)

Enter the following information for your new site:

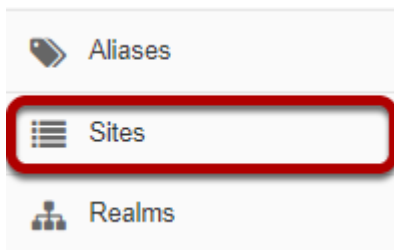
1. **Site Id:** Enter a site id for the new site. This id must be unique and should not contain spaces or special characters. (Hyphens and underscores are acceptable.)
2. **Title:** Enter a title for the site. The title is what users will see in the courses tabs and when the site is listed in Worksite Setup.
3. **Site URL Alias:** (Optional) You may enter a site alias if you choose. This alias is typically a friendlier name for the site which can be more easily typed or distributed as a site URL.
4. **Type:** Enter either **course** or **project** in this field to indicate the type of site you are creating. If you leave this field blank, it will default to a project site.
5. **Short Description:** (Optional) Enter a short description for the site.
6. **Description:** (Optional) Enter a longer description for the site. You may use the Rich Text Editor here to format the text of the description and/or add images or links. This description is what users will see when they first enter the course on the home page of the site. It is also visible when users search the server for sites to join.
7. **Published:** Select either **published** or **unpublished** to indicate the status of the site.
8. **Softly Deleted:** Select **yes** or **no** to indicate whether or not this site has been softly deleted.
9. **Joinable:** Select **yes** or **no** to indicate if this site is joinable.
10. **Role to assign to joiners:** (Optional) If your site is joinable, you may assign a role for joiners (e.g. student).
11. **Worksite Icon URL:** (Optional) If you enter the URL for an image file, this image will be displayed within the site, just above the Tool Menu. Note that this image should be publicly available, so that all users accessing the site will have permission to view the image.

12. **Worksite Info URL:** (Optional) If you enter a URL for a web page, this page will be displayed in the site instead of the Description information entered above. (This URL may also be modified within the site by editing the Site Information Display.)
13. **Skin:** (Optional) If you would like to apply a specific color scheme to this site that is different from the default skin or theme, enter the name of the skin here. (Skins must already be configured on the server in order to use this option.) If you leave this field blank, the default skin for your instance will be applied to the site.
14. **Public View:** Select **yes** or **no** to indicate if this site is viewable to the public without a login.
15. **Custom Page Order:** Select **yes** or **no** to indicate if this site has a custom page order for Tool Menu items.
16. **Properties:** Click on the **Properties** button to configure site properties, such as the academic term.
17. **Pages:** Click on the **Pages** button to select pages or course tools that you would like to add to the site.
18. **Groups:** Click on the **Groups** button to create or edit groups for this site.
19. **Save:** Click **Save** when you have finished entering information to create the new site.

# How do I edit a site using the Sites tool?

Once a site has been created, you can edit any of the site information with the exception of the site id. The site id cannot be changed via the Sites tool once the site has been created.

## Go to Sites.



Select the **Sites** tool from the Tool Menu of the Administration Workspace.

## Locate the site you want to edit.

**SITES** [Link](#) [Help](#)

New Site

### Sites

These are the Sites defined within the system that meet the search criteria. Click on an Id to edit.

You are viewing 1 - 1 of 1 results.

Site Id	Title	Published	Joinable?	Type	Description, URLs
<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-101</a>	DAC-EDUCATION-DEPT1-SUBJ1-101	✓		course	<b>Short Description:</b> DAC-EDUCATION-DEPT1-SUBJ1-101 <b>Description:</b> DAC-EDUCATION-DEPT1-SUBJ1-101 <b>Created:</b> Aug 31, 2017 1:09 pm DA Test

Use the Search function to find the site you want to modify.

## Click on the site id of the site.

Site Id	Title	Published	Joinable?	Type	Description, URLs
<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-101</a>	DAC-EDUCATION-DEPT1-SUBJ1-101	✓		course	<b>Short Description:</b> DAC-EDUCATION-DEPT1-SUBJ1-101 <b>Description:</b> DAC-EDUCATION-DEPT1-SUBJ1-101 <b>Created:</b> Aug 31, 2017 1:09 pm DA Test

## Edit the site information and Save.

Edit: Site DAC-EDUCATION-DEPT1-SUBJ1-101

Review and modify this site's information.

**Site**

Site id: DAC-EDUCATION-DEPT1-SUBJ1-101

Title:

Site URL Alias:

Type:

Short Description:

Description: 

DAC-EDUCATION-DEPT1-SUBJ1-101

**Published:** ☐ unpublished ☒ published

**Notify Deleted:** ☐ yes ☒ no

**Joinable:** ☐ yes ☒ no

**Role to assign to joiners:**

**Worksite icon URL:**

**Worksite info URL:**

**Site:**

**Public View:** ☐ yes ☒ no

**Custom Page Order:** ☐ yes ☒ no

**Info**

Created by: DA Test

Created: Aug 31, 2017 1:09 pm

Modified By: DA Test

Modified: Aug 31, 2017 1:09 pm

Notify Deleted on:

**Properties**

Subject:

School:

Term:

Term end:

Department:

**Continue Editing**

Complete the Site Edit

You may edit any of the following information for the existing site.

1. **Title:** Edit the title for the site. The title is what users will see in the courses tabs and when the site is listed in Worksite Setup.
2. **Site URL Alias:** You may enter or edit a site alias if you choose. This alias is typically a friendlier name for the site which can be more easily typed or distributed as a site URL.
3. **Type:** You may edit **course** or **project** in this field to indicate the type of site. However, please note that changing the type of site after it has been created will not change the default roles for site participants.
4. **Short Description:** Enter or edit a short description for the site.
5. **Description:** Enter or edit a longer description for the site. You may use the Rich Text Editor here to format the text of the description and/or add images or links. This description is

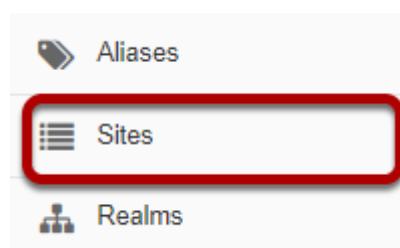
what users will see when they first enter the course on the home page of the site. It is also visible when users search the server for sites to join.

6. **Published:** Select either **published** or **unpublished** to indicate the status of the site.
7. **Softly Deleted:** Select **yes** or **no** to indicate whether or not this site has been softly deleted.
8. **Joinable:** Select **yes** or **no** to indicate if this site is joinable.
9. **Role to assign to joiners:** If your site is joinable, you may assign a role for joiners (e.g. student).
10. **Worksite Icon URL:** If you enter the URL for an image file, this image will be displayed within the site, just above the Tool Menu. Note that this image should be publicly available, so that all users accessing the site will have permission to view the image.
11. **Worksite Info URL:** If you enter a URL for a web page, this page will be displayed in the site instead of the Description information entered above. (This URL may also be modified within the site by editing the Site Information Display.)
12. **Skin:** If you would like to apply a specific color scheme to this site that is different from the default skin or theme, enter the name of the skin here. (Skins must already be configured on the server in order to use this option.) If you leave this field blank, the default skin for your instance will be applied to the site.
13. **Public View:** Select **yes** or **no** to indicate if this site is viewable to the public without a login.
14. **Custom Page Order:** Select **yes** or **no** to indicate if this site has a custom page order for Tool Menu items.
15. **Properties:** Click on the **Properties** button to configure site properties, such as the academic term.
16. **Pages:** Click on the **Pages** button to select pages or course tools that you would like to add to the site.
17. **Groups:** Click on the **Groups** button to create or edit groups for this site.
18. **Save:** Click **Save** when you have finished entering information to create the new site.

# How do I Soft Delete a site from the Sites tool?

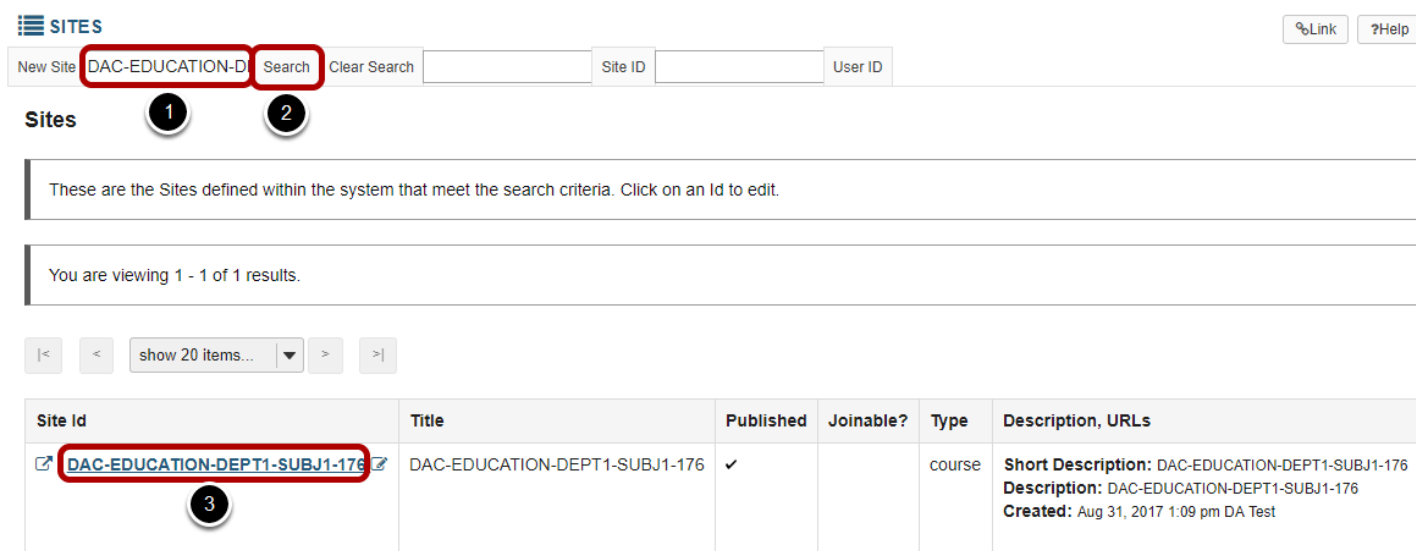
Soft Delete is the default deletion method, and can be done from either the Sites tool in the Administration Workspace, or the [Worksite Setup tool](#) for users with deletion permissions.

## Go to Sites.



Select the **Sites** tool from the Tool Menu in the Administration Workspace.

## Locate the site you want to soft delete.

A screenshot of the 'SITES' tool interface. At the top, there's a search bar with 'New Site' and 'Search' buttons. The 'Search' button is highlighted with a red circle and the number '2'. The search results show one site: 'DAC-EDUCATION-DEPT1-SUBJ1-176'. The site ID is highlighted with a red rectangle and the number '3'. The site details include: Title: DAC-EDUCATION-DEPT1-SUBJ1-176, Published: checked, Joinable?: unchecked, Type: course, and Description: DAC-EDUCATION-DEPT1-SUBJ1-176. The site ID 'DAC-EDUCATION-DEPT1-SUBJ1-176' is also highlighted with a red circle and the number '1'.

**SITES** [Link](#) [Help](#)

New Site

**Sites** 1 2

These are the Sites defined within the system that meet the search criteria. Click on an Id to edit.

You are viewing 1 - 1 of 1 results.

Site Id	Title	Published	Joinable?	Type	Description, URLs
<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-176</a> <span>3</span>	DAC-EDUCATION-DEPT1-SUBJ1-176	✓		course	<b>Short Description:</b> DAC-EDUCATION-DEPT1-SUBJ1-176 <b>Description:</b> DAC-EDUCATION-DEPT1-SUBJ1-176 <b>Created:</b> Aug 31, 2017 1:09 pm DA Test

Find the site you want to delete by performing a search. For example:

1. Enter a search term, such as the site title.
2. Click **Search**.
3. Click on the site id in the search results to go to the detail page for that site.

# Select the Yes radio button next to Softly Deleted.

Edit: Site DAC-EDUCATION-DEPT1-SUBJ1-176

Review and modify this Site's information.

## Site

Site Id: DAC-EDUCATION-DEPT1-SUBJ1-176

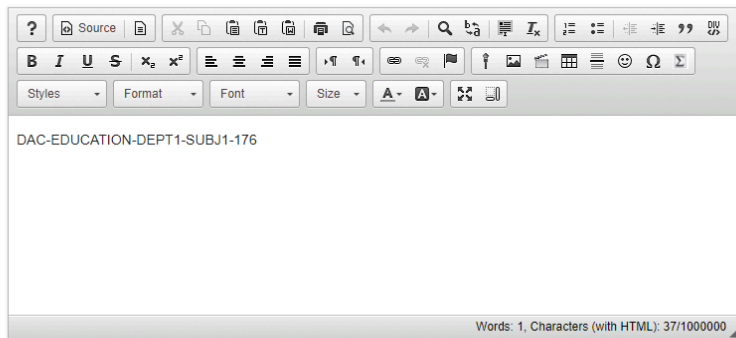
Title: DAC-EDUCATION-DEPT1

Site URL Alias: https://qa01-sakai.marist.edu/portal/site/

Type: course

Short Description: DAC-EDUCATION-DEPT1-

## Description:



The rich text editor displays the text "DAC-EDUCATION-DEPT1-SUBJ1-176". The status bar at the bottom indicates "Words: 1, Characters (with HTML): 37/1000000".

Published: ☐ unpublished ☒ published

Softly Deleted: ☒ yes ☐ no

# Scroll down and click Save.

## Properties

Subject: SUBJ1

School: EDUCATION

term: Spring 2017

term\_eid: Spring 2017

Department: DEPT1

## Continue Editing

Add/Edit Properties

Add/Edit pages

Add/Edit groups

## Complete the Site Edit

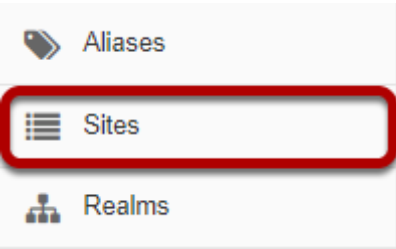
Save

Cancel

# How do I add a stealthed tool to a site?

Stealthed tools are tools which are available in your instance, but are hidden from non-admin users when they select which tools they want to use in a site. In order to add a stealthed tool to a site, the admin user needs to manually add the stealthed tool via the Sites tool.

## Go to Sites.



Select the **Sites** tool from the Tool Menu of the Administration Workspace.

## Locate the site where you would like to add the stealthed tool.

SITES

New Site

DAC-EDUCATION-D

Search

Clear Search

Site ID

User ID

%Link

?Help

Sites

These are the Sites defined within the system that meet the search criteria. Click on an Id to edit.

You are viewing 1 - 1 of 1 results.

<

<

show 20 items...

>

>

Site Id	Title	Published	Joinable?	Type	Description, URLs
<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-176</a>	DAC-EDUCATION-DEPT1-SUBJ1-176	✓		course	<b>Short Description:</b> DAC-EDUCATION-DEPT1-SUBJ1-176 <b>Description:</b> DAC-EDUCATION-DEPT1-SUBJ1-176 <b>Created:</b> Aug 31, 2017 1:09 pm DA Test

Use the Search function to find the site you want to modify.

## Click on the site id of the site.

Site Id	Title	Published	Joinable?	Type	Description, URLs
<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-176</a>	DAC-EDUCATION-DEPT1-SUBJ1-176	✓		course	<b>Short Description:</b> DAC-EDUCATION-DEPT1-SUBJ1-176 <b>Description:</b> DAC-EDUCATION-DEPT1-SUBJ1-176 <b>Created:</b> Aug 31, 2017 1:09 pm DA Test

## Click Add/Edit Pages.

### Properties

Subject:	SUBJ1
School:	EDUCATION
term:	Spring 2017
term_eid:	Spring 2017
Department:	DEPT1

### Continue Editing

Add/Edit Properties

Add/Edit pages


Add/Edit groups

### Complete the Site Edit

Save Cancel

Scroll down toward the bottom of the site editing screen and select the **Add/Edit Pages** button.

# Click New Page.




 **SITES**

[New Page](#)

[Link](#) [Help](#)

**Edit: Site DAC-EDUCATION-DEPT1-SUBJ1-176**

These are the Pages defined in this Site. Click on one to edit. Use the up and down arrows to re-arrange.

	Page Id	Title	Description
	<a href="#">05122740-44f4-4590-80a1-915eeb30bcad</a>	Tests & Quizzes	Layout: Single Column Layout Features: sakai.samigo
	<a href="#">041ea994-156a-4a68-9e14-03df07194dce</a>	Assignments	Layout: Single Column Layout Features: sakai.assignment.grades
	<a href="#">61985ae1-5434-4baf-b0e2-fe2c0905f551</a>	Forums	Layout: Single Column Layout Features: sakai.forums

You will see a listing of pages, or tools, currently active in the Tool Menu of the site. Click **New Page** to add another tool to this list.

# Enter a Title.

Edit: Site DAC-EDUCATION-DEPT1-SUBJ1-176 / Page 60427a92-1671-4fda-8a03-e971b07c4542

Review and modify this Page's information.

## Page

Page Id: 60427a92-1671-4fda-8a03-e971b07c4542

\* Title: Delegated Access

Layout: ☒ Single Column Layout  
☐ Double Column Layout

Popup? ☐ yes ☒ no

Custom Title? ☒ yes ☐ no

## Properties

new: true

Add/Edit Properties

Properties

## Continue Editing

Done Tools

## Complete the Site Edit

Save Cancel

Enter a **title** for the stealthed tool. The title you enter here is what will appear in the Tool Menu of the site once it has been added. You may also select the radio button for **yes** or **no** to indicate whether this is a custom title, or the default tool title.

# Click Tools.

Edit: Site DAC-EDUCATION-DEPT1-SUBJ1-176 / Page 60427a92-1671-4fda-8a03-e971b07c4542

Review and modify this Page's information.

## Page

Page Id: 60427a92-1671-4fda-8a03-e971b07c4542

\* Title: Delegated Access

Layout: ☒ Single Column Layout  
☐ Double Column Layout

Popup? ☐ yes ☒ no

Custom Title? ☐ yes ☒ no

## Properties

new: true

Add/Edit Properties

Properties

Continue Editing

Done Tools

Complete the Site Edit

Save Cancel

# Click New Tool.

SITES

Link

Help

New Tool

Edit: Site DAC-EDUCATION-DEPT1-SUBJ1-176 / Page 60427a92-1671-4fda-8a03-e971b07c4542

There are no tools defined in this page. Click the 'New Tool' button to add a tool.

Continue Editing

Done

Complete the Site Edit

Save Cancel

# Select the stealthed tool to be added.

SITES

Remove Tool

%Link ?Help

Edit: Site DAC-EDUCATION-DEPT1-SUBJ1-176 / Page 60427a92-1671-4fda-8a03-e971b07c4542 / Tool 5dffc8b-1b5a-4521-9a8c-c7246ae9fb66

Review and modify this Tool's information.

**Tool Feature**

Tool Id: sakai.delegatedaccess

Features:

☐

 Account (sakai.singleuser)

☐

 Account Validator (sakai.accountvalidator)☐☐☐☐☐☐☐☐☐☐☐☐☐☒☐

You will see a long list of all the tools available in the system. Locate the one you want to add in the list and click the radio button to select it.

# Scroll down to the bottom of the page and Save.

☐ Web Portlet (sakai.web.168)

☐ Wiki (sakai.rwiki)

☐ Workspace Setup (sakai.sitesetup)

☐ OAuth Admin (sakai.oauth.admin)

Tool Configuration

Title: Delegated Access

LayoutHints

(row, col 0 based):

Configuration

Properties

Add/Edit Properties

Properties

Continue Editing

Done

Complete the Site Edit

Save

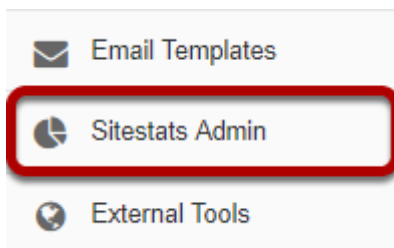
Cancel

# Sitestats Admin

# What is Sitestats Admin?

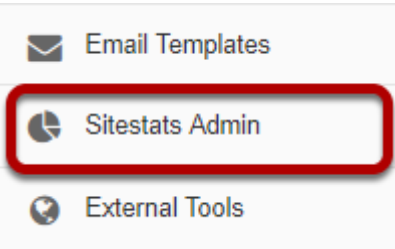
The Sitestats Admin tool allows admin users to access the Statistics reports for any site in the system without having to enter the site itself. Sitestats Admin also allows admins to display server-wide reports and to save custom reports which are available for instructors within all sites in the Statistics tool.

**To access this tool, go to Sitestats Admin in the Tool Menu of the Administration Workspace.**



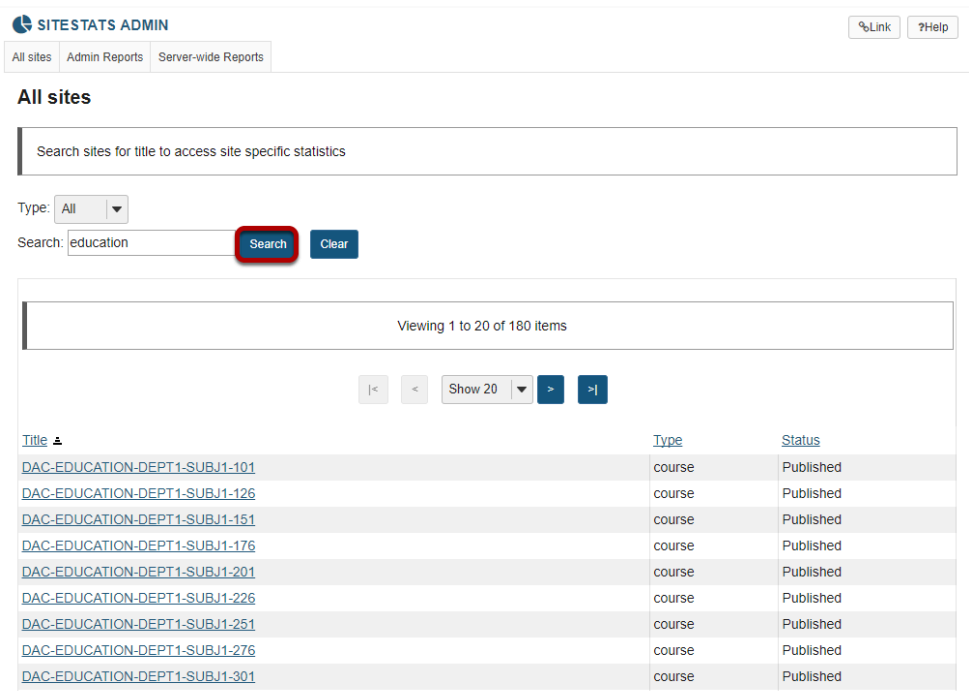
# How do I view reports for a specific site?

## Go to Sitestats Admin.



Select the **Sitestats Admin** tool from the Tool Menu in the Administration Workspace.


## Locate the site you want to view.



Enter a search term and click **Search** to locate the site you want to view.

All sites matching your criteria will be displayed.


# Click on the title of the site.


SITESTATS ADMIN

All sites

Admin Reports

Server-wide Reports

Link

Help

All sites

Search sites for title to access site specific statistics

Type: 

All

Search: 

education

Search

Clear

Viewing 1 to 20 of 180 items

|<

<


Show 20

>

>|

Title	Type	Status
DAC-EDUCATION-DEPT1-SUBJ1-101	course	Published
DAC-EDUCATION-DEPT1-SUBJ1-126	course	Published
DAC-EDUCATION-DEPT1-SUBJ1-151	course	Published
DAC-EDUCATION-DEPT1-SUBJ1-176	course	Published
DAC-EDUCATION-DEPT1-SUBJ1-201	course	Published
DAC-EDUCATION-DEPT1-SUBJ1-226	course	Published
DAC-EDUCATION-DEPT1-SUBJ1-251	course	Published
DAC-EDUCATION-DEPT1-SUBJ1-276	course	Published
DAC-EDUCATION-DEPT1-SUBJ1-301	course	Published


# The site's Statistics will display.


SITESTATS ADMIN

All sites

Admin Reports

Server-wide Reports

Link

Help


DAC-EDUCATION-DEPT1-SUBJ1-101

Overview

Reports

Preferences

Overview

Visits

0

Visits

0

Users who have visited site

1


Site Members

00%

Members who have visited site

1100%

Members who have not visited site

Activity

0


Events

00%

Most active tool

00%

Most active user

Resources

0

Files

00%


Files opened

-

Most opened file

-

User who has opened the most files

Lesson Pages

0

Pages

00%

Pages read

-

Most read page

-

User who has read the most pages

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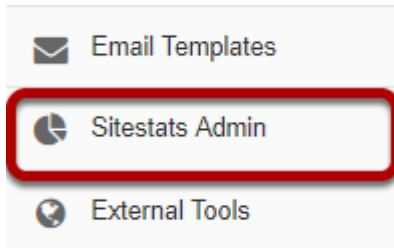
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From this view, you may run any reports within the site the same way an instructor/maintain user would run reports within an individual site. See [What is the Statistics tool?](#) for more information on how to run reports.

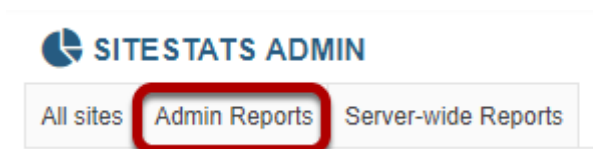
# How do I create predefined reports available throughout the system?

**Go to Sitestats Admin.**

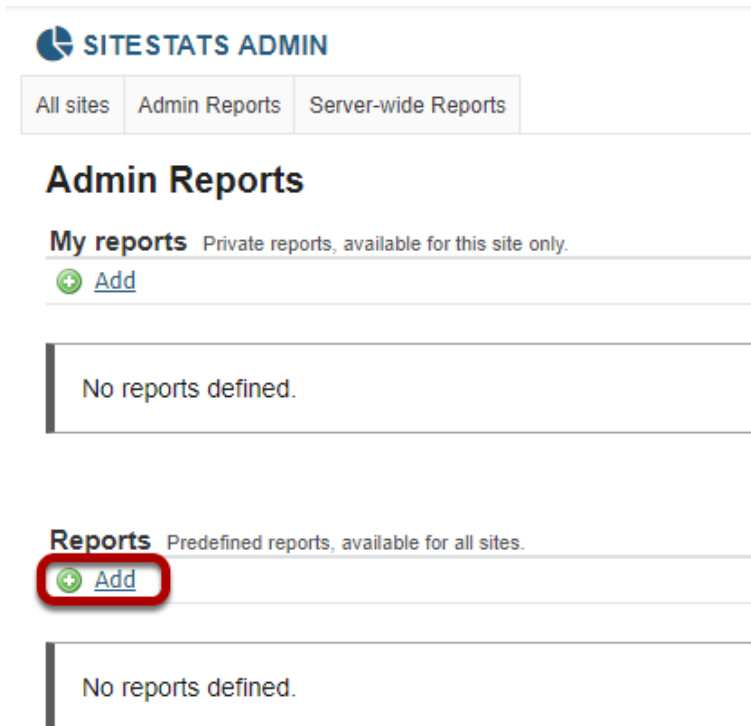


Select the **Sitestats Admin** tool from the Tool Menu in the Administration Workspace.

**Click Admin Reports.**



## Under Reports, click Add.



**SITESSTATS ADMIN**

All sites Admin Reports Server-wide Reports

### Admin Reports

**My reports** Private reports, available for this site only.

[Add](#)

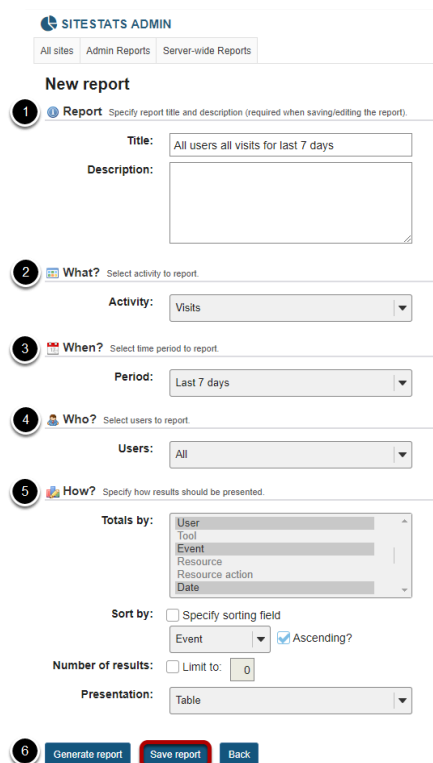
No reports defined.

**Reports** Predefined reports, available for all sites.

[Add](#)

No reports defined.

## Enter the report information.



**SITESSTATS ADMIN**

All sites Admin Reports Server-wide Reports

### New report

- Report** Specify report title and description (required when saving/editing the report).  
Title: All users all visits for last 7 days  
Description:
- What?** Select activity to report.  
Activity: Visits
- When?** Select time period to report.  
Period: Last 7 days
- Who?** Select users to report.  
Users: All
- How?** Specify how results should be presented.  
Totals by: User, Tool, Event, Resource, Resource action, Date  
Sort by: ☐ Specify sorting field, Event, ☒ Ascending?  
Number of results: ☐ Limit to: 0  
Presentation: Table
- Generate report** **Save report** **Back**

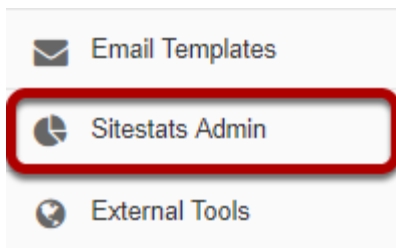
Set up your report by entering the following information:

1. Enter a **Title** and **Description** for your report.
2. Choose **What** to report on. This option allows to configure the type of activity to report. You can choose to report on Visits, Events, or Resources.
3. Choose **When** to report on. This option allows to configure the time period to report.
4. Choose **Who** to report on. This option allows to configure the users to report.
5. Choose **How** to display the report. This option allows to configure how the report will be presented. Totals by: Defines how to group report data (eg, selecting "User" + "Date" will present a report grouped by user and date). Multiple fields can be selected pressing the CTRL (for disjoint selection) or ALT (for range selection) keys while clicking with the mouse.
6. Click **Save Report**.

This report will now appear within the Statistics tool for all sites on the system. Individual users may run it within their own sites if they choose.

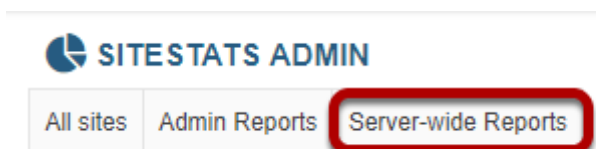
# How do I view server-wide reports?

## Go to Sitestats Admin.



Select the **Sitestats Admin** tool from the Tool Menu in the Administration Workspace.

## Click Server-wide Reports.



## Select the type of report you want to view.



Choose the type of report by clicking one of the links provided and your selected report will display.

You may choose to view:

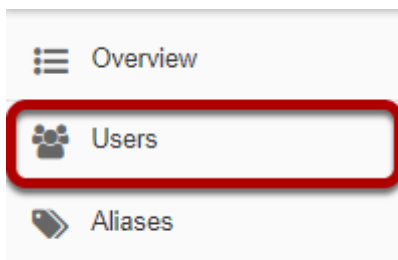
- Monthly Report
- Weekly Report
- Daily Report
- Regular Users
- Hourly Usage
- Top 20 Activities
- Tool Analysis

# Users

# What is the Users tool?

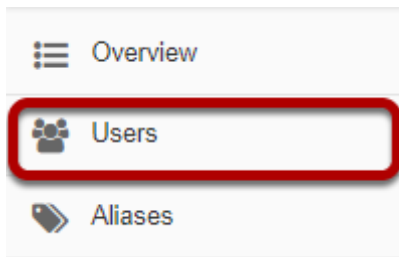
The Users tool allows administrators to manually create new user accounts in Sakai, search for existing user accounts in the system, and view or update user account information, such as user id, name, email, user type, and password.

**To access this tool, select Users from the Administration Workspace Tool Menu.**



# How do I add a new account?

## Go to Users.



Select the **Users** tool from the Tool Menu in the Administration Workspace.

## Click New User.



## Enter the user information and then save.

### Account Details

**Create Account**

\* Indicates a required field.

* User Id	<input type="text"/>
First Name	<input type="text"/>
Last Name	<input type="text"/>
Email	<input type="text"/>
Create New Password	<input type="text"/>
Verify New Password	<input type="text"/>
Type	guest ▼
Disable User	<input type="checkbox"/> Disable

Enter the following user information:

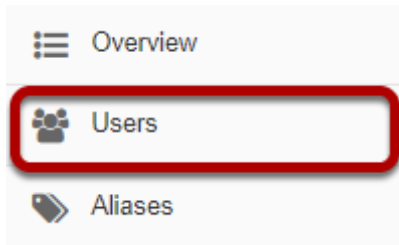
- User Id (required)
- First Name
- Last Name
- Email
- Create New Password
- Verify New Password
- Type

Once all of the information has been entered, click **Save Details** to save the information and add the account.

*Note: User Ids must be unique. If you attempt to add a new user that has the same user id as an existing user, you will receive an error.*

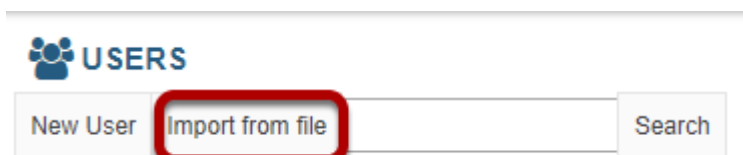
# How do I create multiple new user accounts by importing a file?

Go to Users.

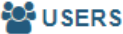


Select the **Users** tool from the Tool Menu in the Administration Workspace.

Click **Import from file**.



Click **Import a file**.



LinkHelp

### Import from file

Select a CSV file containing the details of the you users you wish to create.

**File requirements**

- Include the following headings: user id,first name,last name,email,password,type.
- Column headings must match EXACTLY the list above. They do not need to be in the same order.
- Fields must be comma separated, contain no spaces between fields and each field surrounded with double quotes if it is to contain a space.
- You can also add other columns and these will be stored as user properties, as long as the headings do not clash with the main set above. It can be any arbitrary data.

Import a file

Cancel

Click the **Import a file** button to browse for and select a properly formatted CSV file containing the user account information for the users you would like to create.

Please note the following file requirements when preparing your CSV file.





- Include the following headings: user id, first name, last name, email, password, type.
- Column headings must match EXACTLY the list above. They do not need to be in the same order.
- Fields must be comma separated, contain no spaces between fields and each field surrounded with double quotes if it is to contain a space.
- You can also add other columns and these will be stored as user properties, as long as the headings do not clash with the main set above. It can be any arbitrary data.

## Upload your file.

### Add Attachment

Select an existing item from Resources to attach OR add a new item to a folder to be attached.

Location:  **Administration Workspace Resources**

Title ▾	Actions
 <a href="#">Administration Workspace</a>	<ul style="list-style-type: none"><li>• <b>Add</b> </li><li>◦ <a href="#">Upload Files</a></li><li>◦ <a href="#">Create Folders</a></li><li>◦ <a href="#">Add Web Link (URL)</a></li><li>◦ <a href="#">Create Text Document</a></li><li>◦ <a href="#">Create HTML Page</a></li><li>◦ <a href="#">Create Citation List</a></li></ul>
 <a href="#">demo-accounts.csv</a>	<a href="#">Select</a>
 <a href="#">demo instructor ids.csv</a>	<a href="#">Select</a>
<a href="#">▶ Show other sites</a>	

If the import file has not been previously uploaded to Resources, click **Add** and then **Upload Files** to upload a new item.

# Locate the file to upload, then click Continue.

Upload Files

Location: / Administration Workspace

0.5 KB

demo-accou...

Remove file

Drag and drop files from your desktop into the box above.

Files can be uploaded individually or in ZIP archives. Expand ZIPs after uploading via the file's Action menu. Click Continue when ready to complete the upload. Note that you cannot upload more than 20 MB of material at once.

Copyright: It is your personal responsibility to verify that you have permission from the copyright holder to upload the file(s) to this website. Text, graphics and other media files may all be subject to copyright control even if your site is restricted to site members.

Versioning

Uploaded items should

Overwrite existing files

Create new version

Availability

Uploaded items should be

Visible

Hidden

Email Notification

None - No notification

Continue

Cancel

You may drag and drop your file or click in the drag and drop area to browse for the file to be uploaded. Click **Continue** to upload the file.

# Select the import file.

## Add Attachment

Select an existing item from Resources to attach OR add a new item to a folder to be attached.

Location: Administration Workspace Resources

Title	Actions
Administration Workspace Resources	<div>Add</div>
demo-accounts.csv	<div>Select</div>
<div>Show other sites</div>	

Click the **Select** link for the file containing the user information you wish to import.

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# Click Continue.

## Add Attachment

Select an existing item from Resources to attach OR add a new item to a folder to be attached. Click "Continue" when done.

Items to attach	Remove?
demo-accounts.csv	<a href="#">Remove</a>

Continue

Cancel

Location: Administration Workspace Resources

Title	Actions	
<a href="#">Administration Workspace Resources</a>		
<a href="#">demo-accounts.csv</a>		
<a href="#">▶ Show other sites</a>		

# Preview and confirm the user information.

## Import from file

Select a CSV file containing the details of the you users you wish to create.

### File requirements

- Include the following headings: user id,first name,last name,email,password,type.
- Column headings must match EXACTLY the list above. They do not need to be in the same order.
- Fields must be comma separated, contain no spaces between fields and each field surrounded with double quotes if it is to contain a space.
- You can also add other columns and these will be stored as user properties, as long as the headings do not clash with the main set above. It can be any arbitrary data.

The following data was found in the uploaded file. If this is correct, click 'Continue'.

Note that any users that already exist will be skipped and their original records left untouched.

User Id	First Name	Last Name	Email	Password	Type	Properties
student01	Student01	Demo			registered	
student02	Student02	Demo			registered	
student03	Student03	Demo			registered	
student04	Student04	Demo			registered	
student05	Student05	Demo			registered	
student06	Student06	Demo			registered	
student07	Student07	Demo			registered	
student08	Student08	Demo			registered	
student09	Student09	Demo			registered	
student10	Student10	Demo			registered	
demoInstructor	Instructor	Demo			maintain	

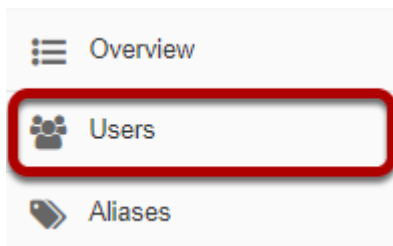
Continue

Cancel

The information for each new user will be displayed. If everything looks correct, click **Continue** to proceed and add the accounts.

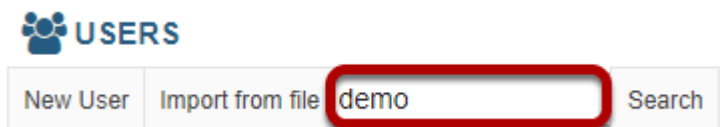
# How do I search for a user account?

## Go to Users.



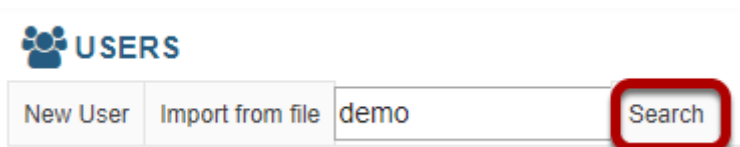
Select the **Users** tool from the Tool Menu in the Administration Workspace.

## Enter a search term.



Enter a search term to locate the account you are looking for. You may search by a full or partial string of characters which appears in the user id, name, or email fields of a user's account.

## Click Search.



# Search results will display.

## Users

These are the Users defined within the system that meet the search criteria. Click a User Id to edit or view detail.  
Note: users defined by an external user authority are not listed here.

You are viewing 1 - 11 of 11 results.

|< < show 20 items.... > >|

User Id	Name	Email	Type	Internal Id
<a href="#">demoinstructor</a>	Demo, Instructor		maintain	4bbf342d-64bc-4efa-9a97-ed77a1462354
<a href="#">student01</a>	Demo, Student01		registered	8f829712-1555-498c-b4e2-746cf690c7f8
<a href="#">student02</a>	Demo, Student02		registered	194f060b-9d6d-44d3-a10b-1875d6760f2a
<a href="#">student03</a>	Demo, Student03		registered	d29d8c94-5b1b-458f-b00f-a73f1cd57ae8
<a href="#">student04</a>	Demo, Student04		registered	a3f099b4-5740-48d1-ab51-ffc6fd6d4074
<a href="#">student05</a>	Demo, Student05		registered	860c69e5-8bca-438d-9694-9e8e2606161a
<a href="#">student06</a>	Demo, Student06		registered	4ed76ea4-0220-42c7-8ae6-6916a342e74f
<a href="#">student07</a>	Demo, Student07		registered	4ecaacb1-bbde-47bc-a533-396bdbd005f9
<a href="#">student08</a>	Demo, Student08		registered	86dbde37-6c9d-4819-adfa-6e49c0e4e7e5
<a href="#">student09</a>	Demo, Student09		registered	f85fd8b2-12f3-4f14-83dc-9d7b2428d010
<a href="#">student10</a>	Demo, Student10		registered	50d884a2-6ea8-4aea-900d-8b31314eaaef

All internal accounts meeting the search criteria will be displayed.

*Note: Users defined by an external user authority (e.g. LDAP, etc.) are not listed here.*

# Click on an individual user id to view that user's details.

Account Details

Edit Account

\* Indicates a required field.

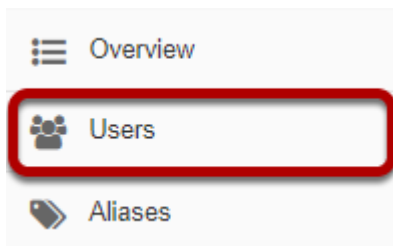
User Id	faculty
First Name	Instructor
Last Name	Demo
Email	
Create New Password	.....
Verify New Password	
Type	maintain
Disable User	<input type="checkbox"/> Disable
Created By	Sakai Administrator
Created	Oct 3, 2017 4:55 pm
Modified By	Sakai Administrator
Modified	Oct 3, 2017 4:55 pm
Internal Id	4bbf342d-64bc-4efa-9a97-ed77a1462354

Update Details

Cancel Changes

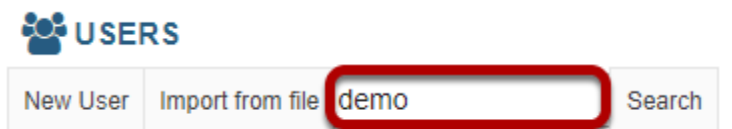
# How do I edit a user account?

## Go to Users.



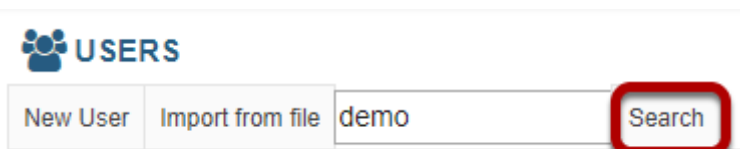
Select the **Users** tool from the Tool Menu in the Administration Workspace.

## Enter a search term.



Enter a search term to locate the account you are looking for. You may search by a full or partial string of characters which appears in the user id, name, or email fields of a user's account.

## Click Search.



# Search results will display.

## Users

These are the Users defined within the system that meet the search criteria. Click a User Id to edit or view detail.  
Note: users defined by an external user authority are not listed here.

You are viewing 1 - 11 of 11 results.

|< < show 20 items.... > >|

User Id	Name	Email	Type	Internal Id
<a href="#">demoinstructor</a>	Demo, Instructor		maintain	4bbf342d-64bc-4efa-9a97-ed77a1462354
<a href="#">student01</a>	Demo, Student01		registered	8f829712-1555-498c-b4e2-746cf690c7f8
<a href="#">student02</a>	Demo, Student02		registered	194f060b-9d6d-44d3-a10b-1875d6760f2a
<a href="#">student03</a>	Demo, Student03		registered	d29d8c94-5b1b-458f-b00f-a73f1cd57ae8
<a href="#">student04</a>	Demo, Student04		registered	a3f099b4-5740-48d1-ab51-ffc6fd6d4074
<a href="#">student05</a>	Demo, Student05		registered	860c69e5-8bca-438d-9694-9e8e2606161a
<a href="#">student06</a>	Demo, Student06		registered	4ed76ea4-0220-42c7-8ae6-6916a342e74f
<a href="#">student07</a>	Demo, Student07		registered	4ecaacb1-bbde-47bc-a533-396bdbd005f9
<a href="#">student08</a>	Demo, Student08		registered	86dbde37-6c9d-4819-adfa-6e49c0e4e7e5
<a href="#">student09</a>	Demo, Student09		registered	f85fd8b2-12f3-4f14-83dc-9d7b2428d010
<a href="#">student10</a>	Demo, Student10		registered	50d884a2-6ea8-4aea-900d-8b31314eaaef

All internal accounts meeting the search criteria will be displayed.

*Note: Users defined by an external user authority (e.g. LDAP, etc.) are not listed here.*

## Click on an individual user id to edit that user's details.

### Account Details

**Edit Account**

\* Indicates a required field.

User Id	<input type="text" value="faculty"/>
First Name	<input type="text" value="Instructor"/>
Last Name	<input type="text" value="Demo"/>
Email	<input type="text"/>
Create New Password	<input type="password" value="....."/>
Verify New Password	<input type="password"/>
Type	<input type="text" value="maintain"/>
Disable User	<input type="checkbox"/> Disable
Created By	Sakai Administrator
Created	Oct 3, 2017 4:55 pm
Modified By	Sakai Administrator
Modified	Oct 3, 2017 4:55 pm
Internal Id	4bbf342d-64bc-4efa-9a97-ed77a1462354

From this screen, you may edit or update any of the following fields:

- User Id
- First Name
- Last Name
- Email
- Create New Password
- Verify Password
- Type

*Note: To keep the existing password, leave both password fields blank.*

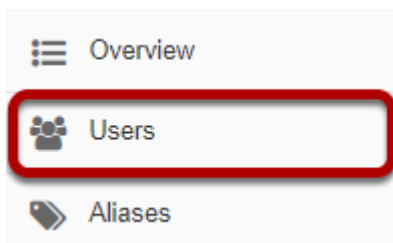
When you are finished editing, click **Update Details** to save the changes.

# How do I disable a user account?

Disabling a user account blocks that user from being able to access the system. However, the user's data and activity are still retained in the system.

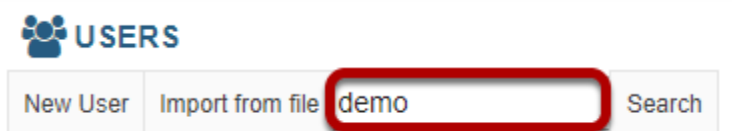
*Note: Disabling an account is often preferable to removing a user account, as removing an account deletes all the user data for that user, including any grades, resources, and other user-related files or activity.*

## Go to Users.



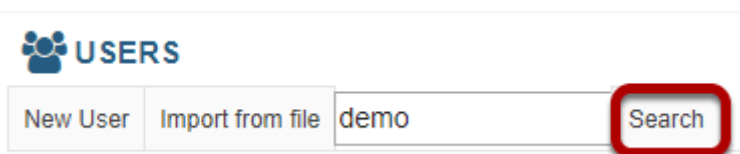
Select the **Users** tool from the Tool Menu in the Administration Workspace.

## Enter a search term.



Enter a search term to locate the account you are looking for. You may search by a full or partial string of characters which appears in the user id, name, or email fields of a user's account.

## Click Search.



# Search results will display.

## Users

These are the Users defined within the system that meet the search criteria. Click a User Id to edit or view detail.  
Note: users defined by an external user authority are not listed here.

You are viewing 1 - 11 of 11 results.

|< < show 20 items.... > >|

User Id	Name	Email	Type	Internal Id
<a href="#">demoinstructor</a>	Demo, Instructor		maintain	4bbf342d-64bc-4efa-9a97-ed77a1462354
<a href="#">student01</a>	Demo, Student01		registered	8f829712-1555-498c-b4e2-746cf690c7f8
<a href="#">student02</a>	Demo, Student02		registered	194f060b-9d6d-44d3-a10b-1875d6760f2a
<a href="#">student03</a>	Demo, Student03		registered	d29d8c94-5b1b-458f-b00f-a73f1cd57ae8
<a href="#">student04</a>	Demo, Student04		registered	a3f099b4-5740-48d1-ab51-ffc6fd6d4074
<a href="#">student05</a>	Demo, Student05		registered	860c69e5-8bca-438d-9694-9e8e2606161a
<a href="#">student06</a>	Demo, Student06		registered	4ed76ea4-0220-42c7-8ae6-6916a342e74f
<a href="#">student07</a>	Demo, Student07		registered	4ecaacb1-bbde-47bc-a533-396bdbd005f9
<a href="#">student08</a>	Demo, Student08		registered	86dbde37-6c9d-4819-adfa-6e49c0e4e7e5
<a href="#">student09</a>	Demo, Student09		registered	f85fd8b2-12f3-4f14-83dc-9d7b2428d010
<a href="#">student10</a>	Demo, Student10		registered	50d884a2-6ea8-4aea-900d-8b31314eaaef

All internal accounts meeting the search criteria will be displayed.

*Note: Users defined by an external user authority (e.g. LDAP, etc.) are not listed here.*

Click on an individual user id to edit that user's details.

#### Account Details

**Edit Account**

\* Indicates a required field.

User Id	<input type="text" value="faculty"/>
First Name	<input type="text" value="Instructor"/>
Last Name	<input type="text" value="Demo"/>
Email	<input type="text"/>
Create New Password	<input type="password" value="....."/>
Verify New Password	<input type="password"/>
Type	<input type="text" value="maintain"/>
Disable User	<input checked="" type="checkbox"/> <b>Disable</b>
Created By	Sakai Administrator
Created	Oct 3, 2017 4:55 pm
Modified By	Sakai Administrator
Modified	Oct 3, 2017 4:55 pm
Internal Id	4bbf342d-64bc-4efa-9a97-ed77a1462354

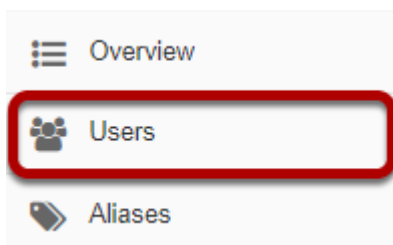
Check the box next to **Disable**, then click **Update Details** to save the change.

# How do I remove a user account?

Removing an account deletes all the user data for that user, including any grades, resources, and other user-related files or activity. This option should be used with caution, as it will delete all information associated with the account!

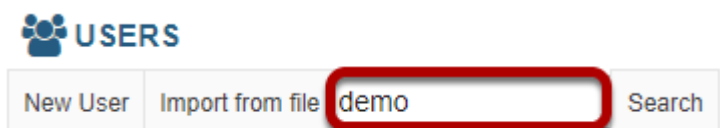
*Note: You may want to disable the user instead. Disabling a user account blocks that user from being able to access the system. However, the user's data and activity are still retained in the system.*

## Go to Users.



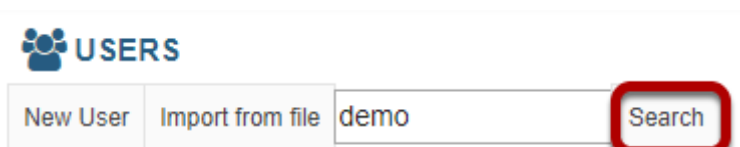
Select the **Users** tool from the Tool Menu in the Administration Workspace.

## Enter a search term.



Enter a search term to locate the account you are looking for. You may search by a full or partial string of characters which appears in the user id, name, or email fields of a user's account.

## Click Search.



# Search results will display.

## Users

These are the Users defined within the system that meet the search criteria. Click a User Id to edit or view detail.  
Note: users defined by an external user authority are not listed here.

You are viewing 1 - 11 of 11 results.

|<

<

show 20 items....

▼

>


>|

User Id	Name	Email	Type	Internal Id
<a href="#">demoinstructor</a>	Demo, Instructor		maintain	4bbf342d-64bc-4efa-9a97-ed77a1462354
<a href="#">student01</a>	Demo, Student01		registered	8f829712-1555-498c-b4e2-746cf690c7f8
<a href="#">student02</a>	Demo, Student02		registered	194f060b-9d6d-44d3-a10b-1875d6760f2a
<a href="#">student03</a>	Demo, Student03		registered	d29d8c94-5b1b-458f-b00f-a73f1cd57ae8
<a href="#">student04</a>	Demo, Student04		registered	a3f099b4-5740-48d1-ab51-ffc6fd6d4074
<a href="#">student05</a>	Demo, Student05		registered	860c69e5-8bca-438d-9694-9e8e2606161a
<a href="#">student06</a>	Demo, Student06		registered	4ed76ea4-0220-42c7-8ae6-6916a342e74f
<a href="#">student07</a>	Demo, Student07		registered	4ecaacb1-bbde-47bc-a533-396bdbd005f9
<a href="#">student08</a>	Demo, Student08		registered	86dbde37-6c9d-4819-adfa-6e49c0e4e7e5
<a href="#">student09</a>	Demo, Student09		registered	f85fd8b2-12f3-4f14-83dc-9d7b2428d010
<a href="#">student10</a>	Demo, Student10		registered	50d884a2-6ea8-4aea-900d-8b31314eaaef

All internal accounts meeting the search criteria will be displayed.

*Note: Users defined by an external user authority (e.g. LDAP, etc.) are not listed here.*

Click on an individual user id to view that user's details.

 **USERS**

[%Link](#) [?Help](#)

[Remove User](#)


**Account Details**

**Edit Account**

\* Indicates a required field.

User Id

faculty



First Name

Instructor


Last Name

Demo


Email

Create New Password

.....




Verify New Password



Type

maintain



Disable User

☒ Disable

Created By

Sakai Administrator

Created

Oct 3, 2017 4:55 pm

Modified By

Sakai Administrator

Modified

Oct 3, 2017 4:55 pm


Internal Id

4bbf342d-64bc-4efa-9a97-ed77a1462354

[Update Details](#)

[Cancel Changes](#)

Click Remove User.

 **USERS**

[%Link](#) [?Help](#)

[Remove User](#)


**Account Details**

**Edit Account**

\* Indicates a required field.

User Id

faculty



First Name

Instructor


Last Name

Demo


Email

Create New Password

.....




Verify New Password



Type

maintain



Disable User

☒ Disable

Created By

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Created

Oct 3, 2017 4:55 pm

Modified By

Sakai Administrator

Modified

Oct 3, 2017 4:55 pm

Internal Id

4bbf342d-64bc-4efa-9a97-ed77a1462354

[Update Details](#)

[Cancel Changes](#)

# Click Remove to confirm deletion.

## Remove User

faculty will be permanently deleted from the system. Are you sure you want to proceed?

User Id	Name	Email	Internal Id
faculty	Instructor Demo		4bbf342d-64bc-4efa-9a97-ed77a1462354

Remove

Cancel

You will be prompted to confirm the removal of the user account. If you are sure you want to delete the user, click **Remove**.

# User Membership

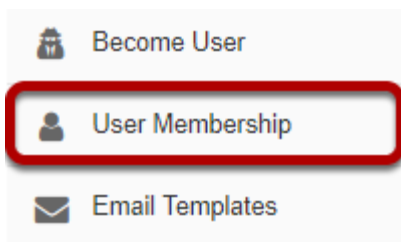
# What is User Membership?

The User Membership tool allows you to find site and group membership information about Sakai users.

By default, this tool is only available to administrators. However, tool access may be granted to other users if desired.

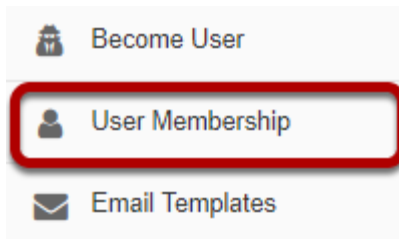
The User Membership tool is available by default in the Administration Workspace. If you would like to add it to other sites, you must do so manually using the Sites tool in the Administration Workspace.

**To access this tool, select User Membership from the Tool Menu in the Administration Workspace.**



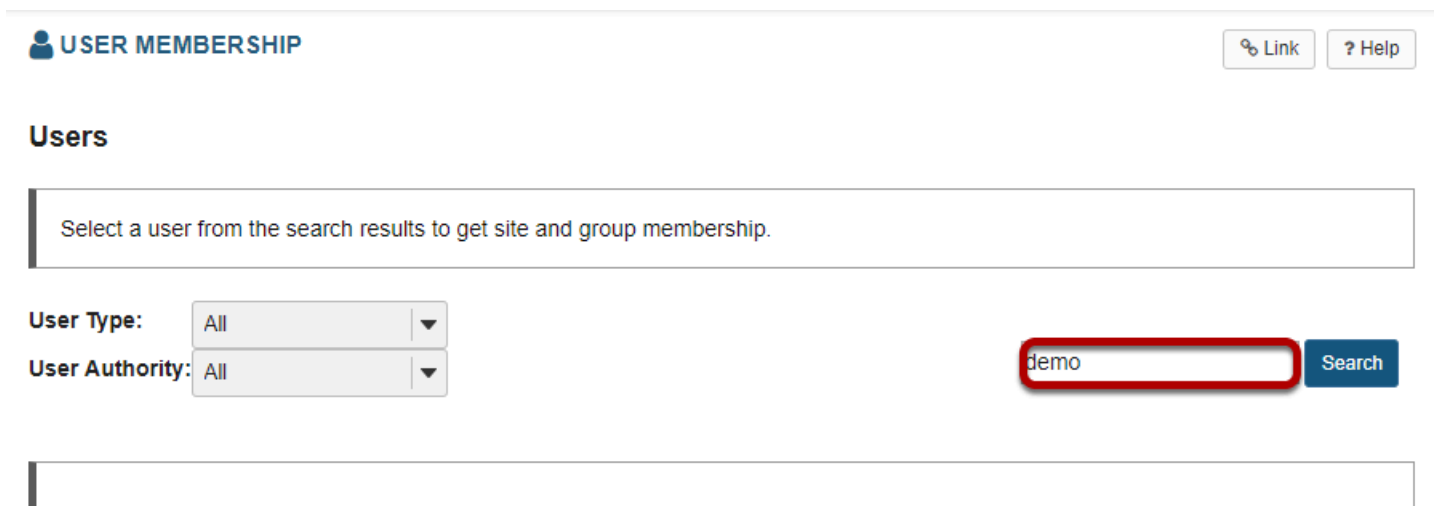
# How do I search for an account in User Membership?

## Go to User Membership.



Select the **User Membership** tool from the Tool Menu in the Administration Workspace.


## Enter a search term.

A screenshot of the 'USER MEMBERSHIP' interface. At the top, there's a header with a user icon, the text 'USER MEMBERSHIP', and 'Link' and 'Help' buttons. Below this is a section titled 'Users'. A message box says 'Select a user from the search results to get site and group membership.' Below that are two dropdown menus: 'User Type:' with 'All' selected and 'User Authority:' with 'All' selected. To the right of these is a search input field containing the text 'demo' (highlighted with a red box) and a blue 'Search' button. At the bottom, there is an empty rectangular box for search results.

Enter a search term into the field provided. You may search for a full or partial name, user ID, or email address.

*Note: If desired, you may also filter your search using the User Type or User Authority drop-down menus.*

# Click Search.

 USER MEMBERSHIP

Link

Help

Users

Select a user from the search results to get site and group membership.


User Type: All

User Authority: All

demo

Search

# View search results.

 USER MEMBERSHIP

Link

Help

Users

Select a user from the search results to get site and group membership.

User Type: All

User Authority: All

demo

Search

Clear search

Viewing 1 to 20 of 26 users

|<

<

Show 20


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>|

User ID	Internal User ID	Name	Email	Type	Authority	Created On	Modified On
<a href="#">demoinstructor</a>	d7b4e901-1dde-465b-a75e-d5cf12afc542	Instructor Demo		maintain	Internal	Sep 26, 2017	Sep 26, 2017
<a href="#">instructor01</a>	aa6b1555-9244-4b8c-972b-24b2fe13263a	instructor01 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor02</a>	a440e7fc-d007-4dc3-b427-f24ed8692414	instructor02 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor03</a>	ba3c9e08-385e-4397-a240-6dba7fa95fb3	instructor03 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor04</a>	8e6c0dce-304a-4c9f-a29d-5631e2520cb1	instructor04 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017

All matching users will be displayed in the search results.

Click on a User ID to see site and group membership for that user.

 USER MEMBERSHIP

Link

Help

Users

Select a user from the search results to get site and group membership.

User Type: All

User Authority: All

demo

Search

Clear search

Viewing 1 to 20 of 26 users

|<

<


Show 20

>

>|

User ID	Internal User ID	Name	Email	Type	Authority	Created On	Modified On
<a href="#">demoinstructor</a>	d7b4e901-1dde-465b-a75e-d5cf12afc542	Instructor Demo		maintain	Internal	Sep 26, 2017	Sep 26, 2017
<a href="#">instructor01</a>	aa6b1555-9244-4b8c-972b-24b2fe13263a	instructor01 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor02</a>	a440e7fc-d007-4dc3-b427-f24ed8692414	instructor02 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor03</a>	ba3c9e08-385e-4397-a240-6dba7fa95fb3	instructor03 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor04</a>	8e6c0dce-304a-4c9f-a29d-5631e2520cb1	instructor04 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017

View the selected user's membership.

 USER MEMBERSHIP

Link

Help

Membership (demoinstructor)

Site and group membership for the selected user.

Actions

Site	Groups	Type	Term	Role	Site status	User status
<input type="checkbox"/> <a href="#">Discussion 1 SMPL101</a>		course	Summer 2017	Instructor	Published	Active
<input type="checkbox"/> <a href="#">Discussion 2 SMPL202</a>		course	Summer 2017	Instructor	Published	Active

Actions

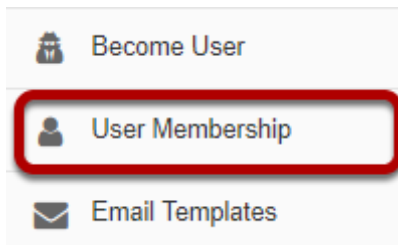
Back to user list

This detail view will display all of the sites in which the user is enrolled. The type, term, and published/unpublished site status are shown, as well as the user's role and status within each site.

*Note: Clicking on the title of a site will take you into that site.*

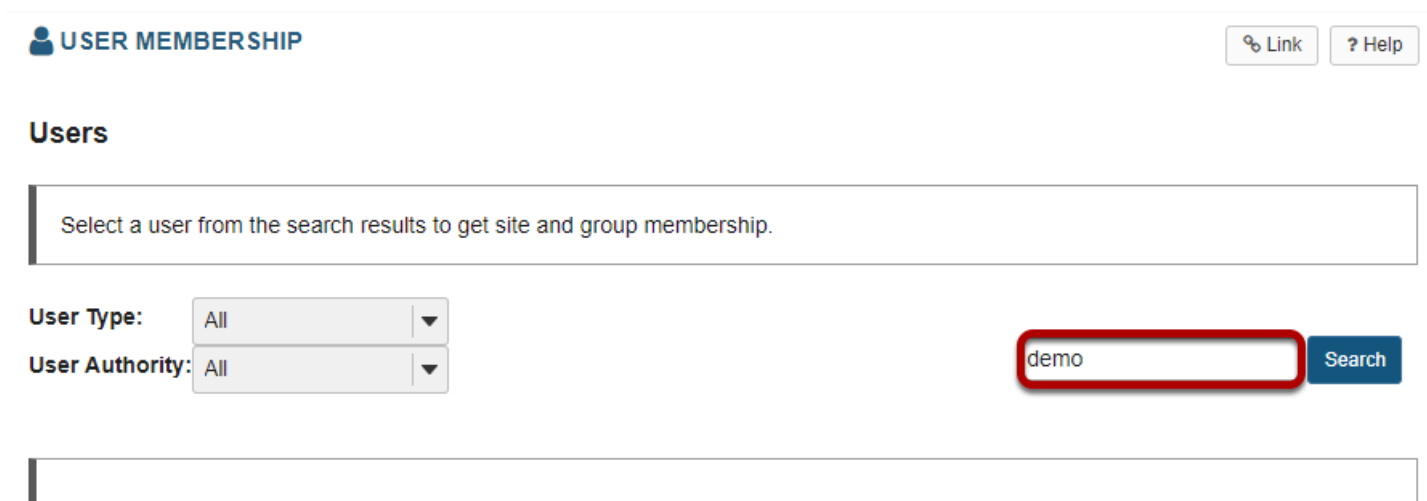
# How do I filter search results in User Membership?

## Go to User Membership.



Select the **User Membership** tool from the Tool Menu in the Administration Workspace.

## Enter a search term.

A screenshot of the 'USER MEMBERSHIP' interface. At the top, there's a header with a user icon, the text 'USER MEMBERSHIP', and two buttons: 'Link' and 'Help'. Below the header is a section titled 'Users'. Under 'Users', there's a large text box containing the instruction: 'Select a user from the search results to get site and group membership.' Below this text box are two dropdown menus: 'User Type:' with 'All' selected, and 'User Authority:' with 'All' selected. To the right of these dropdowns is a search input field containing the text 'demo', which is highlighted with a red box, and a blue 'Search' button. At the bottom of the interface is a large empty rectangular box for search results.

Enter a search term into the field provided. You may search for a full or partial name, user id, or email address.

## Filter search by User Type.

You may filter your search to show only a specified user type if desired.

## Select the User Type from the drop-down menu.

### Users

Select a user from the search results to get site and group membership.

User Type:

All

User Authority:

All

guest

**maintain**

registered

(no type)

demo

Search

From the User Type drop-down menu, select the type of user for which you would like to limit the search results. The list displayed in the drop-down menu will include any user types that currently exist in your instance. In this example, we have selected "maintain" as the user type.

## Click Search.

### Users

Select a user from the search results to get site and group membership.

User Type:

maintain

User Authority:

All

demo

**Search**

## View search results.

### Users

Select a user from the search results to get site and group membership.

User Type:

User Authority:

Viewing 1 to 16 of 16 users

User ID	Internal User ID	Name	Email	Type	Authority	Created On	Modified On
<a href="#">demoinstructor</a>	d7b4e901-1dde-465b-a75e-d5cf12afc542	Instructor Demo		maintain	Internal	Sep 26, 2017	Sep 26, 2017
<a href="#">instructor01</a>	aa6b1555-9244-4b8c-972b-24b2fe13263a	instructor01 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor02</a>	a440e7fc-d007-4dc3-b427-f24ed8692414	instructor02 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor03</a>	ba3c9e08-385e-4397-a240-6dba7fa95fb3	instructor03 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor04</a>	8e6c0dce-304a-4c9f-a29d-5631e2520cb1	instructor04 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor05</a>	a442d5d3-ef6e-4500-b641-82517d1b2134	instructor05 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor06</a>	91412a34-34ee-4f35-8430-cbc92dcd589	instructor06 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor07</a>	f15390d3-bcef-4c7e-825a-b0cad121414f	instructor07 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017

The filtered search results will display. In this example the results show all users matching the search criteria with the user type of faculty.

## Filter search by User Authority.

The User Authority filter allows you to filter your search to show only internal or external accounts. Internal accounts are created and authenticated directly in Sakai. External account are created and authenticated via an external system such as LDAP, Active Directory, etc.

## Select the User Authority from the drop-down menu.

### Users

Select a user from the search results to get site and group membership.

User Type: All

User Authority: All

demo

Search

All  
All  
Internal  
External

From the User Authority drop-down menu, select the type of account for which you would like to limit the search results, either Internal or External. In this example, we will select Internal.

## Click Search.

### Users

Select a user from the search results to get site and group membership.

User Type: All

User Authority: Internal

demo

Search

# View search results.

## Users

Select a user from the search results to get site and group membership.

User Type: 

All

User Authority: 

Internal

demo

Search

Clear search

Viewing 1 to 20 of 26 users

|<

<

Show 20

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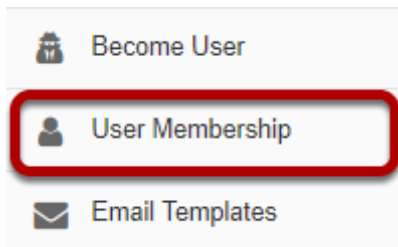
>|

User ID	Internal User ID	Name	Email	Type	Authority	Created On	Modified On
<a href="#">demoinstructor</a>	d7b4e901-1dde-465b-a75e-d5cf12afc542	Instructor Demo		maintain	Internal	Sep 26, 2017	Sep 26, 2017
<a href="#">instructor01</a>	aa6b1555-9244-4b8c-972b-24b2fe13263a	instructor01 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor02</a>	a440e7fc-d007-4dc3-b427-f24ed8692414	instructor02 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor03</a>	ba3c9e08-385e-4397-a240-6dba7fa95fb3	instructor03 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor04</a>	8e6c0dce-304a-4c9f-a29d-5631e2520cb1	instructor04 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor05</a>	a442d5d3-ef6e-4500-b641-82517d1b2134	instructor05 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017

The filtered search results will display. In this example the results show all users matching the search criteria with an internally authenticated account.

# How do I export search results from User Membership?

**Go to User Membership.**



Select the **User Membership** tool from the Tool Menu in the Administration Workspace.

## Exporting a list of users matching your search criteria.

**Perform a search.**

See [How do I search for an account in User Membership?](#) for more information on searching.

# Click Export CSV or Export Excel.

## Users

Select a user from the search results to get site and group membership.

User Type: All

User Authority: All

student0

Search

Clear search

Viewing 1 to 13 of 13 users

< < Show 20 > >

User ID	Internal User ID	Name	Email	Type	Authority	Created On	Modified On
jehart	096afcc5-ee65-458e-b217-170c2ec687bb	Jennifer Hart	jehart_student04@mailinator.com	registered	Internal	Sep 27, 2017	Sep 27, 2017
jfletch	1498605d-5df1-4057-976a-f6dc27417c49	Jessica Fletcher	jfletch_student02@mailinator.com	registered	Internal	Sep 27, 2017	Sep 27, 2017
johart	d1ce5b2f-0cfa-405a-bae7-a7f0ca6a1a29	Jonathan Hart	johart_student03@mailinator.com	registered	Internal	Sep 27, 2017	Sep 27, 2017
ndrew	4cc3bb1a-8565-4f10-b226-40208f5e9286	Nancy Drew	ndrew_student01@mailinator.com	registered	Internal	Sep 27, 2017	Sep 27, 2017
student01	c7e0c22c-d0af-4628-987c-7500043c35e7	Student01 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017
student02	31761fb0-af54-4754-a1d7-34696c58aff3	Student02 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017
student03	8724c058-fd82-4f45-83fb-b3a7f8de4c84	Student03 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017
student04	555ced8c-74cc-42b0-8d16-1c45c7267175	Student04 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017
student05	c2fa13f7-8c94-4930-98bc-63c63999e4cc	Student05 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017
student06	e3f9d8d6-956d-4332-bc0b-c27a1460ccb0	Student06 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017
student07	e11aab46-3bb4-4fb1-91b4-5fafaab49602	Student07 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017
student08	1d04bfcc-3a64-45db-941f-25fdf8333099	Student08 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017
student09	626f2547-7767-4426-a214-2c5027379072	Student09 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017

Export CSV Export Excel


Scroll down to the bottom of the search results and click **Export CSV** or **Export Excel** to download a copy of the results in your preferred file format.

## Exporting site and group membership for an individual user.

### Perform a search.

See [How do I search for an account in User Membership?](#) for more information on searching.

Click on the User ID to for the user in question.

 USER MEMBERSHIP

Link

Help

Users

Select a user from the search results to get site and group membership.

User Type: All

User Authority: All

demo

Search

Clear search

Viewing 1 to 20 of 26 users

|<

<

Show 20

>

>|

User ID	Internal User ID	Name	Email	Type	Authority	Created On	Modified On
<a href="#">demoinstructor</a>	d7b4e901-1dde-465b-a75e-d5cf12afc542	Instructor Demo		maintain	Internal	Sep 26, 2017	Sep 26, 2017
<a href="#">instructor01</a>	aa6b1555-9244-4b8c-972b-24b2fe13263a	instructor01 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor02</a>	a440e7fc-d007-4dc3-b427-f24ed8692414	instructor02 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor03</a>	ba3c9e08-385e-4397-a240-6dba7fa95fb3	instructor03 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017
<a href="#">instructor04</a>	8e6c0dce-304a-4c9f-a29d-5631e2520cb1	instructor04 demo		maintain	Internal	Sep 29, 2017	Sep 29, 2017

Click Actions to expand the action menu.

Membership (demoinstructor)

Site and group membership for the selected user.


Actions

Site	Groups	Type	Term	Role	Site status	User status
<input type="checkbox"/> <a href="#">Discussion 1 SMPL101</a>		course	Summer 2017	Instructor	Published	Active
<input type="checkbox"/> <a href="#">Discussion 2 SMPL202</a>		course	Summer 2017	Instructor	Published	Active

Actions

Back to user list

## Select the sites to be included, and then export.

 **USER MEMBERSHIP** [Link](#) [? Help](#)

**Membership (demoinstructor)**

Site and group membership for the selected user.

▼ Actions

[Select All](#) [Set Selected to Inactive](#) [Export Selected to CSV](#) [Export Selected to Excel](#)

[Deselect All](#) [Set Selected to Active](#)

[Invert Selection](#)

1

Site	Groups	Type	Term	Role	Site status	User status
<input checked="" type="checkbox"/> <a href="#">Discussion 1 SMPL101</a>		course	Summer 2017	Instructor	Published	Active
<input checked="" type="checkbox"/> <a href="#">Discussion 2 SMPL202</a>		course	Summer 2017	Instructor	Published	Active

2

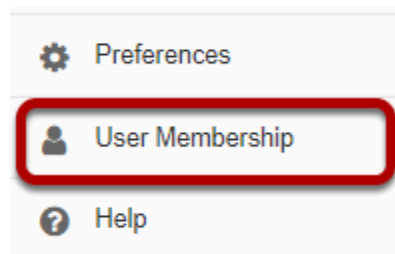
► Actions

[Back to user list](#)

1. This detail view displays all of the sites in which the user is enrolled. The type, term, and published/unpublished site status are shown, as well as the user's role and status within each site. Select the sites you wish to include in the export.
2. Select the **Export Selected to CSV** or **Export to Excel** link to export the data in your desired format.

# How do I make a user inactive in multiple sites?

## Go to User Membership.



Select the **User Membership** tool from the Tool Menu in the Administration Workspace.

## Enter a search term.

### Users

Select a user from the search results to get site and group membership.

User Type: All ▼

User Authority: All ▼

student01

Search

Enter a search term into the field provided. You may search for a full or partial name, user ID, or email address.

*Note: If desired, you may also filter your search using the User Type or User Authority drop-down menus.*

# Click Search.

## Users

Select a user from the search results to get site and group membership.

User Type: All

User Authority: All

student01

Search

# View search results.

## Users

Select a user from the search results to get site and group membership.

User Type: All

User Authority: All

student01

Search

Clear search

Viewing 1 to 2 of 2 users

|<

<

Show 20

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>|

User ID	Internal User ID	Name	Email	Type	Authority	Created On	Modified On
<a href="#">ndrew</a>	4cc3bb1a-8565-4f10-b226-40208f5e9286	Nancy Drew	<a href="#">ndrew_student01@mailinator.com</a>	registered	Internal	Sep 27, 2017	Sep 27, 2017
<a href="#">student01</a>	c7e0c22c-d0af-4628-987c-7500043c35e7	Student01 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017

Export CSV

Export Excel

All matching users will be displayed in the search results.

# Click on a User ID to see site and group membership for that user.

### Users

Select a user from the search results to get site and group membership.

User Type: All

User Authority: All

student01

Search

Clear search

Viewing 1 to 2 of 2 users

|<

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Show 20

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>|

User ID	Internal User ID	Name	Email	Type	Authority	Created On	Modified On
<a href="#">ndrew</a>	4cc3bb1a-8565-4f10-b226-40208f5e9286	Nancy Drew	<a href="#">ndrew_student01@mailinator.com</a>	registered	Internal	Sep 27, 2017	Sep 27, 2017
<a href="#">student01</a>	c7e0c22c-d0af-4628-987c-7500043c35e7	Student01 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017

Export CSV

Export Excel

## Click Actions.

### Membership (student01)

Site and group membership for the selected user.

▸ Actions

	Site	Groups	Type	Term	Role	Site status	User status
<input type="checkbox"/>	<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-201</a>		course	Spring 2017	Student	Published	Active
<input type="checkbox"/>	<a href="#">Discussion 1 SMPL101</a>		course	Summer 2017	Student	Published	Active
<input type="checkbox"/>	<a href="#">Discussion 2 SMPL202</a>		course	Summer 2017	Student	Published	Active
<input type="checkbox"/>	<a href="#">Marist SMP 101 Summer 2017</a>		course	Summer 2017	Student	Published	Active

▸ Actions

Back to user list

This detail view will display all of the sites in which the user is enrolled. The type, term, and published/unpublished site status are shown, as well as the user's role and status within each site.

*Note: Clicking on the title of a site will take you into that site.*

## Select some or all of the user's enrolled sites.

### Membership (student01)

Site and group membership for the selected user.

#### ▼ Actions

[Select All](#)

[Deselect All](#)


[Invert Selection](#)

[Set Selected to Inactive](#)

[Set Selected to Active](#)

[Export Selected to CSV](#)

[Export Selected to Excel](#)

Site 	Groups	Type	Term	Role	Site status	User status
<input checked="" type="checkbox"/> <a href="#">DAC-EDUCATION-DEPT1-SUBJ1-201</a>		course	Spring 2017	Student	Published	Active
<input checked="" type="checkbox"/> <a href="#">Discussion 1 SMPL101</a>		course	Summer 2017	Student	Published	Active
<input checked="" type="checkbox"/> <a href="#">Discussion 2 SMPL202</a>		course	Summer 2017	Student	Published	Active
<input checked="" type="checkbox"/> <a href="#">Marist SMP 101 Summer 2017</a>		course	Summer 2017	Student	Published	Active

#### ► Actions

[Back to user list](#)

You may select all or some of the user's sites by using the **Select All** link in the Actions menu, or by checking the boxes next to the sites in which you want to make the user inactive.

# Click Set Selected to Inactive in the Actions menu.

## Membership (student01)

Site and group membership for the selected user.

▼ Actions

[Select All](#)  
[Deselect All](#)  
[Invert Selection](#)

[Set Selected to Inactive](#)  
[Set Selected to Active](#)

[Export Selected to CSV](#)  
[Export Selected to Excel](#)

Site	Groups	Type	Term	Role	Site status	User status
<input checked="" type="checkbox"/> <a href="#">DAC-EDUCATION-DEPT1-SUBJ1-201</a>		course	Spring 2017	Student	Published	Active
<input checked="" type="checkbox"/> <a href="#">Discussion 1 SMPL101</a>		course	Summer 2017	Student	Published	Active
<input checked="" type="checkbox"/> <a href="#">Discussion 2 SMPL202</a>		course	Summer 2017	Student	Published	Active
<input checked="" type="checkbox"/> <a href="#">Marist SMP 101 Summer 2017</a>		course	Summer 2017	Student	Published	Active

► Actions

Back to user list

# View user's current status.

## Membership (student01)

Site and group membership for the selected user.

► Actions

Site	Groups	Type	Term	Role	Site status	User status
<input type="checkbox"/> <a href="#">DAC-EDUCATION-DEPT1-SUBJ1-201</a>		course	Spring 2017	Student	Published	Inactive
<input type="checkbox"/> <a href="#">Discussion 1 SMPL101</a>		course	Summer 2017	Student	Published	Inactive
<input type="checkbox"/> <a href="#">Discussion 2 SMPL202</a>		course	Summer 2017	Student	Published	Inactive
<input type="checkbox"/> <a href="#">Marist SMP 101 Summer 2017</a>		course	Summer 2017	Student	Published	Inactive

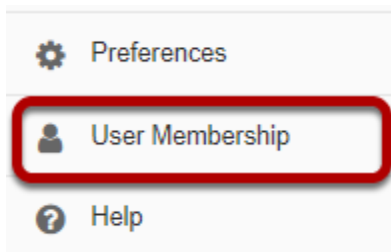
► Actions

Back to user list

Notice that the user's status is now "inactive" in the specified sites.

# How do I make a user active in multiple sites?

## Go to User Membership.



Select the **User Membership** tool from the Tool Menu in the Administration Workspace.

## Enter a search term.

### Users

Select a user from the search results to get site and group membership.

User Type:

User Authority:

Enter a search term into the field provided. You may search for a full or partial name, user ID, or email address.

*Note: If desired, you may also filter your search using the User Type or User Authority drop-down menus.*

# Click Search.

## Users

Select a user from the search results to get site and group membership.

User Type: All

User Authority: All

student01

Search

# View search results.

## Users

Select a user from the search results to get site and group membership.

User Type: All

User Authority: All

student01

Search

Clear search

Viewing 1 to 2 of 2 users

|<

<

Show 20

>

>|

User ID	Internal User ID	Name	Email	Type	Authority	Created On	Modified On
<a href="#">ndrew</a>	4cc3bb1a-8565-4f10-b226-40208f5e9286	Nancy Drew	<a href="#">ndrew_student01@mailinator.com</a>	registered	Internal	Sep 27, 2017	Sep 27, 2017
<a href="#">student01</a>	c7e0c22c-d0af-4628-987c-7500043c35e7	Student01 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017

Export CSV

Export Excel

All matching users will be displayed in the search results.

# Click on a User ID to see site and group membership for that user.

## Users

Select a user from the search results to get site and group membership.

User Type: All

User Authority: All

student01

Search

Clear search

Viewing 1 to 2 of 2 users

|<

<

Show 20

>

>|

User ID	Internal User ID	Name	Email	Type	Authority	Created On	Modified On
<a href="#">ndrew</a>	4cc3bb1a-8565-4f10-b226-40208f5e9286	Nancy Drew	<a href="#">ndrew_student01@mailinator.com</a>	registered	Internal	Sep 27, 2017	Sep 27, 2017
<a href="#">student01</a>	c7e0c22c-d0af-4628-987c-7500043c35e7	Student01 Demo		registered	Internal	Sep 26, 2017	Sep 26, 2017

Export CSV

Export Excel

# Click Actions.

## Membership (student01)

Site and group membership for the selected user.

▸ Actions

Site	Groups	Type	Term	Role	Site status	User status
<input type="checkbox"/> <a href="#">DAC-EDUCATION-DEPT1-SUBJ1-201</a>		course	Spring 2017	Student	Published	Inactive
<input type="checkbox"/> <a href="#">Discussion 1 SMPL101</a>		course	Summer 2017	Student	Published	Inactive
<input type="checkbox"/> <a href="#">Discussion 2 SMPL202</a>		course	Summer 2017	Student	Published	Inactive
<input type="checkbox"/> <a href="#">Marist SMP 101 Summer 2017</a>		course	Summer 2017	Student	Published	Inactive

▸ Actions

Back to user list

This detail view will display all of the sites in which the user is enrolled. The type, term, and published/unpublished site status are shown, as well as the user's role and status within each site.

*Note: Clicking on the title of a site will take you into that site.*

## Select some or all of the user's enrolled sites.

### Membership (student01)

Site and group membership for the selected user.

#### ▼ Actions

[Select All](#)

[Set Selected to Inactive](#)


[Export Selected to CSV](#)

[Deselect All](#)

[Set Selected to Active](#)

[Export Selected to Excel](#)

[Invert Selection](#)

Site 	Groups	Type	Term	Role	Site status	User status
<input checked="" type="checkbox"/> <a href="#">DAC-EDUCATION-DEPT1-SUBJ1-201</a>		course	Spring 2017	Student	Published	Inactive
<input checked="" type="checkbox"/> <a href="#">Discussion 1 SMPL101</a>		course	Summer 2017	Student	Published	Inactive
<input checked="" type="checkbox"/> <a href="#">Discussion 2 SMPL202</a>		course	Summer 2017	Student	Published	Inactive
<input checked="" type="checkbox"/> <a href="#">Marist SMP 101 Summer 2017</a>		course	Summer 2017	Student	Published	Inactive

#### ► Actions

[Back to user list](#)

You may select all or some of the user's sites by using the **Select All** link in the Actions menu, or by checking the boxes next to the sites in which you want to make the user inactive.

# Click Set Selected to Active in the Actions menu.

Membership (student01)

Site and group membership for the selected user.

▼ Actions

Select All

Deselect All

Invert Selection

Set Selected to Inactive

**Set Selected to Active**

Export Selected to CSV

Export Selected to Excel

Site	Groups	Type	Term	Role	Site status	User status
<input checked="" type="checkbox"/> <a href="#">DAC-EDUCATION-DEPT1-SUBJ1-201</a>		course	Spring 2017	Student	Published	Inactive
<input checked="" type="checkbox"/> <a href="#">Discussion 1 SMPL101</a>		course	Summer 2017	Student	Published	Inactive
<input checked="" type="checkbox"/> <a href="#">Discussion 2 SMPL202</a>		course	Summer 2017	Student	Published	Inactive
<input checked="" type="checkbox"/> <a href="#">Marist SMP 101 Summer 2017</a>		course	Summer 2017	Student	Published	Inactive

► Actions

Back to user list

# View user's current status.

Membership (student01)

Site and group membership for the selected user.

► Actions

Site	Groups	Type	Term	Role	Site status	User status
<input type="checkbox"/> <a href="#">DAC-EDUCATION-DEPT1-SUBJ1-201</a>		course	Spring 2017	Student	Published	Active
<input type="checkbox"/> <a href="#">Discussion 1 SMPL101</a>		course	Summer 2017	Student	Published	Active
<input type="checkbox"/> <a href="#">Discussion 2 SMPL202</a>		course	Summer 2017	Student	Published	Active
<input type="checkbox"/> <a href="#">Marist SMP 101 Summer 2017</a>		course	Summer 2017	Student	Published	Active

► Actions

Back to user list

Notice that the user's status is now "active" in the specified sites.

Sakai 19 Administrator Guide (English)

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# Worksite Setup

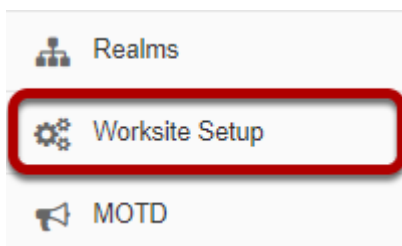
# What is Worksite Setup?

The Worksite Setup tool provides information about the sites to which you currently belong or may join. If you have a role that allows it, you can use this tool to make changes to information about the site, tools available in the site, and access to the site. You can also publish the site using the Worksite Setup tool.

Many of the functions of the Worksite Setup tool mirror those of the [Site Info](#) tool; Worksite Setup is available through Home, whereas Site Info is available in each site.

If you don't have the appropriate permissions, you will only see the information about the site published by the site owner in Worksite Setup.

**To access this tool, click Worksite Setup from the Tool Menu in My Workspace.**



# How does Worksite Setup differ for admin users?

Unlike most users who only see sites in which they are currently enrolled when they go to WorkSite Setup, admin users will be able to view and search for all sites in the system via Worksite Setup. Admin users may also access any site in the system by clicking on the worksite title displayed in Worksite Setup.

Worksite Setup is the preferred tool for creating new sites manually. When creating a new site in Worksite Setup, users are guided through the process of selecting the site type, selecting the term and section. Also, the default set of tools in the site will automatically be enabled. While admin users may also create sites manually from the Sites tool, it is recommended that manual site creation be done via Worksite Setup.

In addition, admin users have access to the [Hard Delete](#) feature via Worksite Setup.

# How do I define the default set of tools added to site on site creation?

The default tool suite (i.e. the tools added to a site on creation) is specified in the file `toolOrder.xml` file (located in the `.../apache-tomcatxxx/sakai` folder).

See the sample extract from the `toolOrder.xml` file for course sites below:

```
<toolOrder><category name="course">
  <tool id="sakai.iframe.site"/>
  <tool id="sakai.synoptic.chat"/>
  <tool id="sakai.synoptic.announcement"/>
  <tool id="home" selected="true"/>
  <tool id="sakai.announcements" selected="true"/>
  <tool id="sakai.schedule"/>
  <tool id="sakai.syllabus"/>
  <tool id="sakai.resources" selected="true"/>
  <tool id="sakai.lessonbuildertool" selected="true"/>
  <tool id="sakai.podcasts"/>
  <tool id="sakai.rwiki"/>
<tool id="sakai.poll"/>
  <tool id="sakai.messagecenter"/>
  <tool id="sakai.forums"/>
  <tool id="sakai.messages"/>
  <tool id="sakai.discussion"/>
  <tool id="sakai.mailbox"/>
  <tool id="sakai.chat" selected="true"/>
  <tool id="sakai.dropbox"/>
```

```
<tool id="sakai.assignment.grades" selected="true"/>
<tool id="sakai.samigo"/>
<tool id="sakai.gradebookng" selected="true"/>
<tool id="sakai.postem"/>
<tool id="sakai.news"/>
<tool id="sakai.iframe"/>
<tool id="sakai.sections"/>
<tool id="sakai.site.roster" selected="true"/>
<tool id="sakai.search" selected="true"/>
<tool id="sakai.siteinfo" selected="true" required="true"/>
</category><category name="project">
```

The tools which include **selected="true"** will be selected by default when the person creating the site is on the **Site Info > Edit Tools > Course Site Tools** screen.

The tools which include **required="true"**, such as Site Info, are mandatory tools. The user will not be able to de-select them on the **Site Info > Edit Tools > Course Site Tools** screen.

If your instance of Sakai uses different site types (project, collaboration etc.), each site type can its own section in the toolOrder file.

# How are sites deleted?

When you delete a site in Sakai, there are two different types of deletion: Soft Delete and Hard Delete.

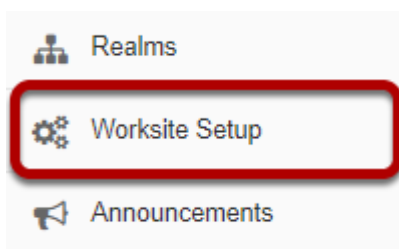
[Soft Delete](#) is the default deletion method, and can be done from either the Sites tool in the Administration Workspace, or the Worksite Setup tool for users with deletion permissions. Soft Delete removes the site but leaves site data intact in the database and file system. There is also job that administrative users may run in the Job Scheduler tool to purge any softly deleted sites in the system.

[Hard Delete](#) is an option for permanently removing both the site and all of its data from the system. This option can be done in the Worksite Setup tool for users with deletion permissions (typically admins only). Hard Delete is used when an institution wants to free up space on the server by completely removing old site files and data.

# How do I Soft Delete a site from Worksite Setup?

Soft Delete is the default deletion method, and can be done from either the Sites tool in the Administration Workspace, or the Worksite Setup tool for users with deletion permissions.

## Go to Worksite Setup.



Select the **Worksite Setup** tool from the Tool Menu in your site.

## Locate and select the site or sites you want to soft delete.

**WORKSITE SETUP** [Link](#) [Help](#)

New

View: All My Sites ▼

Filter by Term: None ▼

DAC-EDUCATION-DEPT1- Search Clear Search

1 2

Edit Delete Hard Delete

1 site was found that matched your search for DAC-EDUCATION-DEPT1-SUBJ1-326 in the view of "site\_type\_all".

Check a box and use the buttons above or below to take action on a site. Click column headers to sort the table.

Viewing 1 - 1 of 1 items

< show 20 items per page ▼ >

<span>3</span> <span>Worksite Title</span> <span>▲</span>	Type	Creator	Term	Status	Creation Date
<input checked="" type="checkbox"/> <a href="#">DAC-EDUCATION-DEPT1-SUBJ1-326</a> ⓘ	course	datest	Summer 2017	Published	Aug 31, 2017 1:09 pm

Edit Delete Hard Delete

Find the site you want to delete by performing a search. For example:

1. Enter a search term, such as the site title.
2. Click **Search**.
3. Check the box next to the site or sites you would like to delete.

## Click the Delete button.

**WORKSITE SETUP** [Link](#) [Help](#)

New

View: All My Sites

Filter by Term: None

1 site was found that matched your search for DAC-EDUCATION-DEPT1-SUBJ1-326 in the view of "site\_type\_all".

Check a box and use the buttons above or below to take action on a site. Click column headers to sort the table.

Viewing 1 - 1 of 1 items

< show 20 items per page >

<input type="checkbox"/>	<a href="#">Worksite Title</a>	<a href="#">Type</a>	<a href="#">Creator</a>	<a href="#">Term</a>	<a href="#">Status</a>	<a href="#">Creation Date</a>
<input checked="" type="checkbox"/>	<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-326</a>	course	datest	Summer 2017	Published	Aug 31, 2017 1:09 pm

Click the **Delete** button located at the top or the bottom of the screen.

*Note: Make sure you do NOT click Hard Delete, as that option will permanently delete the site and all of its files and data.*

# Click Mark for deletion to confirm site removal.

## Softly Deleting Site...

This site will be 'softly deleted' but will remain accessible to you via the "View softly deleted Sites" option in the Worksite Setup tool which is found in Home. It will eventually be purged as per the schedule set by your System Administrator.  
Participants will no longer be able to access the site, however the contents of the site will be preserved and you can restore access to the site at any time before it is purged.

**You have selected the following site for soft deletion:**

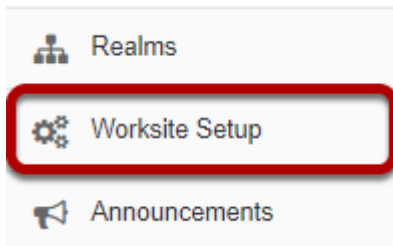
DAC-EDUCATION-DEPT1-SUBJ1-326

Mark for deletion

Cancel

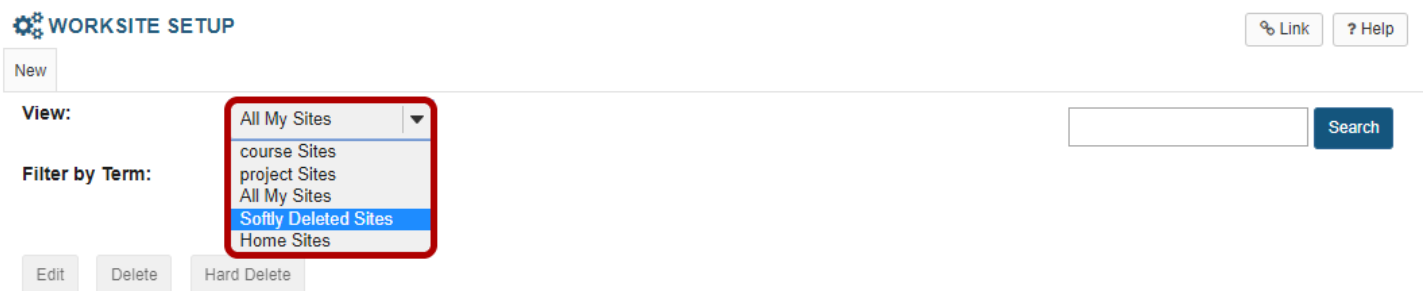
# How do I restore a softly deleted site?

Go to Worksite Setup.



Select the **Worksite Setup** tool from the Tool Menu.

From the View drop-down menu, select Softly Deleted Sites.



# All sites marked for deletion will be displayed.

WORKSITE SETUP

New

View:

Softly Deleted Sites

Filter by Term:

None

Edit

Delete

Hard Delete

Restore

Link

Help

Search

Check a box and use the buttons above or below to take action on a site. Click column headers to sort the table.

Viewing 1 - 2 of 2 items

<

show 20 items per page

>

<input type="checkbox"/>	Worksite Title	Type	Creator	Term	Status	Creation Date
<input type="checkbox"/>	DAC-EDUCATION-DEPT1-SUBJ1-326	course	datest	Summer 2017	Softly Deleted	Aug 31, 2017 1:09 pm
<input type="checkbox"/>	Marist Sample 1		admin		Softly Deleted	Sep 13, 2017 12:58 pm

Edit

Delete

Hard Delete

Restore

# Select the site you want to restore, then click Restore.

WORKSITE SETUP

New

View:

Softly Deleted Sites

Filter by Term:

None

Edit

Delete

Hard Delete

Restore

Link

Help

Search

Check a box and use the buttons above or below to take action on a site. Click column headers to sort the table.

Viewing 1 - 2 of 2 items

<

show 20 items per page

>

<input type="checkbox"/>	Worksite Title	Type	Creator	Term	Status	Creation Date
<input checked="" type="checkbox"/>	DAC-EDUCATION-DEPT1-SUBJ1-326	course	datest	Summer 2017	Softly Deleted	Aug 31, 2017 1:09 pm
<input type="checkbox"/>	Marist Sample 1		admin		Softly Deleted	Sep 13, 2017 12:58 pm

Edit

Delete

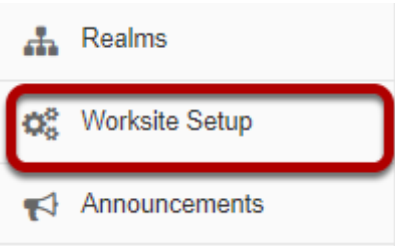
Hard Delete

Restore

# How do I Hard Delete a site?

Hard deleting a site will completely remove the site and all of its files and data from the system. Typically, only admin users have permission to perform a hard delete.

## Go to Worksite Setup.



Select the **Worksite Setup** tool from the Tool Menu in the Administration Workspace or Home.

## Locate and select the site or sites you want to permanently delete.

WORKSITE SETUP

[Link](#) [Help](#)

New

View:

All My Sites

Filter by Term:

None

DAC-EDUCATION-DEPT1-

Search

Clear Search

1

2

Edit

Delete

Hard Delete

1 site was found that matched your search for DAC-EDUCATION-DEPT1-SUBJ1-326 in the view of "site\_type\_all".

Check a box and use the buttons above or below to take action on a site. Click column headers to sort the table.

Viewing 1 - 1 of 1 items

<

show 20 items per page

>

3

Worksite Title	Type	Creator	Term	Status	Creation Date
<input checked="" type="checkbox"/> DAC-EDUCATION-DEPT1-SUBJ1-326	course	datest	Summer 2017	Published	Aug 31, 2017 1:09 pm

Edit

Delete

Hard Delete

Find the site or sites you want to delete by performing a search. For example:

1. Enter a search term, such as the site title.
2. Click **Search**.
3. Check the box next to the site or sites you would like to delete.

## Click Hard Delete.

**WORKSITE SETUP** [Link](#) [Help](#)

New

View: All My Sites DAC-EDUCATION-DEPT1- Search Clear Search

Filter by Term: None

Edit Delete **Hard Delete**

1 site was found that matched your search for DAC-EDUCATION-DEPT1-SUBJ1-326 in the view of "site\_type\_all".

Check a box and use the buttons above or below to take action on a site. Click column headers to sort the table.

Viewing 1 - 1 of 1 items

< show 20 items per page >

<input type="checkbox"/>	Worksite Title <a href="#">▲</a>	Type	Creator	Term	Status	Creation Date
<input checked="" type="checkbox"/>	<a href="#">DAC-EDUCATION-DEPT1-SUBJ1-326</a> ⓘ	course	datest	Summer 2017	Published	Aug 31, 2017 1:09 pm

Edit Delete **Hard Delete**

Click the Hard **Delete** button located at the top or the bottom of the screen.

*Note: If you do not want to permanently delete the site and all of its files and data, you may choose the **Delete** button instead to perform a [soft delete](#).*

## Click Hard Delete again to confirm deletion.

### Removing Site...

Deleting a site removes the entire site's content and is not recoverable - no one else will be able to access the deleted site. If you are trying to remove yourself from the site, use the Membership tool in your Home to unjoin the site.

NOTE: You chose Hard Delete so these sites will have their tool content purged from the system.

**You have selected the following site for removal:**

DAC-EDUCATION-DEPT1-SUBJ1-326

**Hard delete** Cancel

*Note: This action will purge the site and all of its data from the system. Once purged, the data is not recoverable.*