Sakai 11 Administrator Guide

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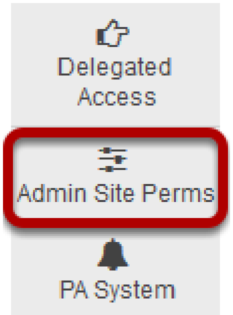
Admin Site Perms

What is the Admin Site Perms tool?

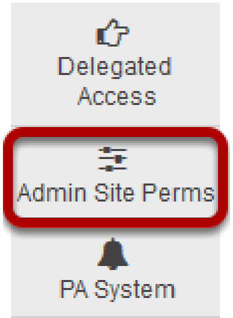
The Admin Site Perms tool allows admin users to add or remove permissions across all sites for specified roles. If you would like to modify the permissions for existing roles in your instance, this tool makes it easy to implement the change system-wide.

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



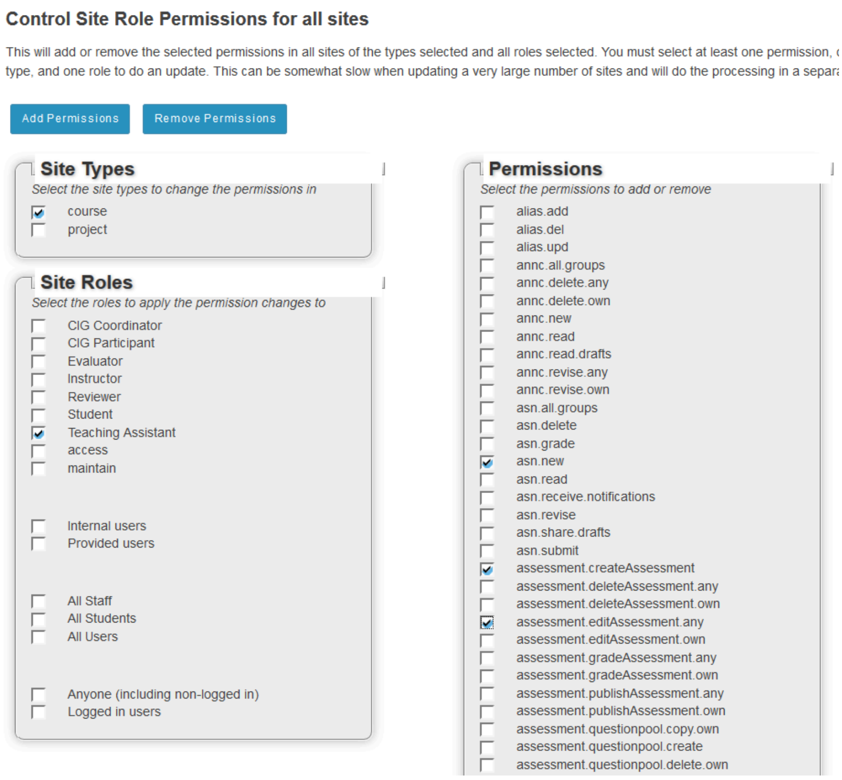
How do I add site role permissions for all sites?

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.



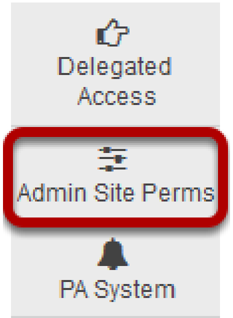
Note: You must select at least one site type, role, and permission.

Click Add Permissions.

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

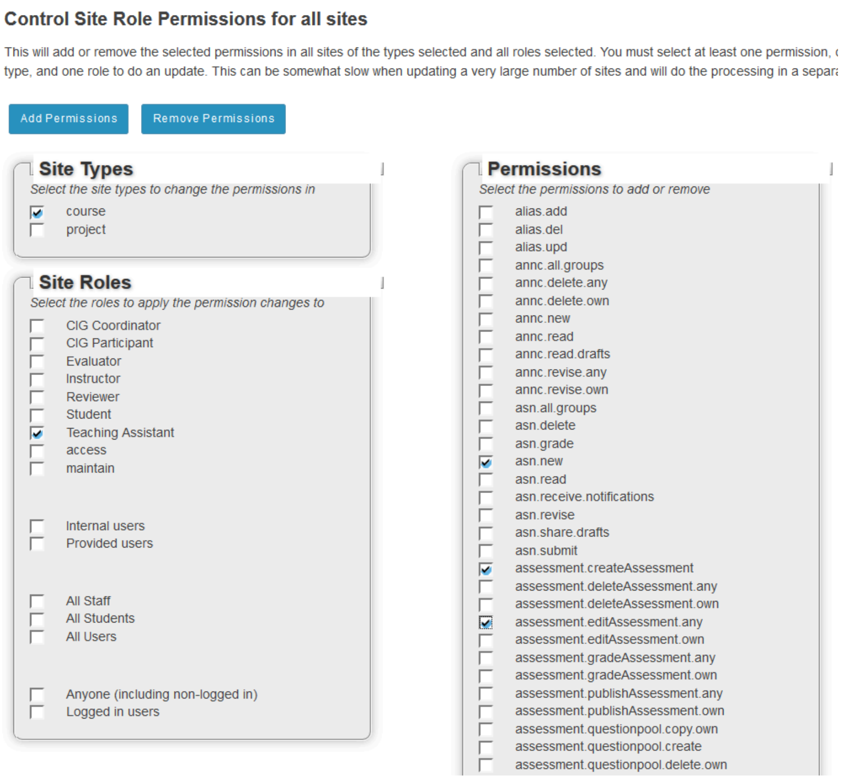
How do I remove site role permissions for all sites?

Go to Admin Site Perms.



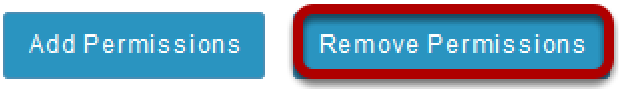
Select the **Admin Site Perms** tool from the Tool Menu in the Administration Workspace.

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



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.

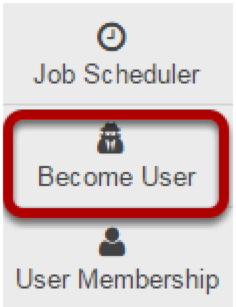
Become User

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.

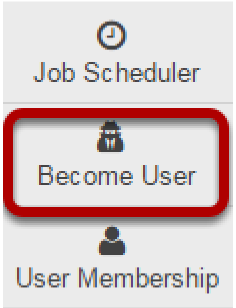
When you log out after using the Become User tool to impersonate/masquerade as a user, you will automatically revert back to your admin account.

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



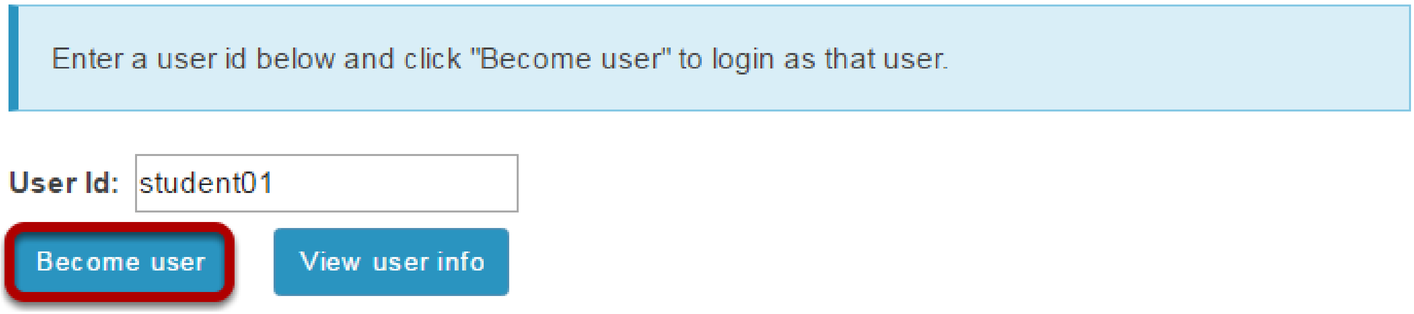
How do I log in as another user?

Go to the Become User tool.



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

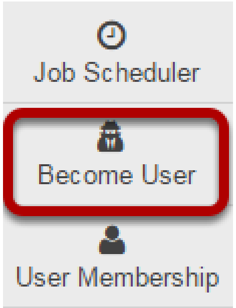
Enter a user id and click Become user.



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

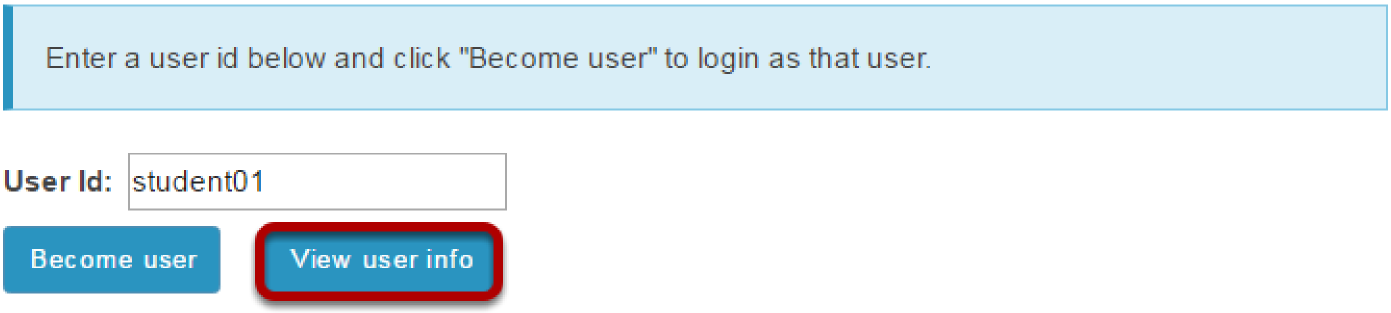
How do I view user info?

Go to the Become User tool.



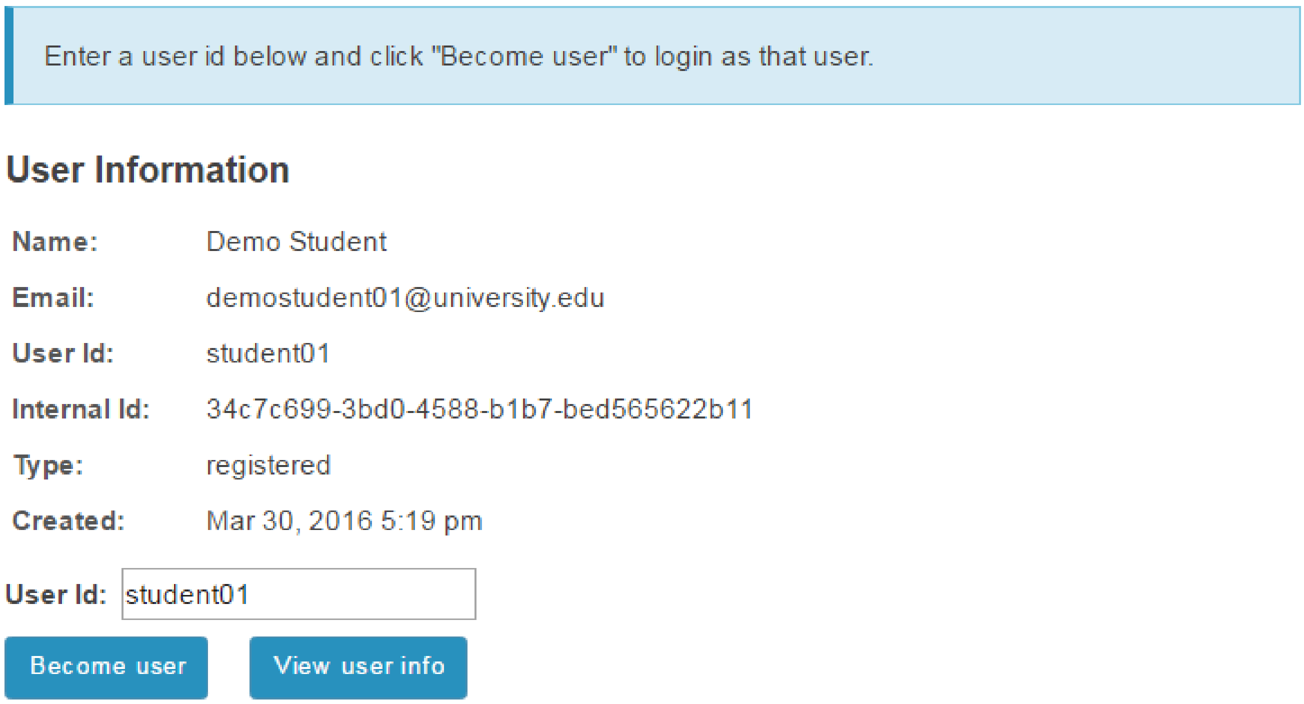
Select **Become User** in the Administration Workspace Tool Menu.

Enter a user id and click View user info.



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.



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.

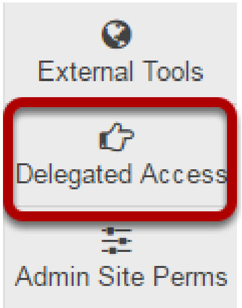
To access this tool, select Delegated Access from the Tool Menu in the Administration Workspace.

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

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

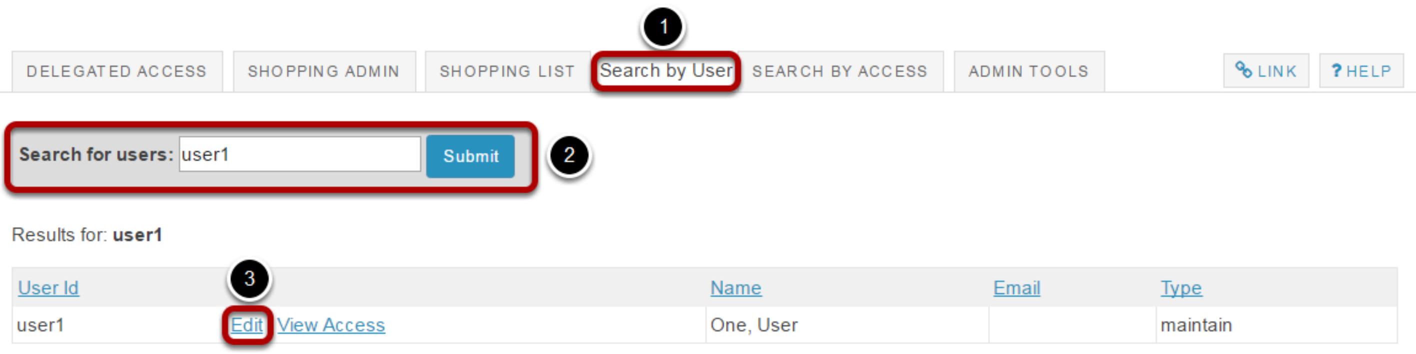
You may want to let a non-admin user manage delegated access for other users. To do so, you can add this capability to the Delegated Access tool you make available in the non-admin user's My Workspace.

Go to Delegated Access tool.



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

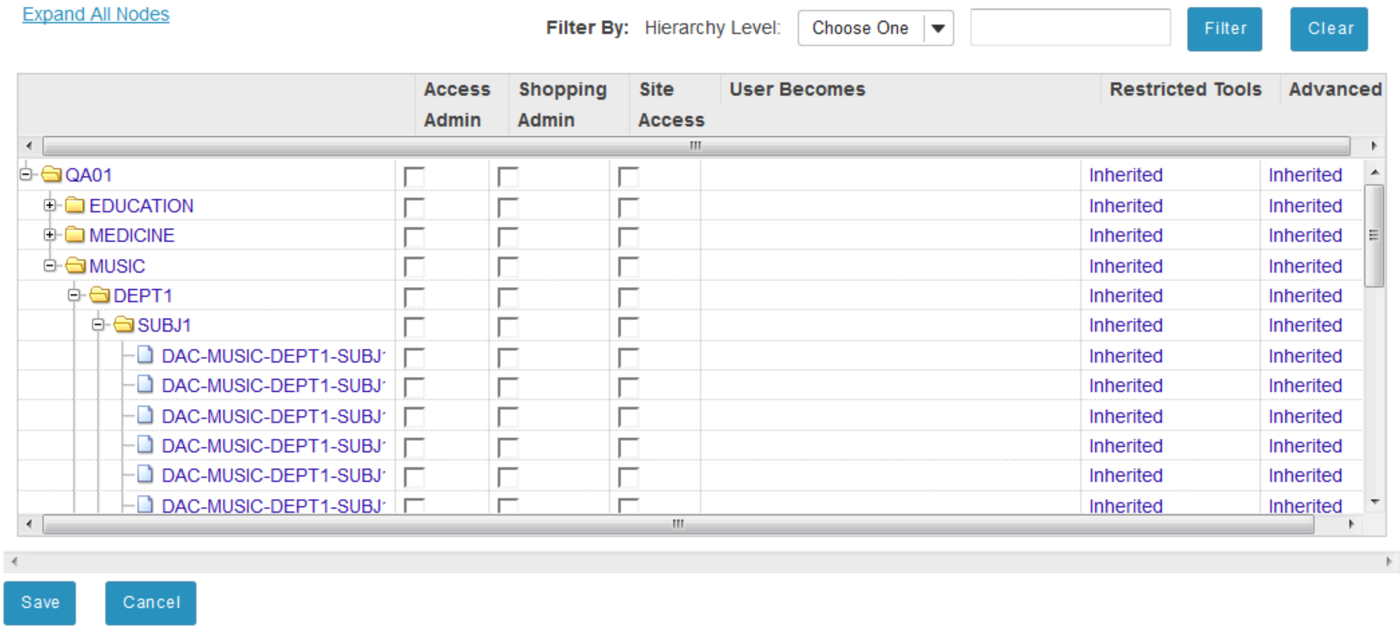
Find and select user



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?*

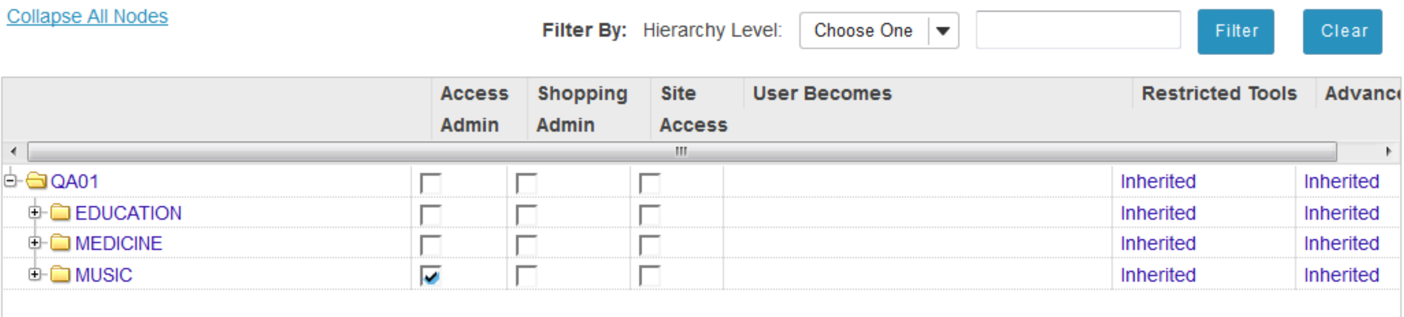
Expand hierarchy nodes.



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.

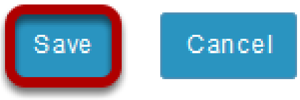
Note: Settings you select for a node will apply to all its "child" (lower-level) nodes, but not to any other nodes at the same level in the hierarchy. You can always override settings that a lower-level node inherits from a higher node.

Set admin capability.



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

Save settings



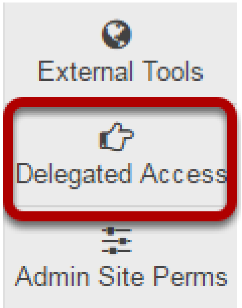
Click **Save**. A "Successfully saved" message displays.

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?

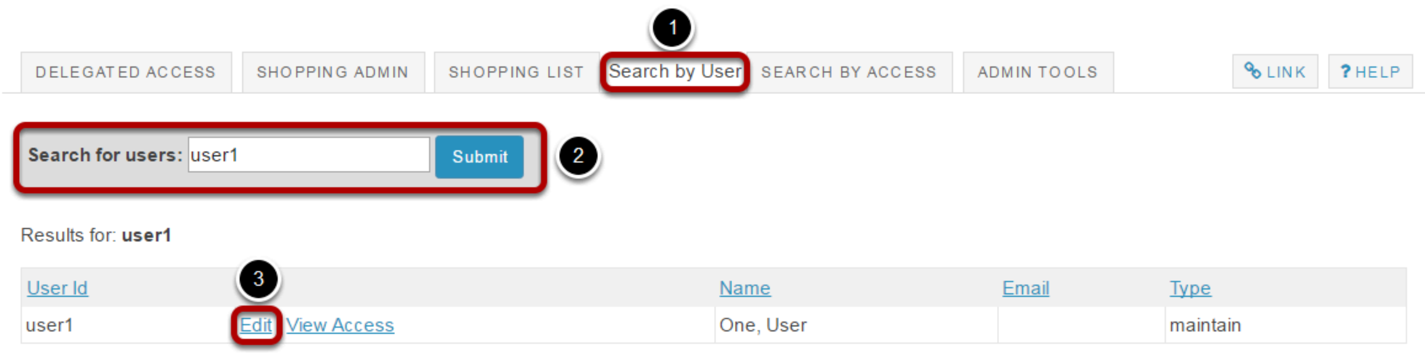
You may want to let a non-admin user manage shopping period access for other users. To do so, you can add this capability to the Delegated Access tool you make available in the non-admin user's My Workspace.

Go to Delegated Access tool.



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

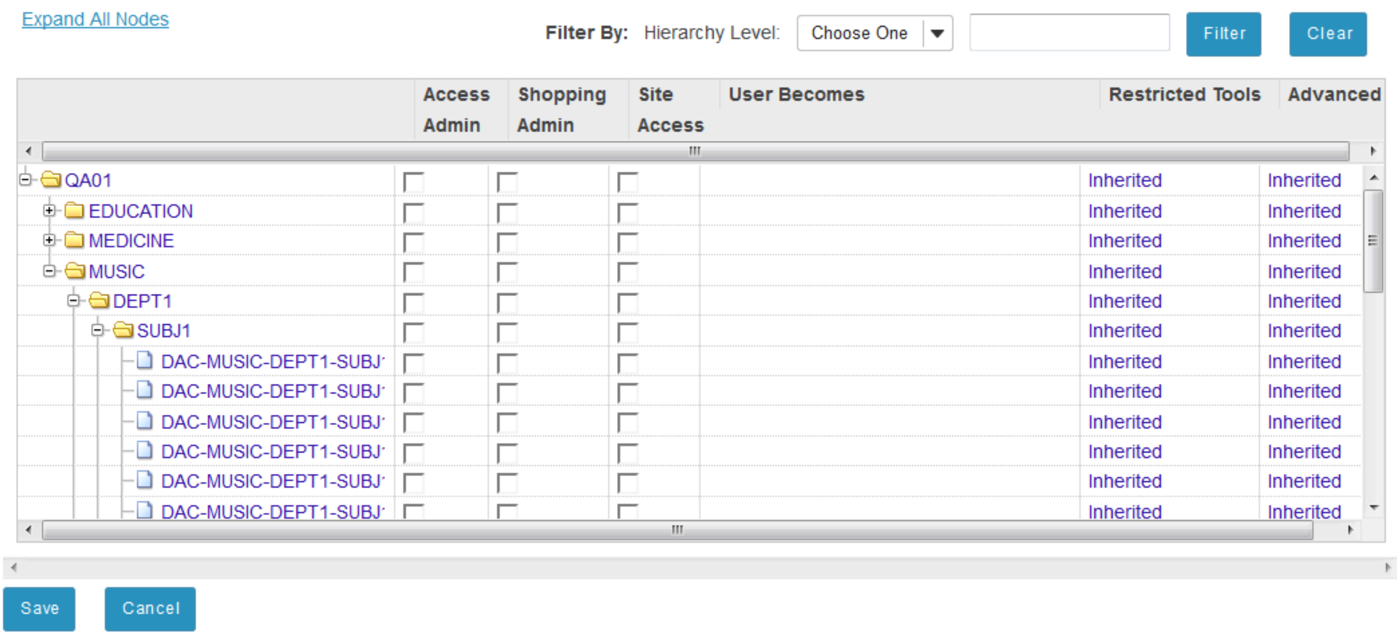
Find and select user



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?](#)*

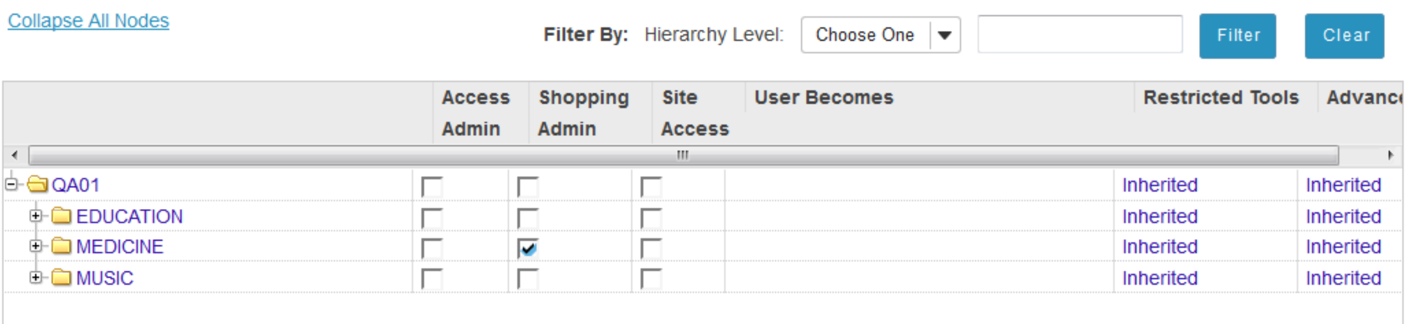
Expand hierarchy nodes.



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.

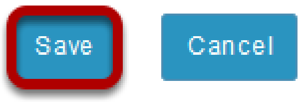
Note: Settings you select for a node will apply to all its "child" (lower-level) nodes, but not to any other nodes at the same level in the hierarchy. You can always override settings that a lower-level node inherits from a higher node.

Set shopping admin capability.



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

Save settings.

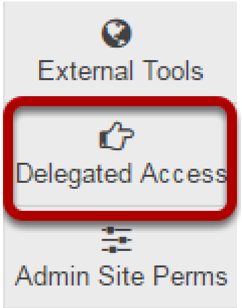


Click **Save**. A "Successfully saved" message displays.

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 *Shopping Admin* and *Shopping List* buttons for managing shopping period access for other users.

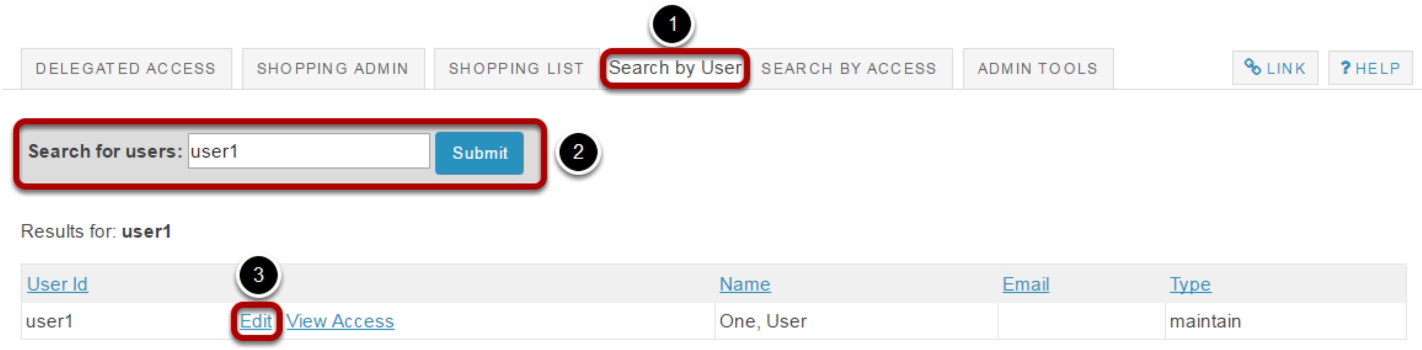
How do I delegate site access to a user?

Go to Delegated Access tool.



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

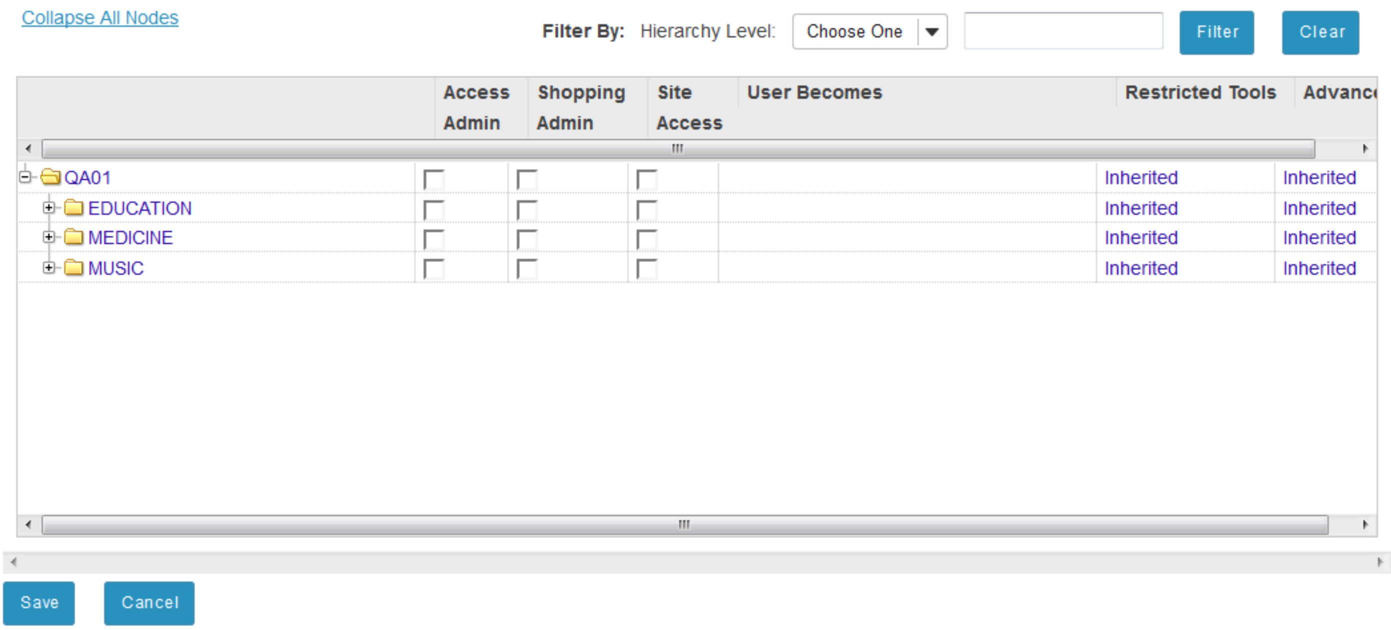
Find and select user



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?]*

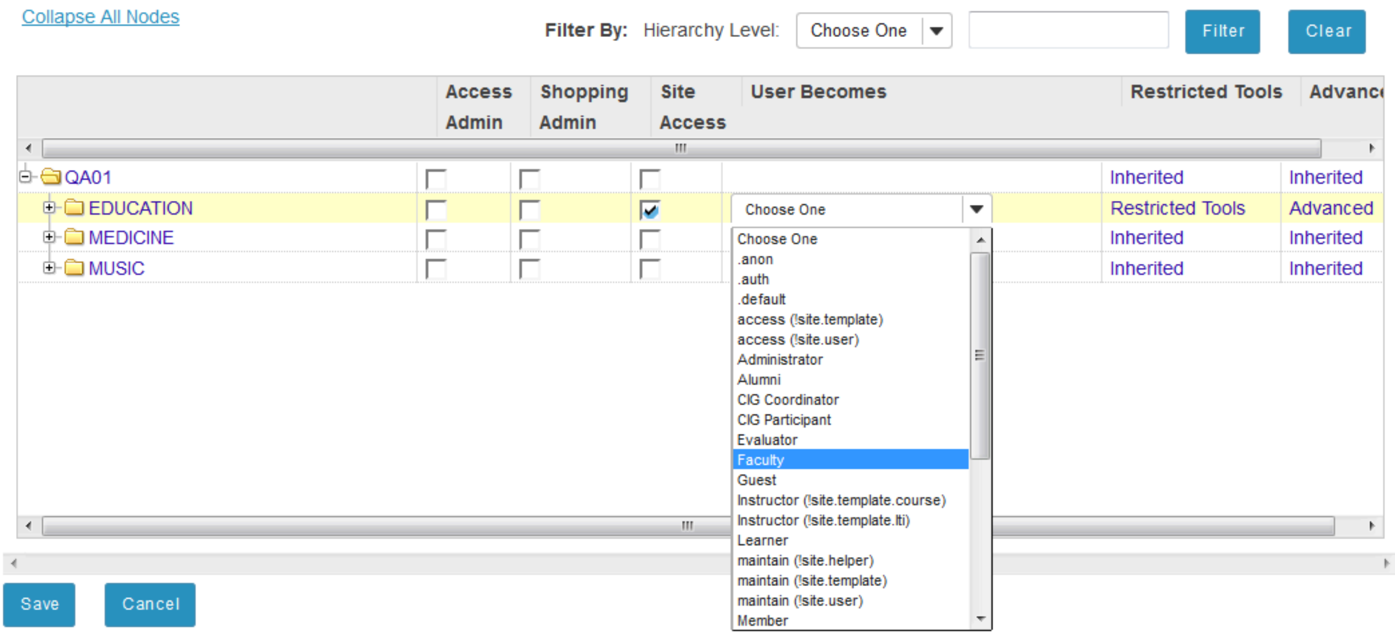
Expand hierarchy nodes.



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.

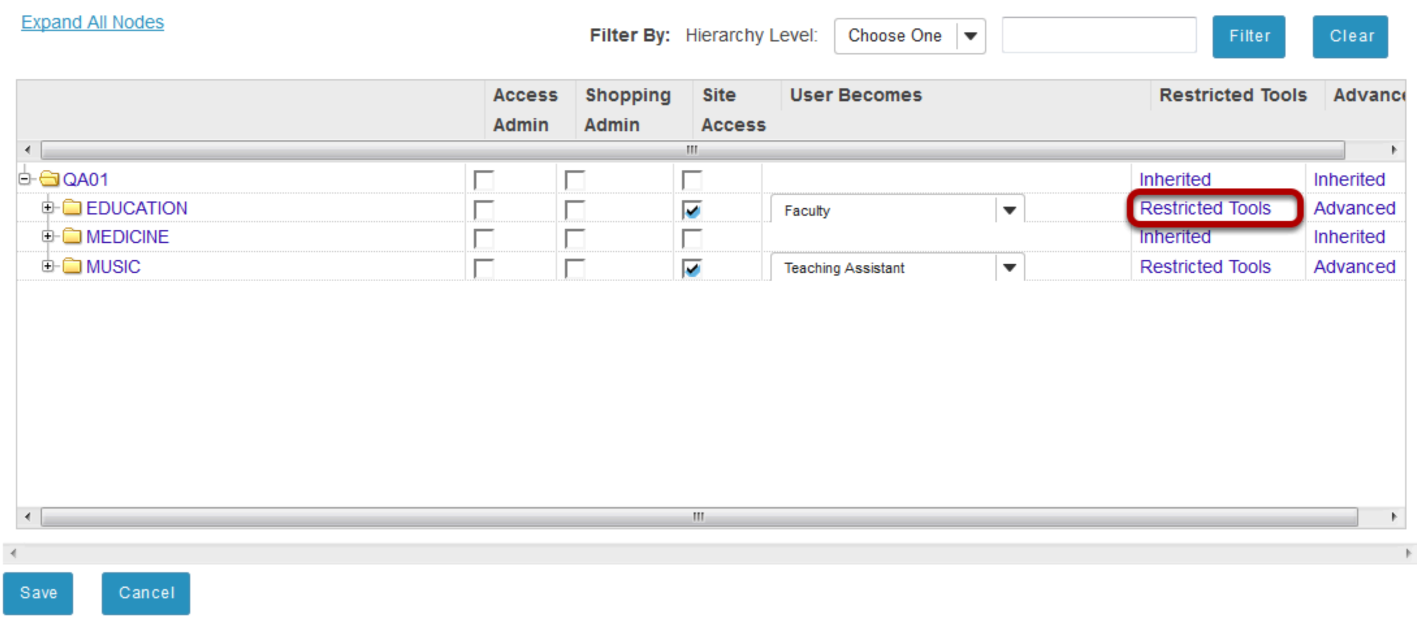
Set access and role



For a particular node:

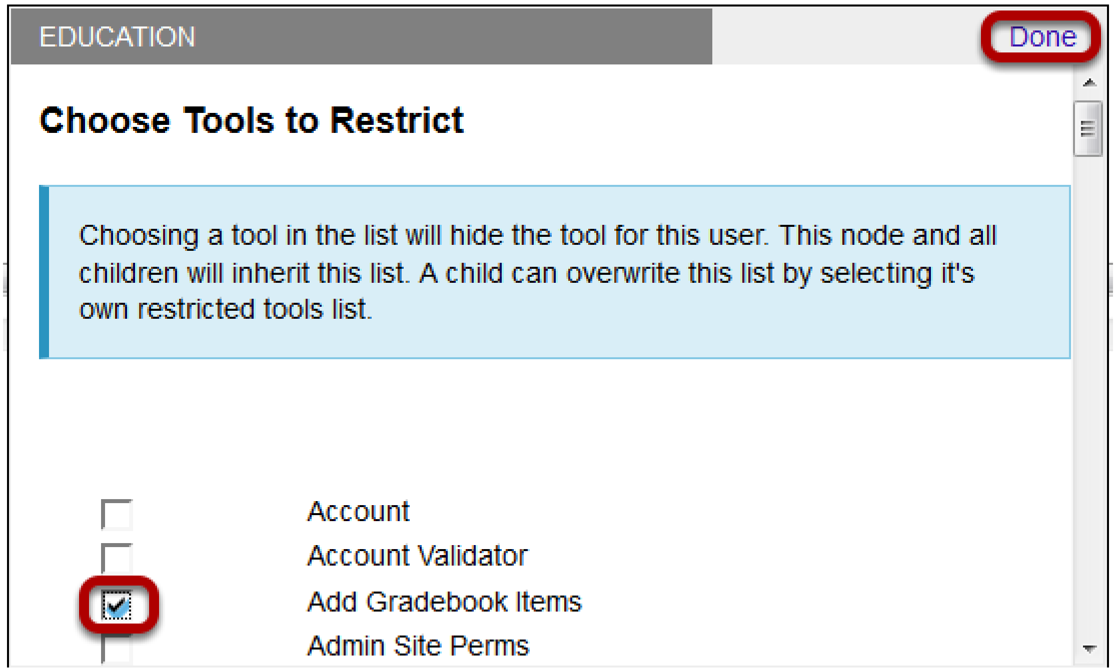
1. Check **Site Access**.
2. Select a role from the *User Becomes* menu. The user will have the permissions for the selected role when accessing sites.

Set tool restrictions. (Optional)

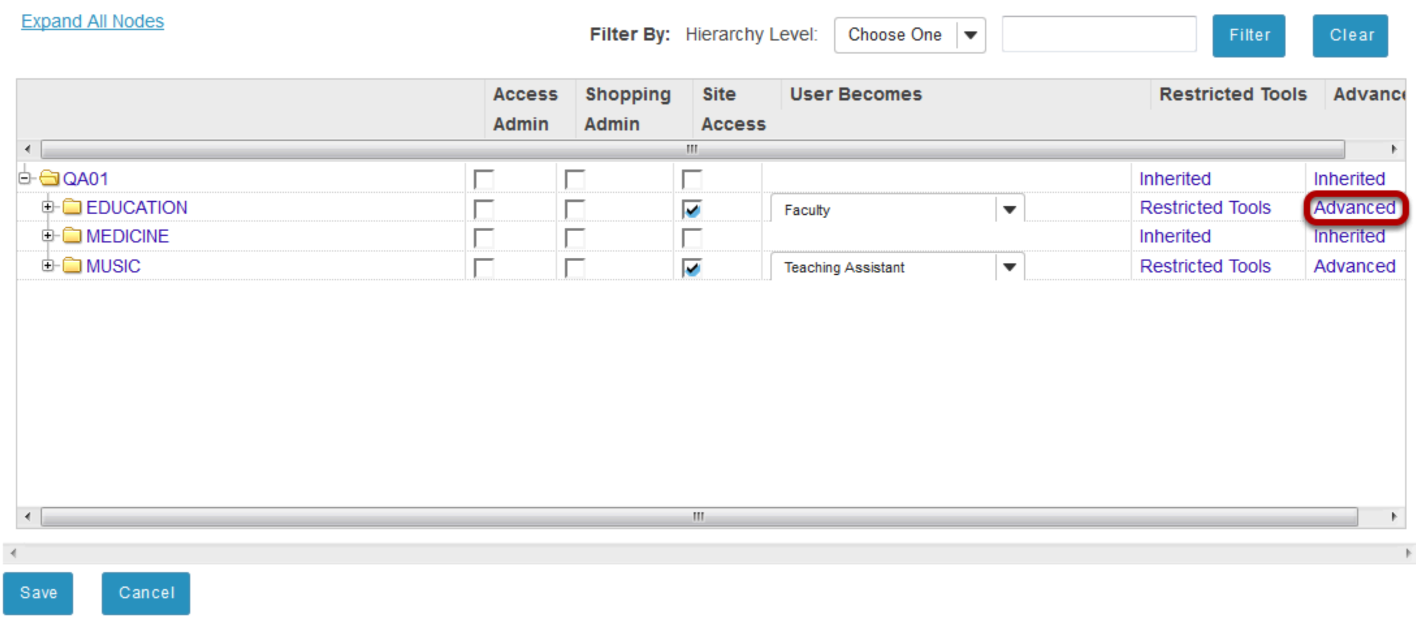


If you would like to restrict access to specific tools within a node or site, click **Restricted Tools**.

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

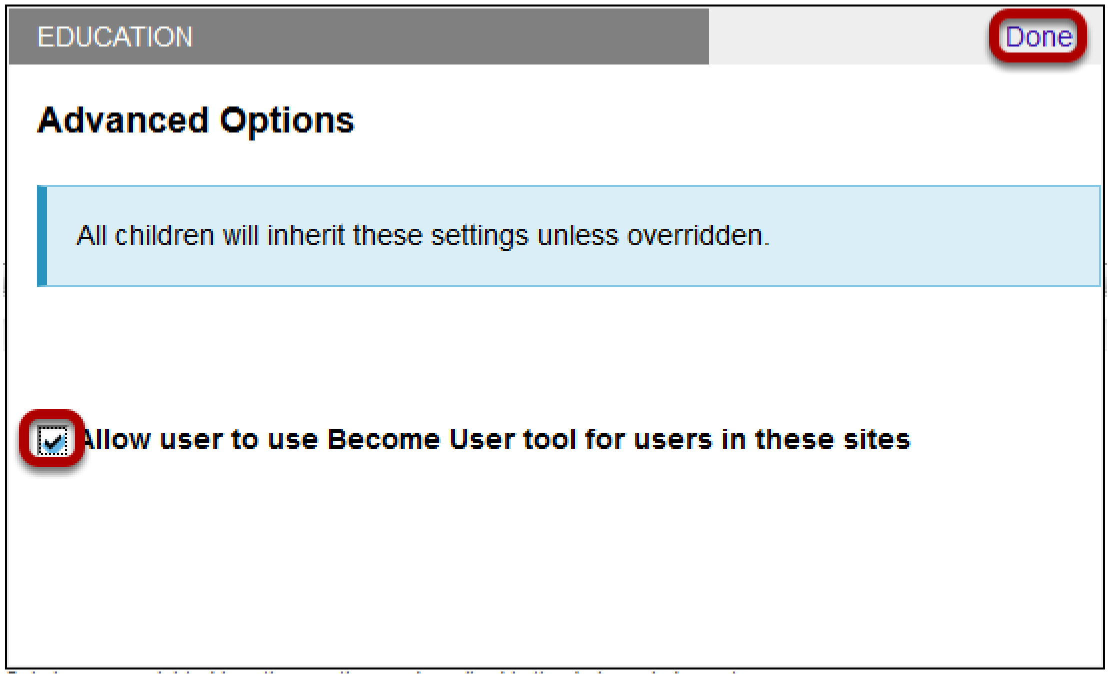


Add Become User tool. (Optional)



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

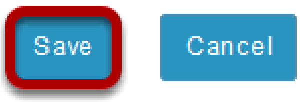
Enable Become User tool, then click Done.



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.

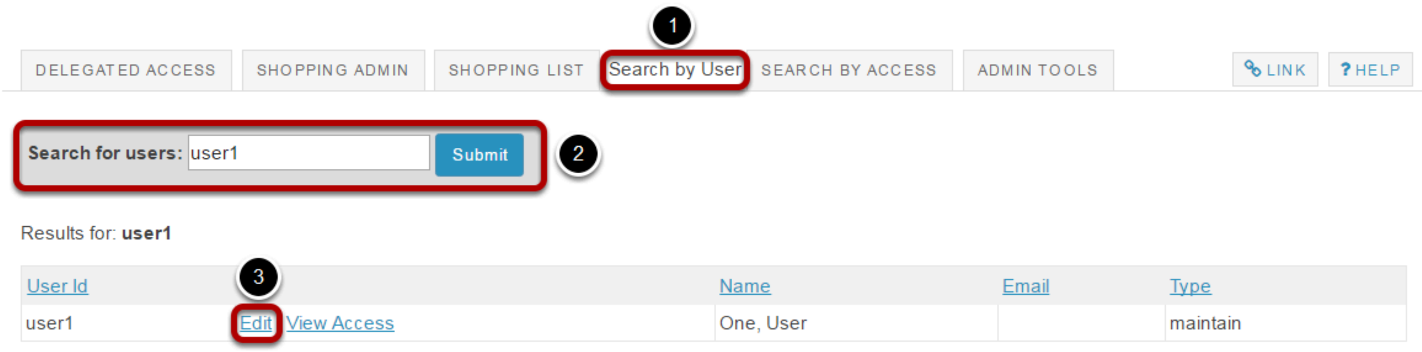
If the user has no previous delegated access permissions enabled, the *Delegated Access* tool gets added to the user's My Workspace, along with *Become User* if you also enabled access to that tool.

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 My Workspace site.

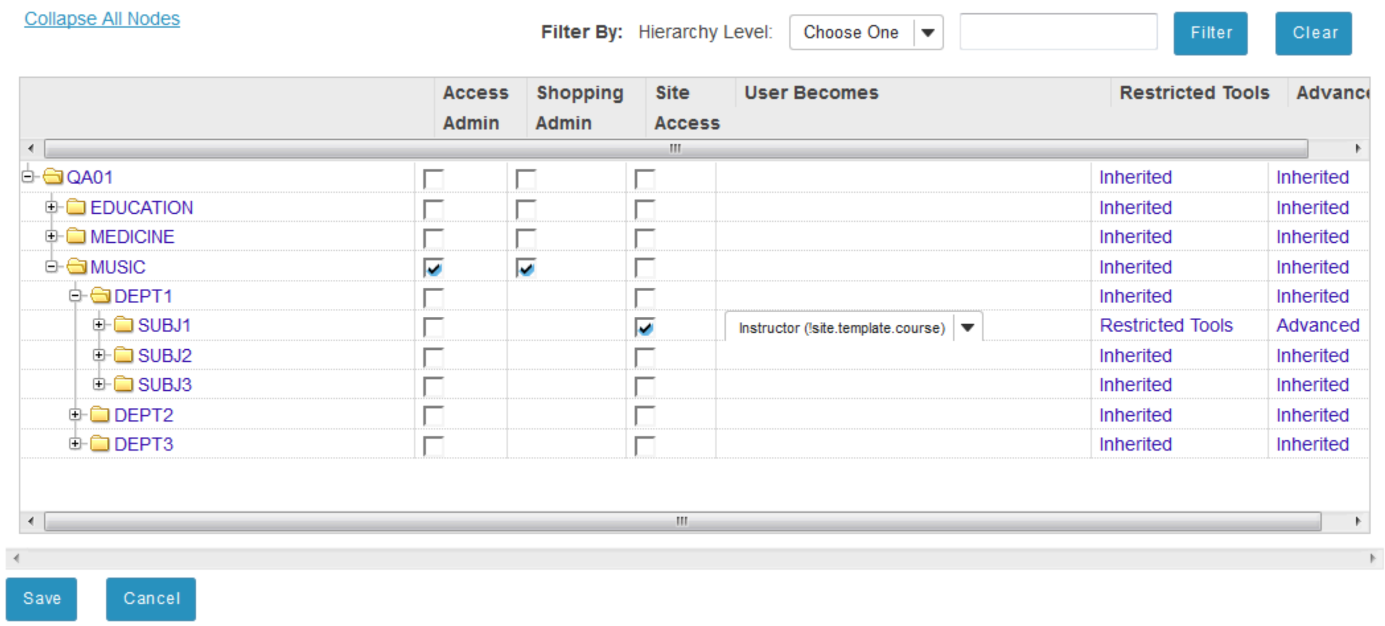
Find and select user



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.



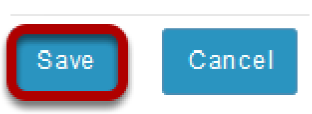
If you want to edit user permissions that apply to all sites in your Sakai instance, you can skip this step. Otherwise, click the **Expand All Nodes** link (or click the root node). Continue expanding nodes to access the appropriate node(s).

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.

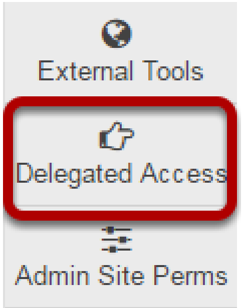
Save changes.



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

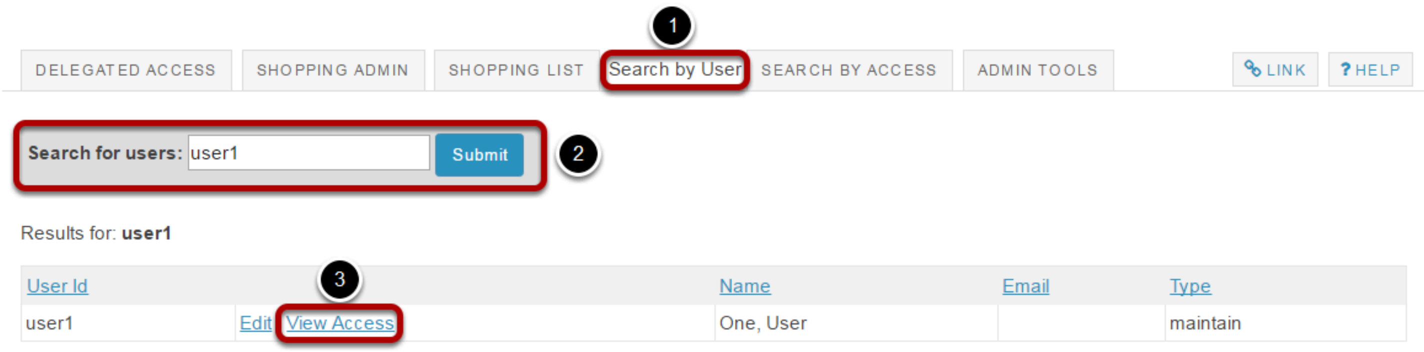
How do I remove user permissions in Delegated Access?

Go to Delegated Access tool.



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

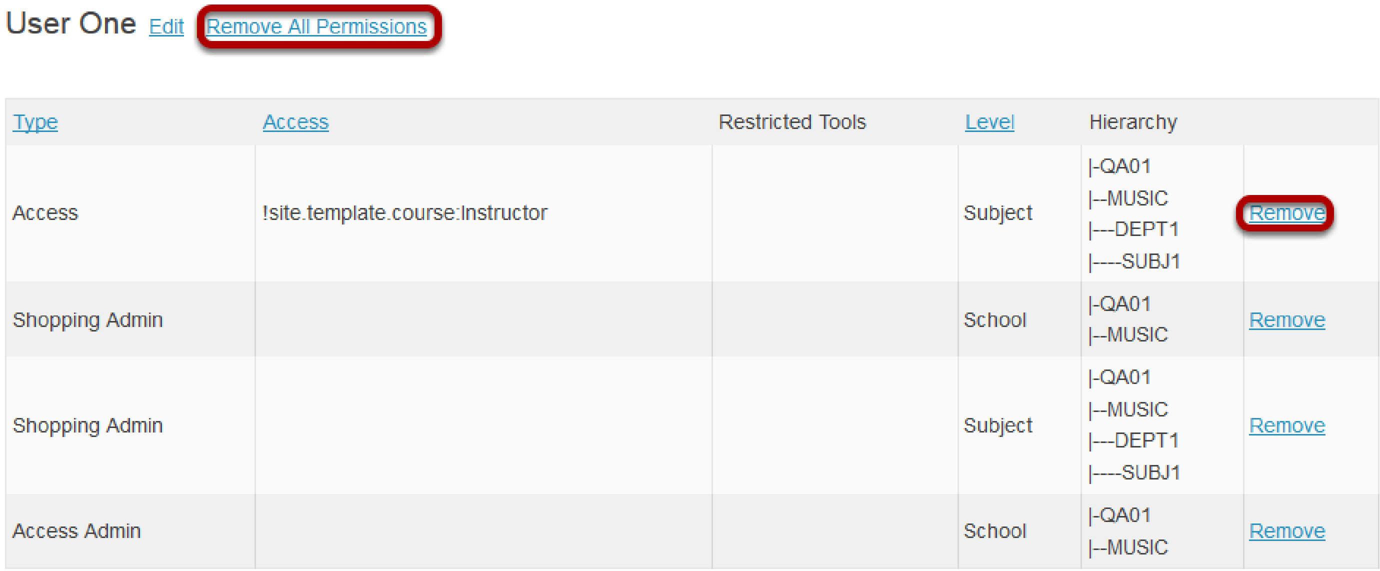
Find and select user



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?](#)*

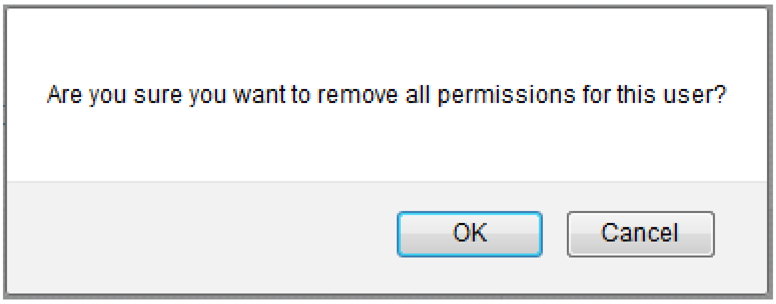
Remove permissions



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.

If you don't want a dialog box to display for subsequent permission removals, check the box for **Prevent this page from creating additional dialogs**.

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 My Workspace site.

Search by user.

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.*

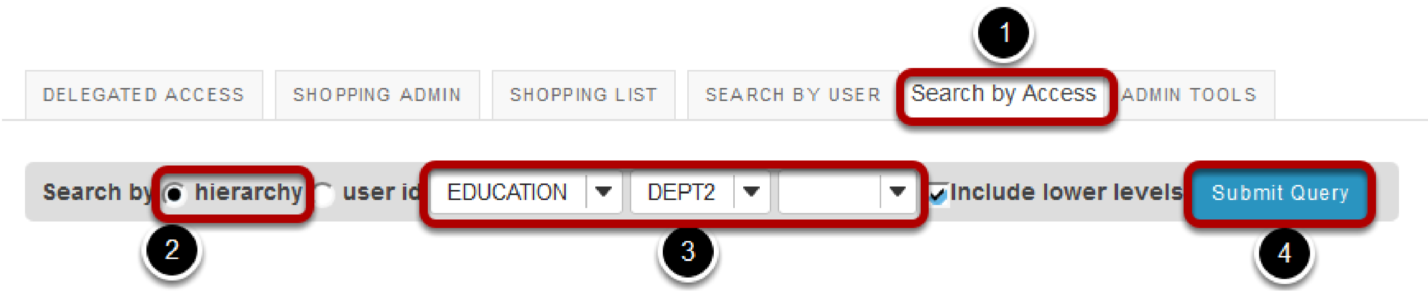
View user settings.

User One Edit | Remove All Permissions

Type	Access	Restricted Tools	Level	Hierarchy	
Access	!site.template.course:Teaching Assistant		School	|-QA01 |--MUSIC	Remove
Shopping Admin			School	|-QA01 |--EDUCATION	Remove
Access Admin			School	|-QA01 |--EDUCATION	Remove

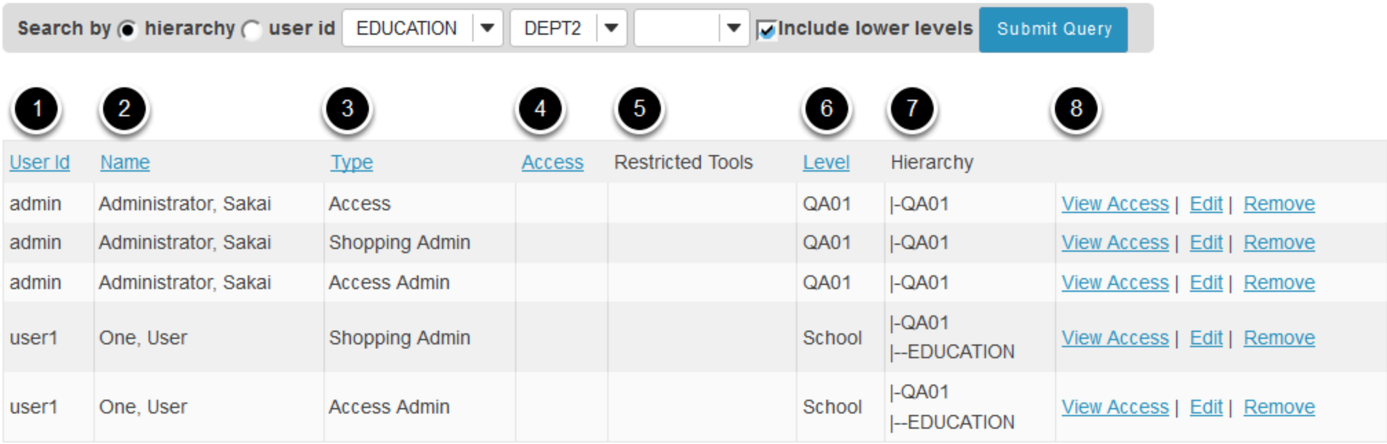
To view all access settings for a user you have searched for, click the **View Access** link for that user.

Search by hierarchy.



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 Query**.

View access by hierarchy



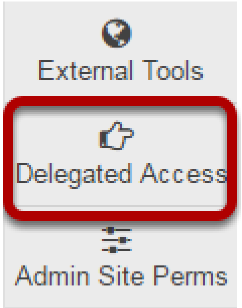
User Id	Name	Type	Access	Restricted Tools	Level	Hierarchy	
admin	Administrator, Sakai	Access			QA01	|-QA01	View Access | Edit | Remove
admin	Administrator, Sakai	Shopping Admin			QA01	|-QA01	View Access | Edit | Remove
admin	Administrator, Sakai	Access Admin			QA01	|-QA01	View Access | Edit | Remove
user1	One, User	Shopping Admin			School	|-QA01 |--EDUCATION	View Access | Edit | Remove
user1	One, User	Access Admin			School	|-QA01 |--EDUCATION	View Access | Edit | Remove

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 of the Administration Workspace or in your own My Workspace site.

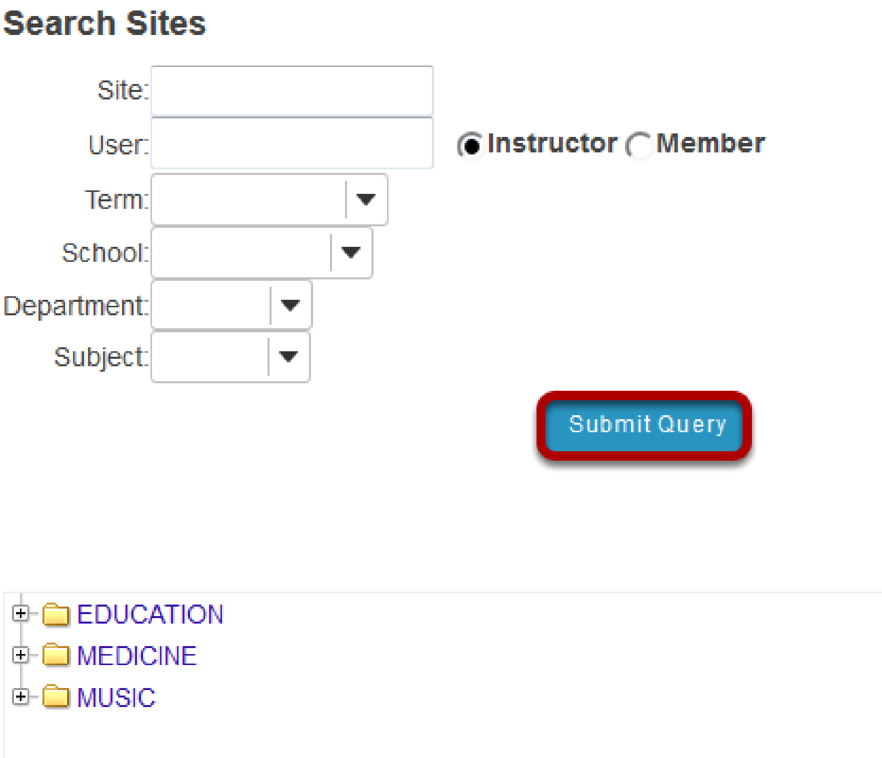
*Tip: If you are already in the Delegated Access tool, click the **Delegated Access** button in the menu bar.*

Find site.

You can find a site in two ways:

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

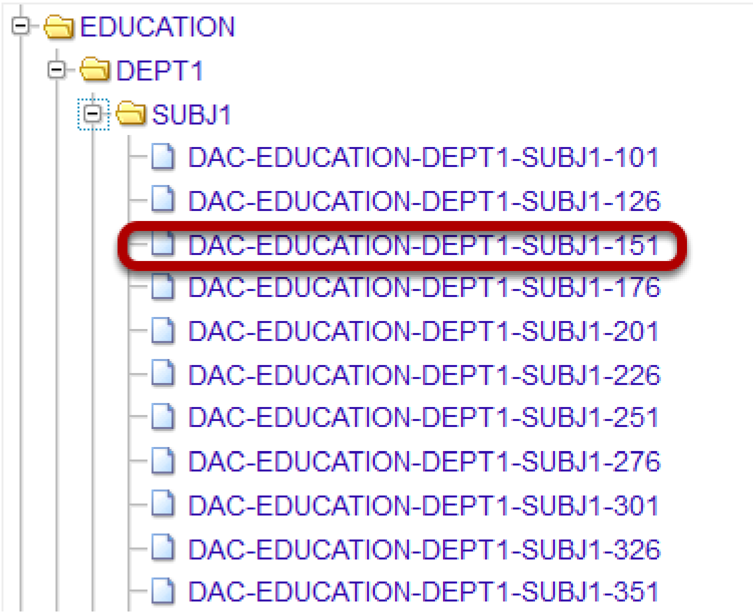
Search for the site.



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 Query**.

Expand hierarchy nodes.



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

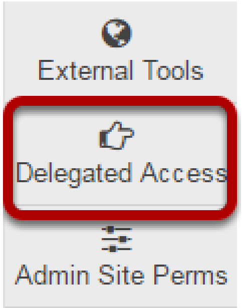
Access site

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

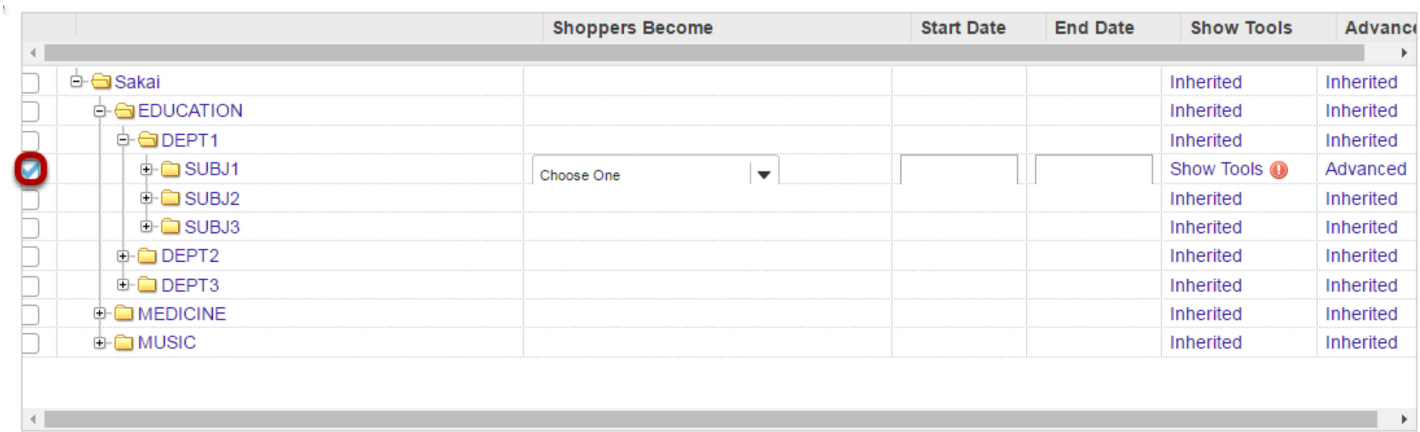


Select the **Delegated Access** too from the Tool Menu in the Administration Workspace or in your own My Workspace site.

Go to shopping period settings

Click the **Shopping Admin** button.

Select hierarchy nodes

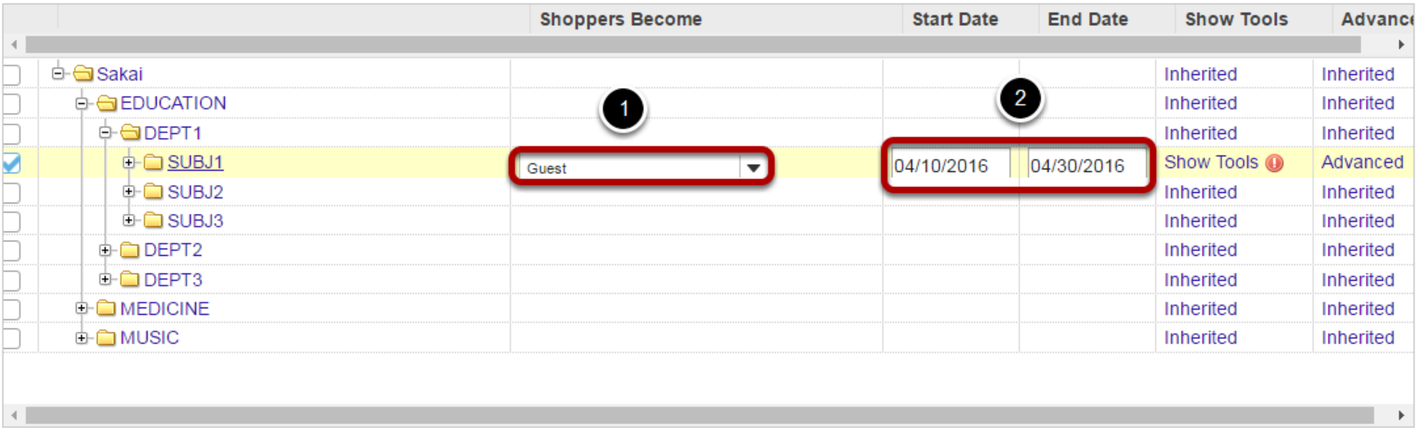


Click on the root node and continue expanding nodes to select the appropriate node(s) and/or site(s). If you want to configure a single shopping period for all sites in your Sakai instance, you can skip this step.

Important Notes:

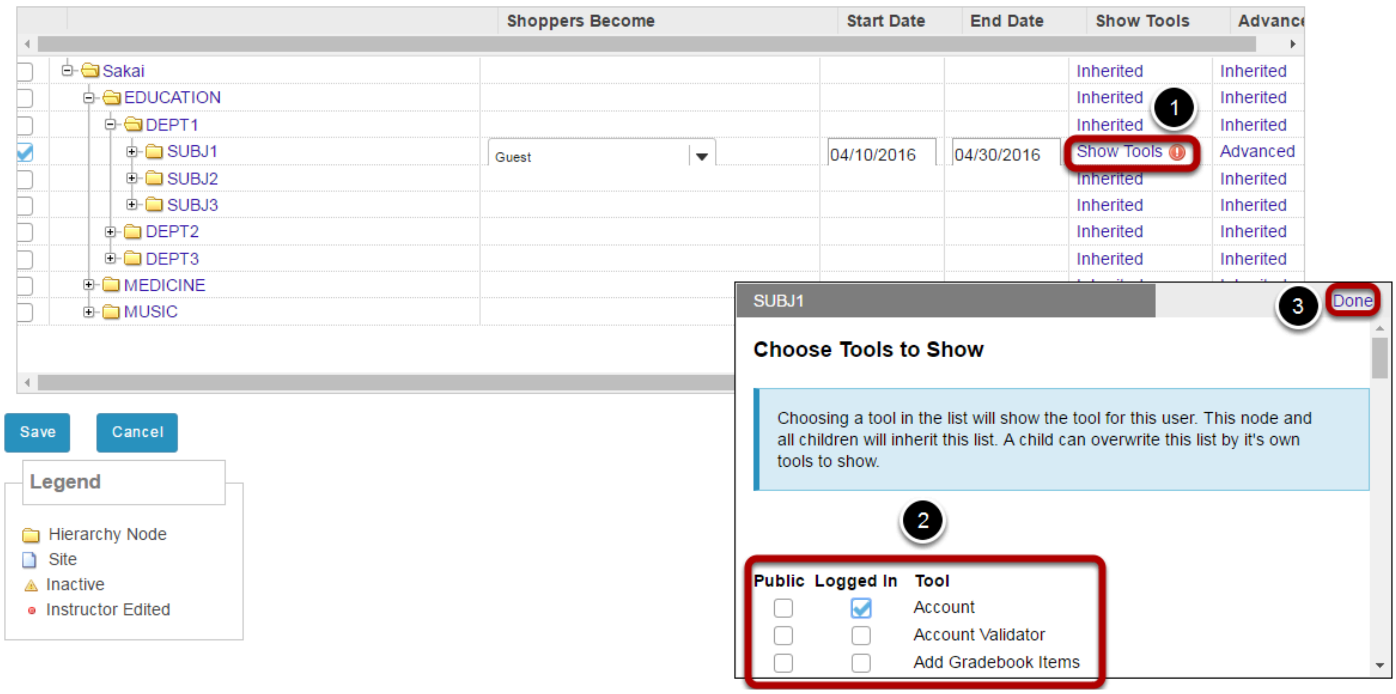
- Settings you select for a node will apply to all its "child" (lower-level) nodes, but not to any other nodes at the same level in the hierarchy. You can always override settings that a lower-level node inherits from a higher node.
- While you can select multiple nodes and sites, you will have to configure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



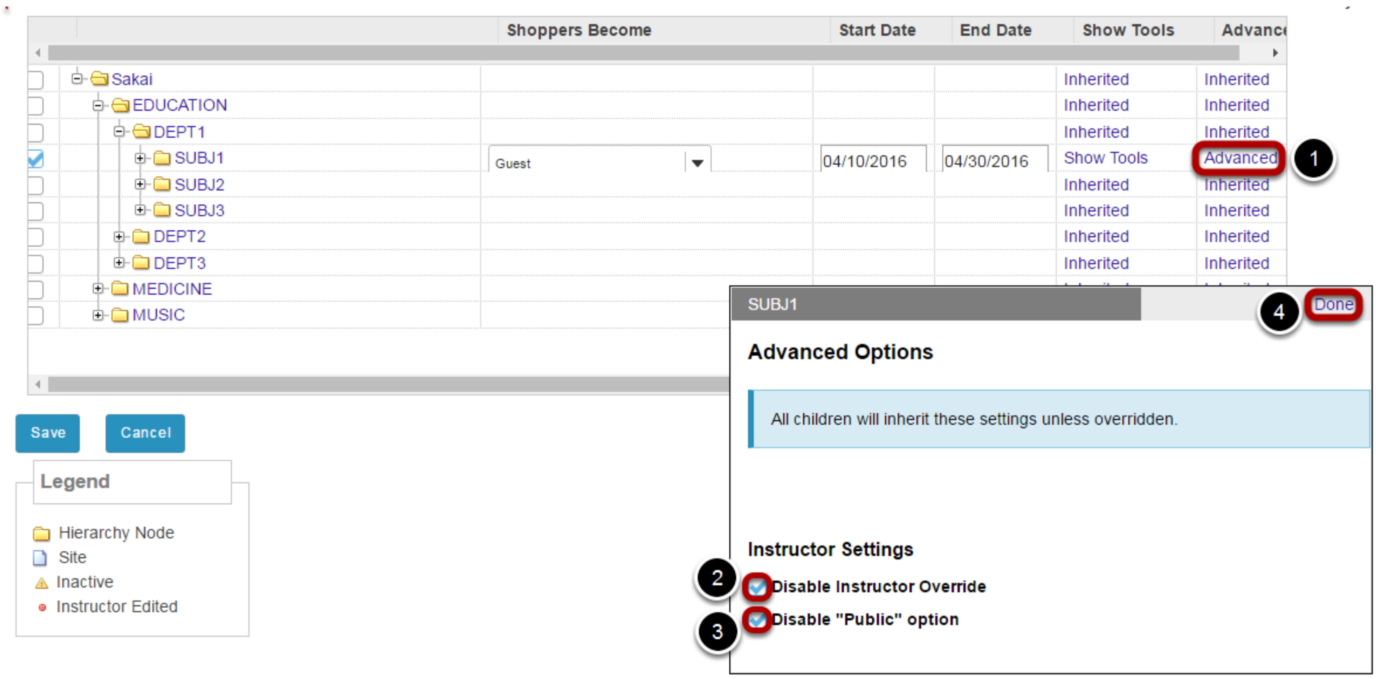
1. Choose site role for shoppers.
2. Provide start/end date.

Set tool access



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**.

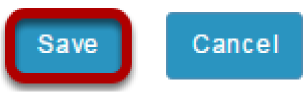
Set advanced options



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**.

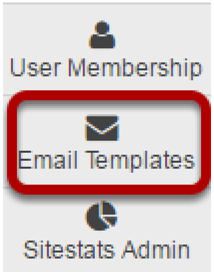
Email Templates

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.

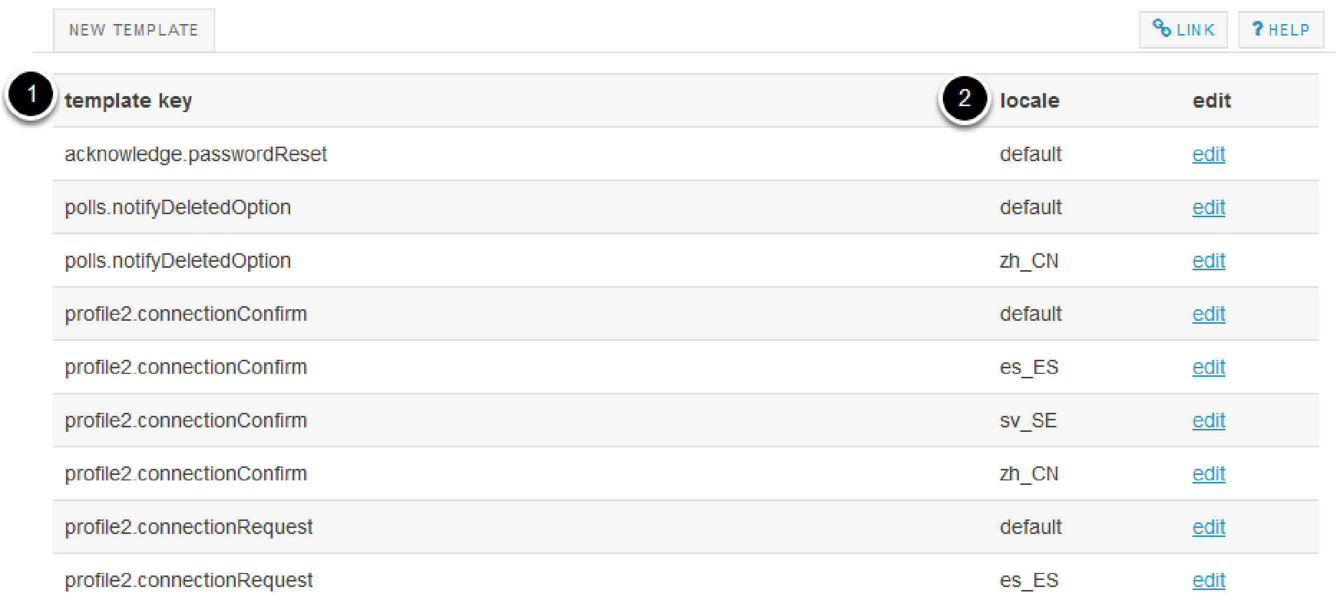
For example, if your institution has modified the name of Sakai to a different local system name (i.e. CTools, T-Square, etc.) you may modify the existing email templates to use your local system name and inform users about institution-specific resources.

Go to the Email Templates tool.



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

View existing template keys and locales.

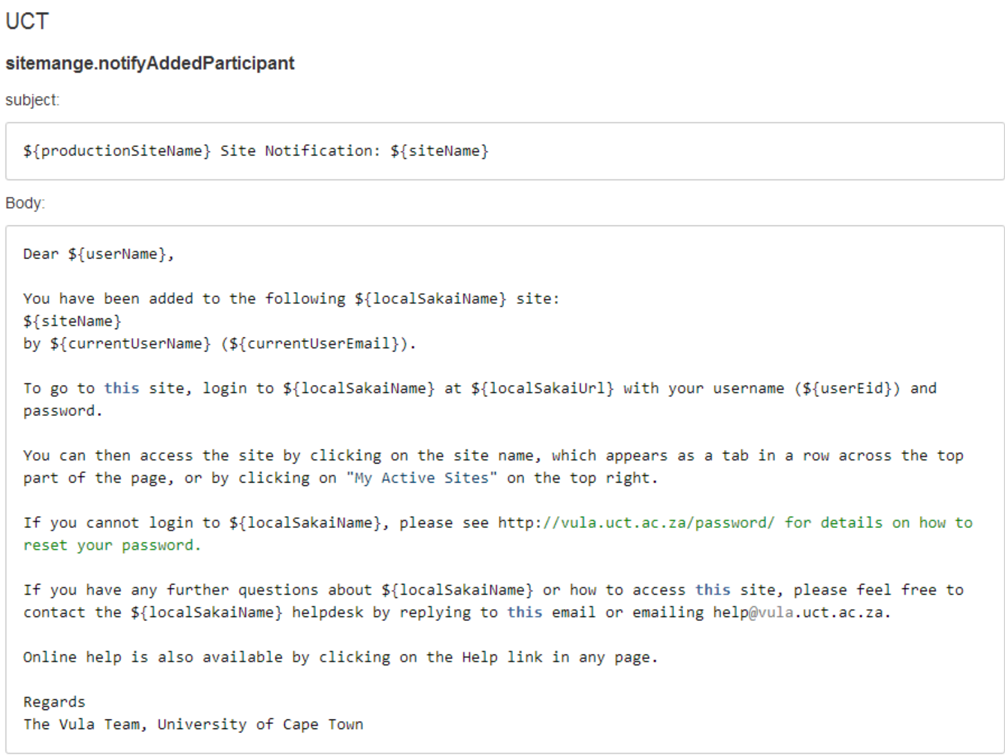


template key	locale	edit
acknowledge.passwordReset	default	edit
polls.notifyDeletedOption	default	edit
polls.notifyDeletedOption	zh_CN	edit
profile2.connectionConfirm	default	edit
profile2.connectionConfirm	es_ES	edit
profile2.connectionConfirm	sv_SE	edit
profile2.connectionConfirm	zh_CN	edit
profile2.connectionRequest	default	edit
profile2.connectionRequest	es_ES	edit

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}
```

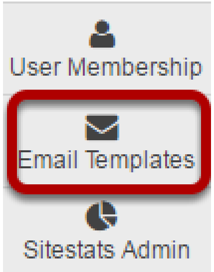
Body:

```
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.

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.

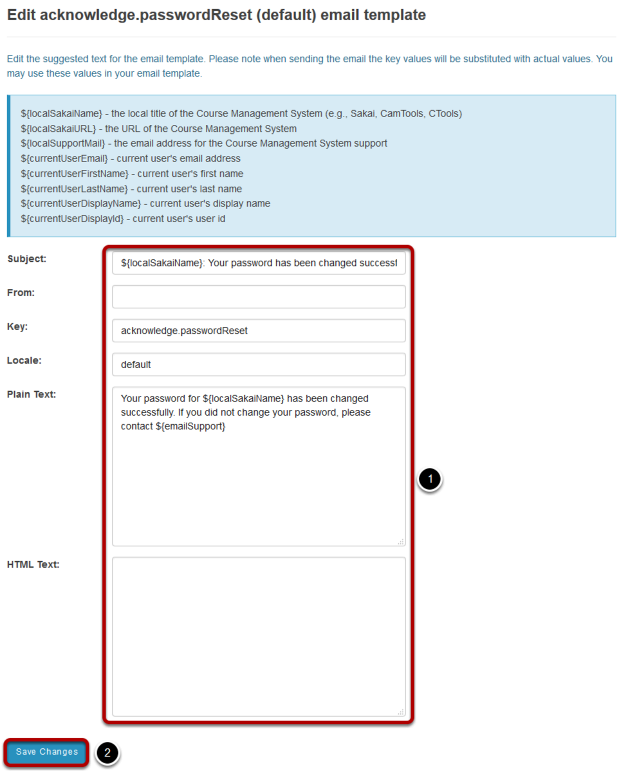


Select the **Email Templates** tool from the Administration Workspace Tool Menu.

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

template key	locale	edit
acknowledge.passwordReset	default	edit
polls.notifyDeletedOption	default	edit
polls.notifyDeletedOption	zh_CN	edit
profile2.connectionConfirm	default	edit
profile2.connectionConfirm	es_ES	edit
profile2.connectionConfirm	sv_SE	edit

Edit the template as needed.



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

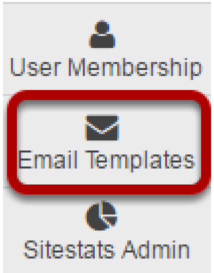
${currentUserDisplayName} - current user's display name

${currentUserDisplayId} - current user's user id

How do I add a new email template?

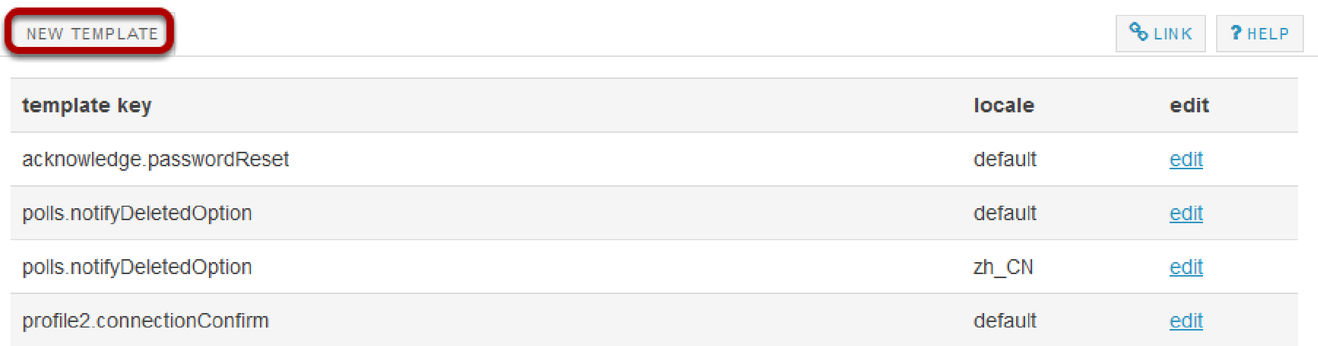
Note: Tools must already be configured to use the template service in order to be added here. You may add additional templates for existing keys using this tool. However, adding new template keys to the system would require custom code development.

Go to the Email Templates tool.

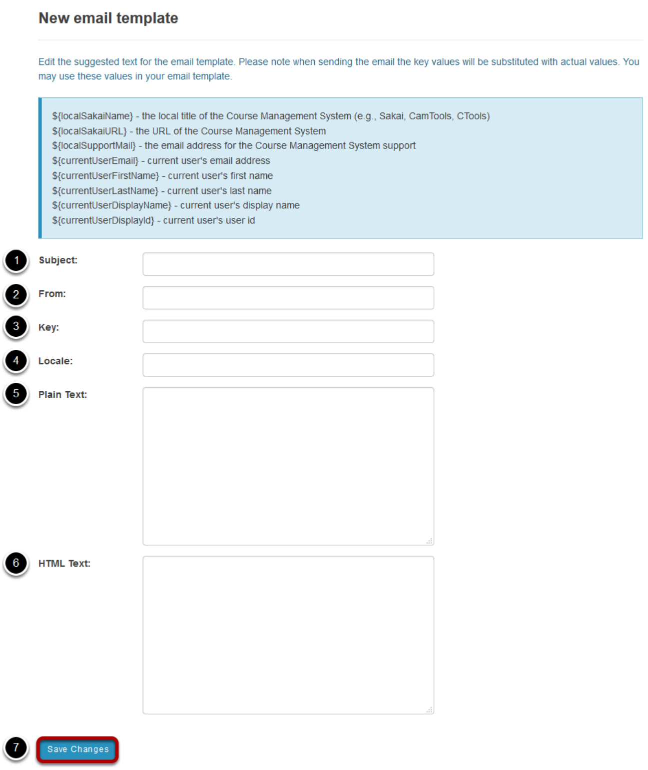


Select the **Email Templates** tool from the Administration Workspace Tool Menu.

Click New template.



Enter template information into the fields provided and Save.



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

External Tools

What are External Tools?

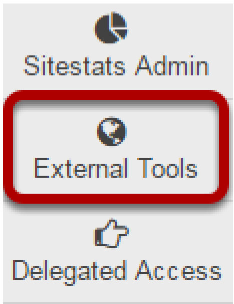
If you're a functional administrator, External Tools lets you configure integration with an external solution that utilizes LTI, an independent standard for web-based applications developed by IMS. You can integrate solutions that are compliant with either of the following LTI standards:

- LTI 1.1
- LTI 2.0

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.

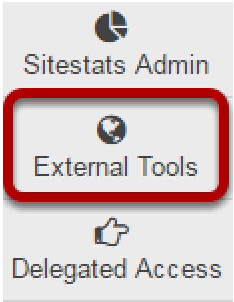
To access this tool, select External Tools from the Tool Menu of the Administration Workspace.



How do I make an LTI 1.1 tool available to site owners?

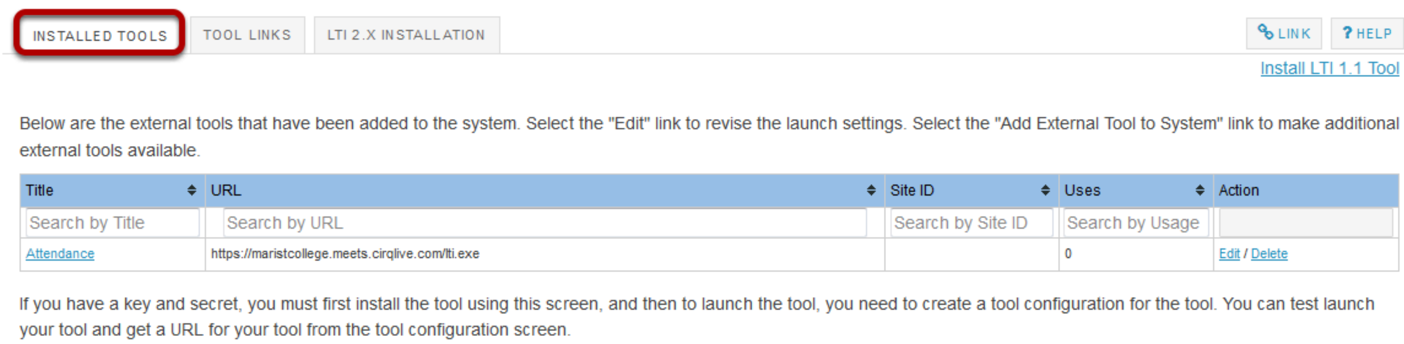
Note: Configuration of an external tool requires information unique to the external solution being integrated. In addition, integration with a solution from a third-party vendor may require an account with that vendor. Be sure to confirm all necessary information for an external solution before configuration.

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 Sakai instance, you'll see them listed.

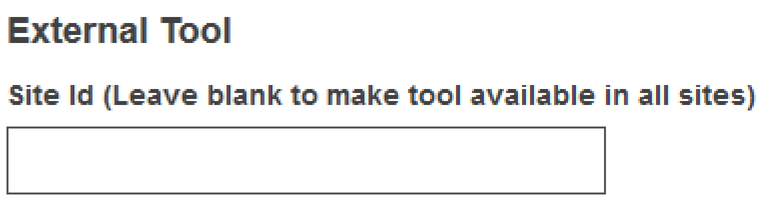
Install LTI 1.1 tool.

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

Configure LTI tool

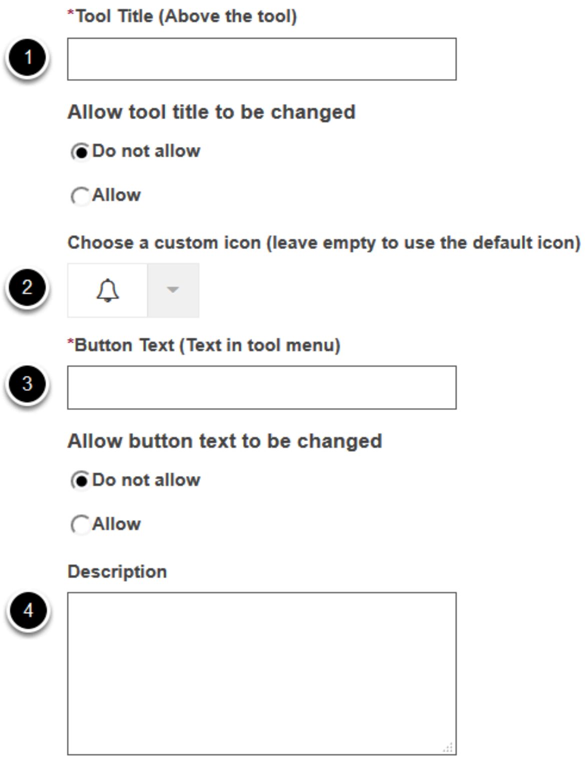
On the *External Tool* page, select settings and provide information as appropriate.

Site ID



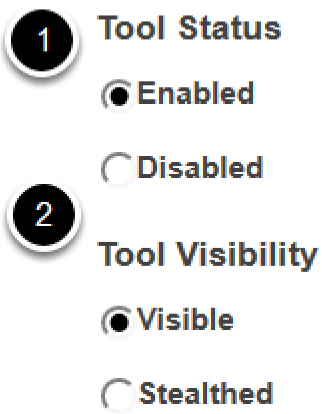
Enter the appropriate site ID in the **Site Id** field if you want the external tool to be available ONLY in that site. If you want the external tool to be available in all sites, be sure to leave this field blank.

Name/description



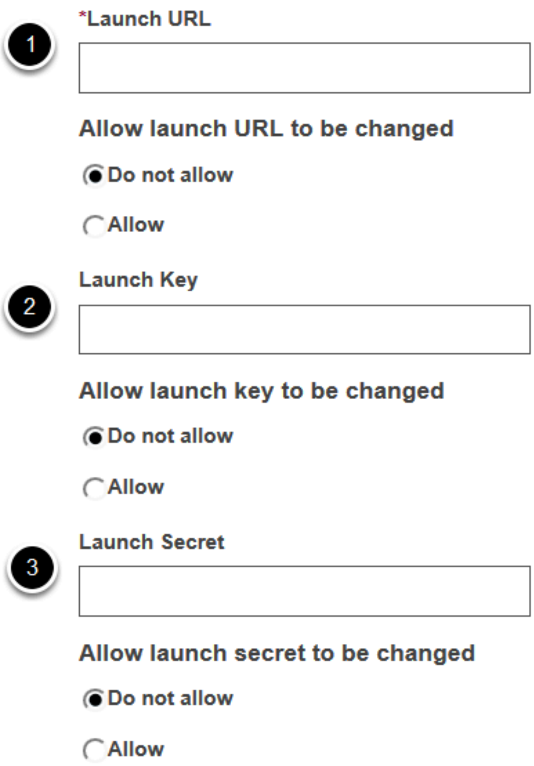
1. Enter text in the **Tool Title** field. When users access the tool in a site, this text displays at the top of the frame. (Choose **Allow** to let site owners edit this information.)
2. (Optional) Select a custom icon from the drop-down menu.
3. Enter text in the **Button Text** field. When users access the tool in a site, they'll see this text in the Tool Menu. (Choose **Allow** to let site owners edit this information.)
4. Enter text in the **Description** field. This description will display to site owners when they select the tool via Site Info.

Status/visibility



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

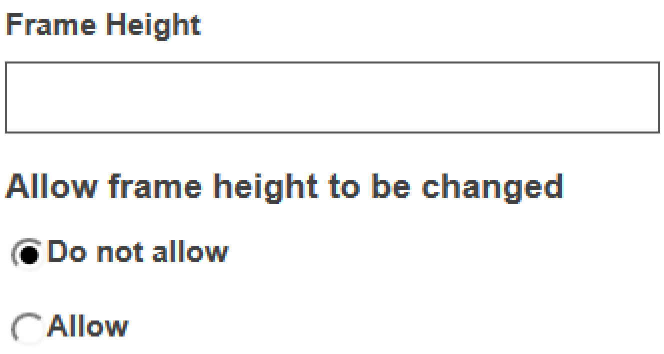


Note: The following settings are unique to each external solution. If the solution being integrated is from a third-party vendor, the vendor typically provides this information.

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.

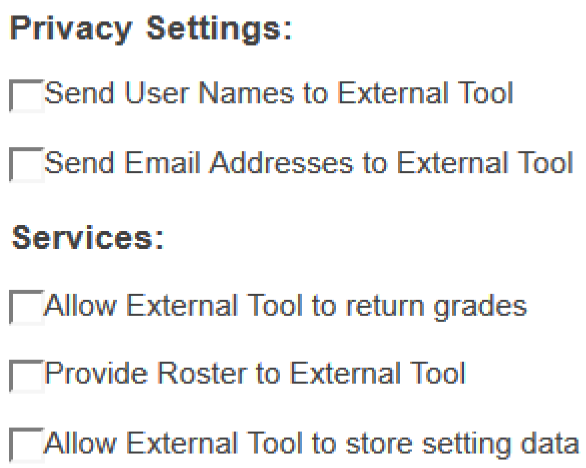
*****Click **Allow** to let site owners edit this information.

Frame height



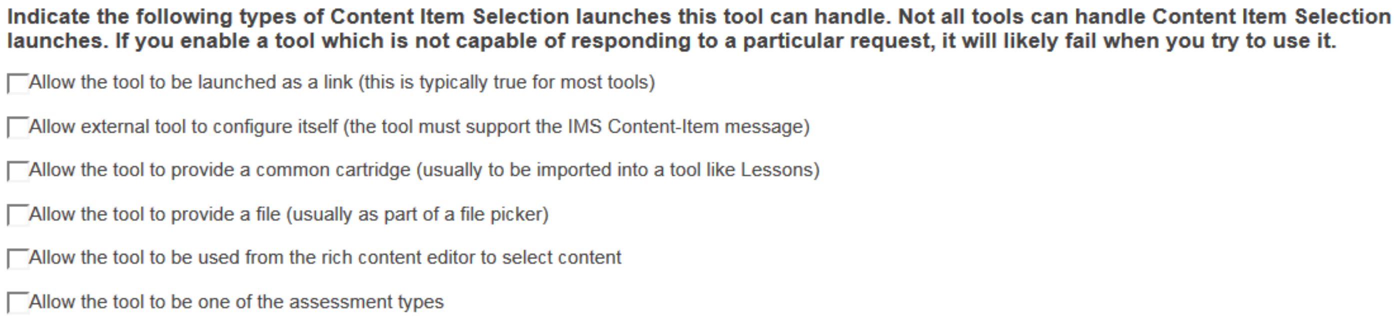
To specify a height for the tool frame in a site, enter a value (in pixels) in the **Frame Height** field. Click **Allow** to let site owners edit this value.

Privacy settings/services



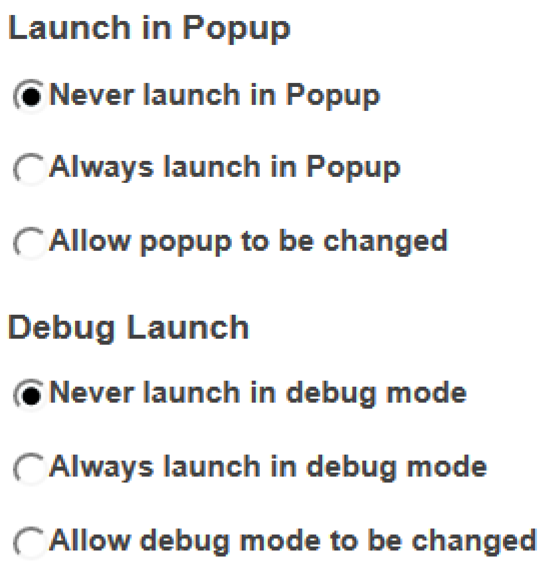
Determine the site information you want provided to the external solution, and whether the solution will return grades for Gradebook integration. Select settings as appropriate.

Content Item Selection launches.



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

Popup/debug



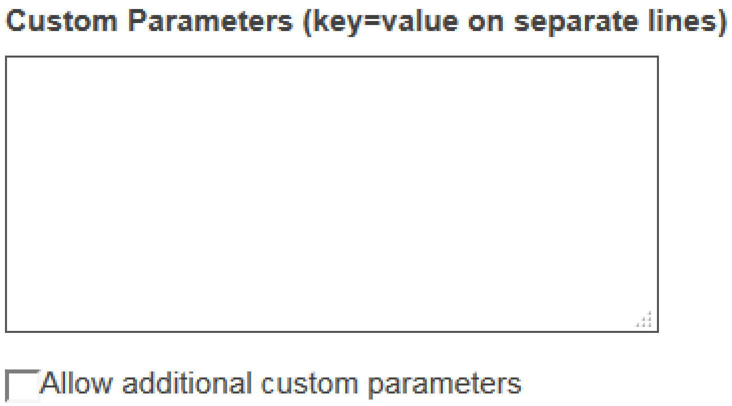
Choose how the external solution displays when it launches.

- 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.

Custom parameters

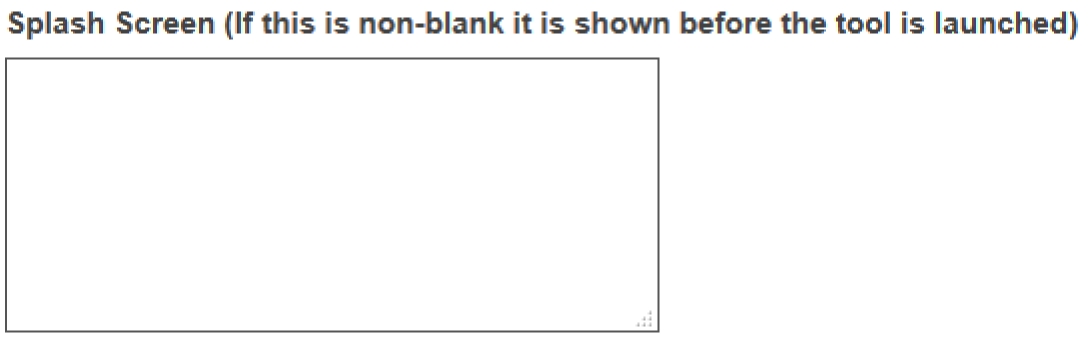


Provide additional parameters in the **Custom Parameters** field, as appropriate. A parameter should be in the following format:

key=value

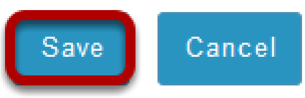
Be sure to list each parameter on a separate line. Click **Allow additional custom parameters** to let site owners enter more parameters.

Splash screen



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

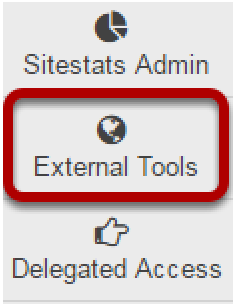
Save your work



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

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

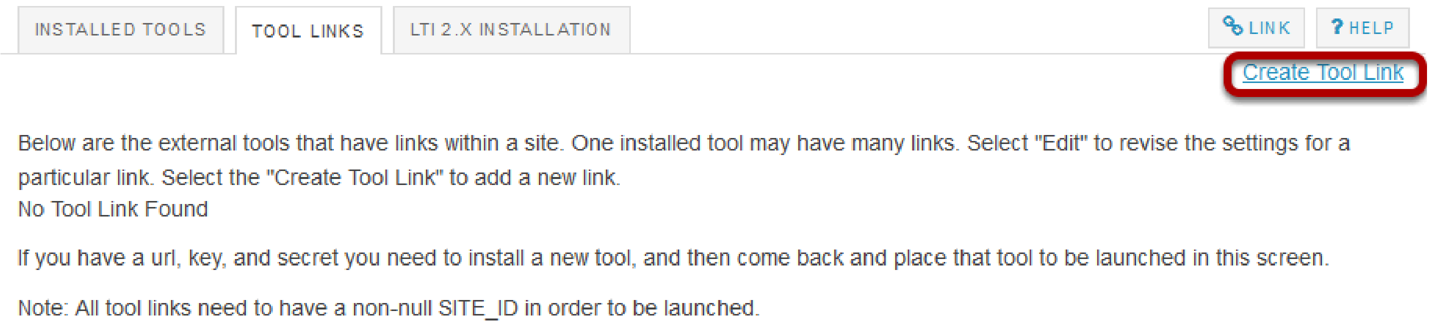
Go to External Tools.



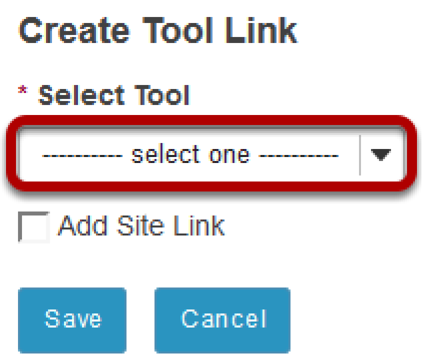
Select the **External Tools** link from the Tool Menu in the Administration Workspace.

Click Tool Links.

Click the Create Tool Link.

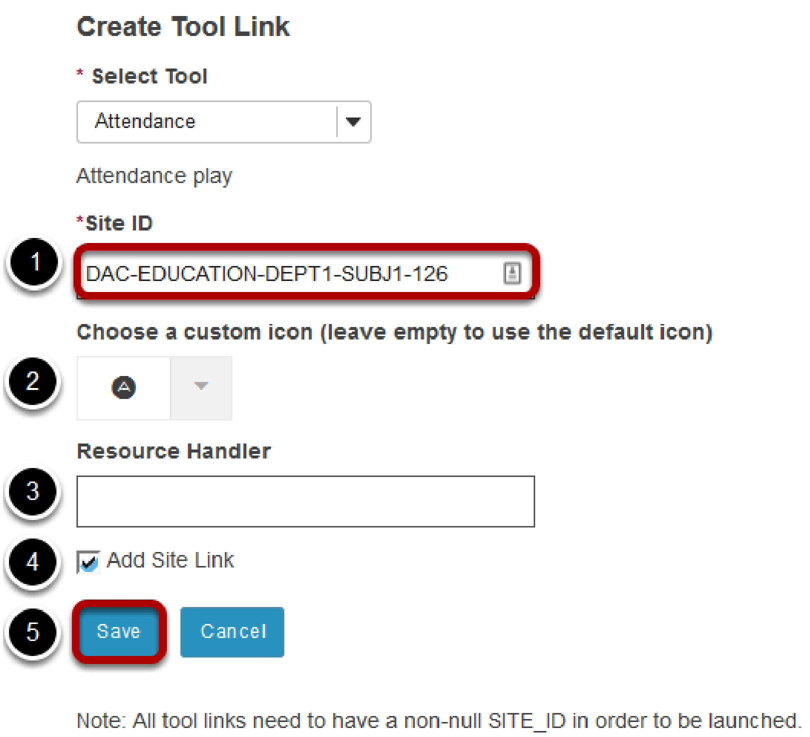


Select a tool from the drop-down list.



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.

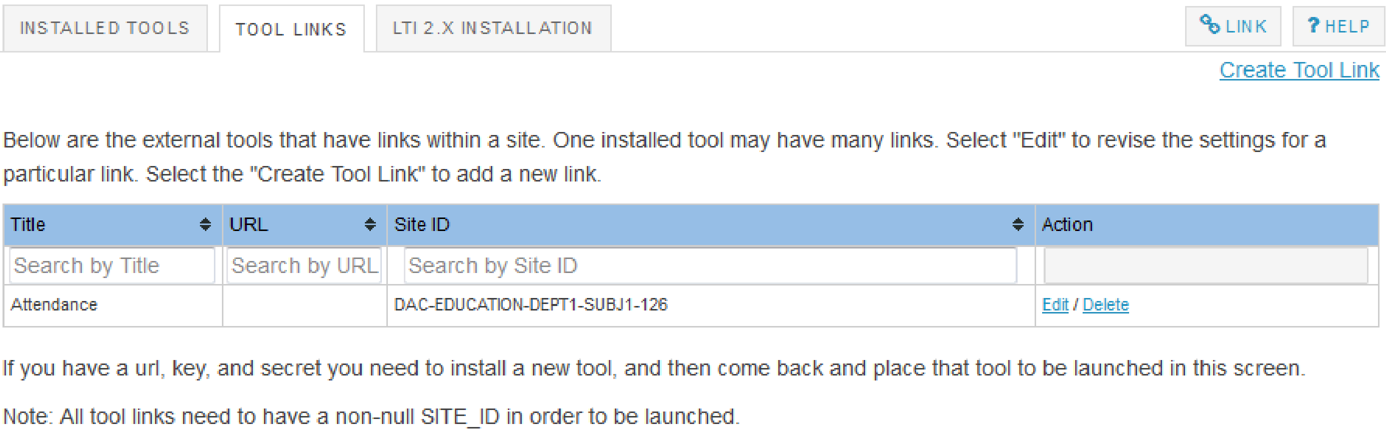
Enter the site information and save.



1. The **Site ID** is required.
2. (Optional) Select a **Custom Icon** for the tool.
3. (Optional) Specify a **Resource Handler** for the tool.
4. (Optional) Check the box to **Add Site Link**. This will place a link to the tool in the destination site's Tool Menu.

5. Click **Save** to save your settings.

View tool links to sites.



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.

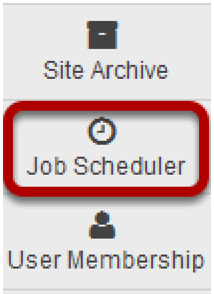
Job Scheduler

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.

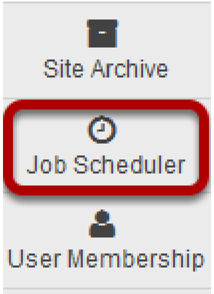
For more information on creating custom jobs, please visit the Confluence wiki: https://confluence.sakaiproject.org/display/BOOT/Quartz+in+Sakai

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



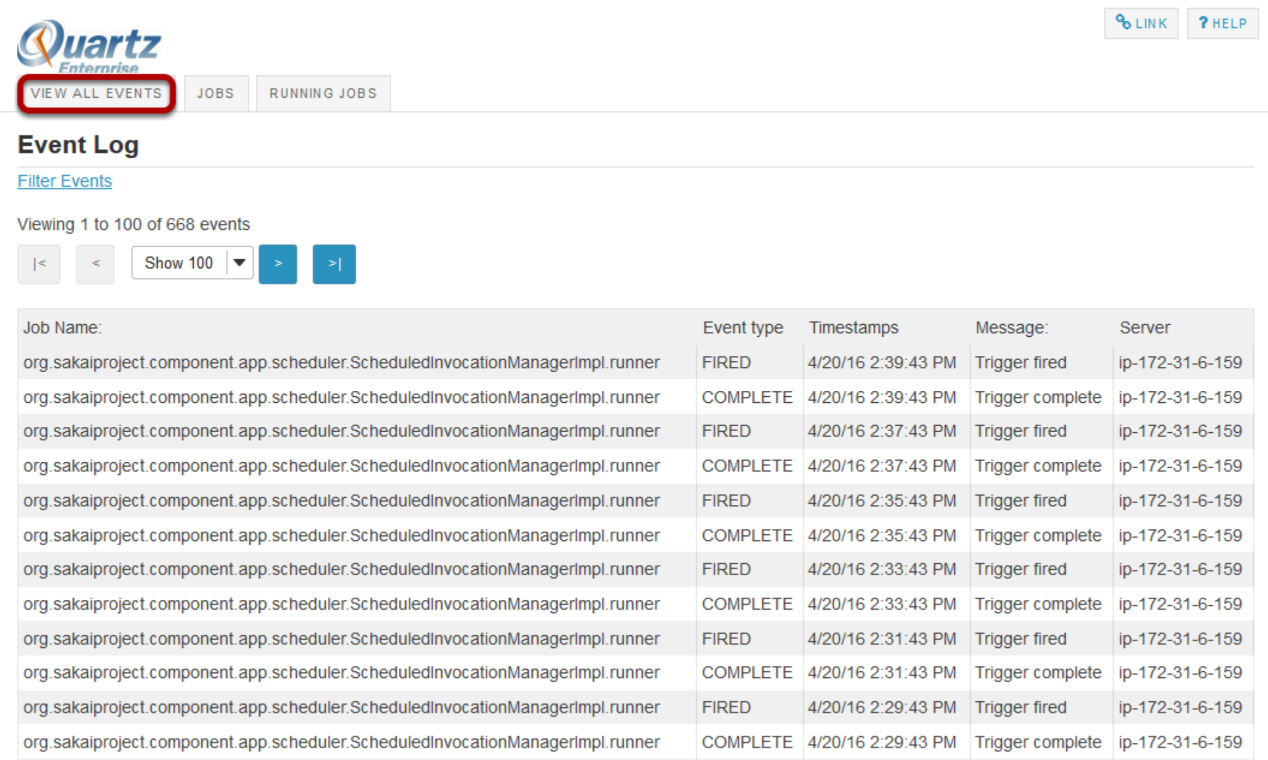
How do I view the event log?

Go to the Job Scheduler tool.



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

Viewing the event log.

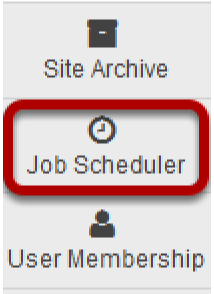


The landing page for the tool takes you to a view showing **All Events**.

Note: If you would like to view only events logged from a current date range, you may Filter Events by date.

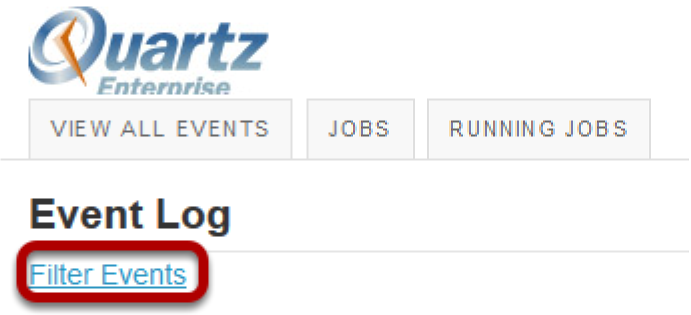
How do I filter events?

Go to the Job Scheduler tool.

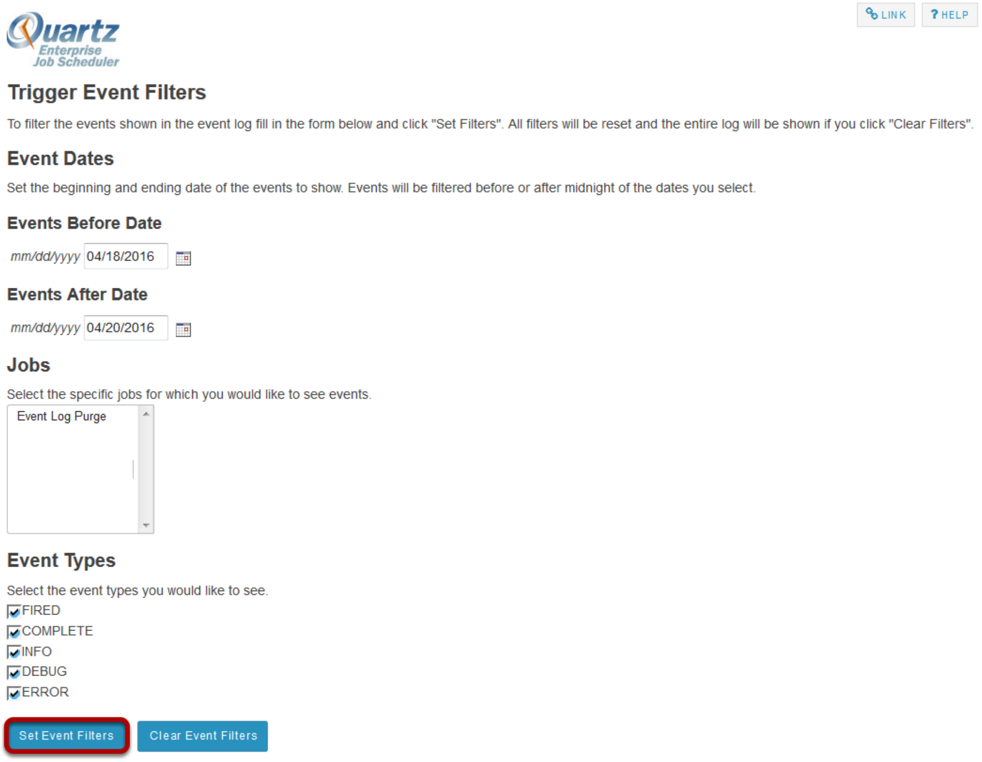


Select the **Job Scheduler** tool from the Tool Menu in the Administration Workspace.

Click Filter Events.



Set the desired filters.

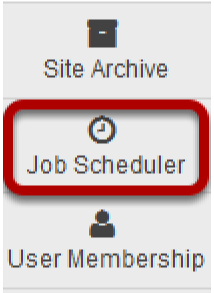


Choose the filters you would like to apply in order to limit your view of the event log to the desired items. You may filter events by date, job, or type.

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

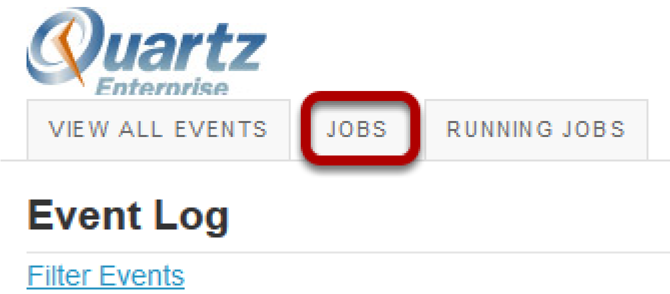
How do I view jobs?

Go to the Job Scheduler tool.

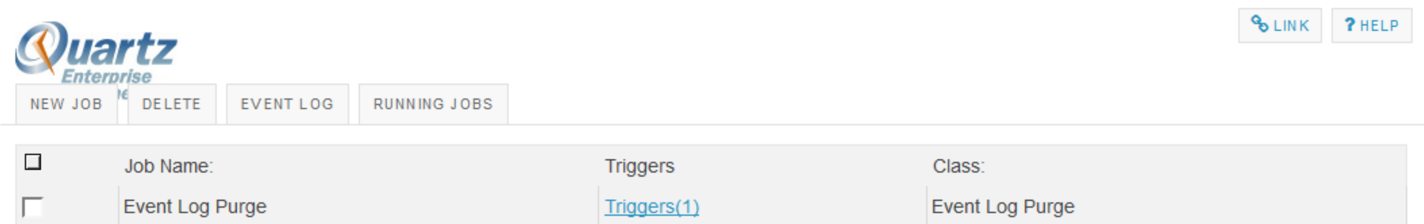


Select the **Job Scheduler** tool from the Tool Menu in the Administration Workspace.

Click the Jobs button.

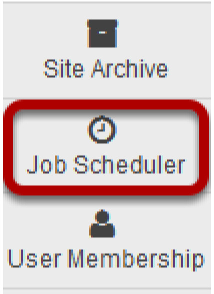


View the list of currently scheduled jobs.



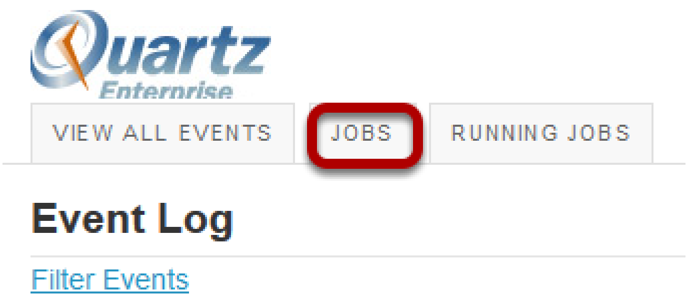
How do I schedule a new job?

Go to the Job Scheduler tool.

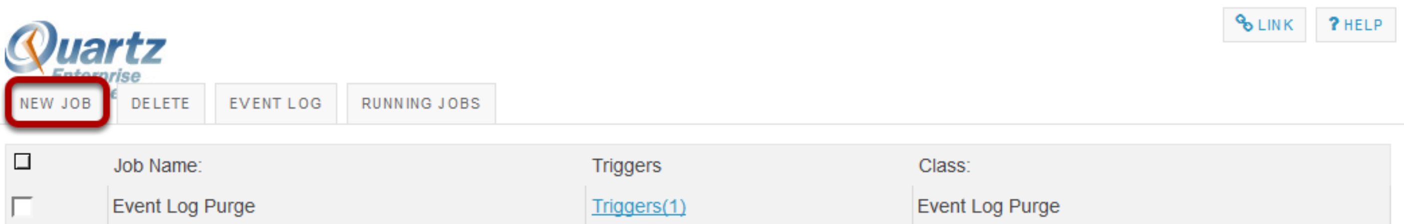


Select the **Job Scheduler** tool from the Tool Menu in the Administration Workspace.

Click the Jobs button.

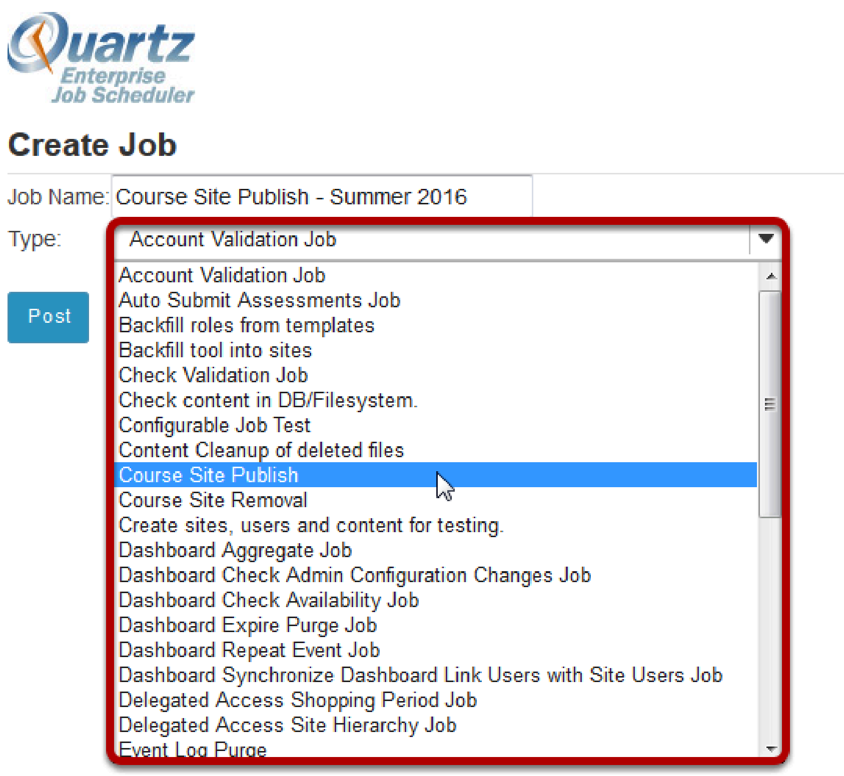


Click the New Job button.



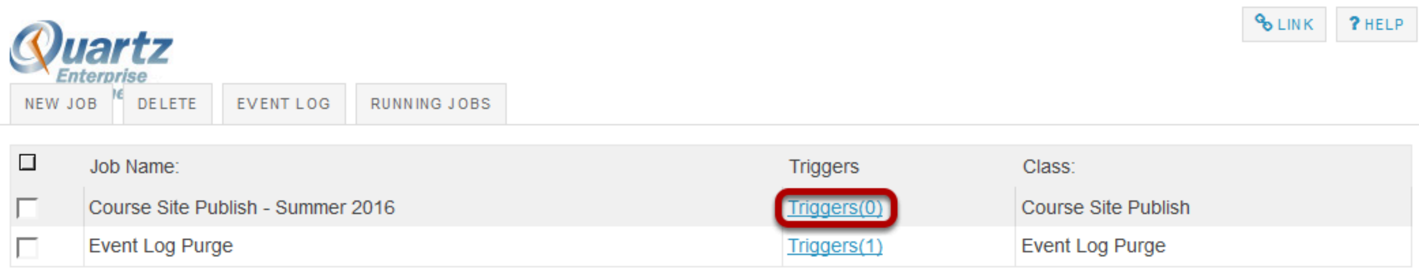
Give the job a name.

Select the job type from the drop-down menu.

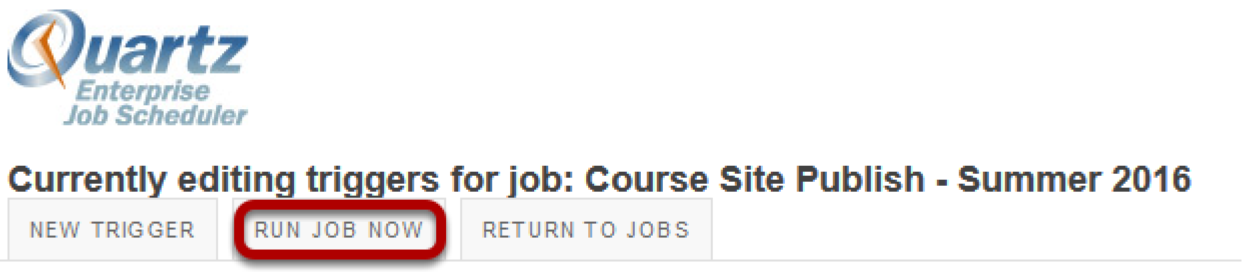


Click Post.

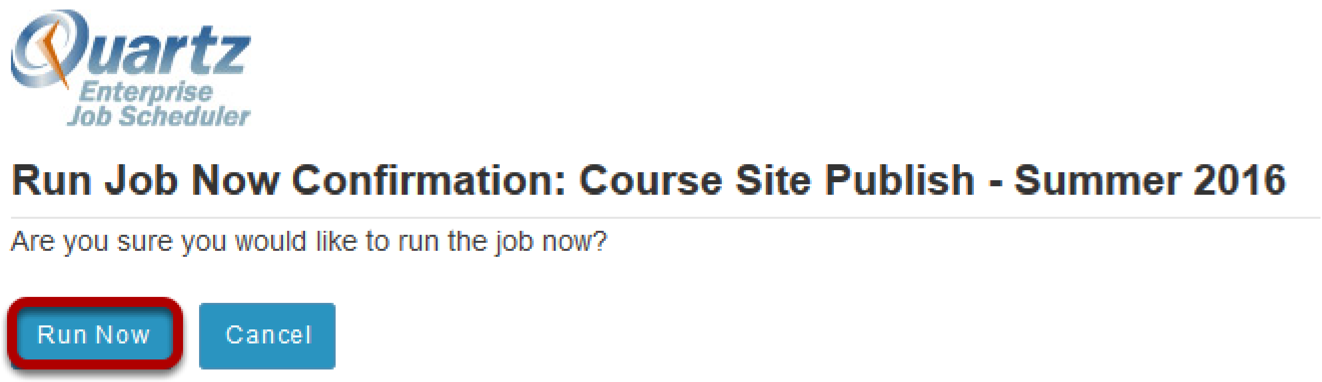
Select the Triggers link to add a trigger.



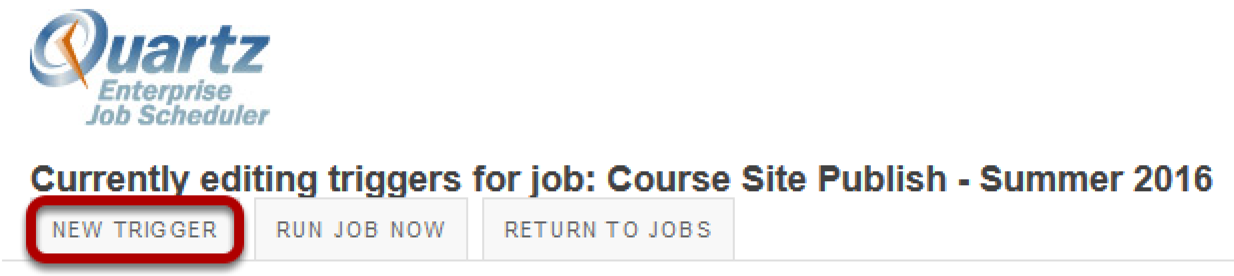
Click Run Job Now to run the job manually.



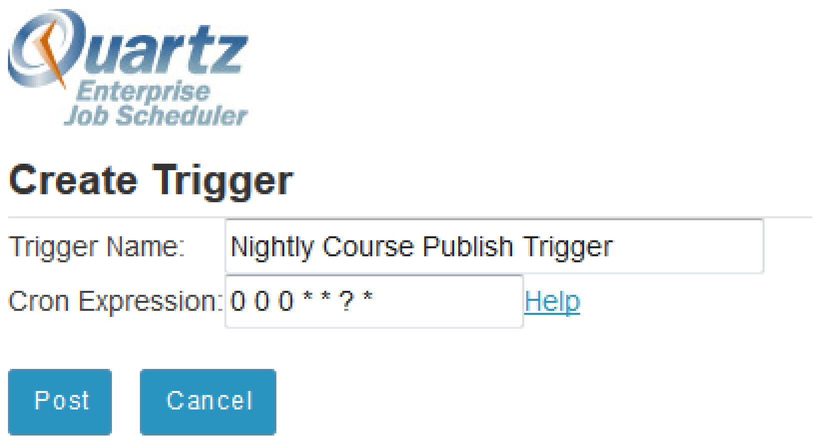
Click Run Now to confirm.



Or, to automate the job, click New Trigger.



Enter a Trigger Name and Cron Expression.



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 #

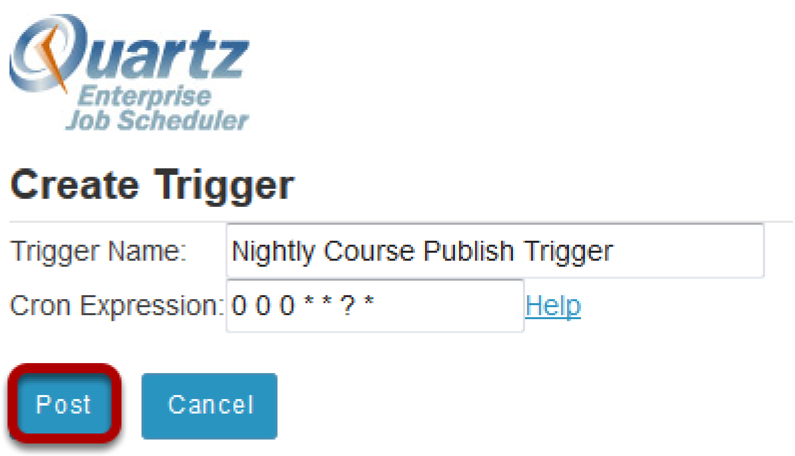
Year NO empty, 1970-2099 , - * /

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.



View the list of triggers for that job.

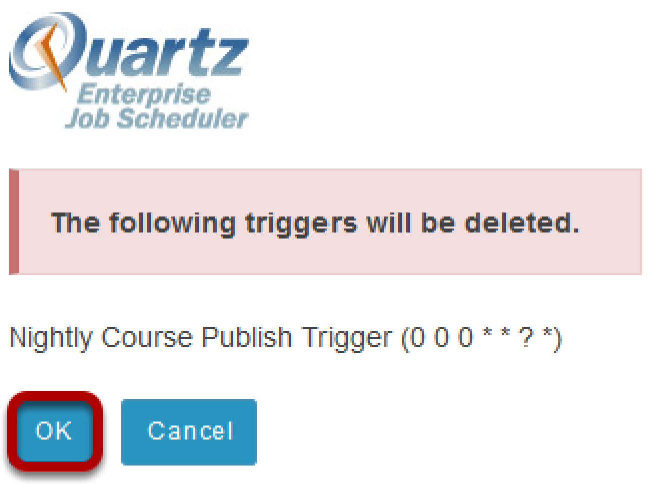
You will see a list of triggers for the current job, along with an indication of when it is next scheduled to run.

You may add additional triggers if desired.

Deleting a trigger.

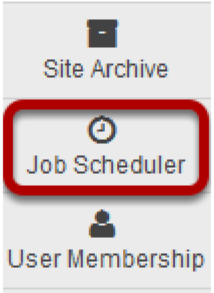
To remove an existing trigger, select the check box next to the item and then click the **Delete** button.

Click OK to confirm the deletion.



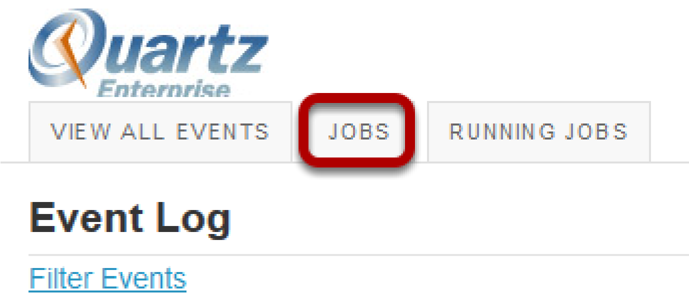
How do I delete a job?

Go to the Job Scheduler tool.



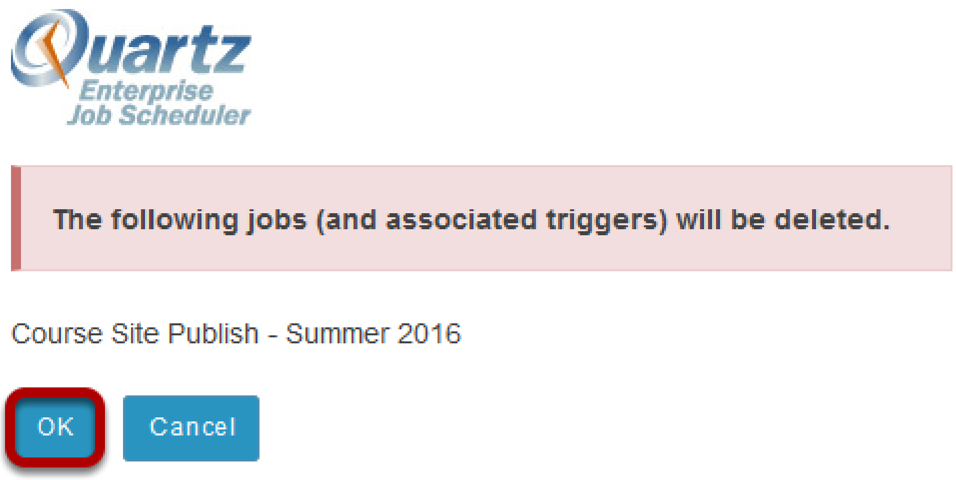
Select the **Job Scheduler** tool from the Tool Menu in the Administration Workspace.

Click the Jobs button.



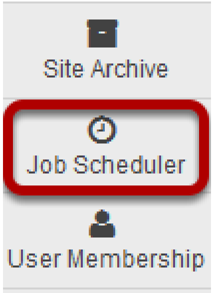
Select the job you want to remove and click Delete.

Click OK to confirm the deletion.



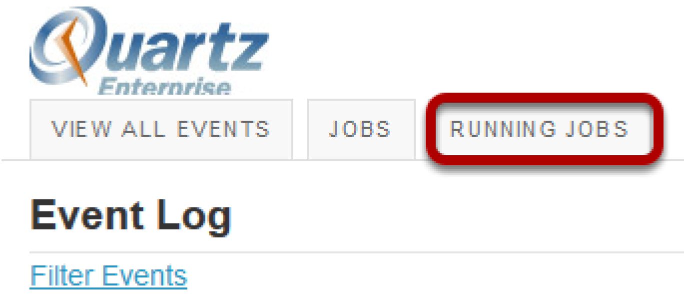
How do I view running jobs?

Go to the Job Scheduler tool.

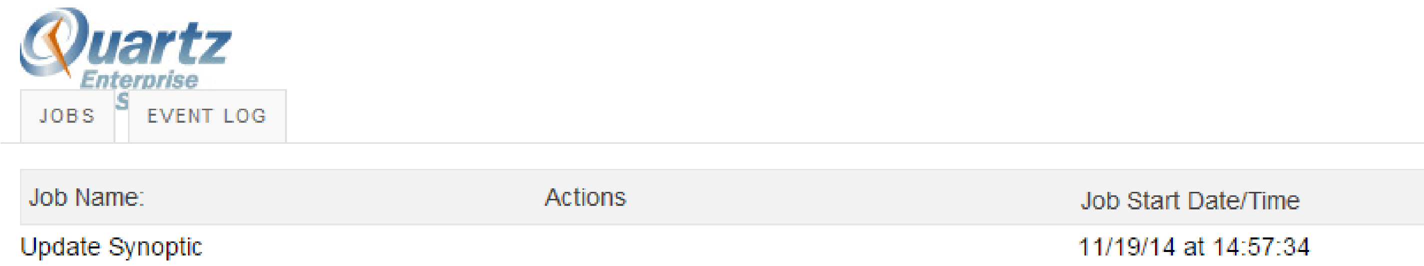


Select the **Job Scheduler** tool from the Tool Menu in the Administration Workspace.

Click the Running Jobs button.



View the list of currently running jobs.



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,tin

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

- memory.org.sakaiproject.authz.impl.DbAuthzGroupService.realmRoleGroupCache=timeToLiveSe

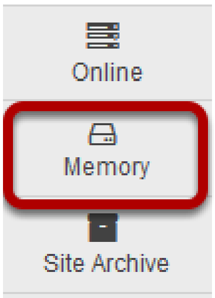
The user/site cache keeps track of the sites associated with the user:

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

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,timeToIdle

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

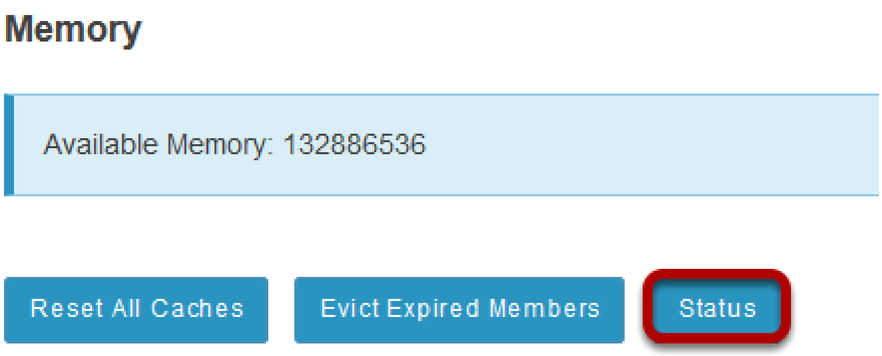


How do I view Memory Status?

Go to the Memory tool

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

Click Status.



The memory report will display.

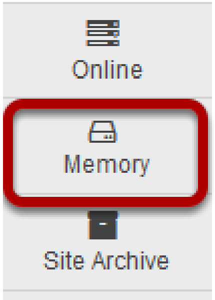
Memory

```
** 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
org.sakaiproject.component.app.messageforums.ui.UIPermissionsManagerImpl.userGroupMembershipCache Ehcache: count:2 hits:2 misses:
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?

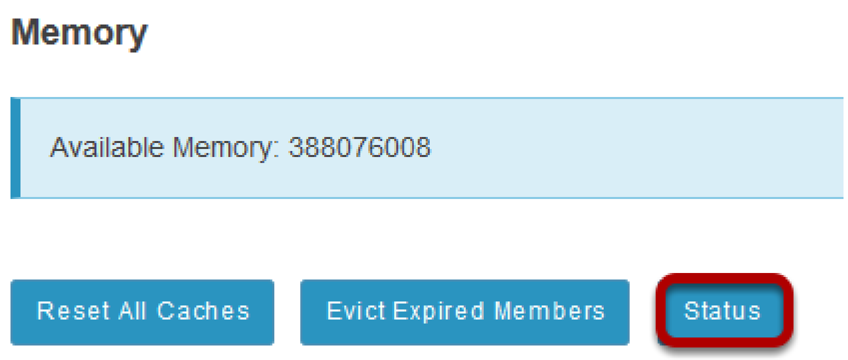
A maxed-out cache will have a count value of 10000 or 100000. Look for these values in the Status area of the Memory tool.

Go to the Memory tool



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

Click Status.



Look for a count value of 10000 or 100000.

Memory

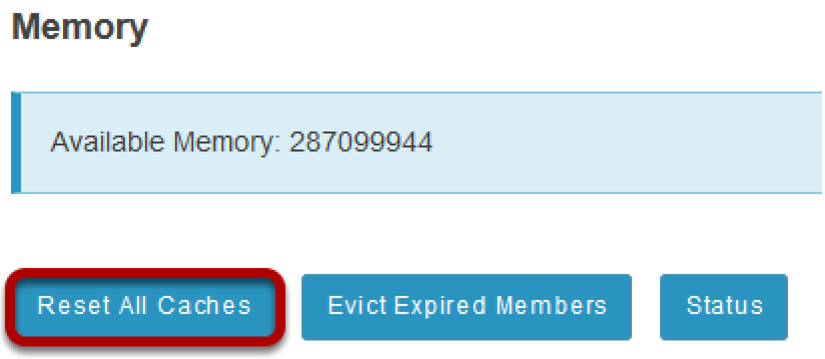
```
** Memory report
freeMemory: 370530912 totalMemory: 959971328 maxMemory: 959971328

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:145324 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:2 hit%:50
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
```

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.

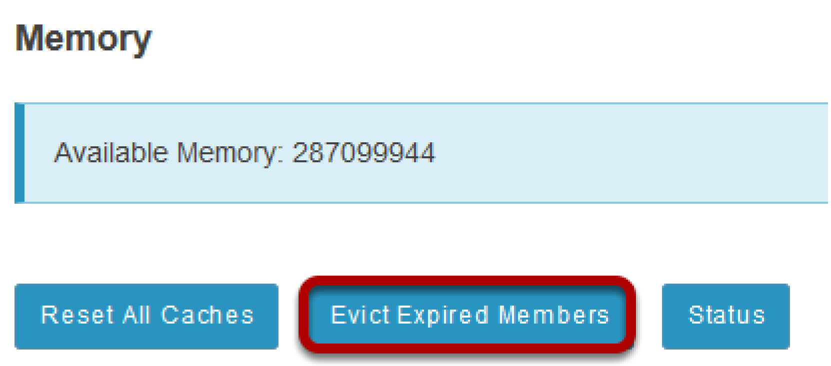


How do I evict expired members?

Go to the Memory tool

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

Click Evict Expired Members.

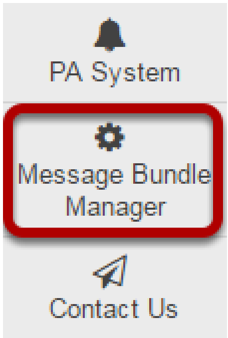


Message Bundle Manager

What is the Message Bundle Manager tool?

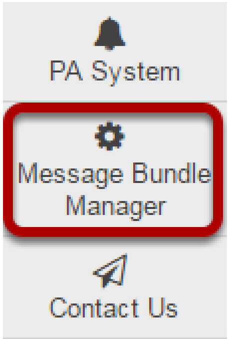
With the Message Bundle Manager, Sakai Administrators can find and edit system message properties, which define UI text for Sakai components in various languages.

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?

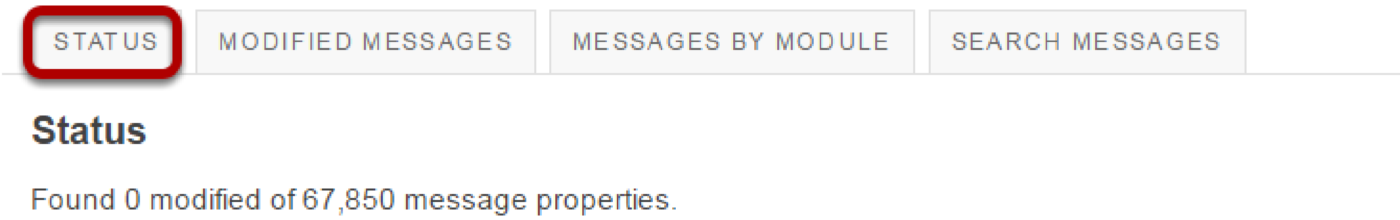
Go to Message Bundle Manager.



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.

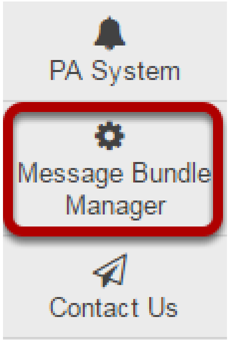
View Status.



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.

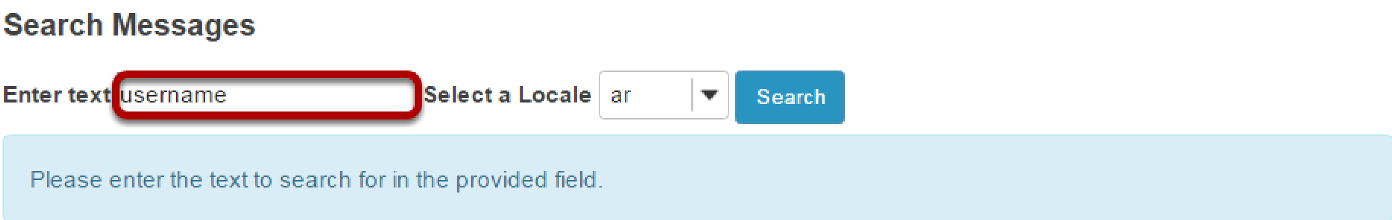


Select the **Message Bundle Manager** tool from the Tool Menu in the Administration Workspace.

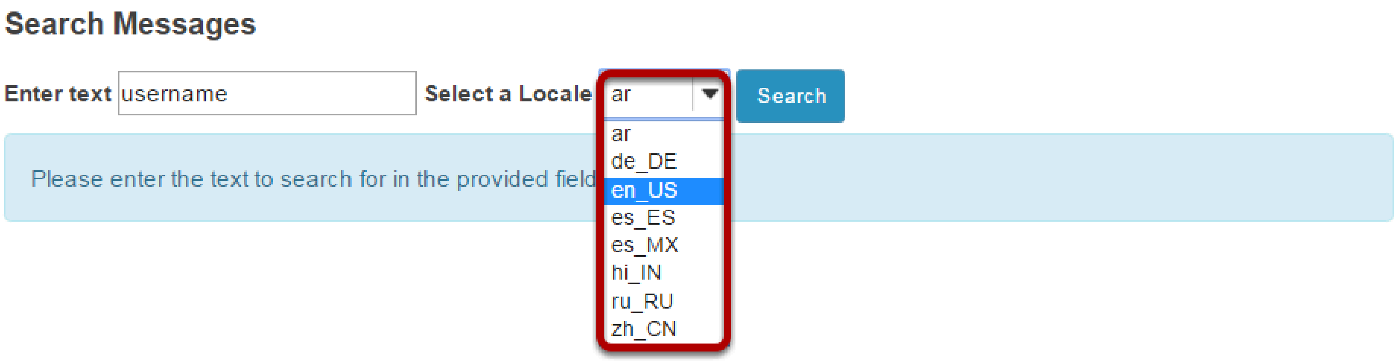
Note: If you do not see the Message Bundle Manager tool in the menu, you may need to add it. See [How do I add a stealthed tool to a site?](#) for more information on adding a tool to the site.

Click Search Messages.

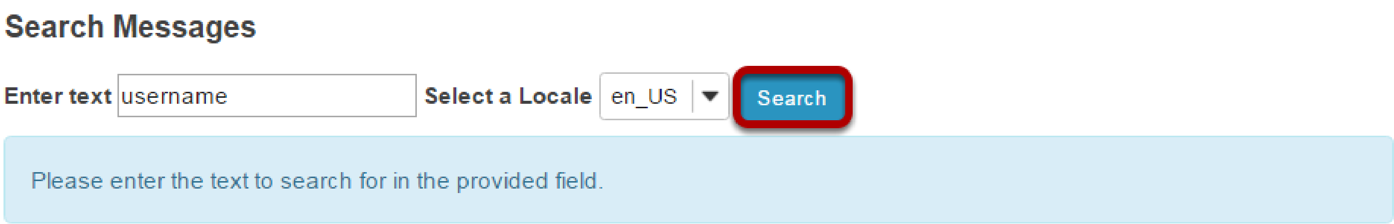
Enter search text.



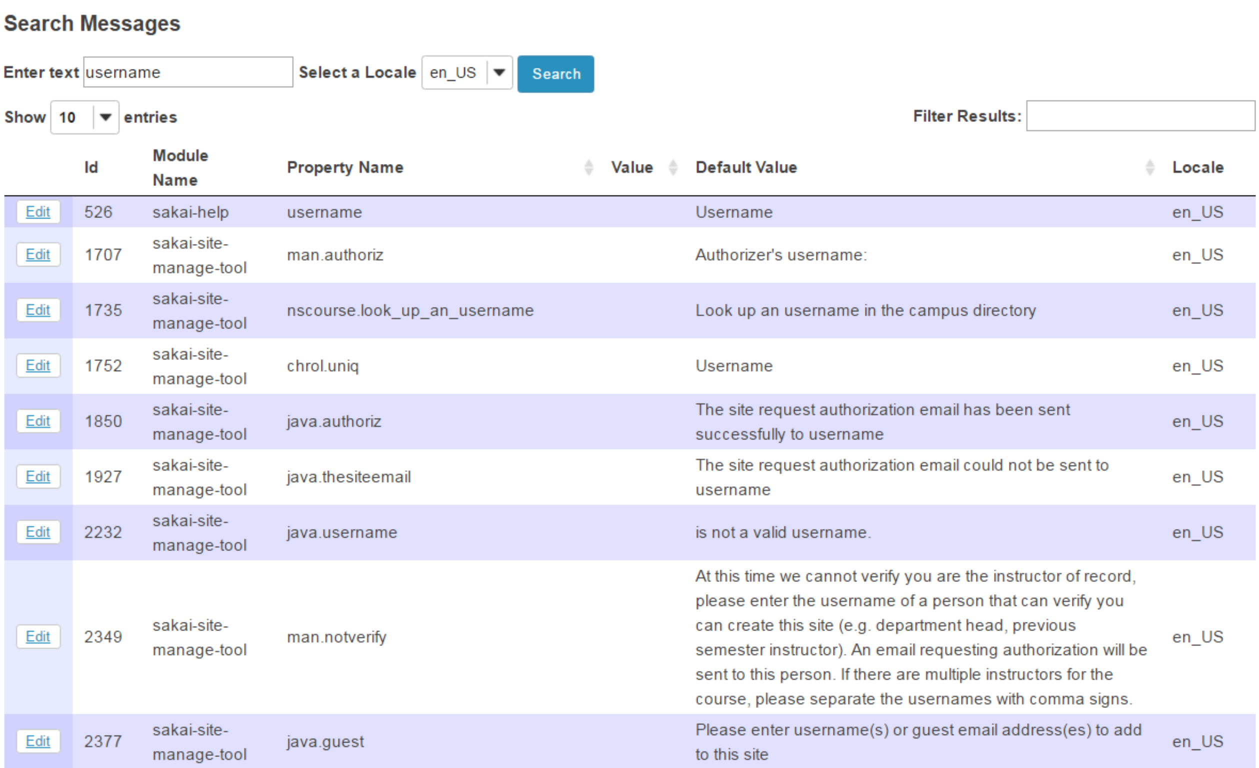
Select language.



Click the Search button.



View search results.

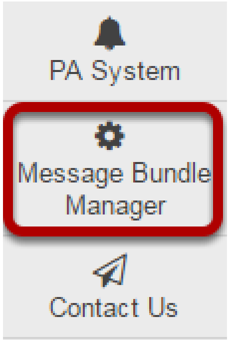


	Id	Module Name	Property Name	Value	Default Value	Locale
Edit	526	sakai-help	username		Username	en_US
Edit	1707	sakai-site-manage-tool	man.authoriz		Authorizer's username:	en_US
Edit	1735	sakai-site-manage-tool	nscourse.look_up_an_username		Look up an username in the campus directory	en_US
Edit	1752	sakai-site-manage-tool	chrol.uniq		Username	en_US
Edit	1850	sakai-site-manage-tool	java.authoriz		The site request authorization email has been sent successfully to username	en_US
Edit	1927	sakai-site-manage-tool	java.thesiteemail		The site request authorization email could not be sent to username	en_US
Edit	2232	sakai-site-manage-tool	java.username		is not a valid username.	en_US
Edit	2349	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
Edit	2377	sakai-site-manage-tool	java.guest		Please enter username(s) or guest email address(es) to add to this site	en_US

All items matching your search criteria will be displayed.

How do I view system messages by module?

Go to Message Bundle Manager.

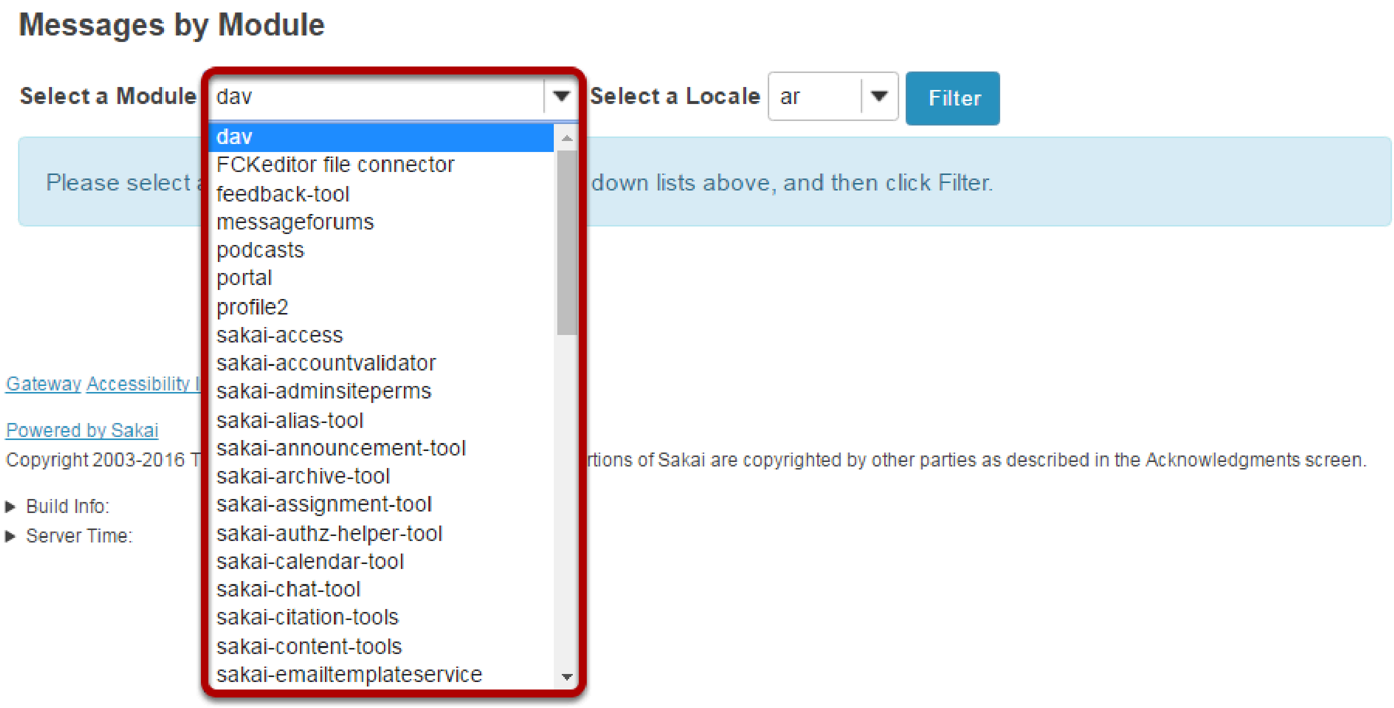


Select the **Message Bundle Manager** tool from the Tool Menu in the Administration Workspace.

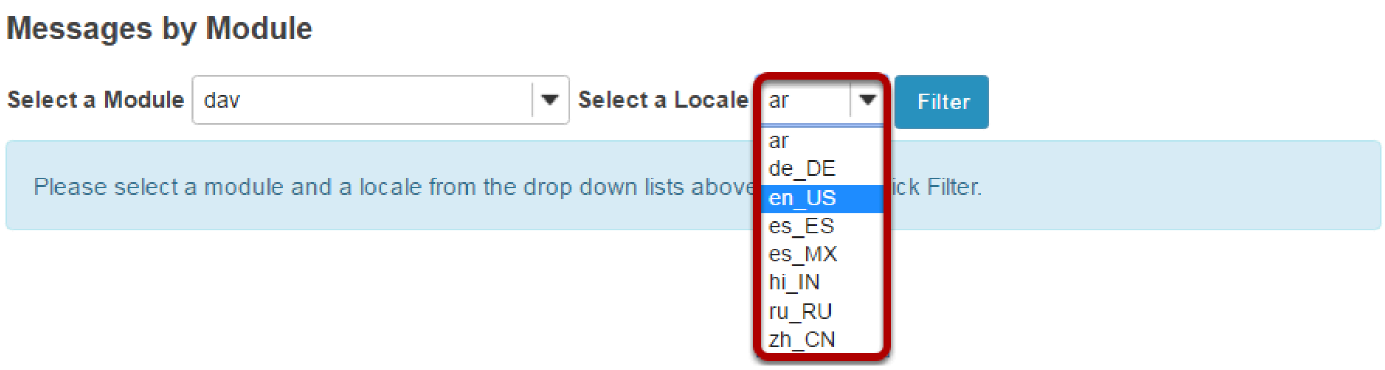
Note: If you do not see the Message Bundle Manager tool in the menu, you may need to add it. See [How do I add a stealthed tool to a site?](#) for more information on adding a tool to the site.

Click Messages by Module.

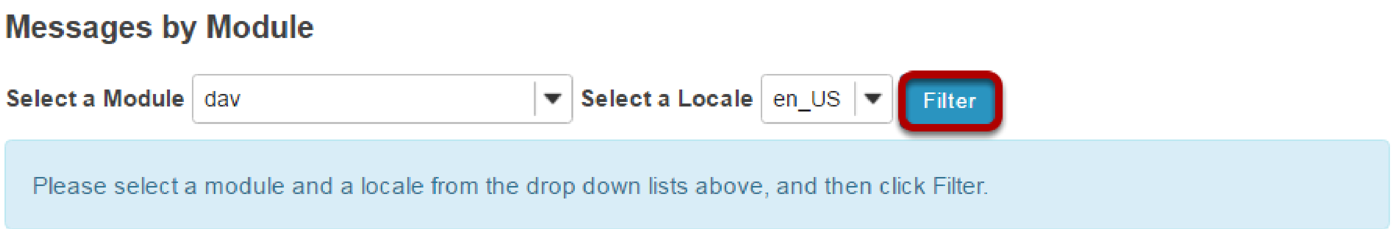
Select the module.



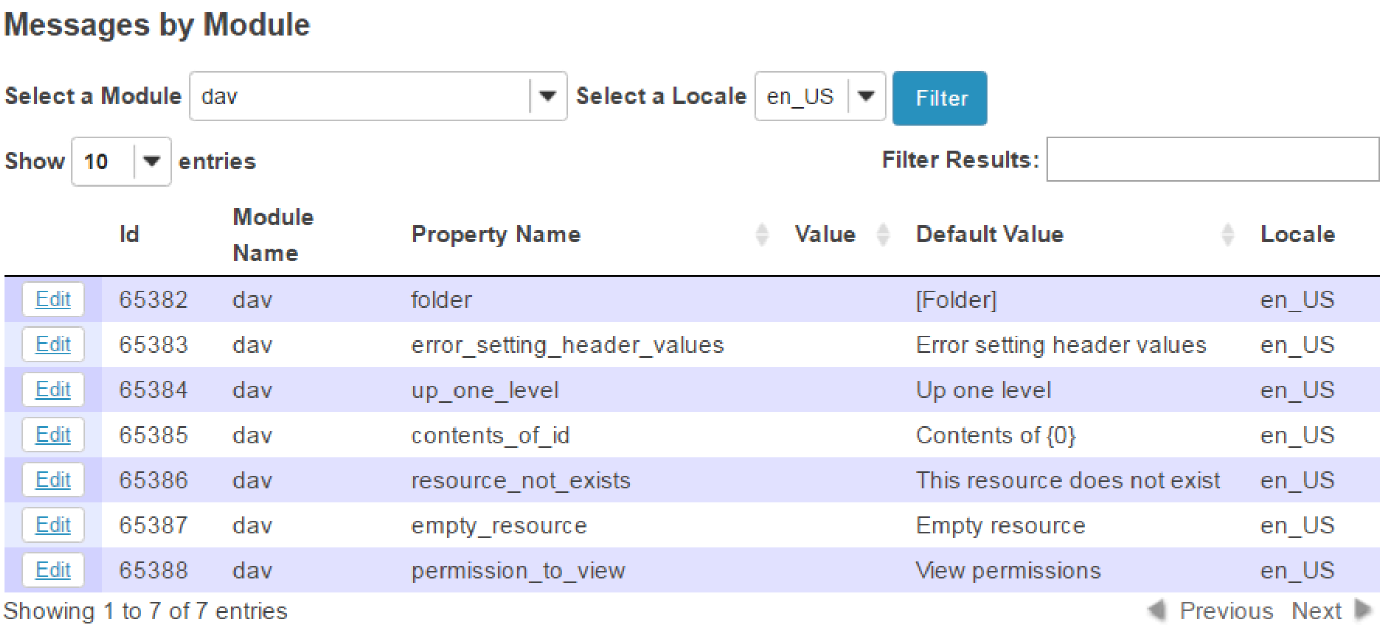
Select the language.



Click Filter.



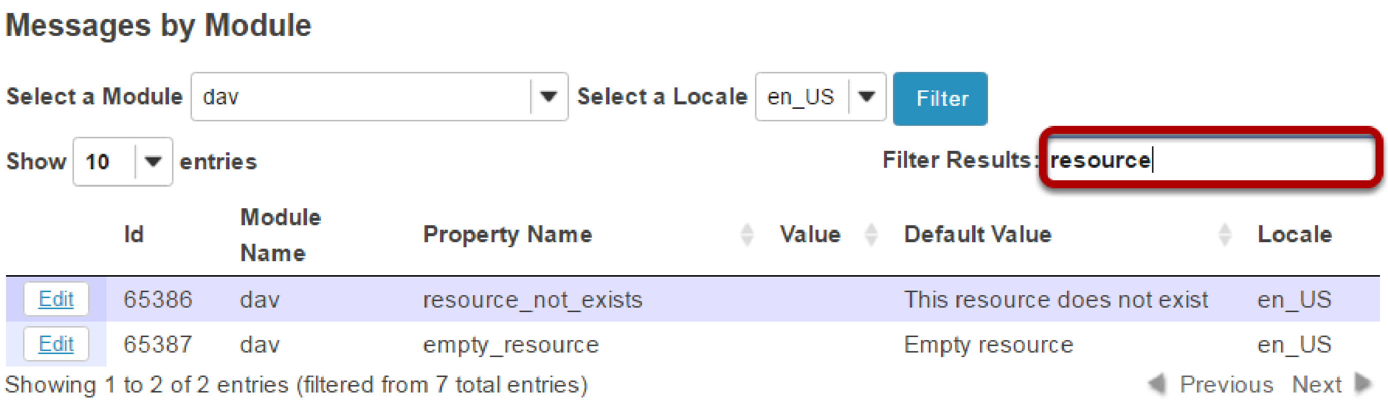
View module messages.



	Id	Module Name	Property Name	Value	Default Value	Locale
Edit	65382	dav	folder		[Folder]	en_US
Edit	65383	dav	error_setting_header_values		Error setting header values	en_US
Edit	65384	dav	up_one_level		Up one level	en_US
Edit	65385	dav	contents_of_id		Contents of {0}	en_US
Edit	65386	dav	resource_not_exists		This resource does not exist	en_US
Edit	65387	dav	empty_resource		Empty resource	en_US
Edit	65388	dav	permission_to_view		View permissions	en_US

All system messages for that module will be displayed.

Filter results.

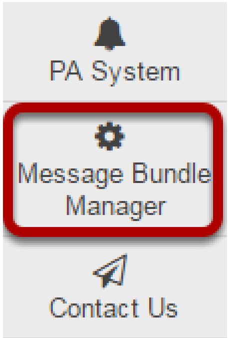


	Id	Module Name	Property Name	Value	Default Value	Locale
Edit	65386	dav	resource_not_exists		This resource does not exist	en_US
Edit	65387	dav	empty_resource		Empty resource	en_US

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.

How do I customize a default system message?

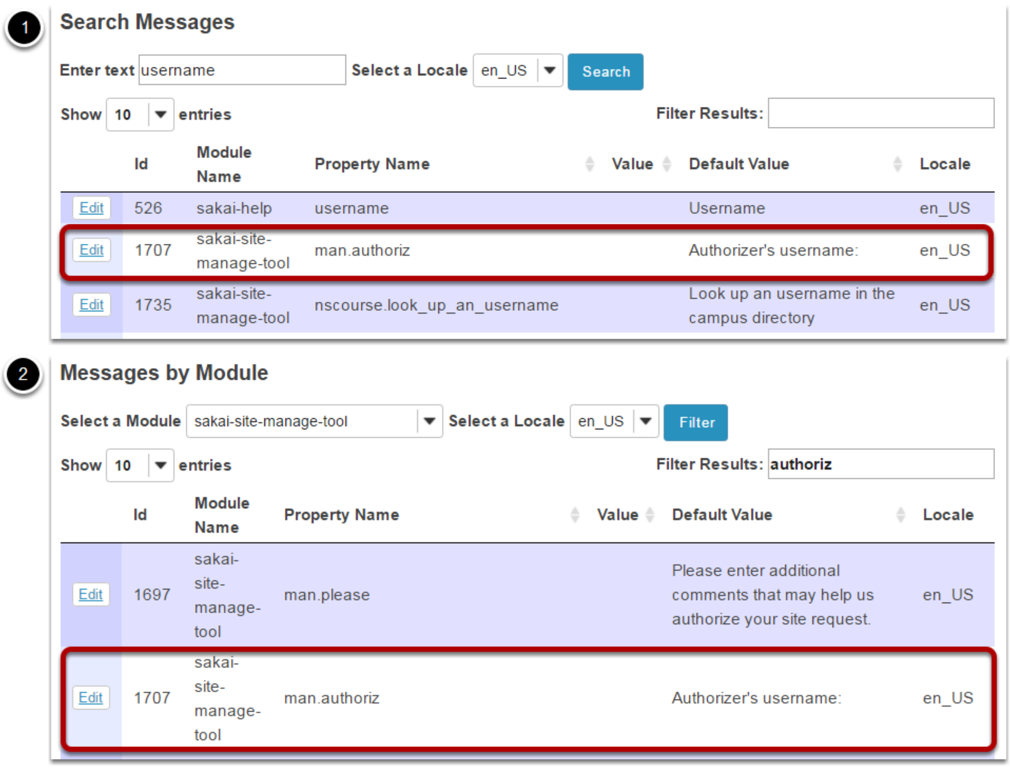
Go to Message Bundle Manager.



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.

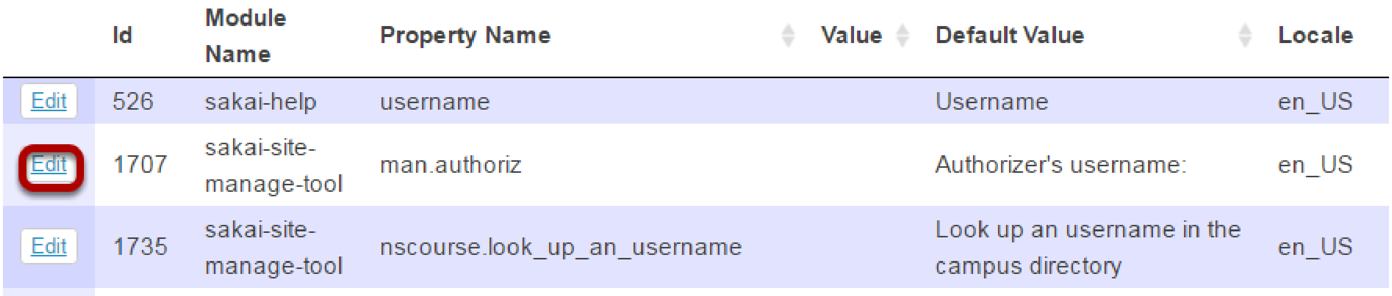
Locate the message that you would like to customize.



You may locate the default message by:

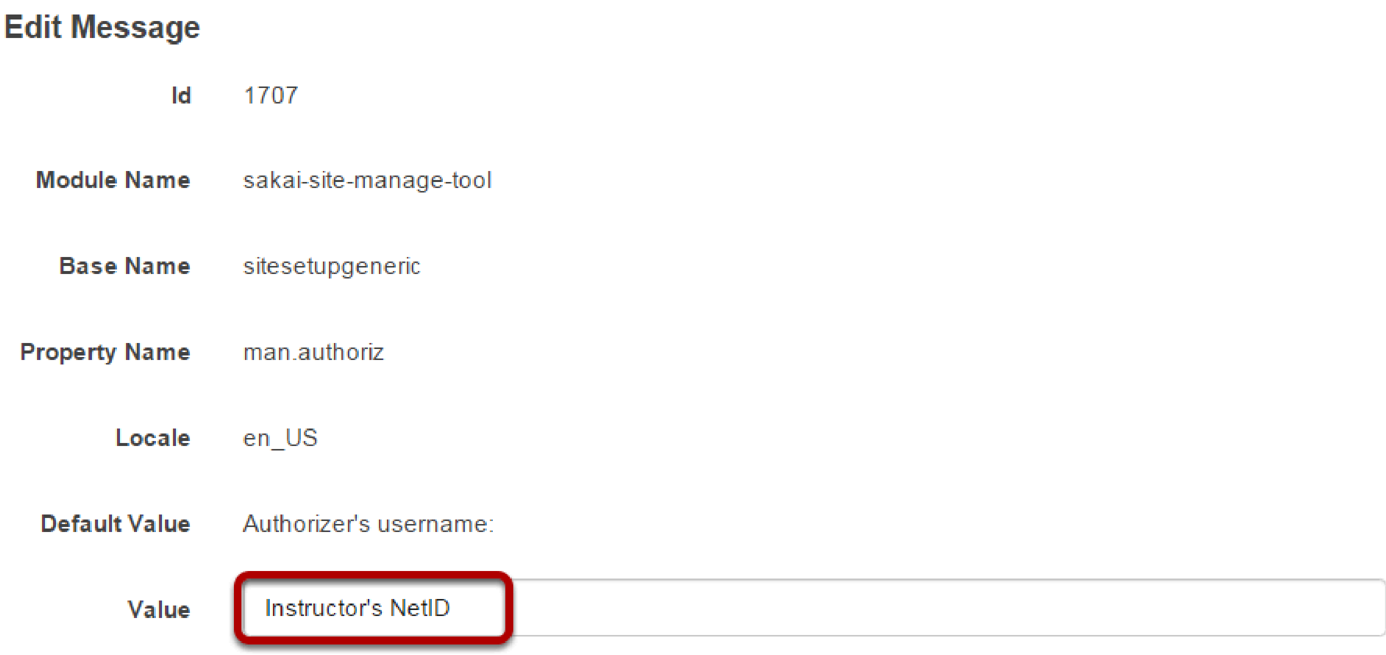
1. Searching for the message. (See How do I search system messages? for more information.)
2. Viewing messages by module. (See How do I view system messages by module? for more information.)

Click Edit.

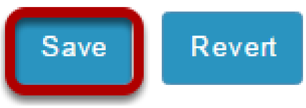


	Id	Module Name	Property Name	Value	Default Value	Locale
Edit	526	sakai-help	username		Username	en_US
Edit	1707	sakai-site-manage-tool	man.authoriz		Authorizer's username:	en_US
Edit	1735	sakai-site-manage-tool	nscourse.look_up_an_username		Look up an username in the campus directory	en_US

Enter your custom text into the Value field.



Click Save.



The modified message information will be displayed.

Modified Messages

Show 10 entries   Filter Results: CSV

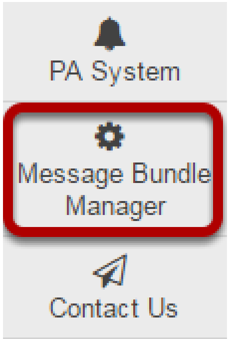
	Id	Module Name	Property Name	Value	Default Value	Locale
Edit	1707	sakai-site-manage-tool	man.authoriz	Instructor's NetID	Authorizer's username:	en_US

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?

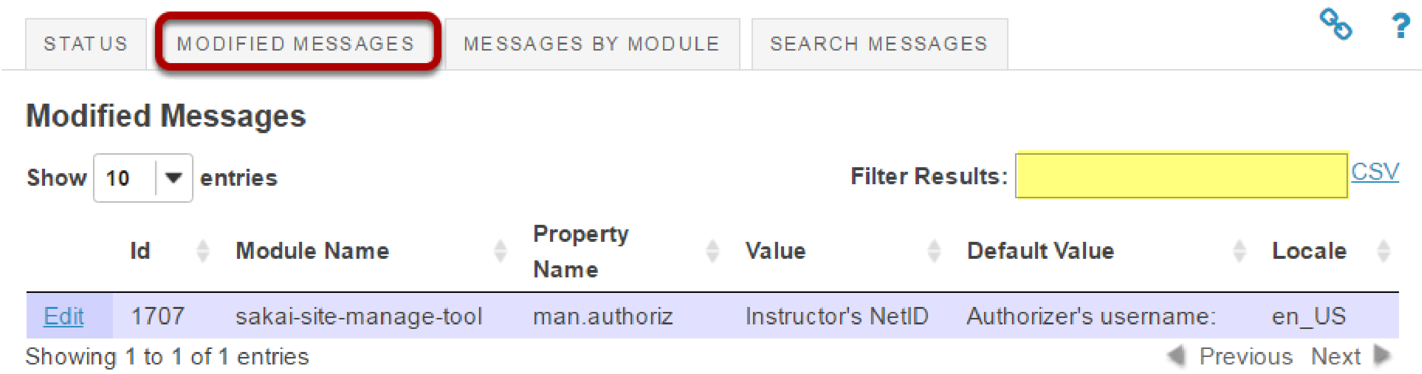
Go to Message Bundle Manager.



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.

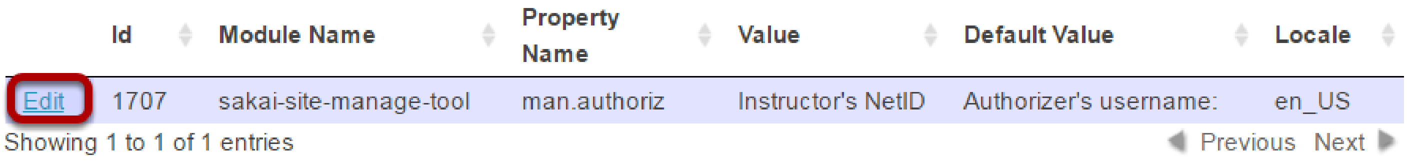
Click Modified Messages.



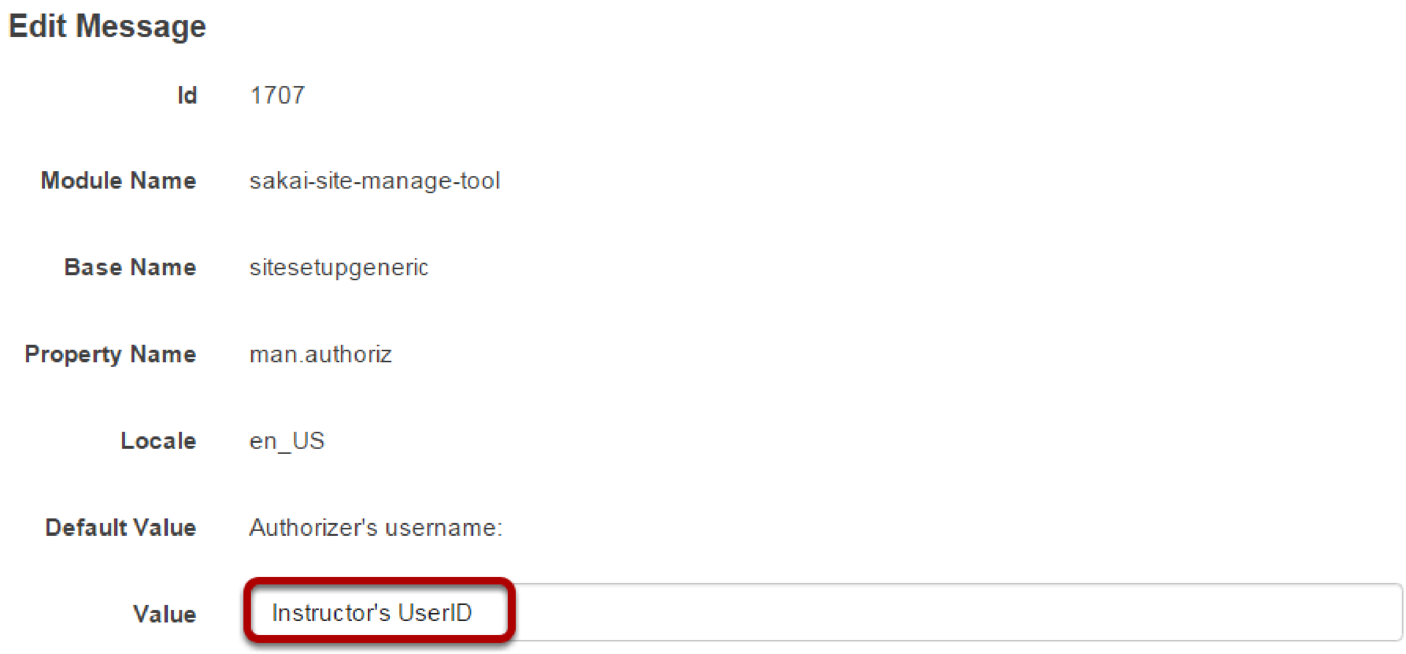
All modified messages in the system will display.

*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.*

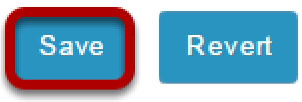
Click Edit.



Make your changes to the text in the Value field.



Click Save.



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.

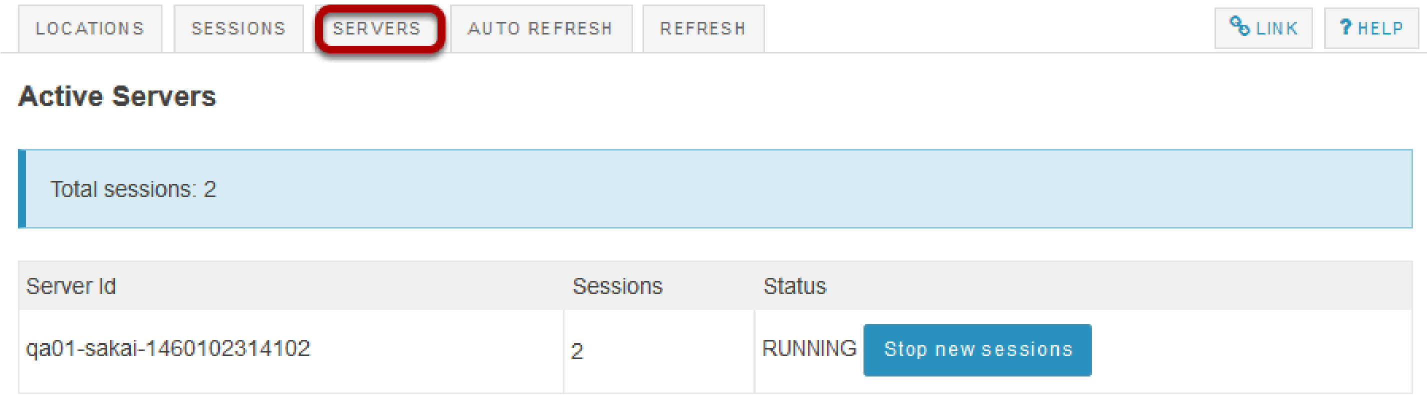
To access this tool, select Online from the Tool Menu of the Administration Workspace.

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.



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 ***Server*** *tab to view this information if you are in a different tab.*

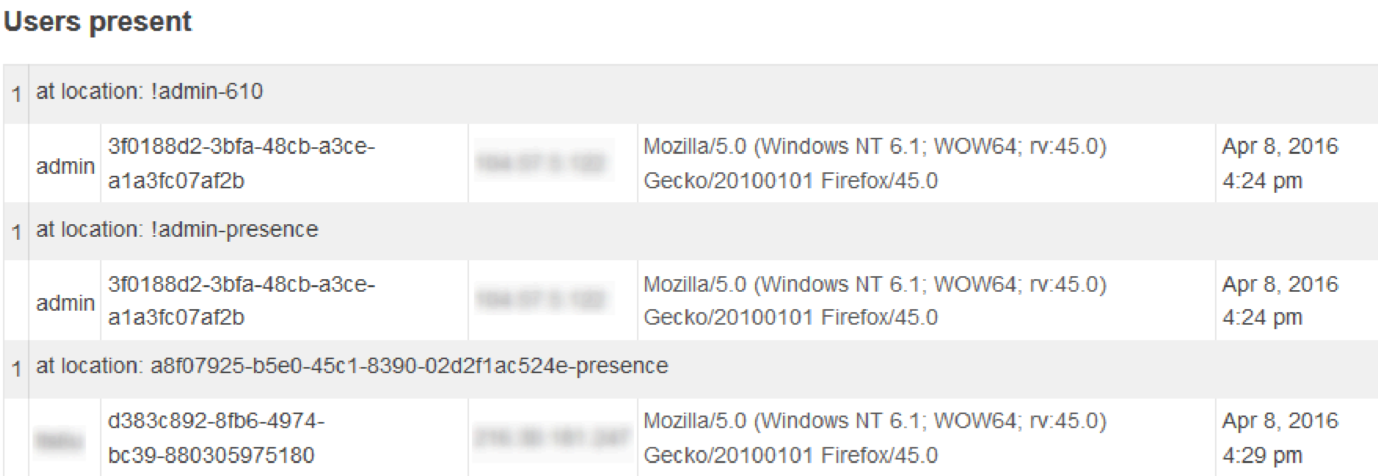
How do I view user locations?

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.



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.

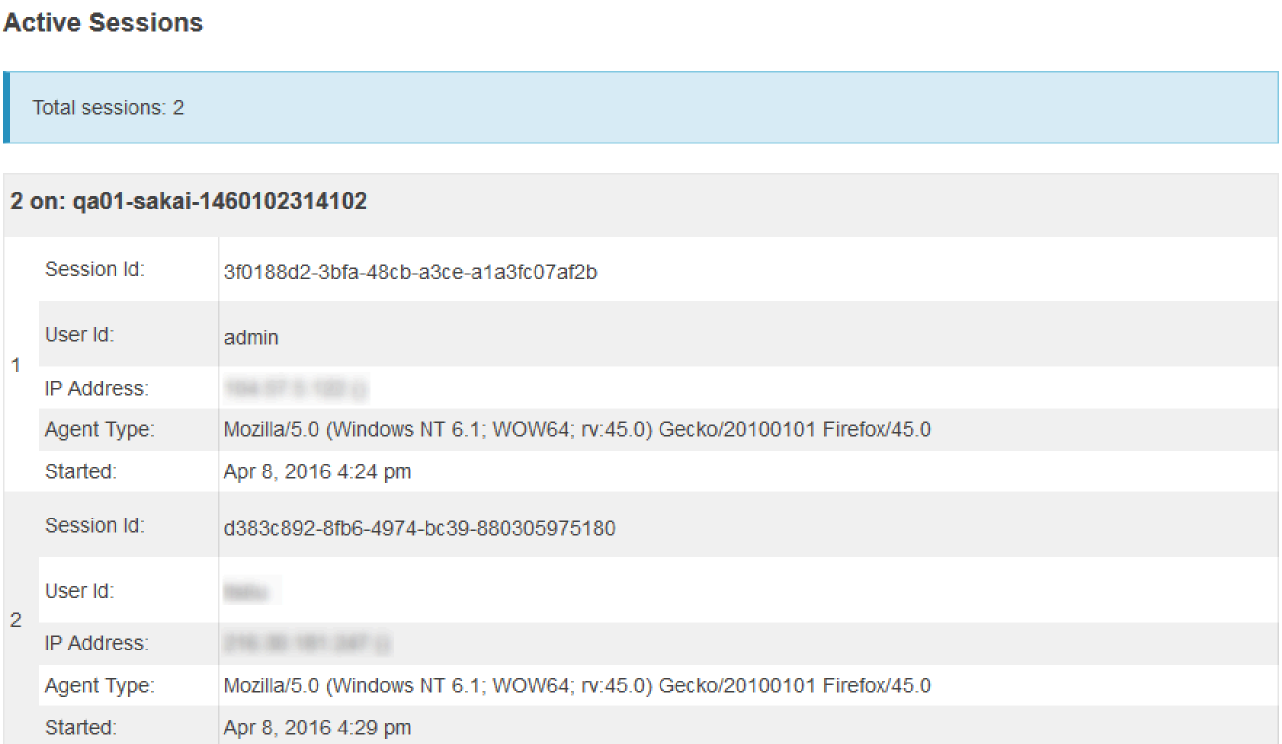
How do I view active sessions?

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.



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?

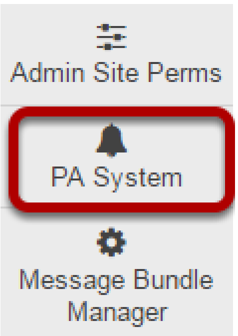
The PA System tool provides system administrators with the ability to deliver customizable system-wide or targeted alerts to users in their Sakai instance. These alerts may take the form of dismissible, rich-text popup alerts or simple text banners, color-coded by alert priority. All alerts are centrally managed through the PA System tool within the Sakai Admin 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:

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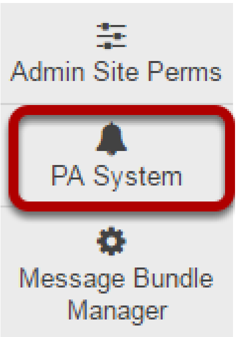
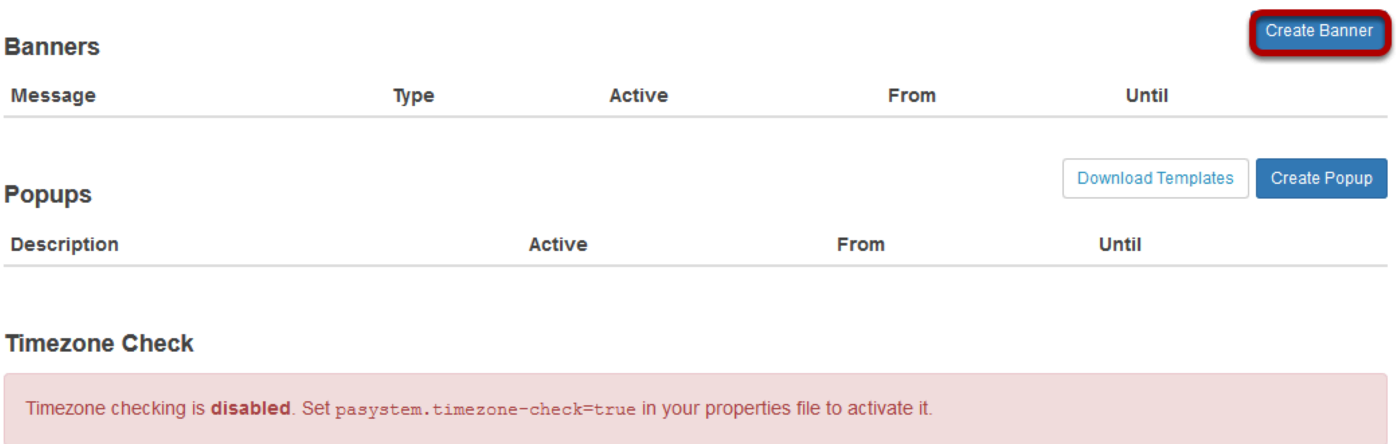
- Red (High priority) - can be neither dismissed nor hidden by the user

Go to PA System.

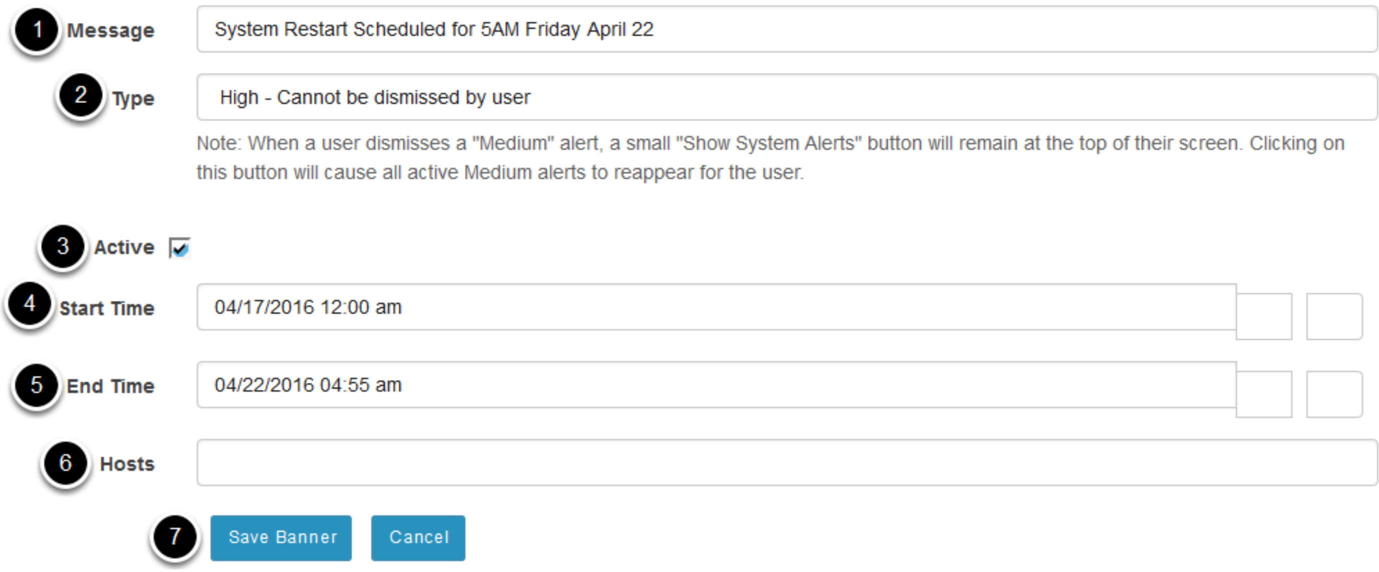


Select the **PA System** tool from the Tool Menu in the Administration Workspace.

Click Create Banner.

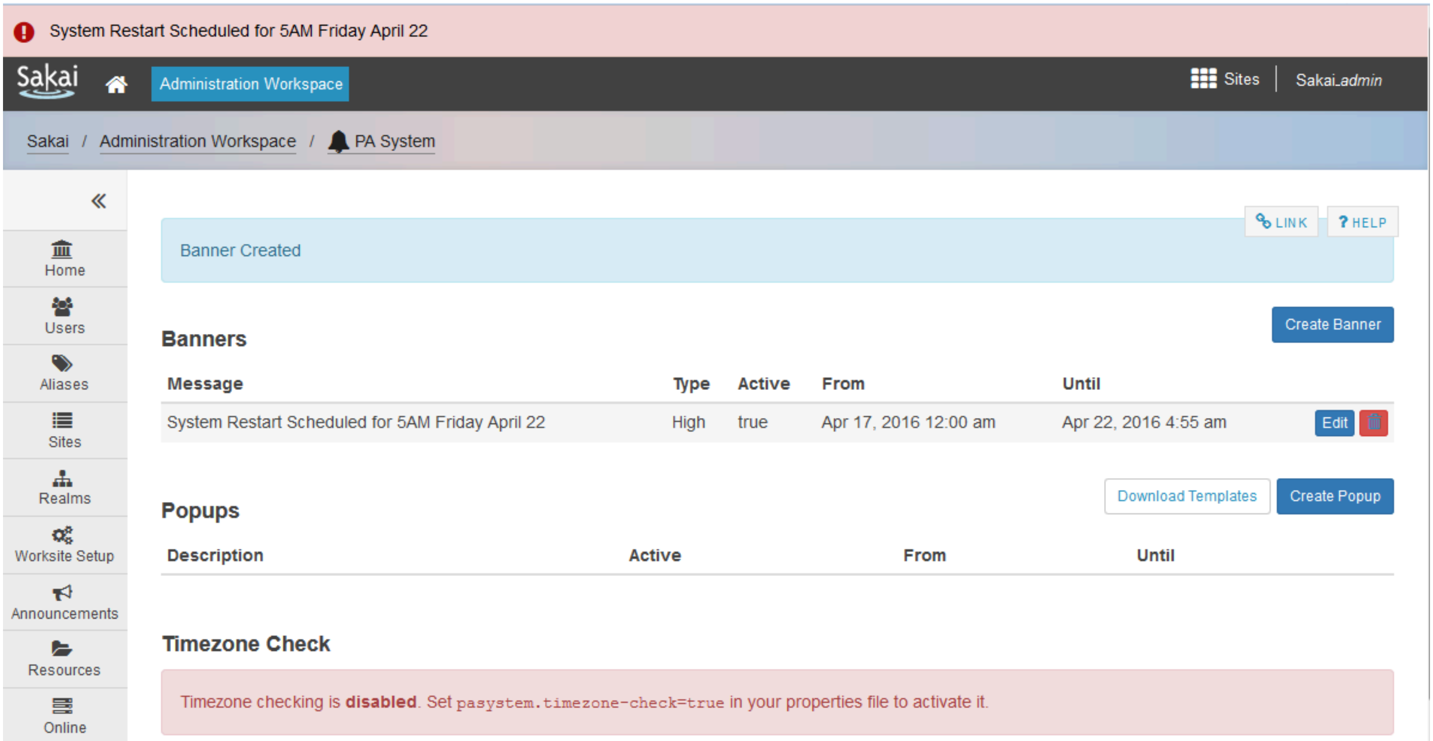


Enter the banner information.



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:

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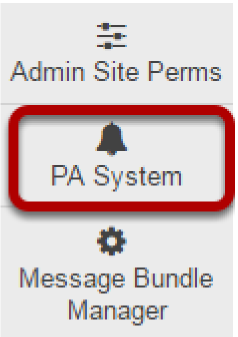
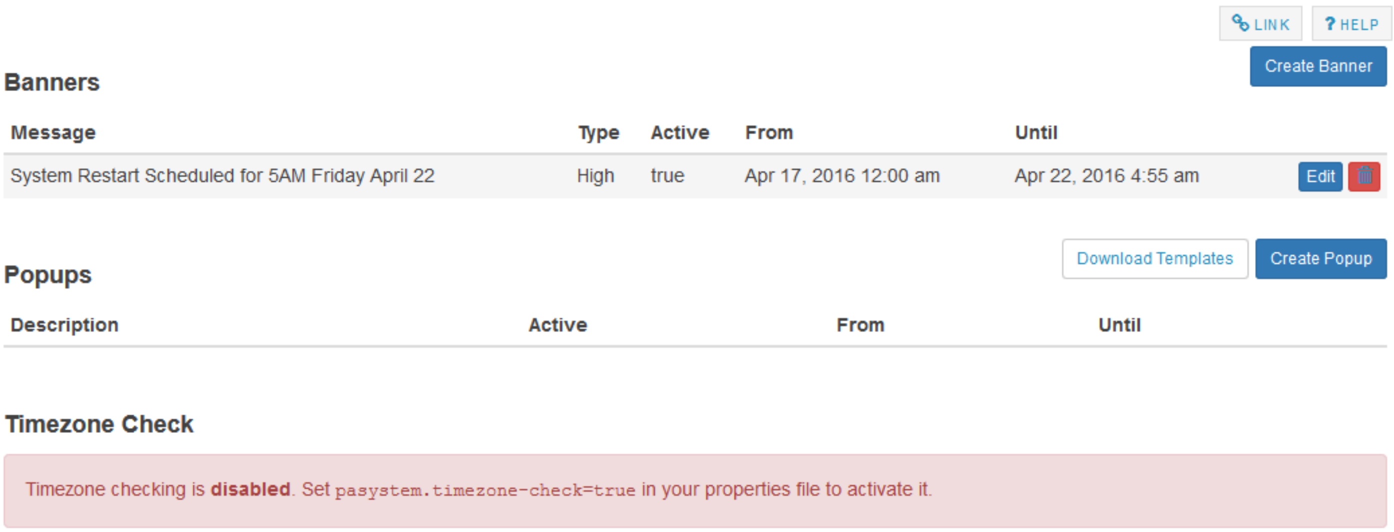
Go to PA System.

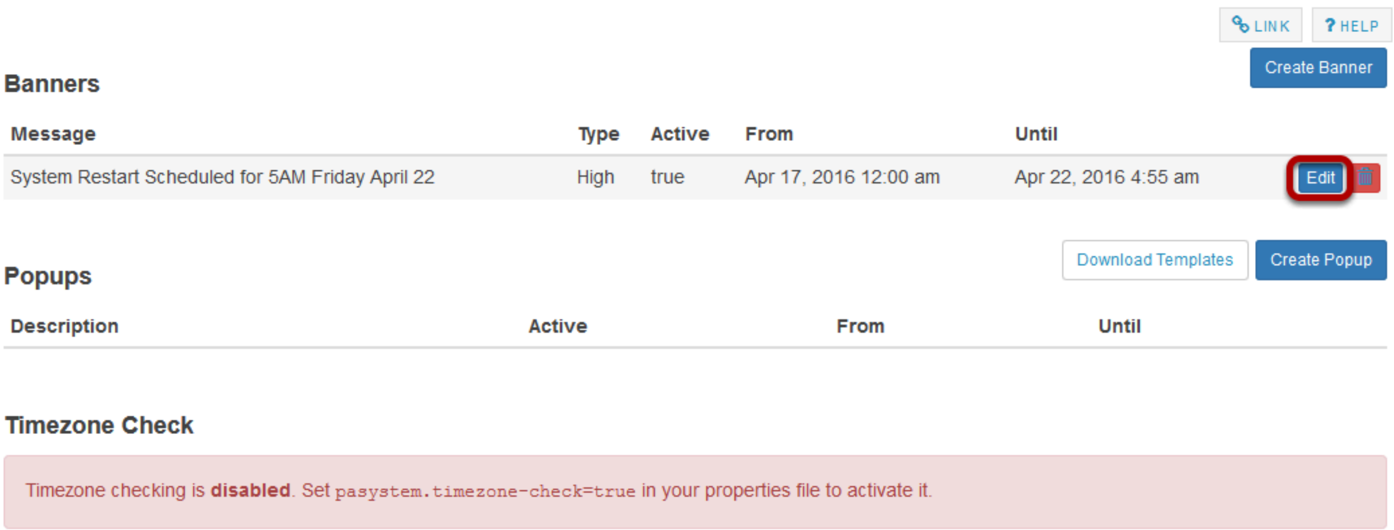


Select the **PA System** tool from the Tool Menu in the Administration Workspace.

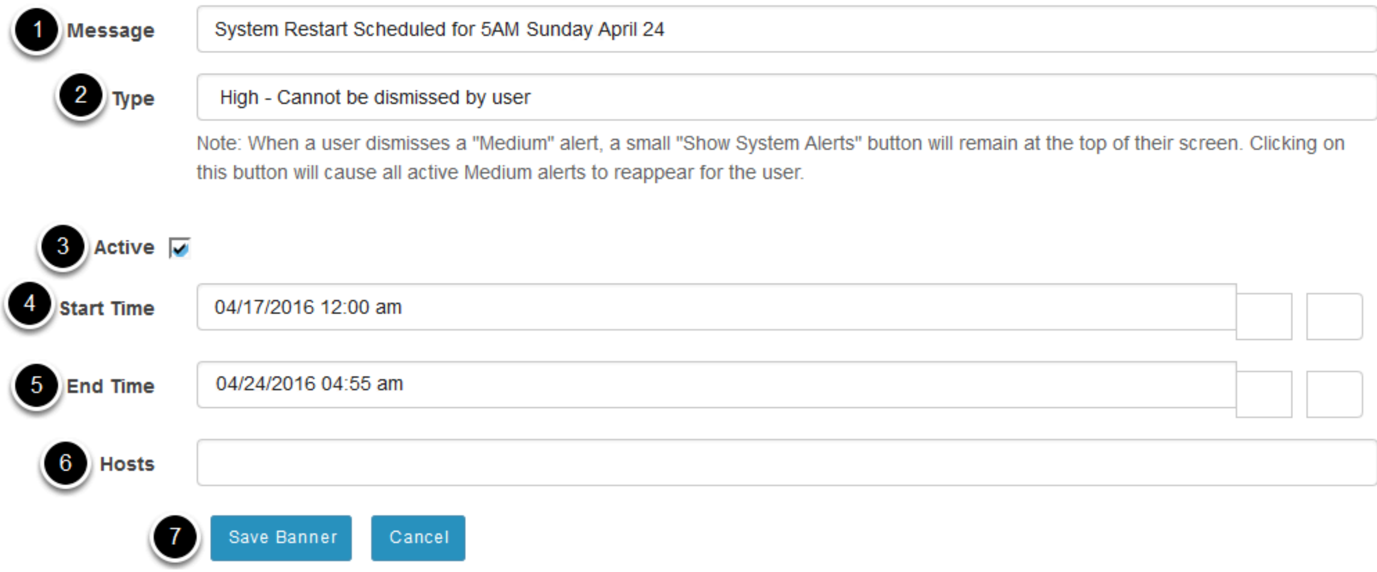
View existing banners.



Click Edit for the banner message you want to modify.

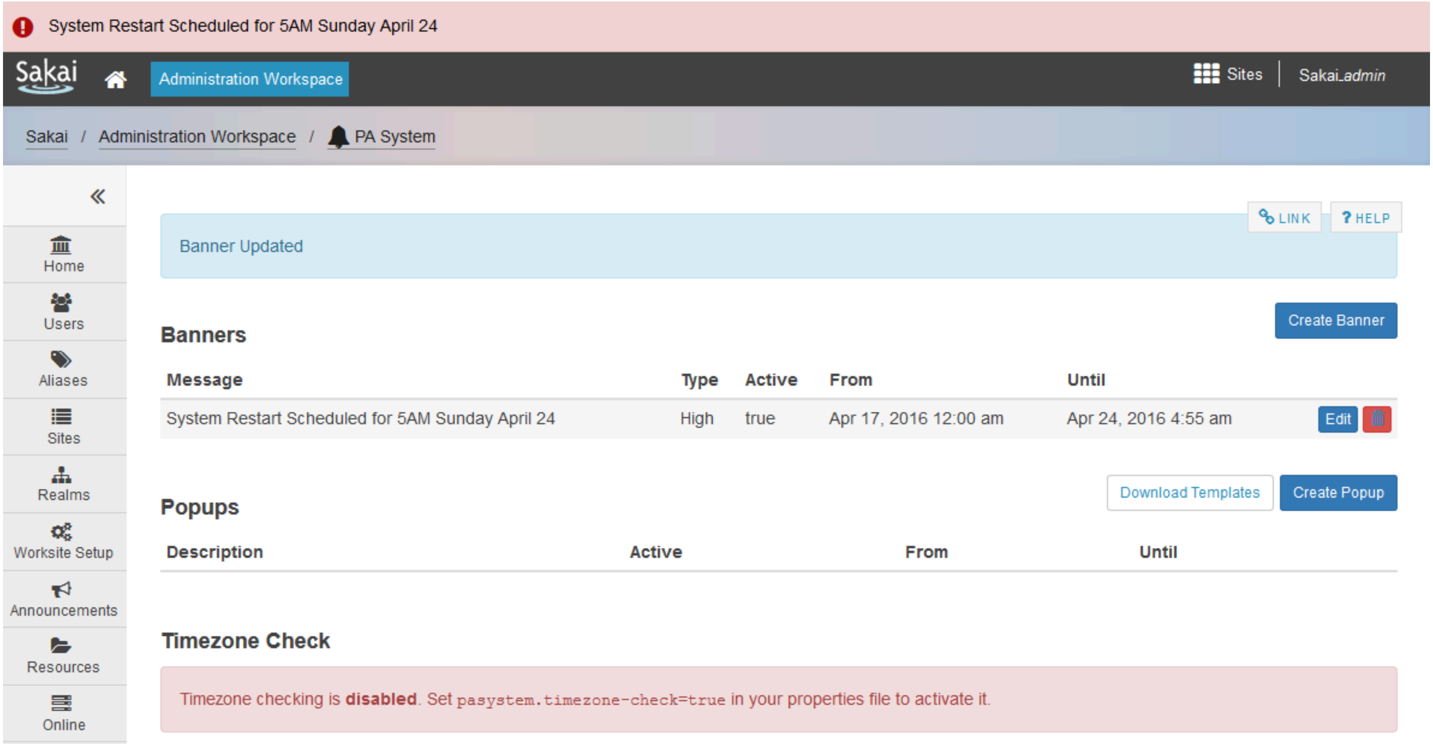


Edit the message information as needed, and then save.



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 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:

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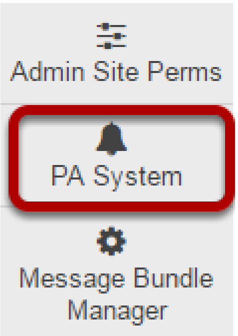
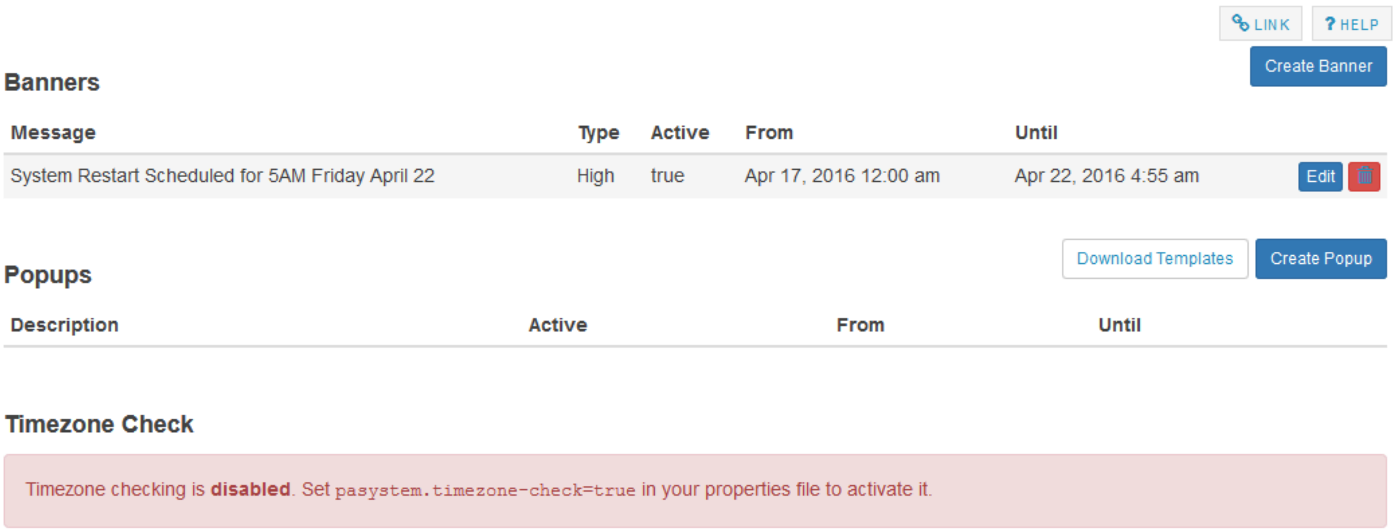
- Yellow (Medium priority) - can be hidden (minimized) by the user
- Red (High priority) - can be neither dismissed nor hidden by the user

Go to PA System.

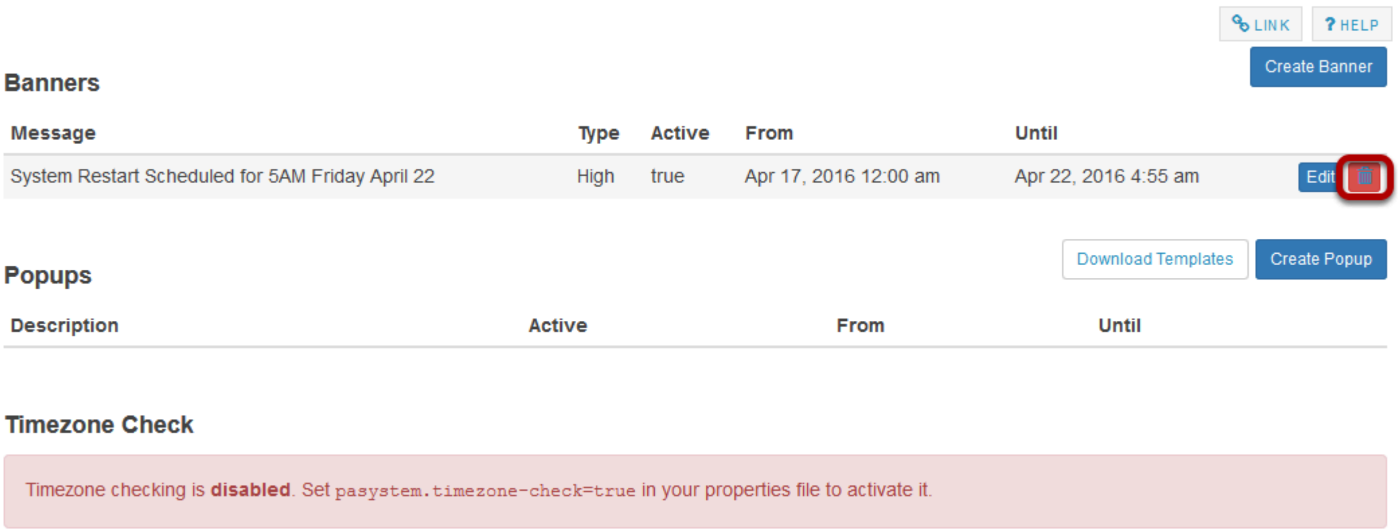


Select the **PA System** tool from the Tool Menu in the Administration Workspace.

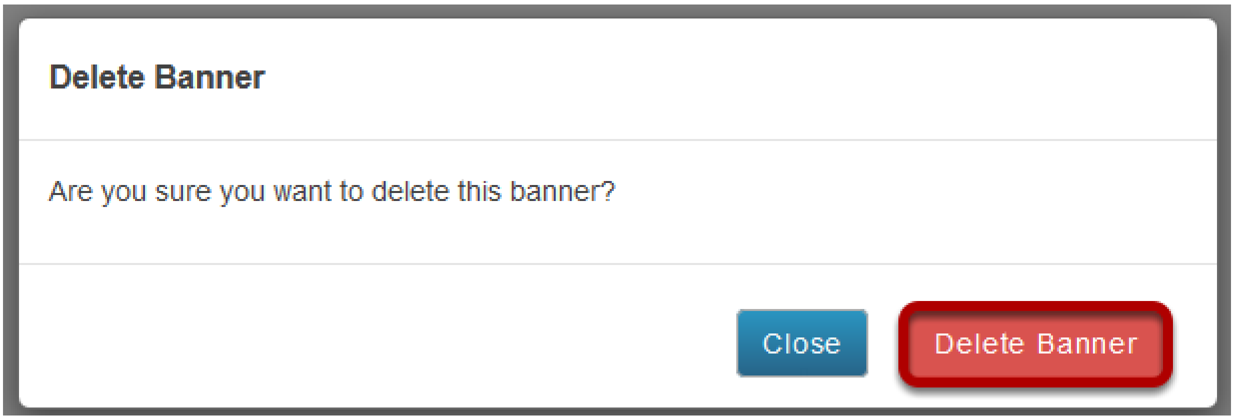
View existing banners.



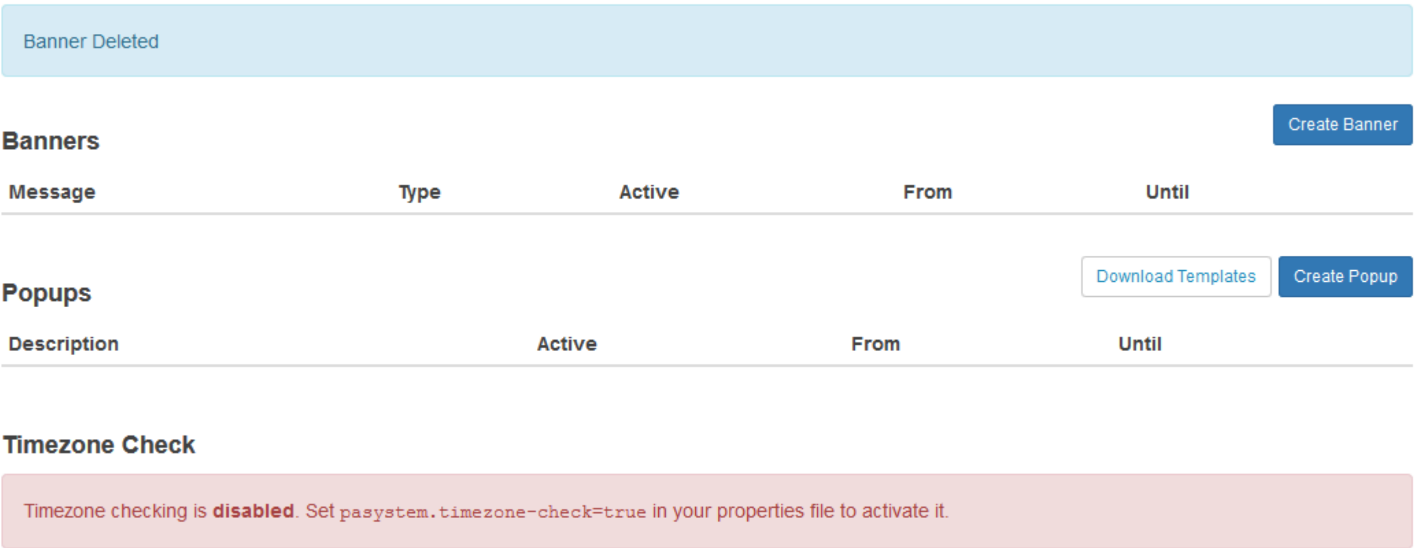
Click the trashcan icon (Delete) for the banner message you want to delete.



Click Delete Banner to confirm the deletion.



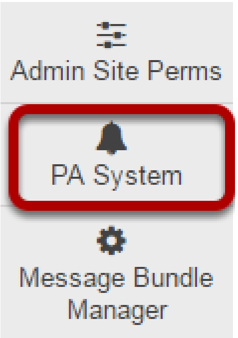
The banner will be deleted and a confirmation message will be displayed.



How do I create a popup system message?

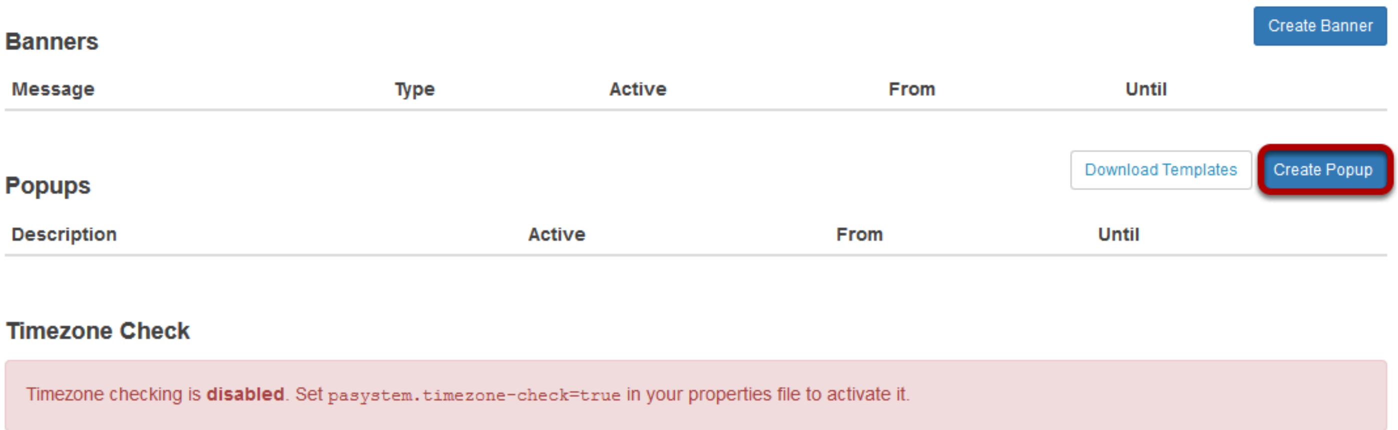
Popup alerts are modal windows that users see upon logging into the system. These popups may be temporarily or permanently dismissed by the user. The content of these alerts allow for rich HTML content/formatting.

Go to PA System.

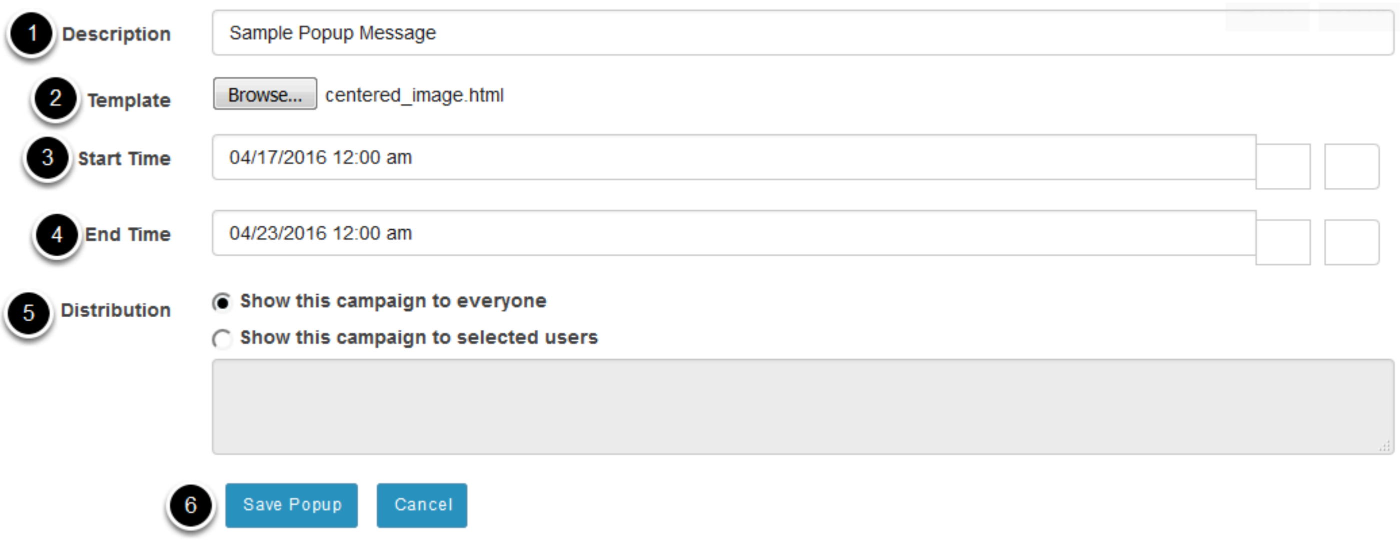


Select the **PA System** tool from the Tool Menu in the Administration Workspace.

Click Create Popup.

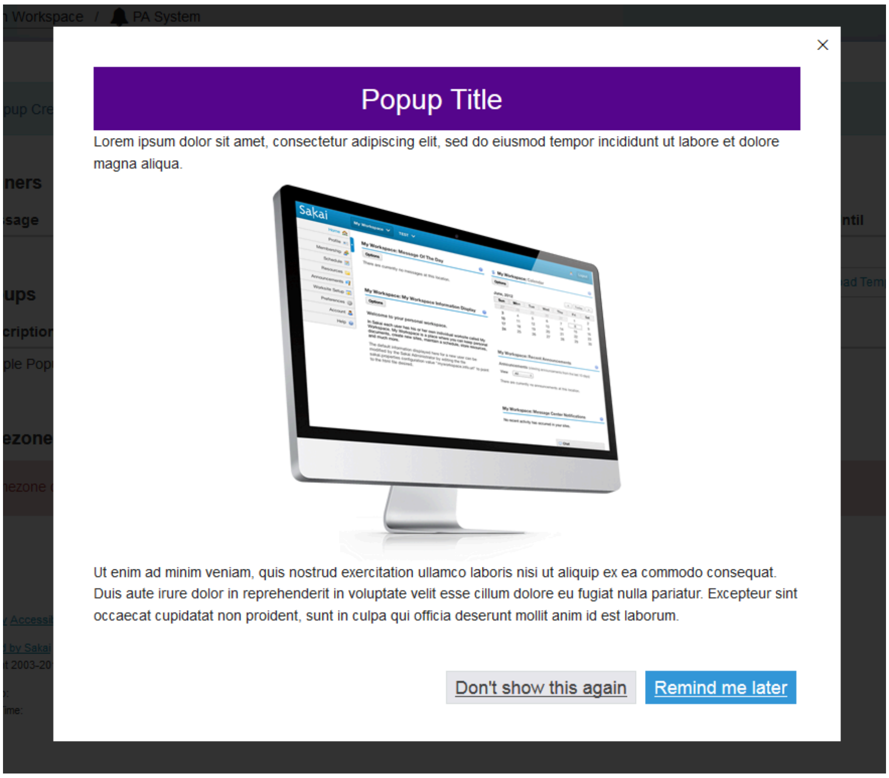


Enter the popup information.



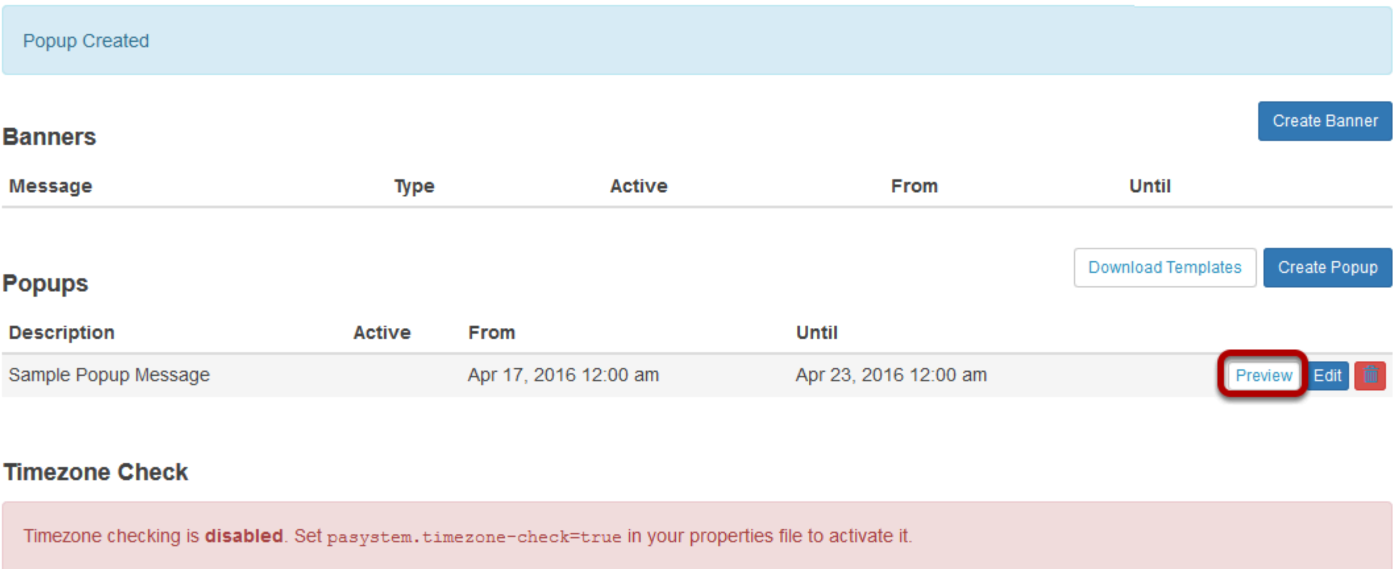
1. **Description:** This is the description of your popup message as shown in the PA System message list.
2. **Template:** Click **Browse** to locate and select the file containing your popup message content. *(Note: Several sample templates are provided for you if you click Download Templates from the 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.

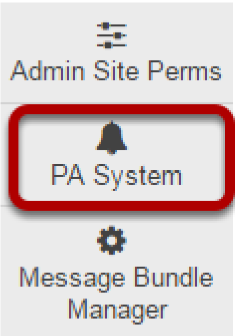
Admin users may also click the Preview button to preview a popup message.



How do I edit an existing popup system message?

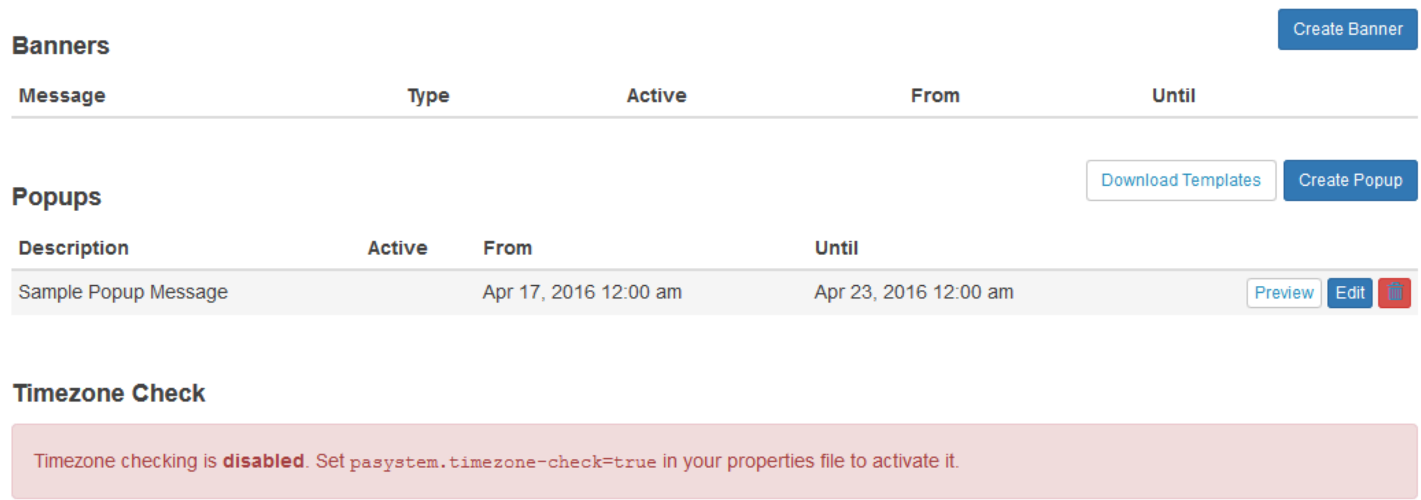
Popup alerts are modal windows that users see upon logging into the system. These popups may be temporarily or permanently dismissed by the user. The content of these alerts allow for rich HTML content/formatting.

Go to PA System.

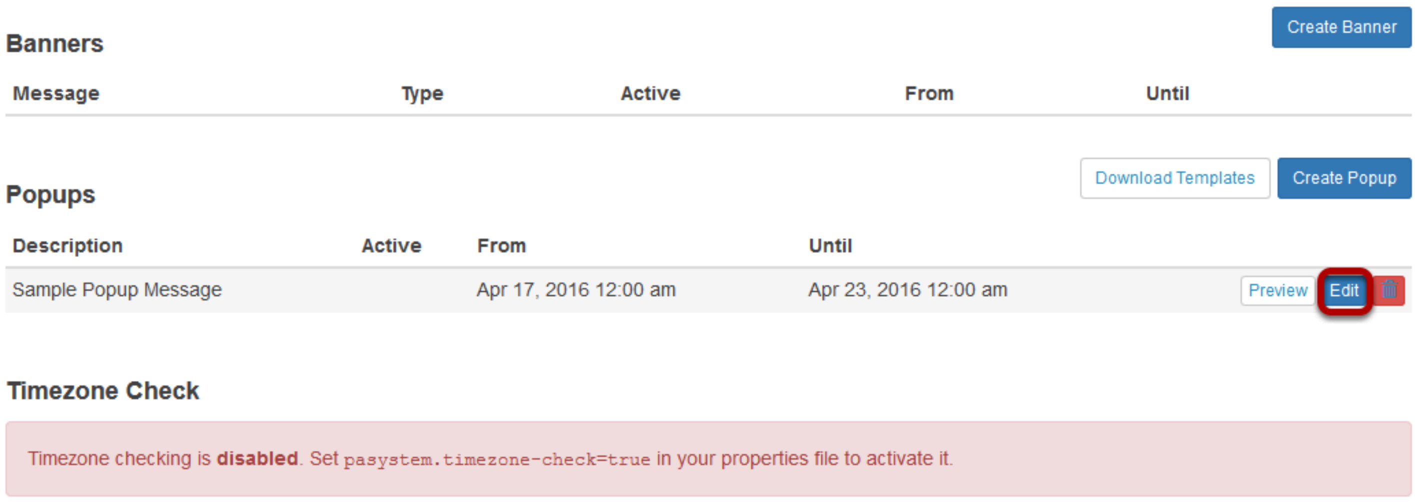


Select the **PA System** tool from the Tool Menu in the Administration Workspace.

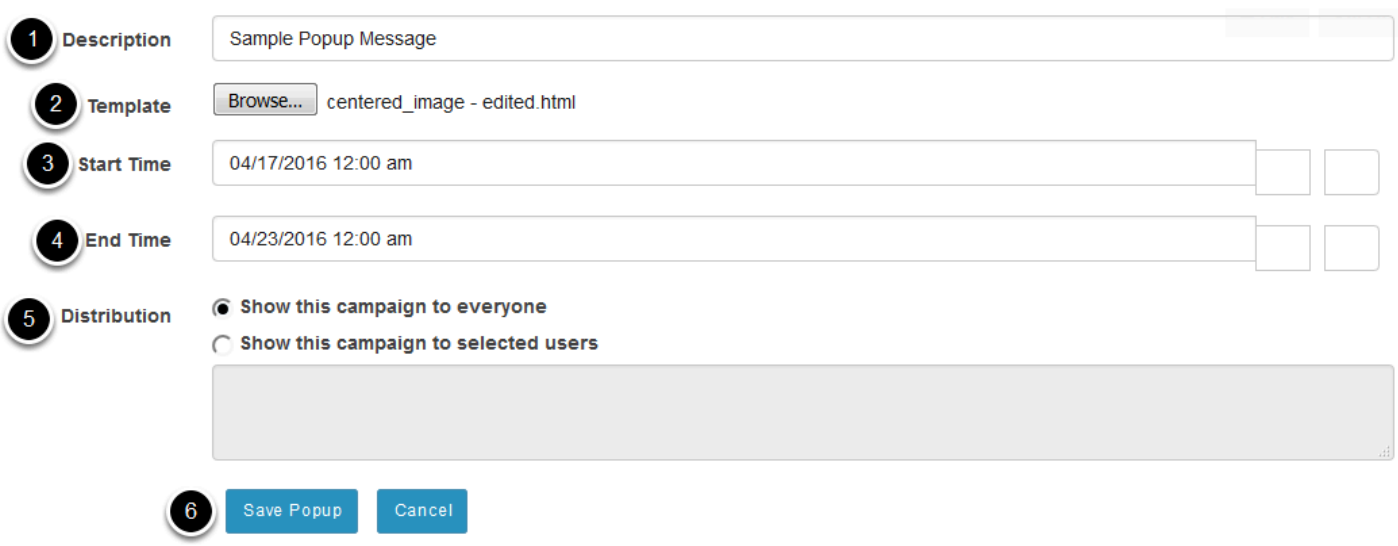
View existing popup messages.



Click Edit for the popup you want to modify.



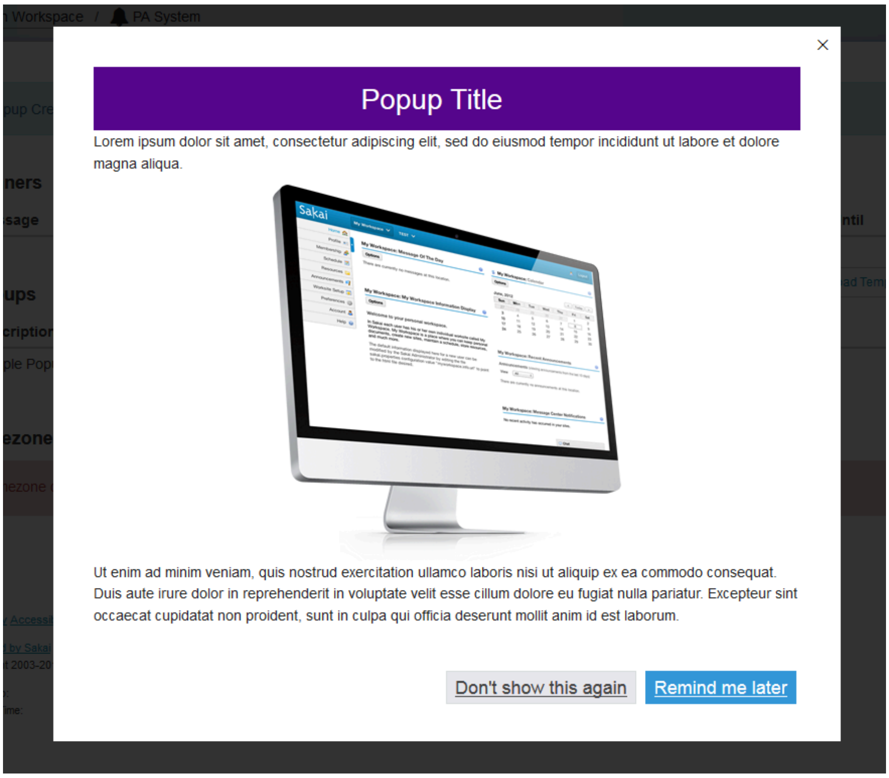
Edit the popup information as needed, then save.



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.

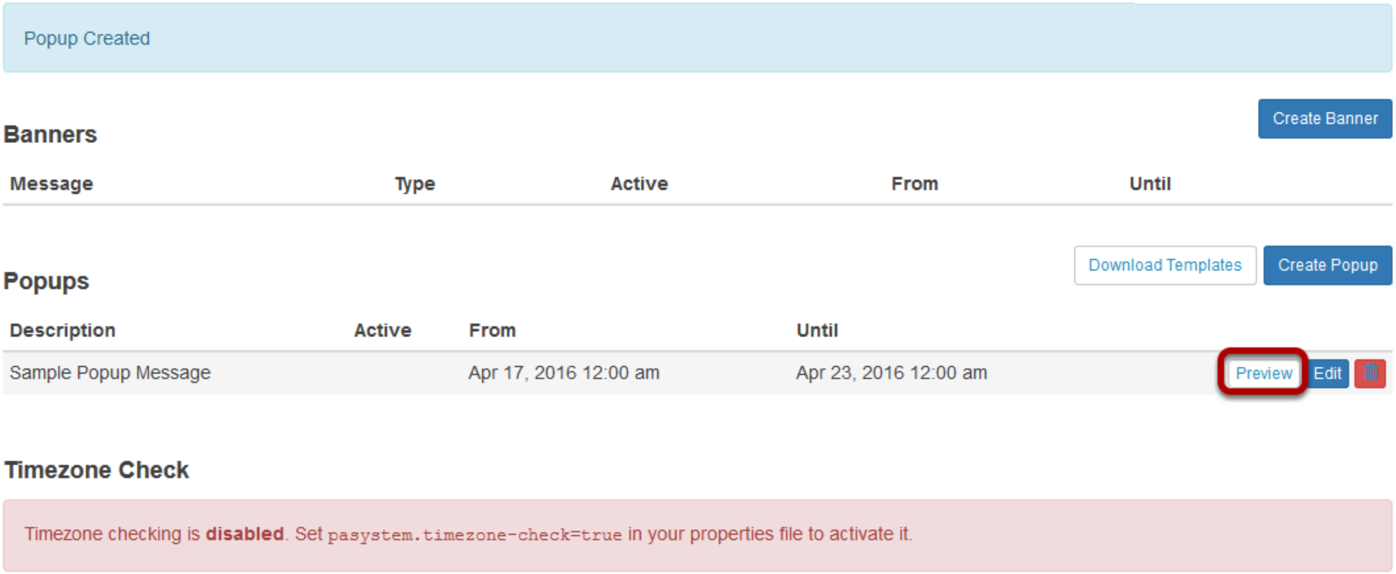
Note: Remember that you will need to make your changes to the html template file before uploading the edited version. Popup message content cannot be edited online via the PA System tool.

View the popup message.



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

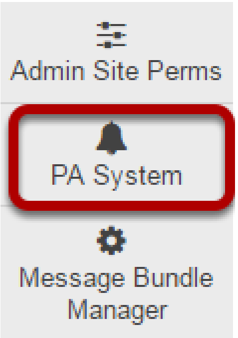
Admin users may also click the Preview button to preview a popup message.



How do I delete a popup system message?

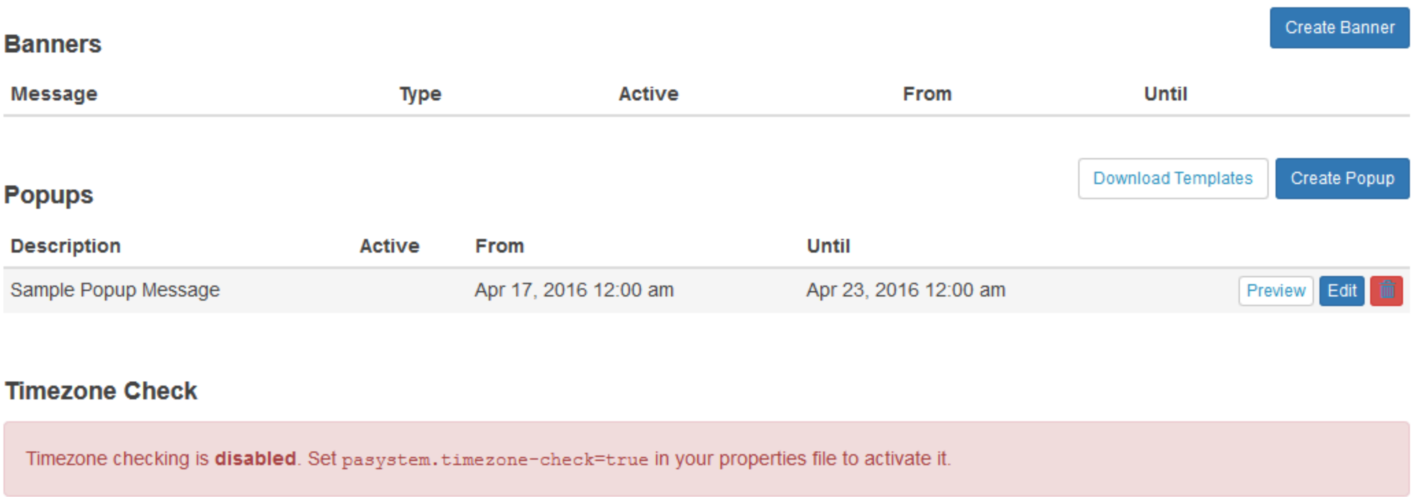
Popup alerts are modal windows that users see upon logging into the system. These popups may be temporarily or permanently dismissed by the user. The content of these alerts allow for rich HTML content/formatting.

Go to PA System.

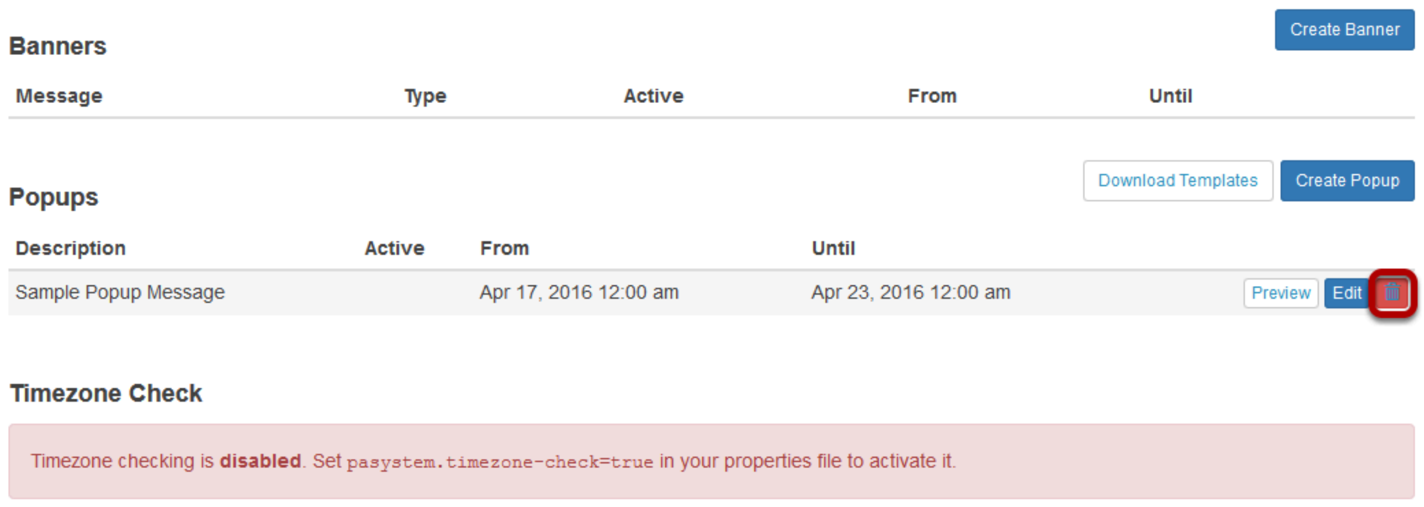


Select the **PA System** tool from the Tool Menu in the Administration Workspace.

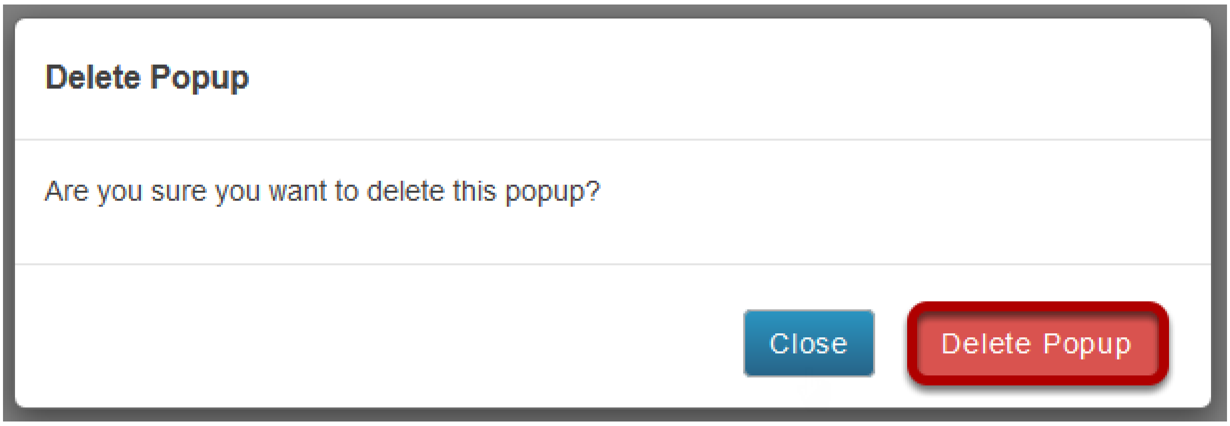
View existing popup messages.



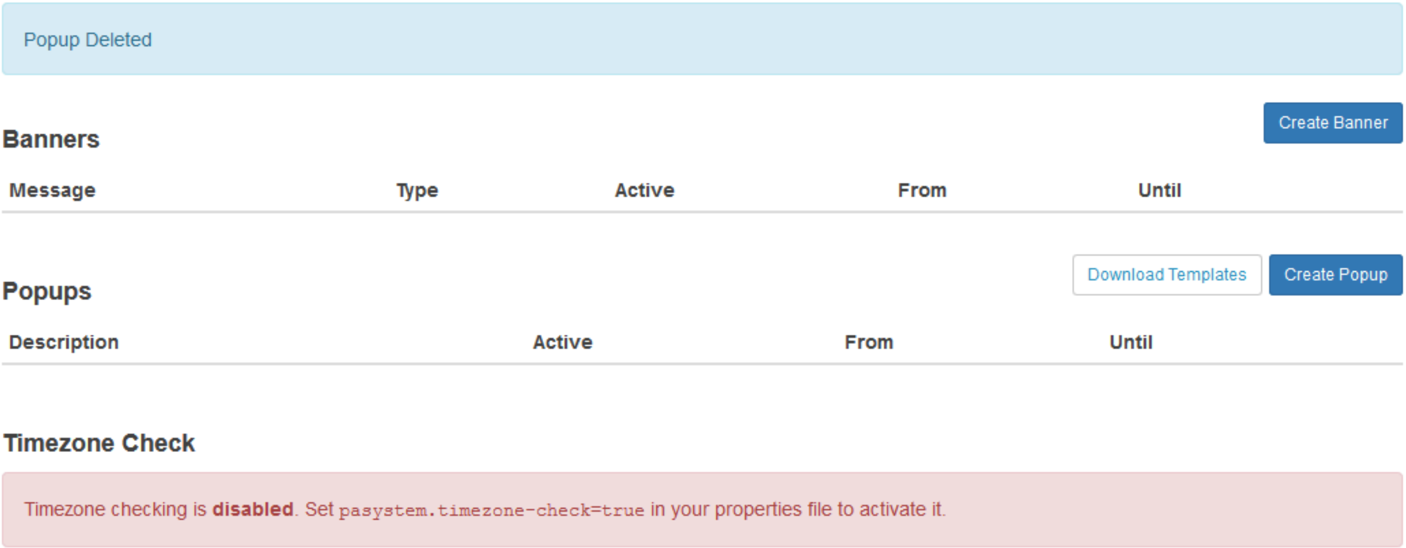
Click the trashcan icon (Delete) for the popup you want to delete.



Click Delete Popup to confirm deletion.



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



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 worksite, 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, Schedule, 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 worksite.

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 worksite depends on the particular implementation of the system administrator. If you have broad rights to a worksite, 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 worksite level by anyone with full permissions to the site.
- All users are assigned the broadest role in their respective My Workspaces 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.

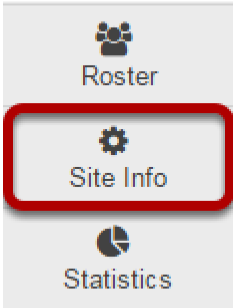
Custom roles

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?

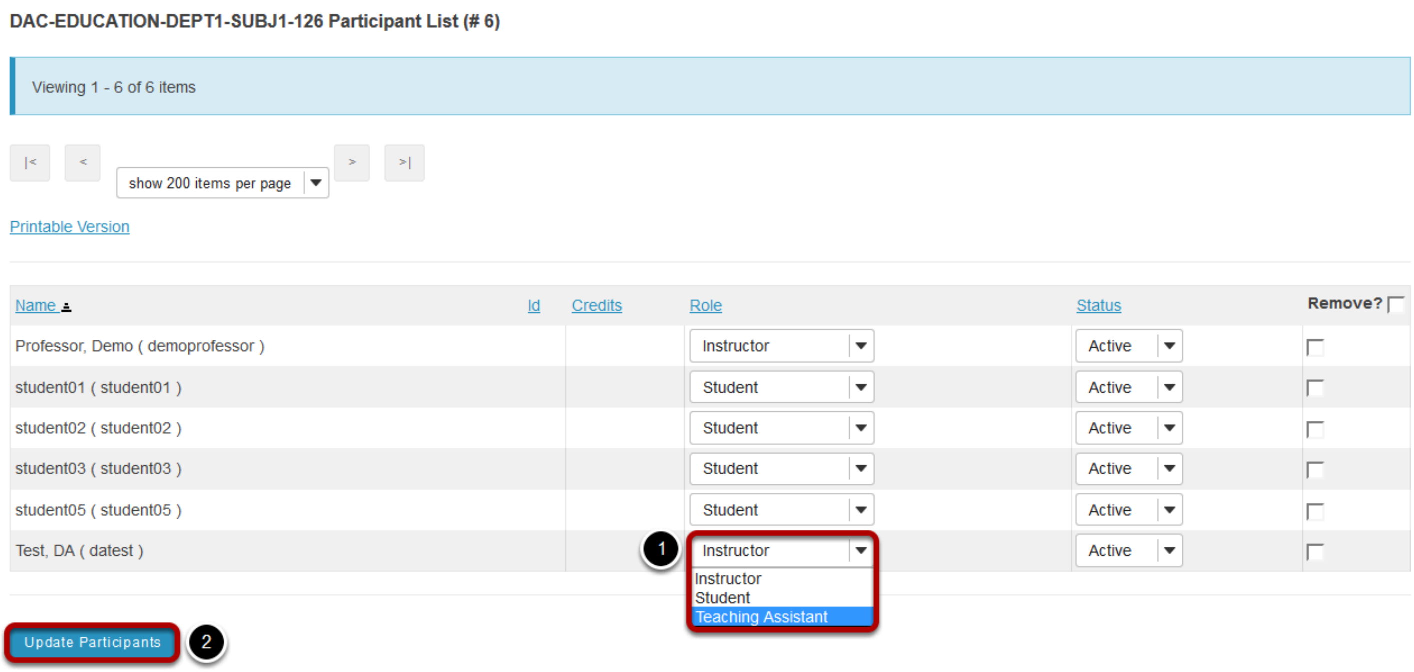
Note: To complete these steps, you must be assigned a role having the necessary permissions within the site.

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.



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 sites 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.

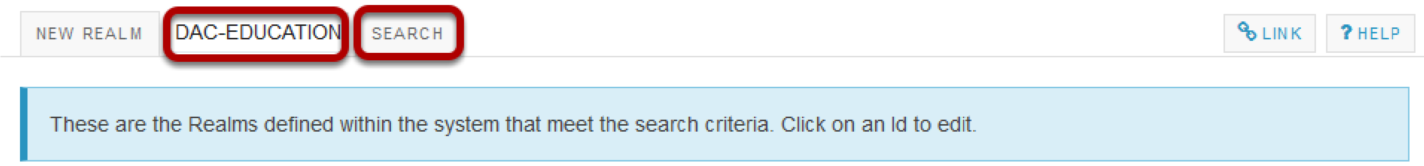
To access this tool, select Realms from the Tool Menu in the Administration Workspace.

How do I search Realms?

Go to Realms.

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

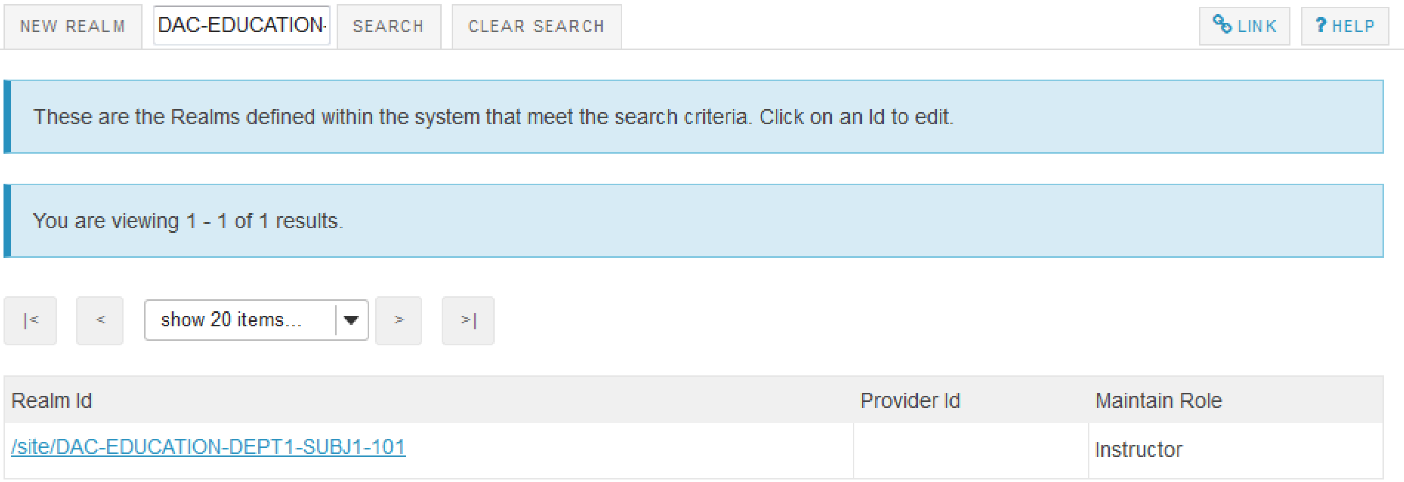
Enter the site id for the site you are looking for and click Search.



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.

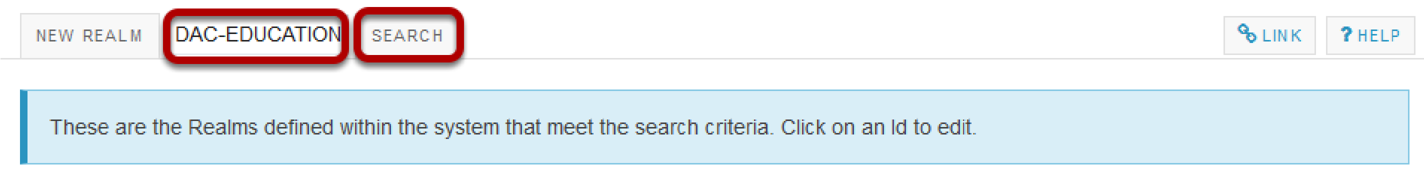


How do I modify an existing role within a Realm?

Go to Realms.

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

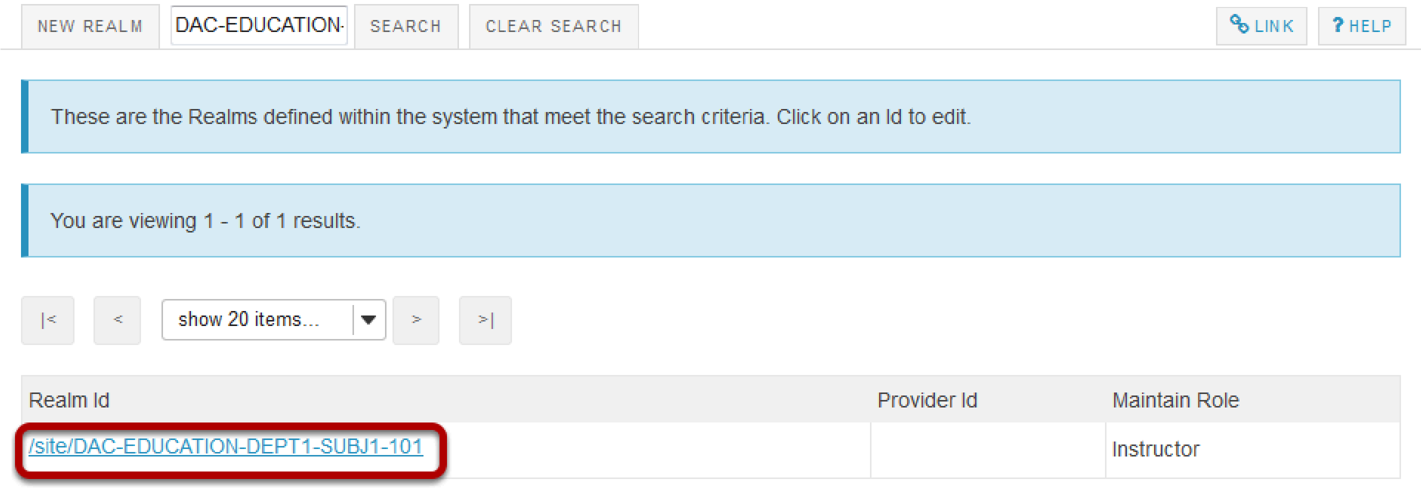
Search and locate the site you want to edit.



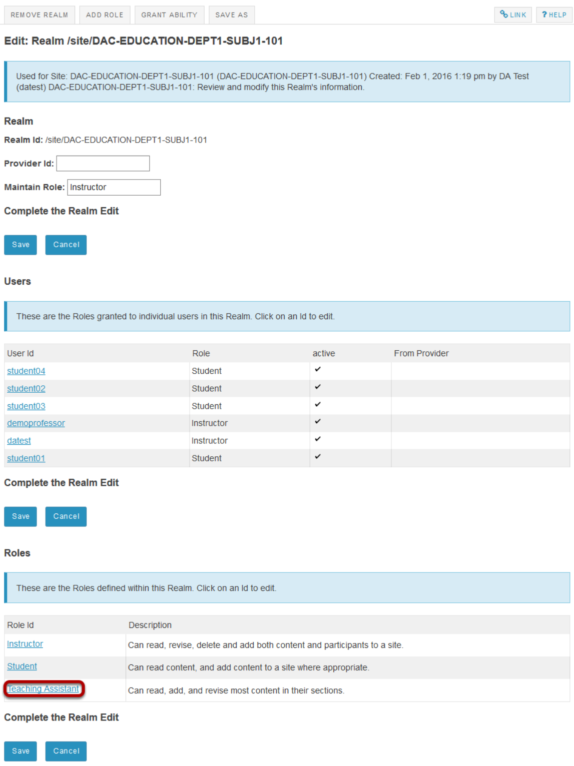
Tip: You can locate the site id of a course or project site by using the admin Sites tool to search for the site and view/edit its details, or by accessing the site and copying the site id from the URL displayed in your web browser. The site id is the string of characters displayed just after the /site/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

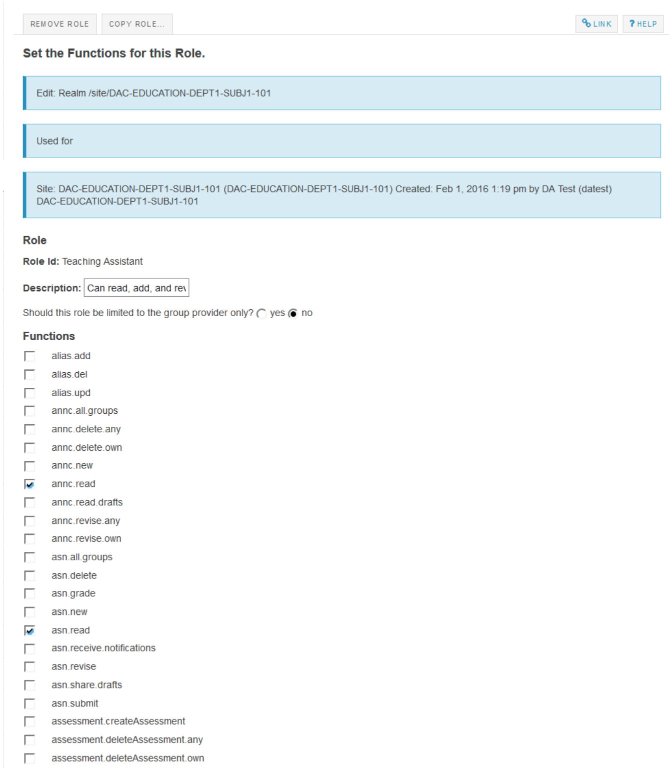
Click on the realm id.



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



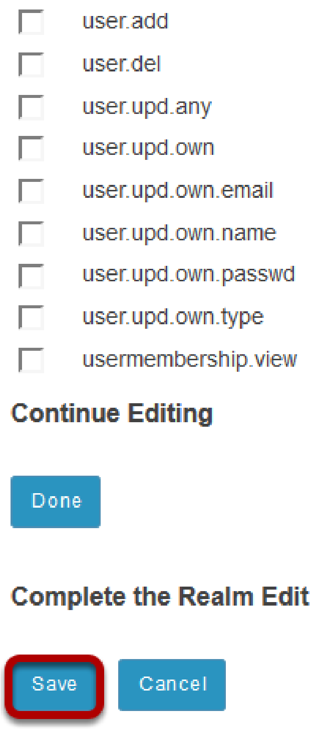
Select the desired permissions.



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.



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.

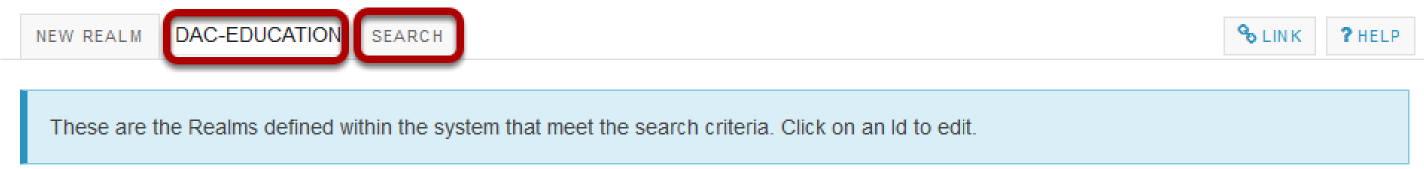
How do I create a new, or custom role within a Realm?

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.

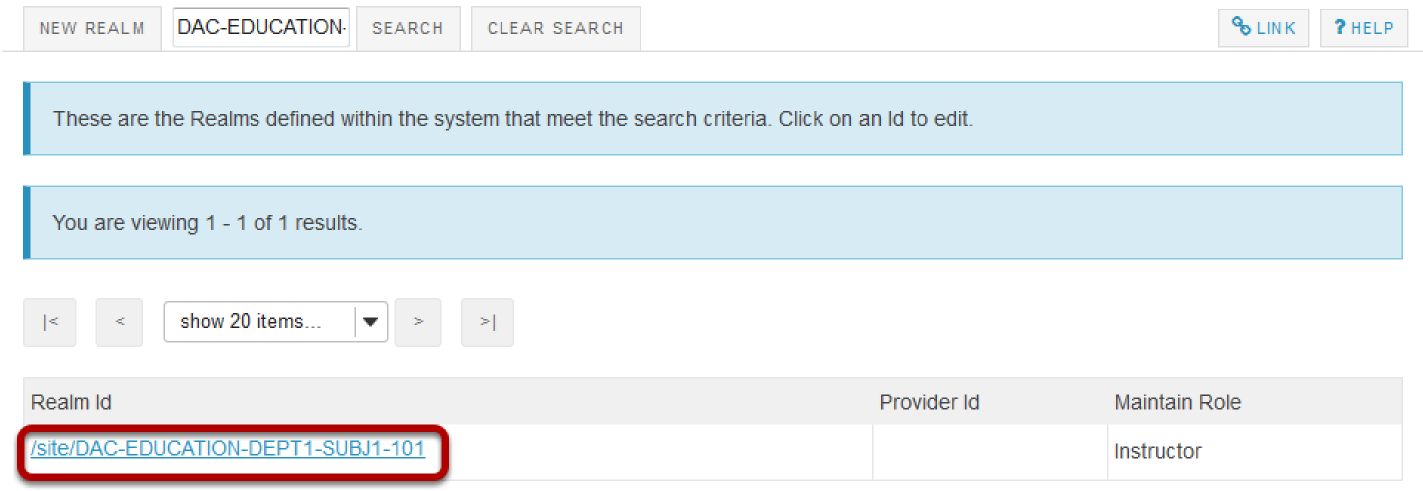
Search and locate the site you want to edit.



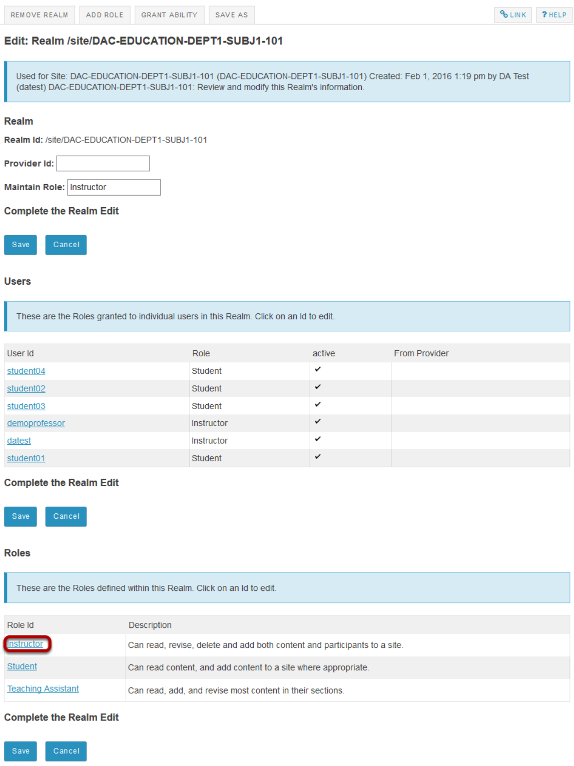
Tip: You can locate the site id of a course or project site by using the admin Sites tool to search for the site and view/edit its details, or by accessing the site and copying the site id from the URL displayed in your web browser. The site id is the string of characters displayed just after the /site/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

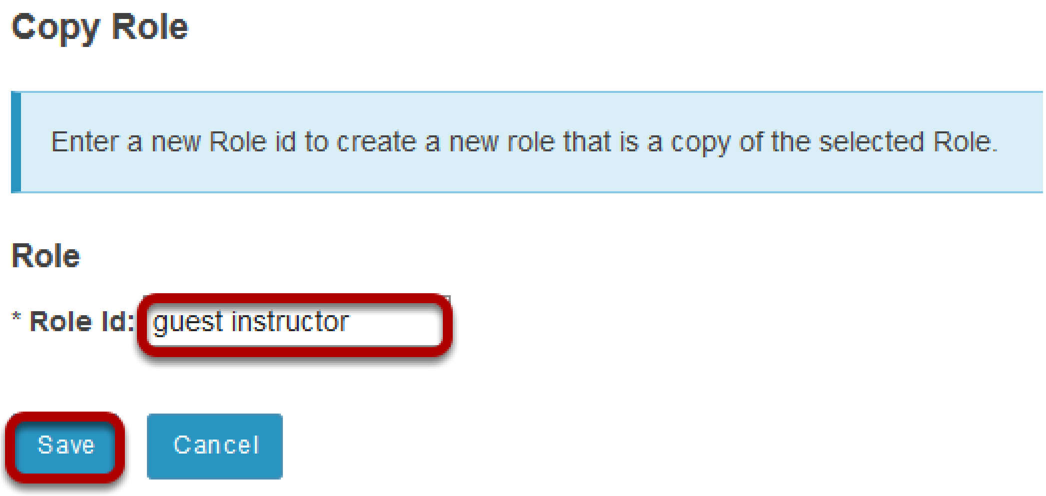


Click on the role id for the role you want to modify.

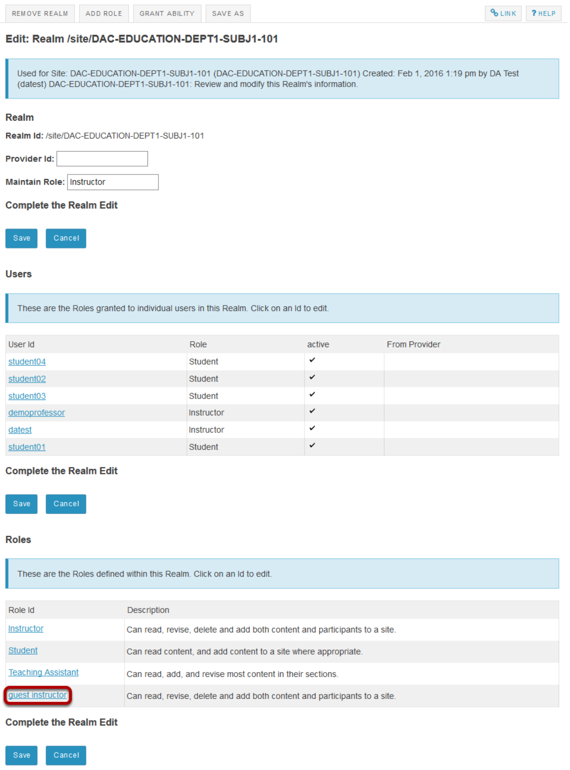


Click Copy Role.

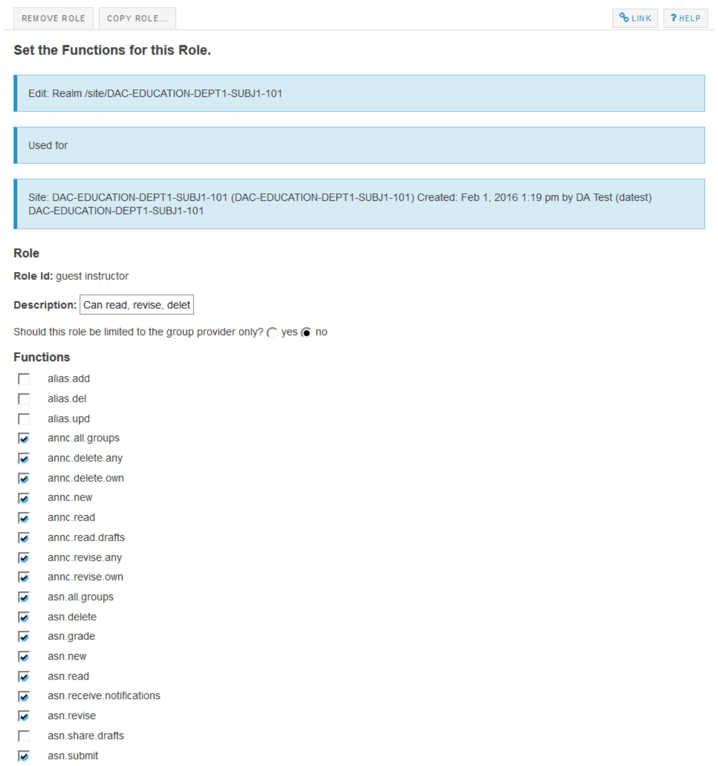
Enter a role id for the new role and Save.



Click on the role id for the new role.



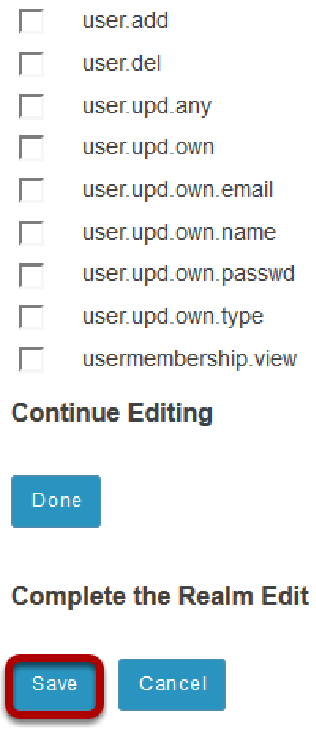
Select the desired permissions.



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.



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.

Resources

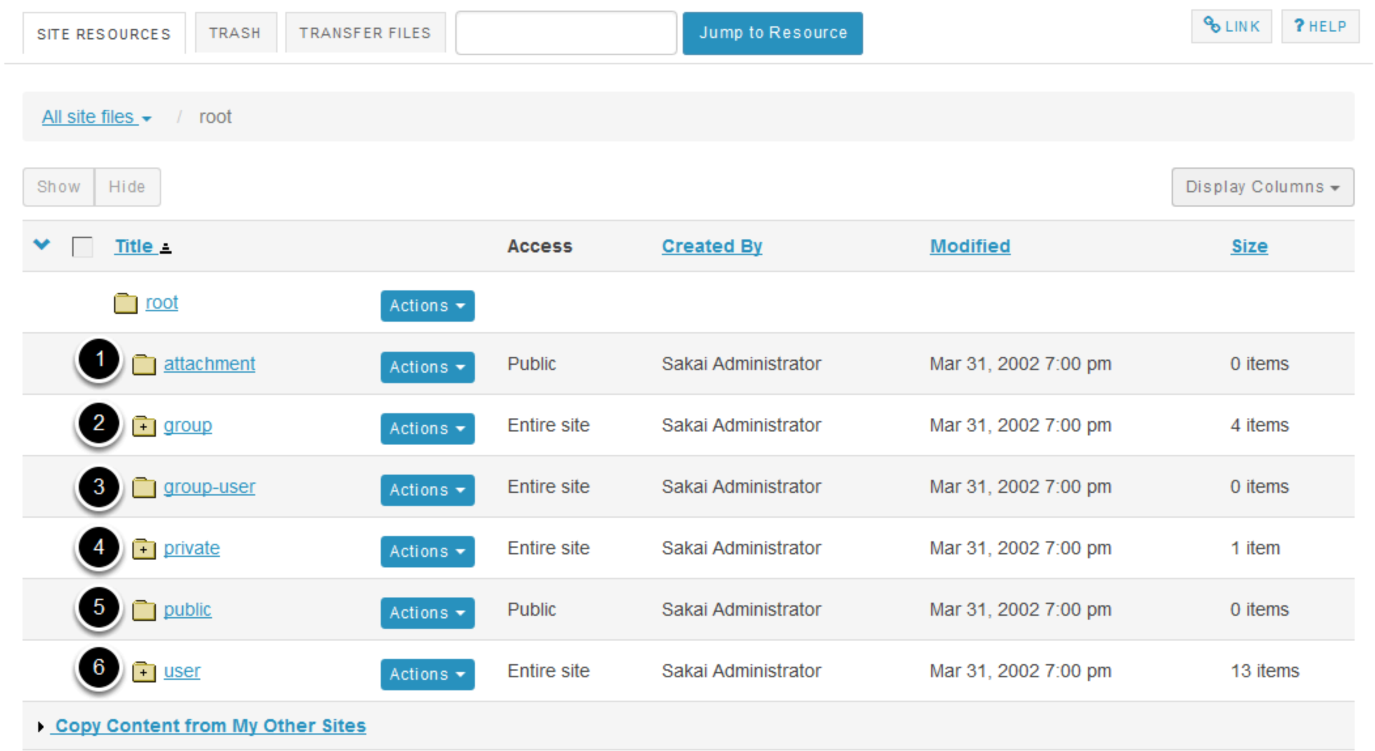
What Resources are specific to admin users?

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.



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' My Workspace sites.

Search

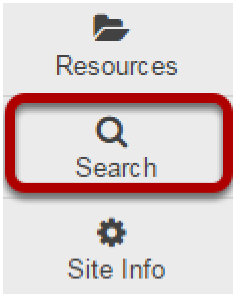
Search Administration

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.

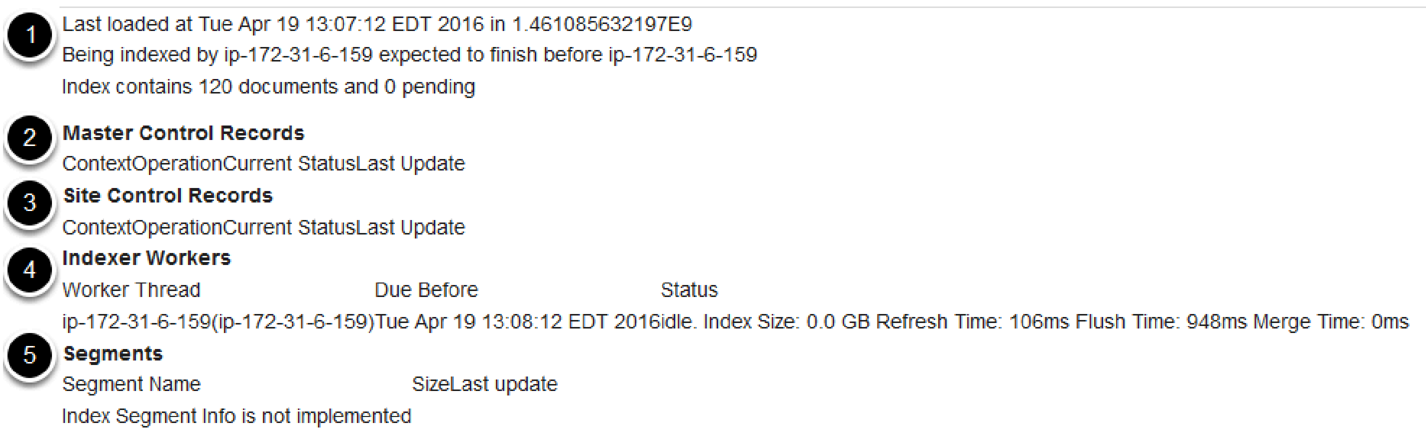
Go to Search.



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.

View Search administration information.



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.

Index Queue

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, Remove Lock)

Only instance administrators are allowed to perform Global operations. These operations are, rebuild, refresh and release lock.

- **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 sightly 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.
- **Remove Lock** should only be issued if the operator is certain that the indexer thread that is supposed to be performing the current index operation has died. This should almost never be necessary, as each indexer thread emits a heartbeat to the cluster that conforms its health. If any indexer thread that has not emitted a heartbeat, or has become overdue has a writer lock on the index, it will have that lock removed by one of the other indexer threads, which will allow one of the other indexer threads to recover the indexing operation.

Site Commands (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.

Refresh Status

This command will refresh the page to give you an update on the status of the engine.

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?

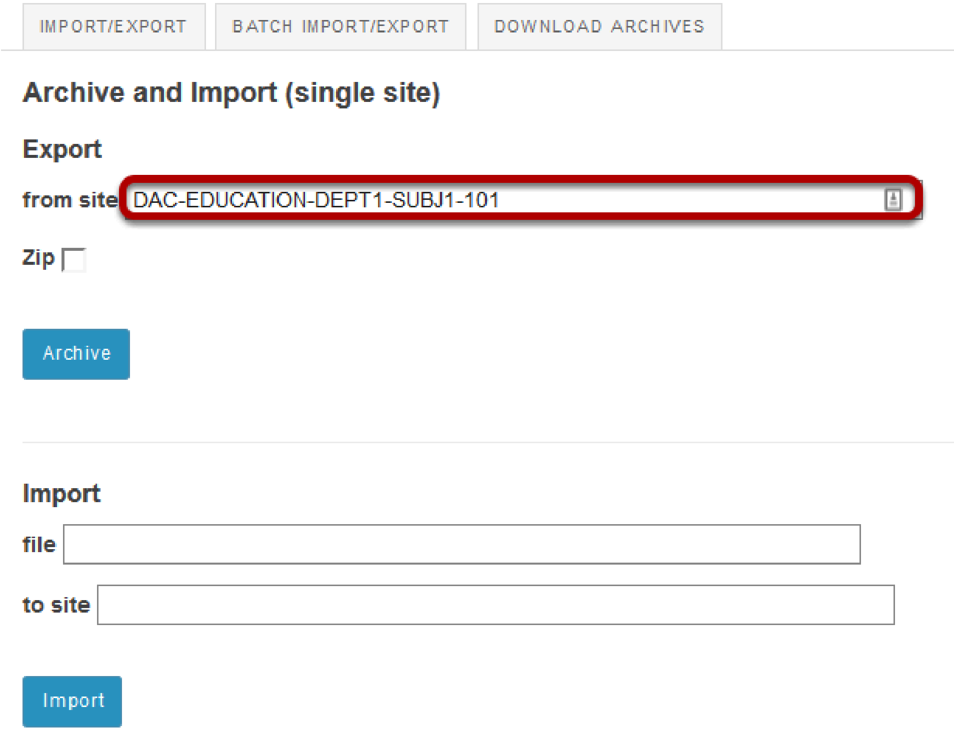
Exporting or archiving a site will create folder containing archive files which can be used for offline data retention or for transfer to another instance of Sakai. By default, site archives are placed on the file server in the following location: $CATALINA_HOME/sakai/archive/

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

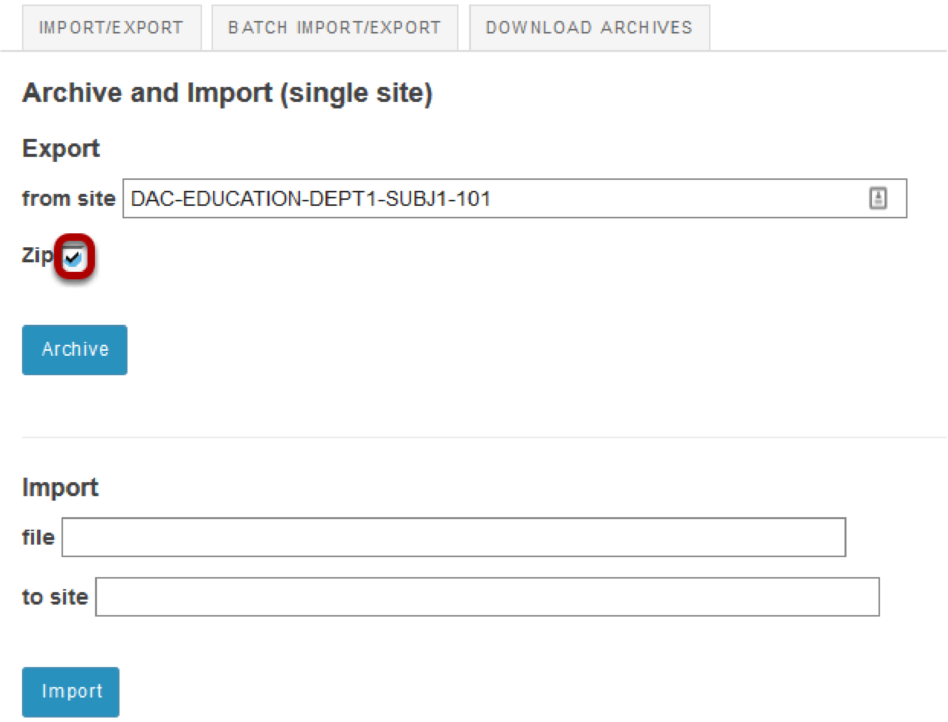
Go to Site Archive.

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

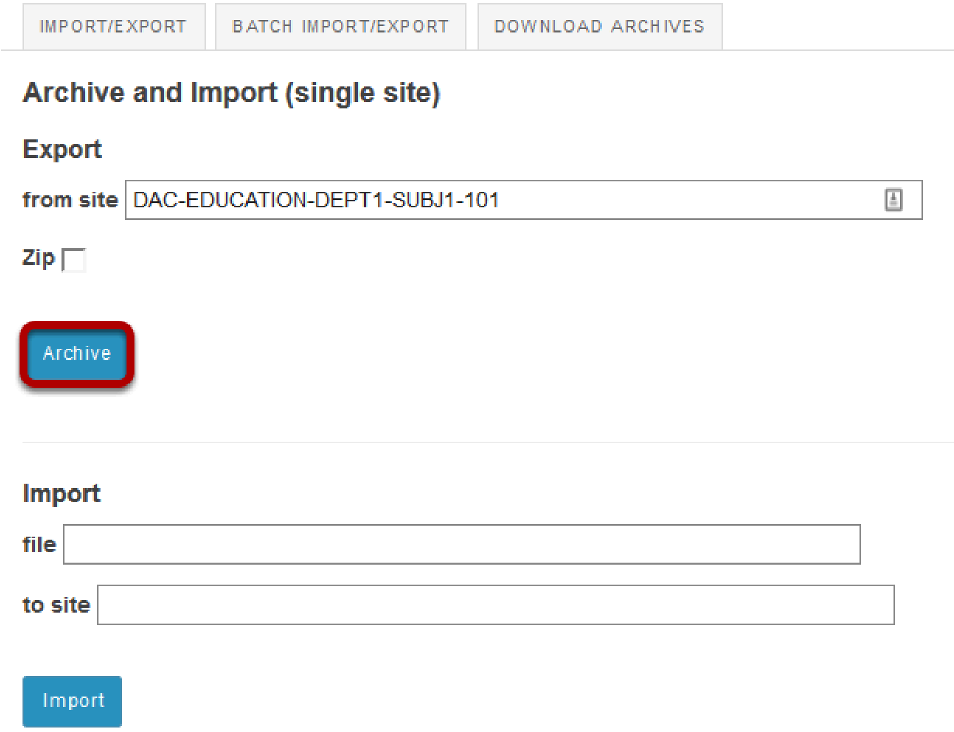
In the Export from site field, enter the site id.



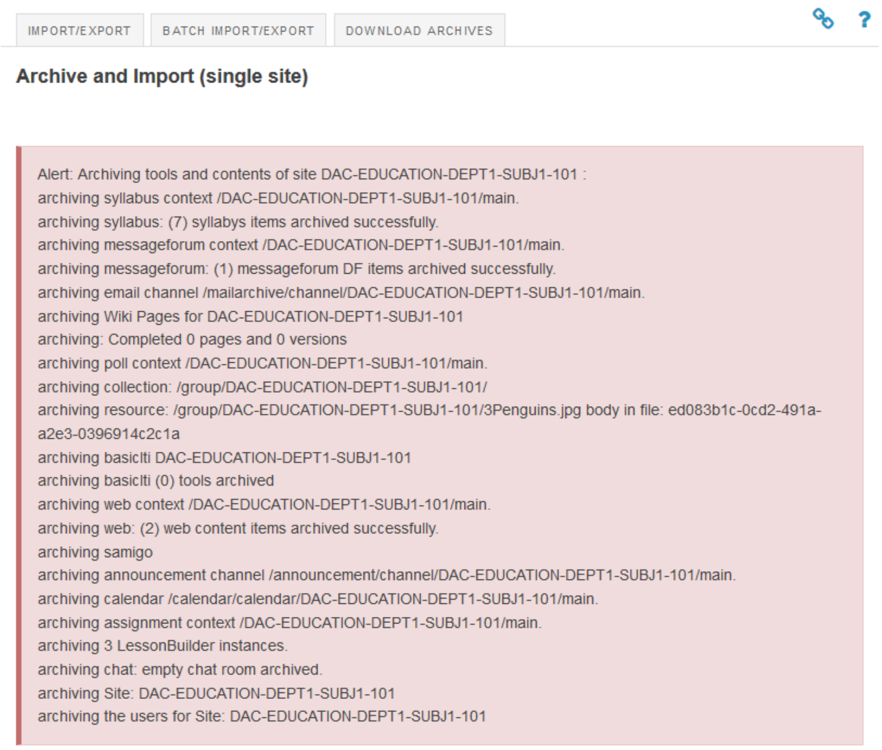
Check the Zip box to create a zipped archive file for download.



Click Archive.



Archive progress will be displayed.

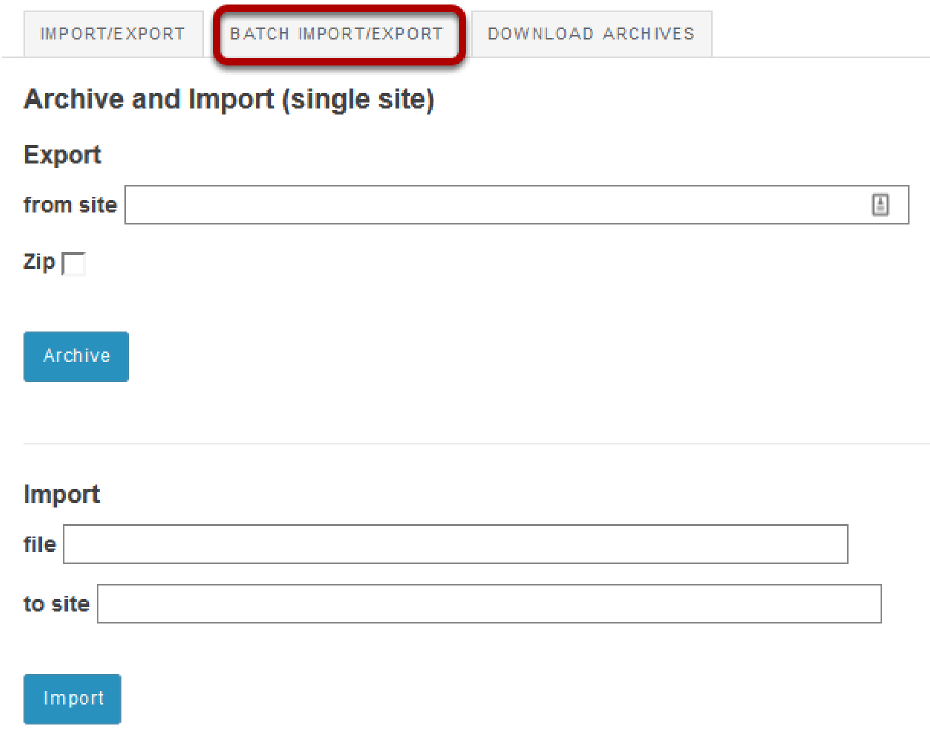


How do I batch export or archive multiple sites?

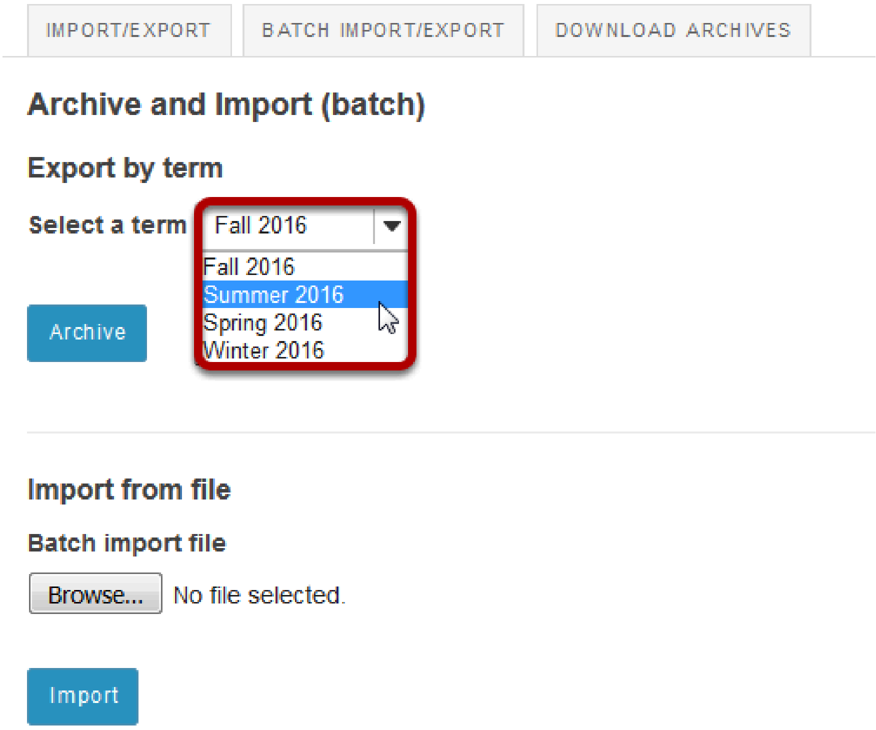
Go to Site Archive.

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

Click Batch Import/Export.

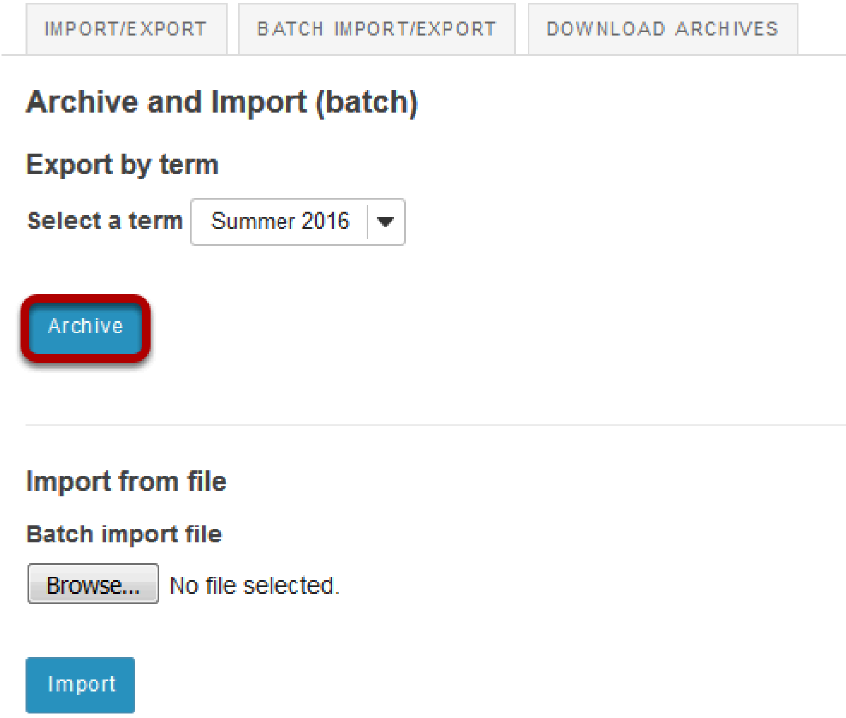


Select a term from the drop-down menu.

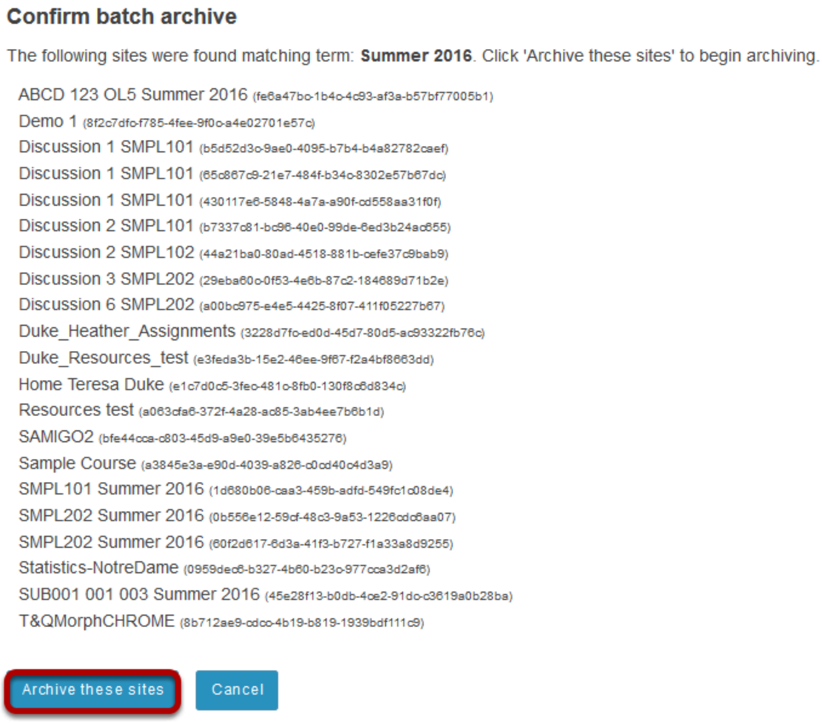


The term drop-down menu will be populated with the existing terms in your instance of Sakai. Click on the term you wish to archive to select it.

Click Archive.

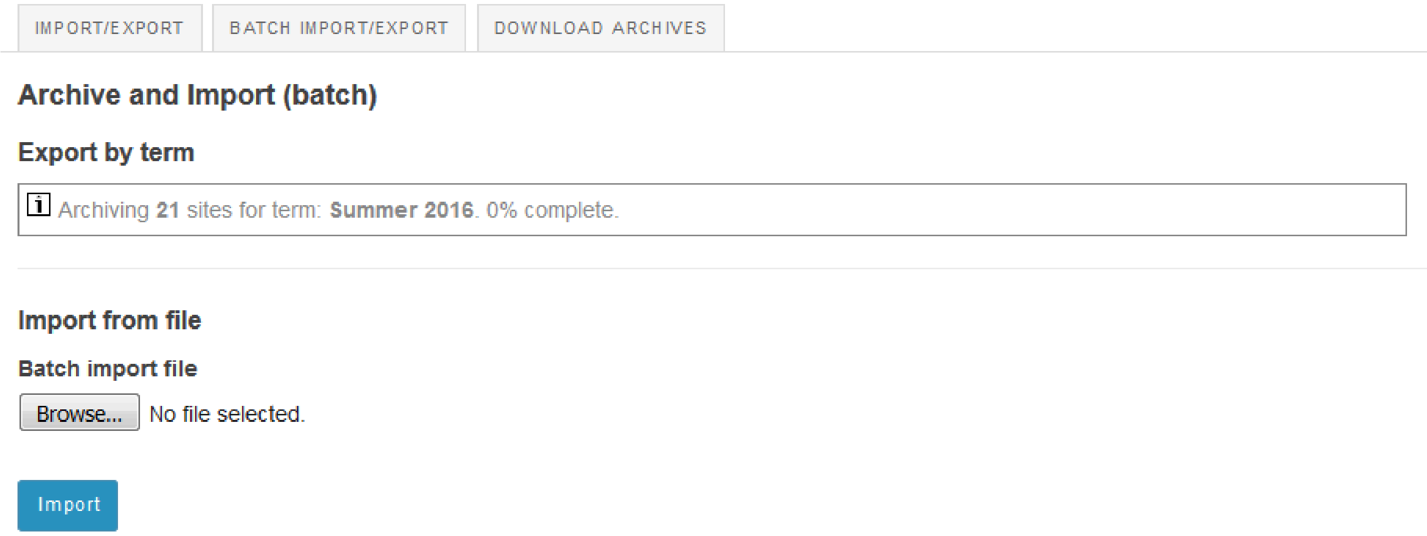


Confirm the list of sites to be archived.



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.



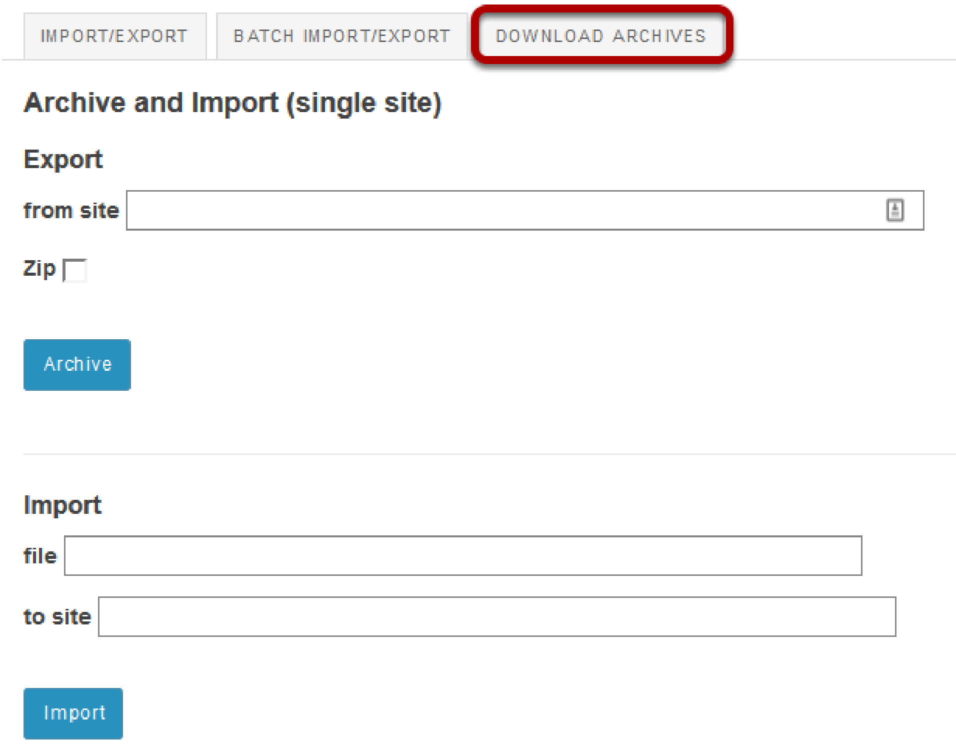
Note: Depending on the number and size of the sites you have selected for archiving, this process may take a while.

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)
Demo 1 (8f2c7dfc-f785-4fee-9f0c-a4e02701e57c)	2016-04-14 15:29:45	9 KB	da39a3ee5e6b4b0d3255bfef95601890afd80709
SMPL101 Summer 2016 (1d680b06-caa3-459b-adfd-549fc1c08de4)	2016-04-14 15:30:32	33 KB	30ff734769a22ba5810d778812496d54e93f07b3
Discussion 1 SMPL101 (b5d52d3c-9ae0-4095-b7b4-b4a82782caef)	2016-04-14 15:29:45	83 KB	b2daf3acd166ec41b6ce4ca98afcecaa1338f452
Duke_Heather_Assignments (3228d7fc-ed0d-45d7-80d5-ac93322fb76c)	2016-04-14 15:30:18	148 KB	a166a9efccd455308ca8b1d720d8c33894e7bbfe
Discussion 6 SMPL202 (a00bc975-e4e5-4425-8f07-411f05227b67)	2016-04-14 15:30:17	9 KB	da39a3ee5e6b4b0d3255bfef95601890afd80709

Note: Site archives must be downloaded individually.

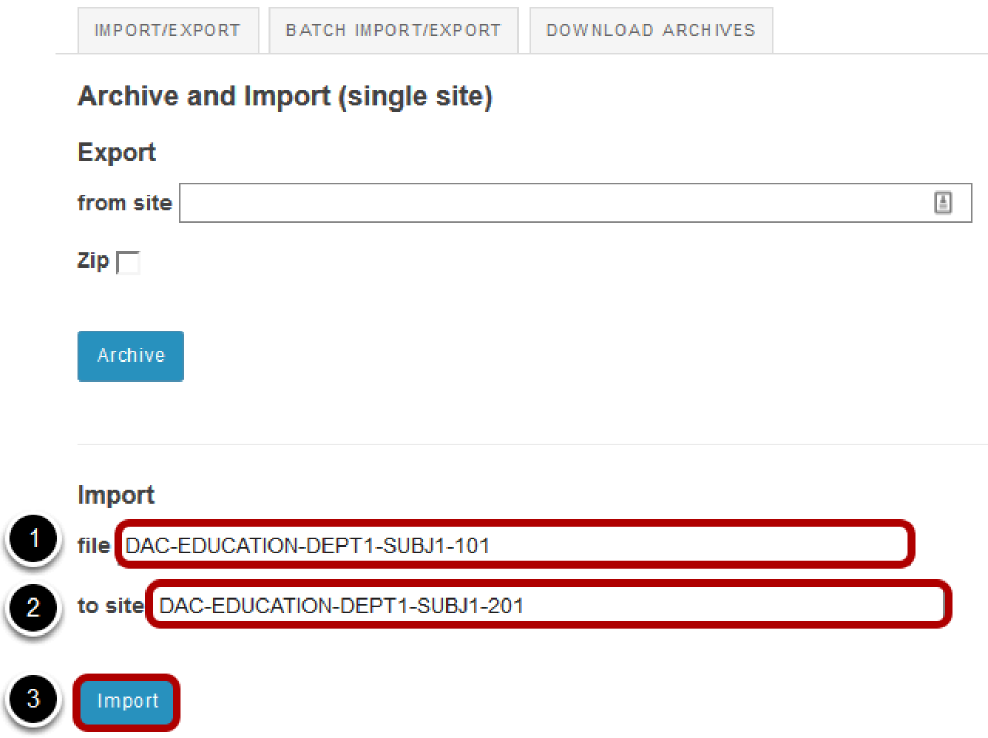
How do I import an individual site archive?

A site archive may be imported via the Site Archive tool in the Administration Workspace, or into an existing site via Worksite Setup.

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.

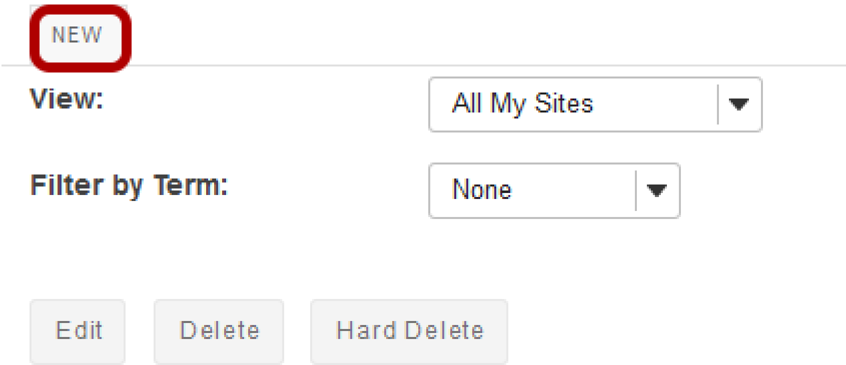


1. Enter the top level directory name for the archive directory on the server. This should be the **siteid-archive**.
2. Enter the site id for the destination site where the archive content will be copied. If the destination site id does not exist, a new site with the specified id will be created.
3. Click **Import**.

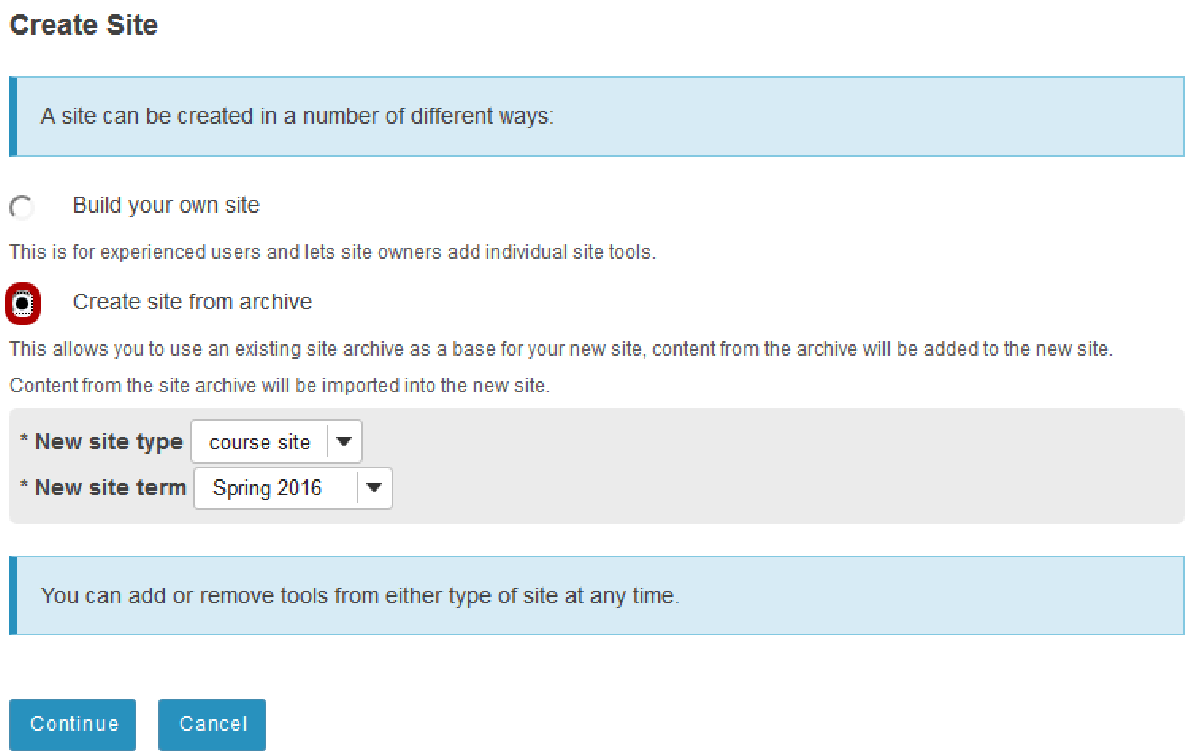
Importing an archive via Worksite Setup

Select the **Worksite Setup** tool from the Tool Menu in either the Administration Workspace or My Workspace.

Click New.



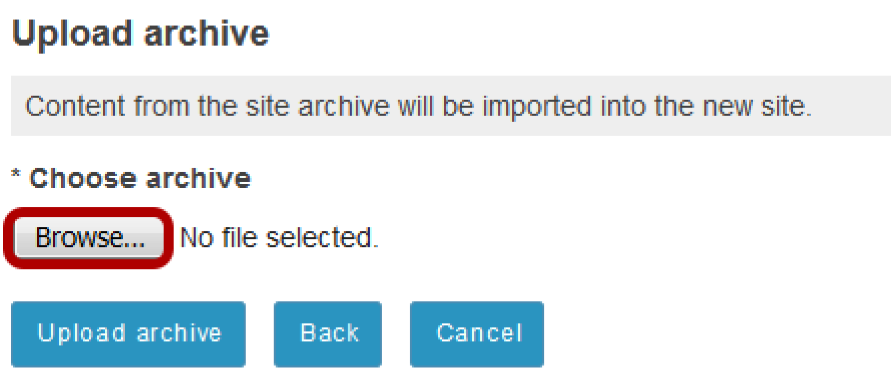
Select Create site from archive.



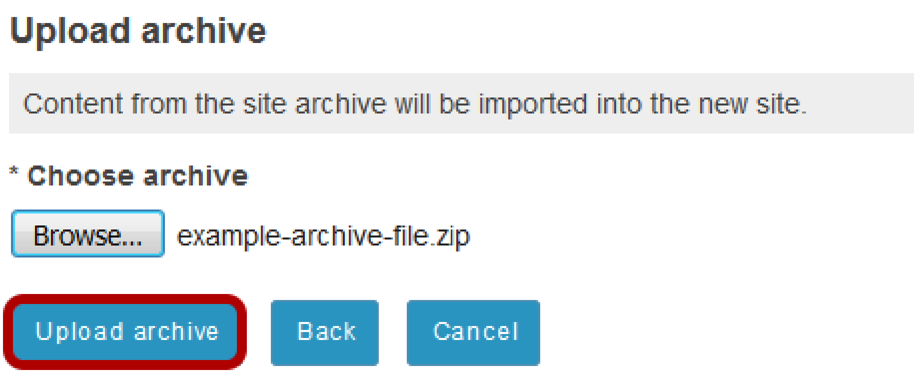
Follow the series of prompts to create a new site.

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.



Click Upload archive.

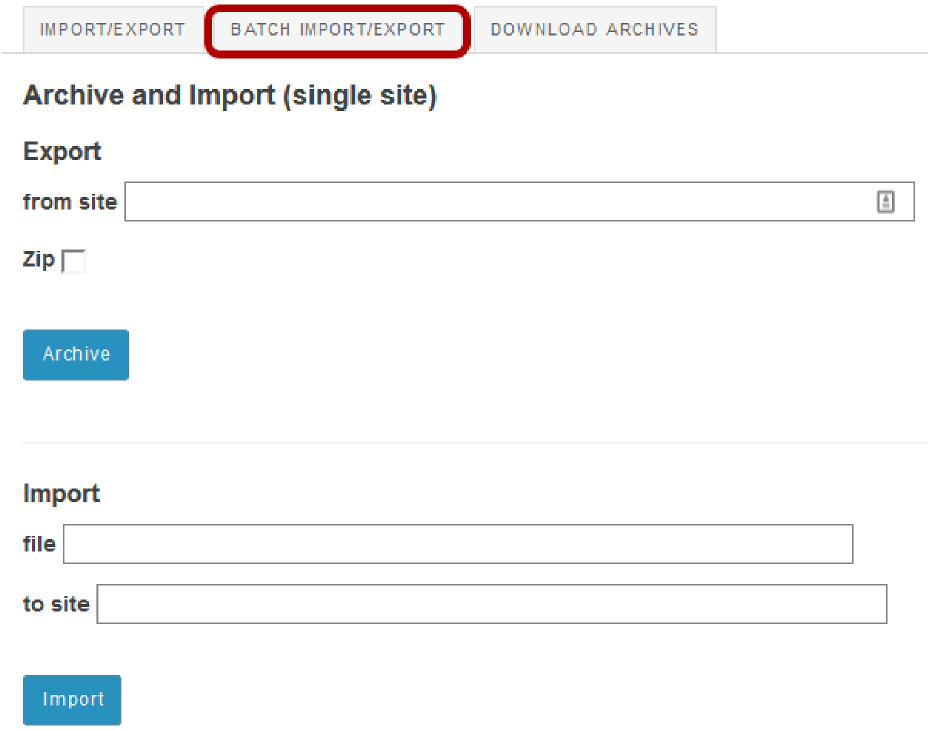


How do I batch import multiple site archives?

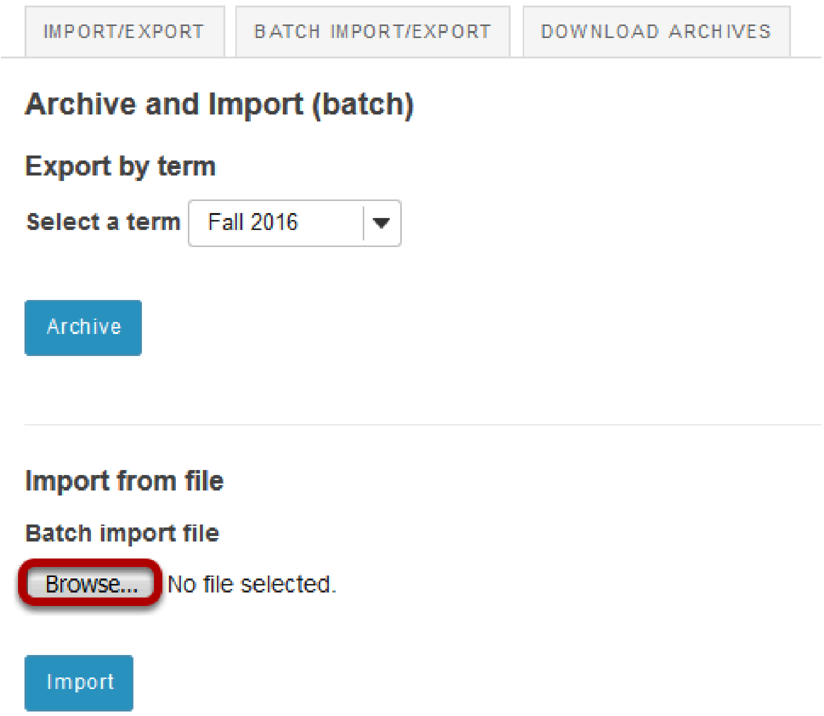
Go to Site Archive

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

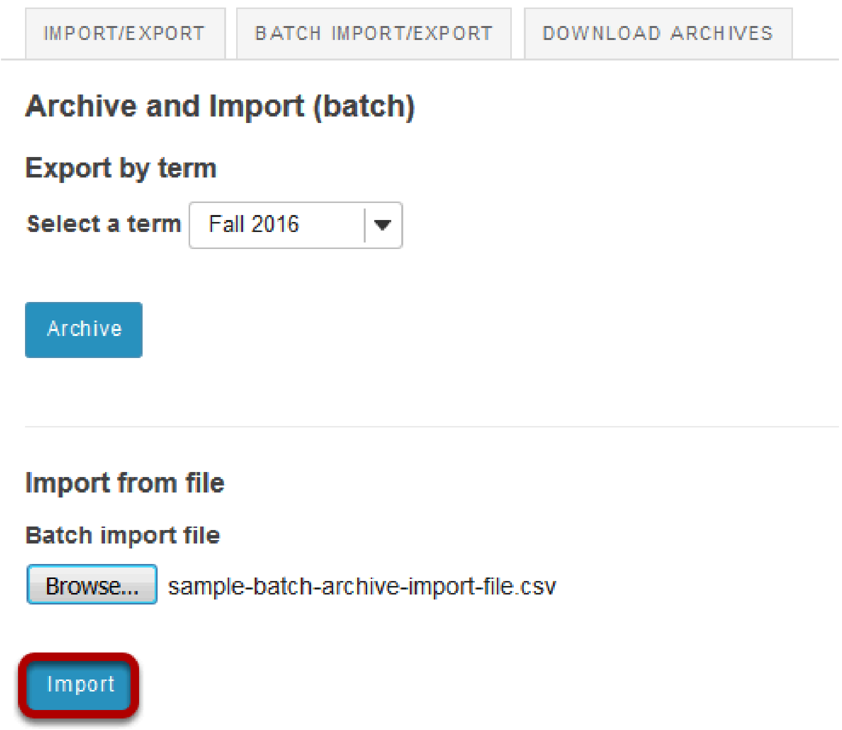
Select Batch Import/Export.



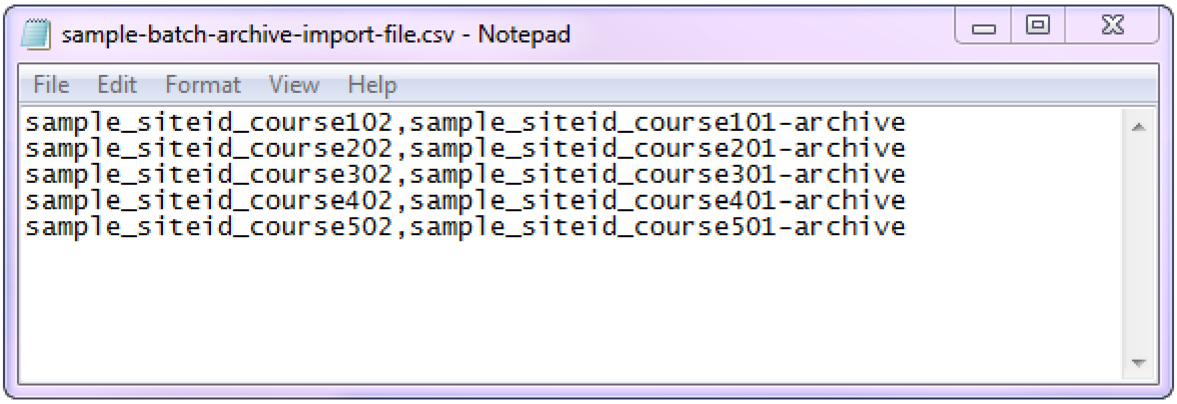
Click Browse to locate your batch import file.



Once you have selected the batch import file, click Import.



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.

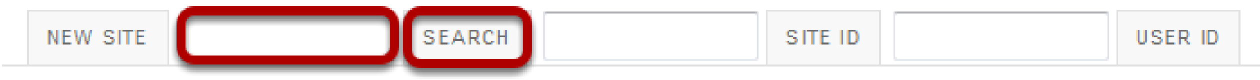
To access this tool, select Sites from the Tool Menu in the Administration Workspace.

How do I search for a site using the Sites tool?

Go to the Sites tool.

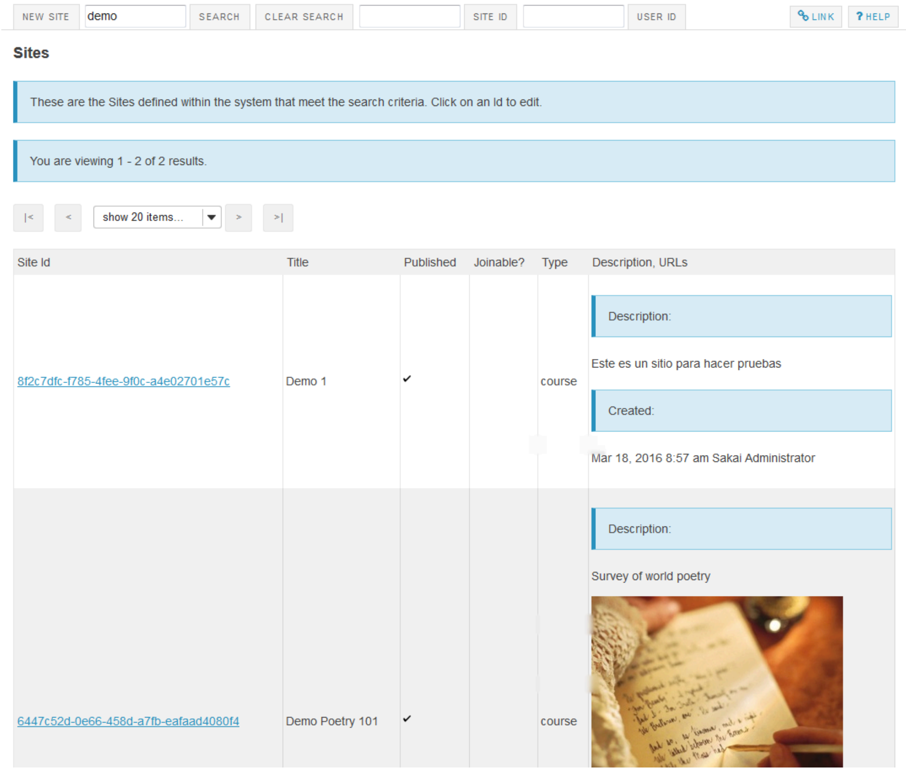
Select the **Sites** tool from the Tool Menu of the Administration Workspace.

Enter your search criteria.



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.



All sites matching your criteria will be displayed in a list.

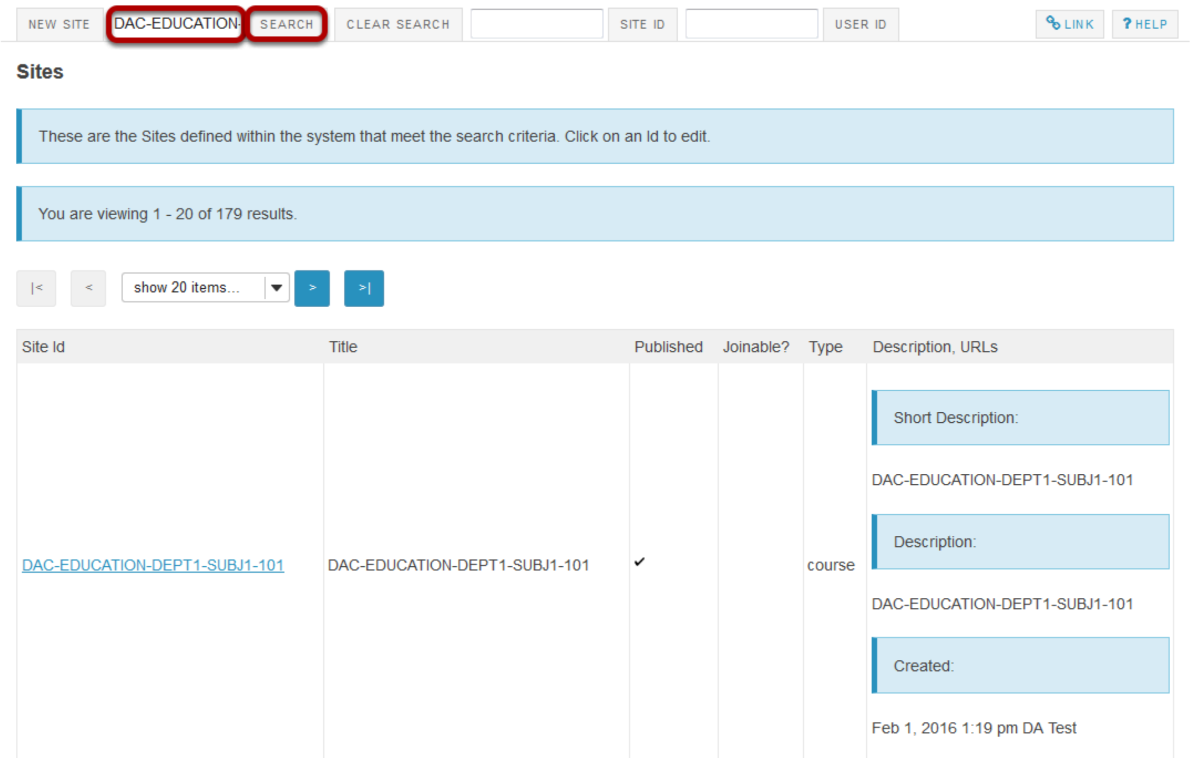
How do I edit a site using the Sites tool?

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.

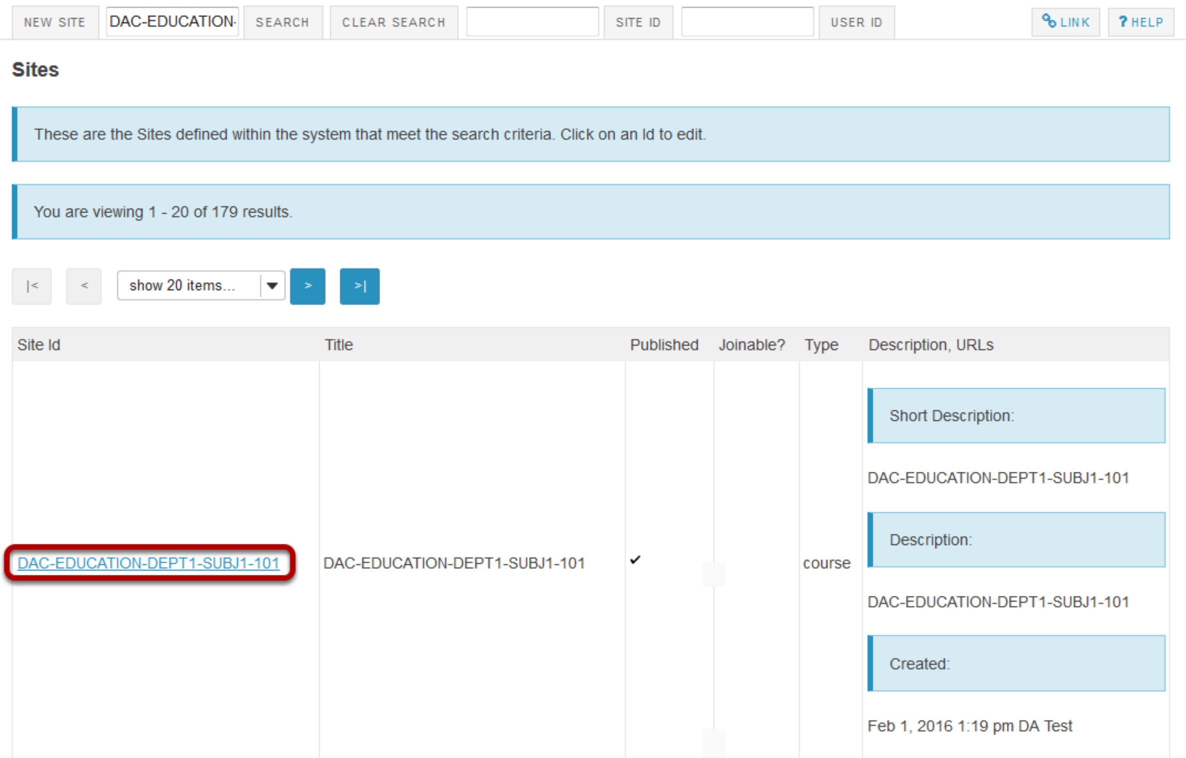
Select the **Sites** tool from the Tool Menu of the Administration Workspace.

Locate the site you want to edit.

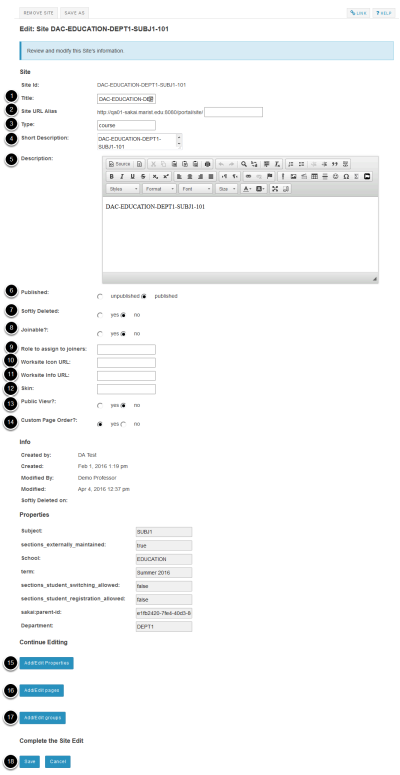


Use the Search function to find the site you want to modify.

Click on the site id of the site.



Edit the site information and Save.



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.

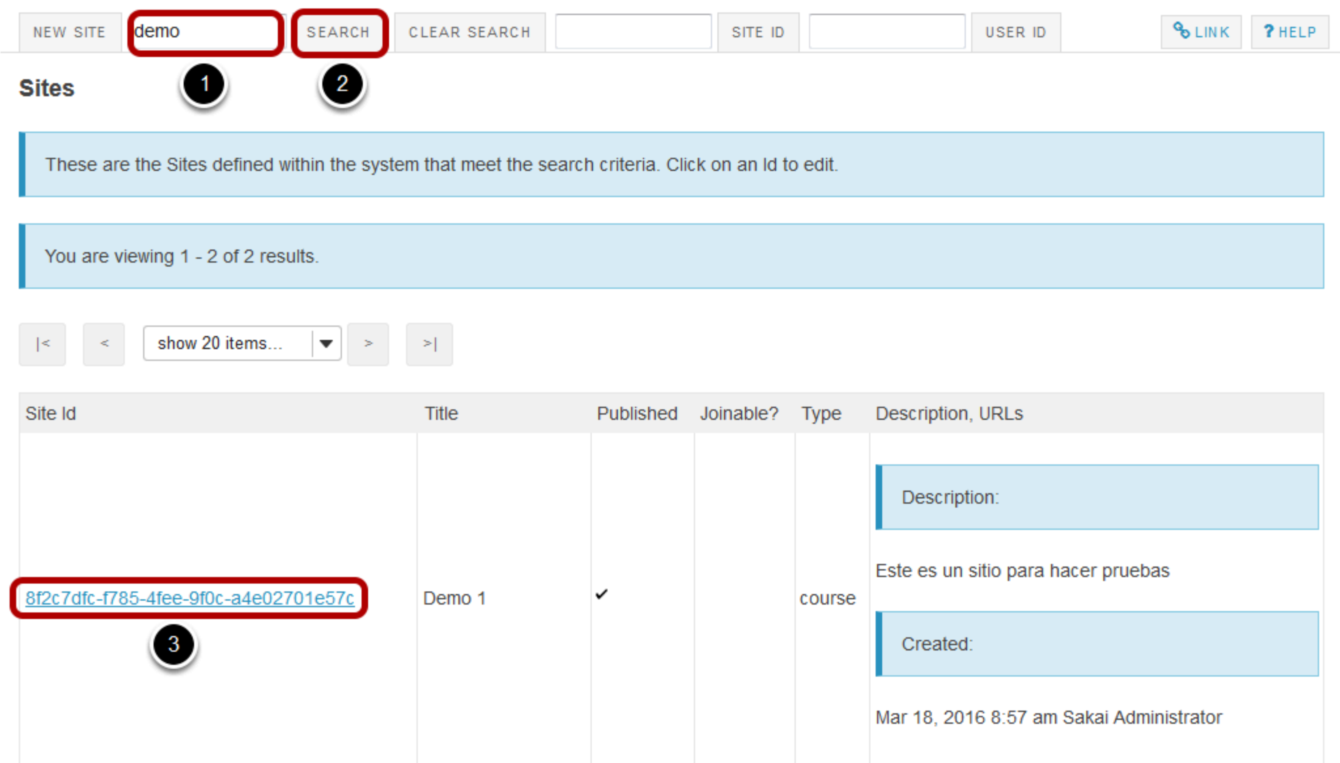
How do I Soft Delete a site from the Sites tool?

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.

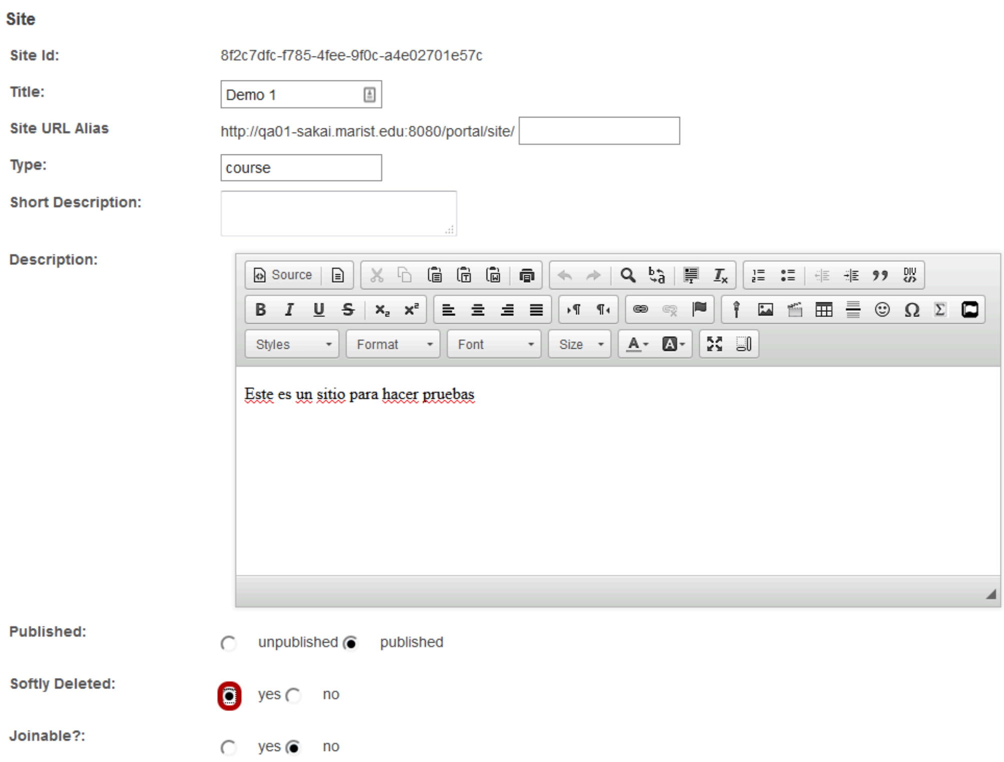
Locate the site you want to soft delete.



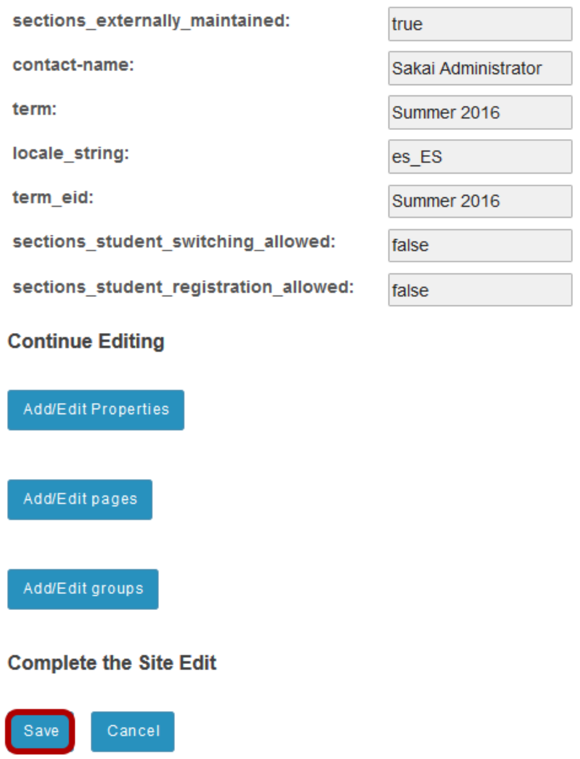
Find the site you want to delete be performing a search. For example:

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.



Scroll down and click Save.



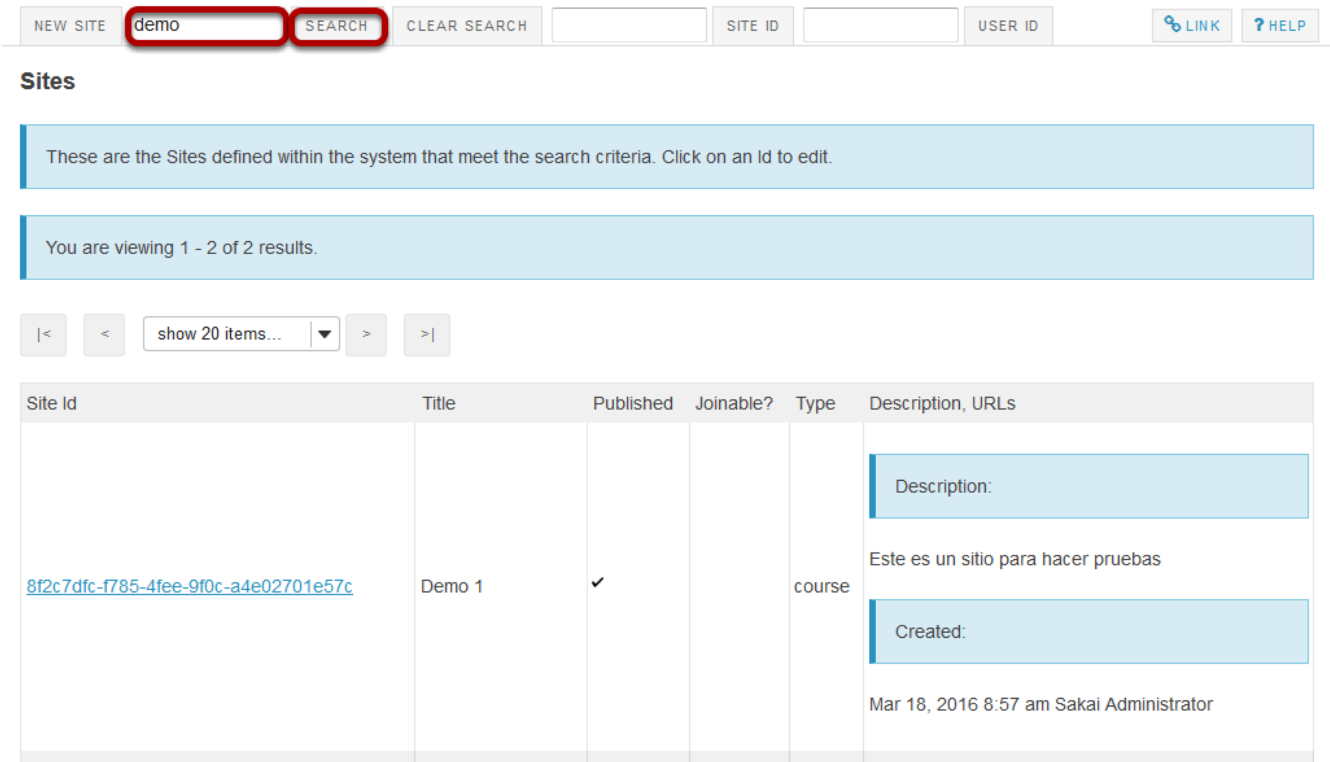
How do I add a stealthed tool to a site?

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.

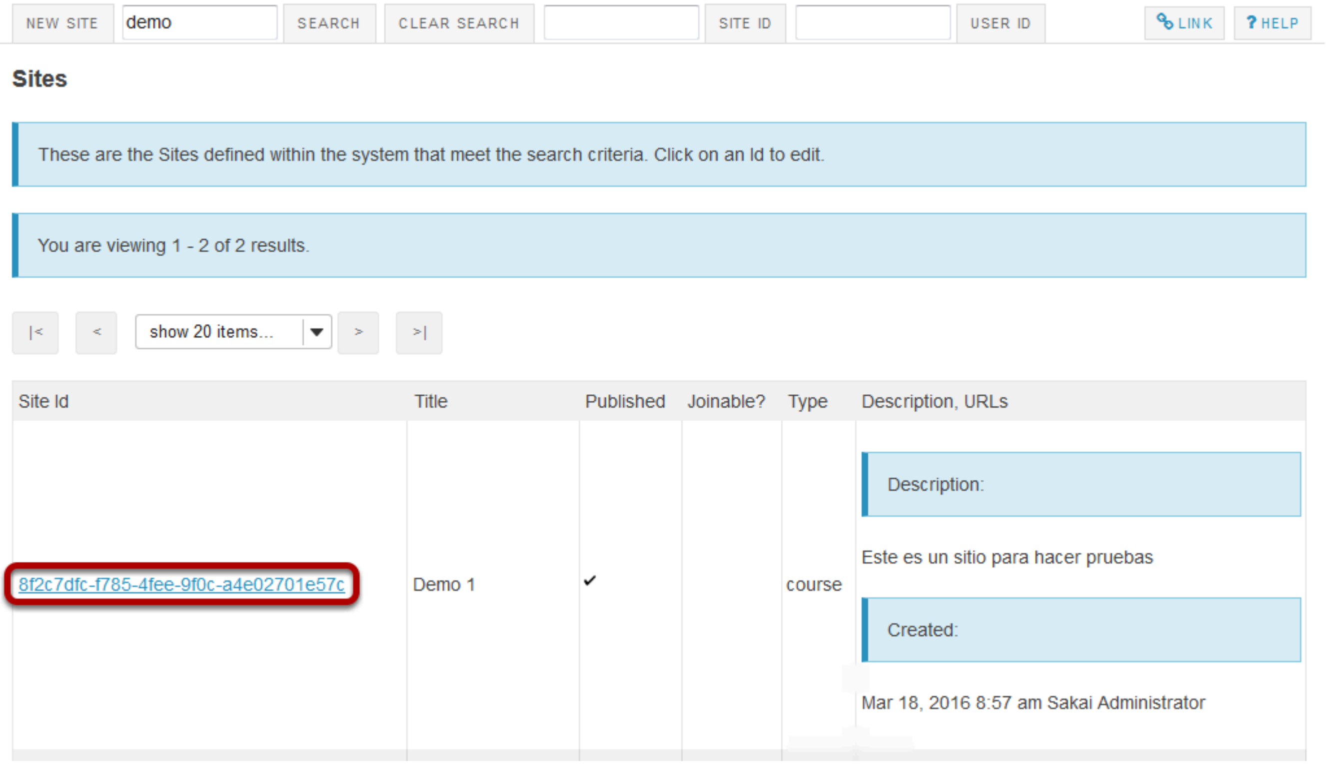
Select the **Sites** tool from the Tool Menu of the Administration Workspace.

Locate the site where you would like to add the stealthed tool.

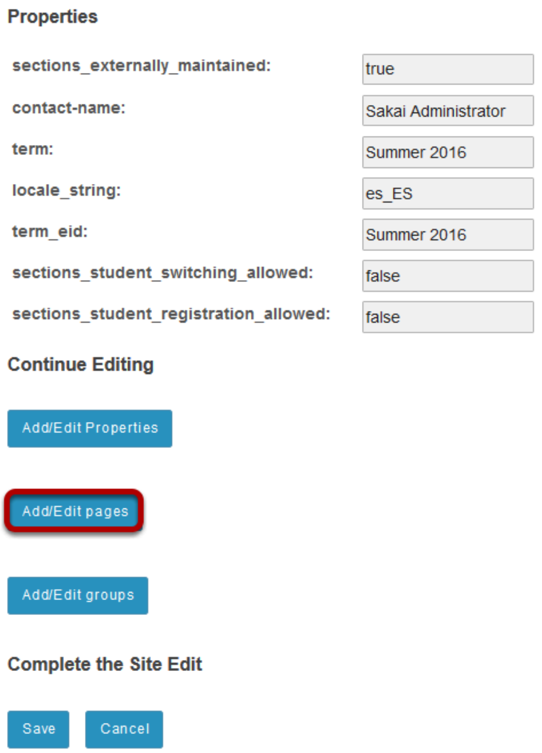


Use the Search function to find the site you want to modify.

Click on the site id of the site.

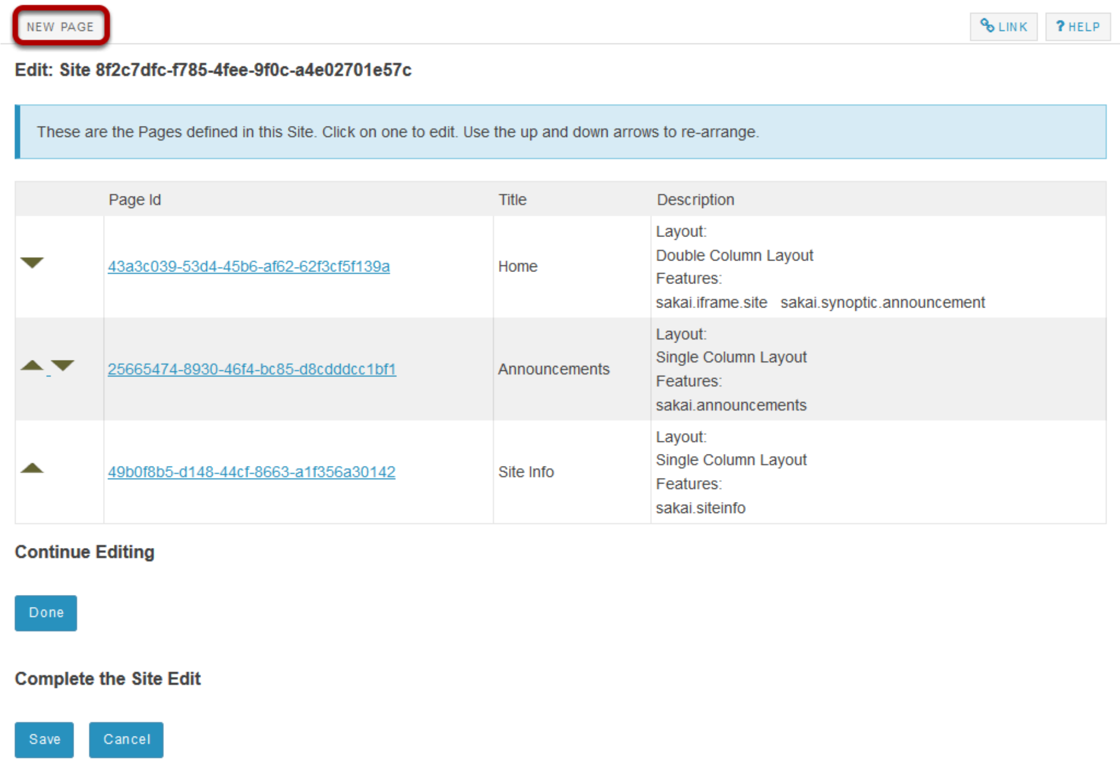


Click Add/Edit Pages.



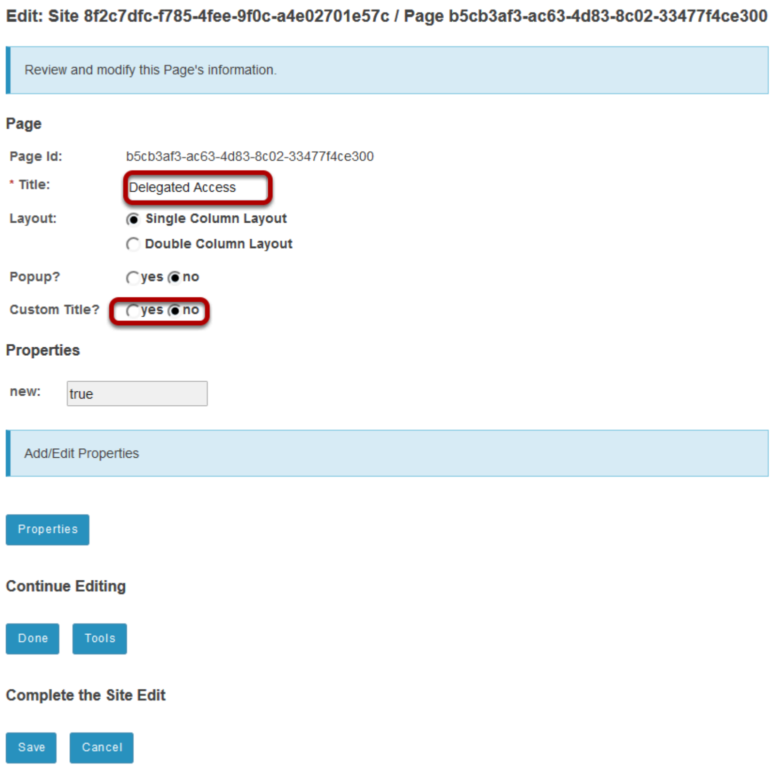
Scroll down toward the bottom of the site editing screen and select the **Pages** button.

Click New Page.



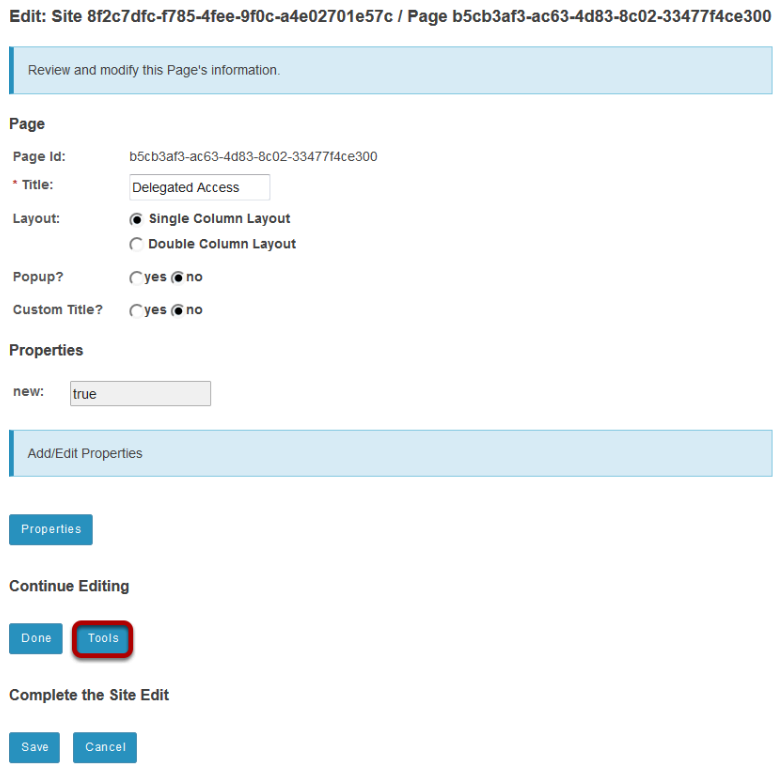
You will see a listing of pages, or tools, currently active in the Tool Menu of the site. Click **New Page** to add another tool to this list.

Enter a Title.

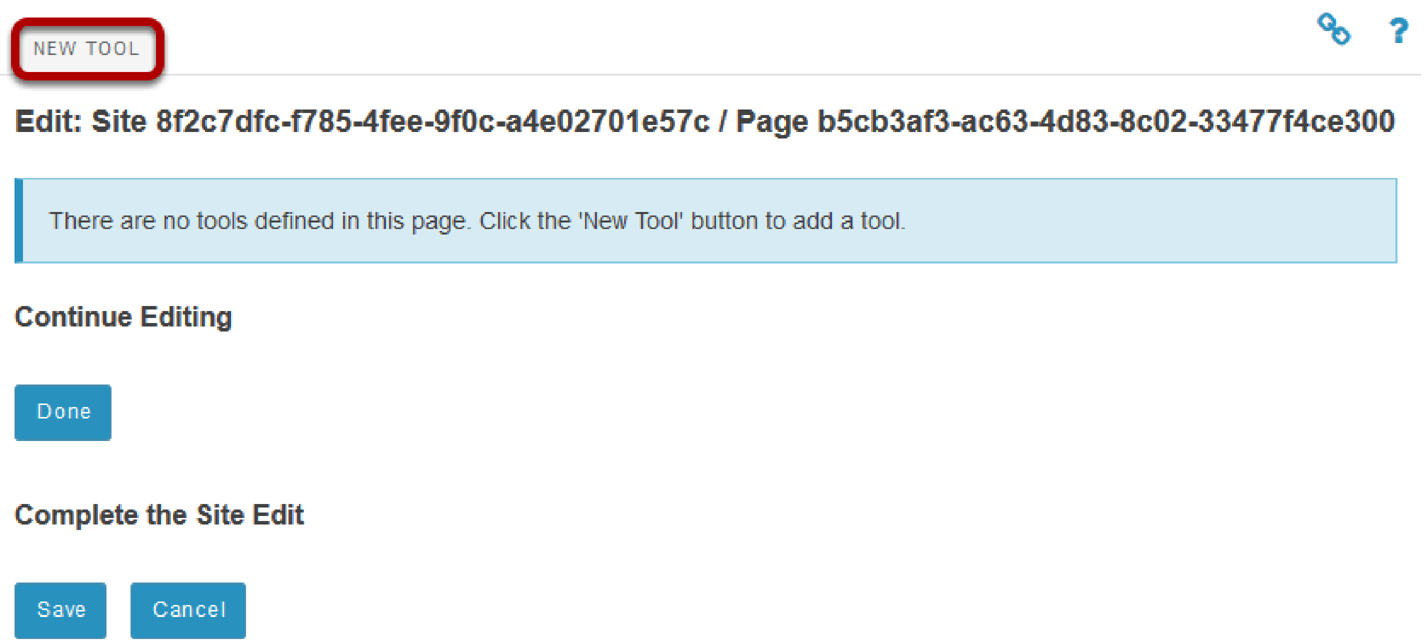


Enter a **title** for the stealthed tool. The title you enter here is what will appear in the Tool Menu of the site once it has been added. You may also select the radio button for **yes** or **no** to indicate whether this is a custom title, or the default tool title.

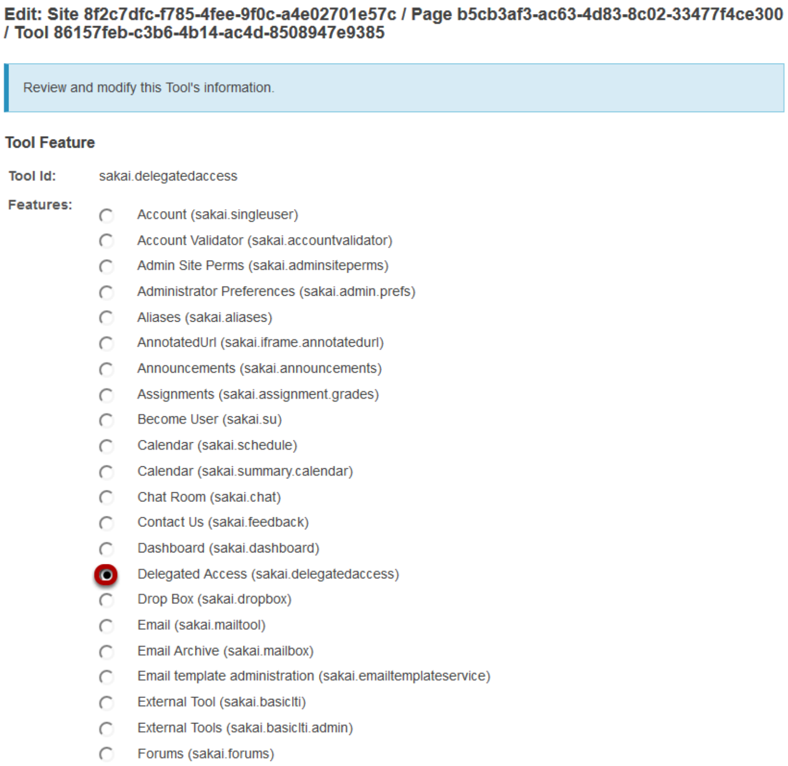
Click Tools.



Click New Tool.

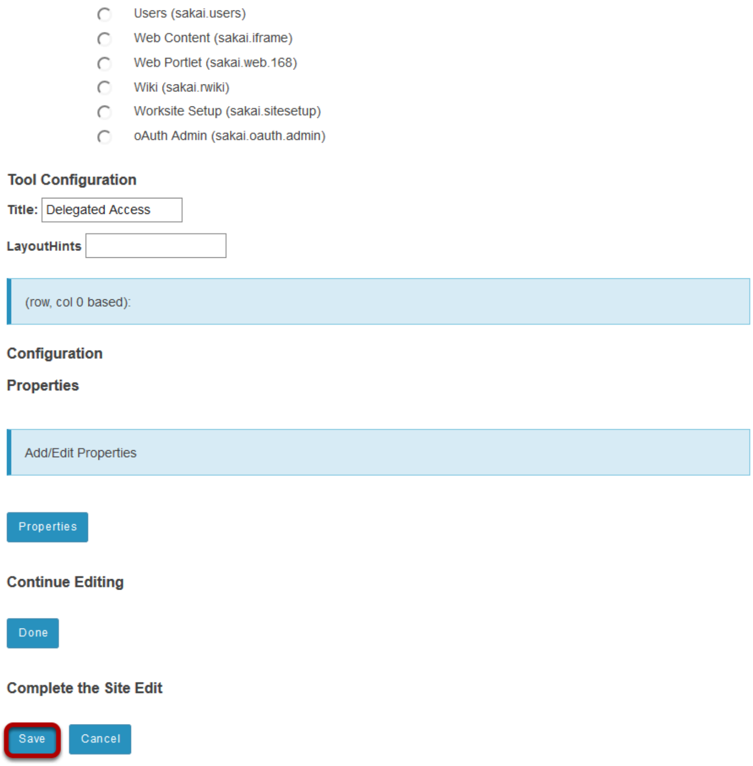


Select the stealthed tool to be added.



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.

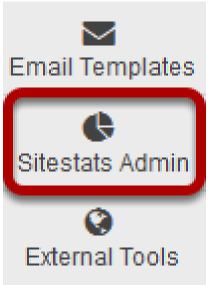


Sitestats Admin

What is Sitestats Admin?

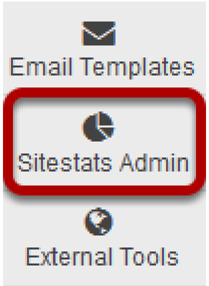
The Sitestats Admin tool allows admin users to access the Statistics reports for any site in the system without having to enter the site itself. Sitestats Admin also allows admins to display server-wide reports and to save custom reports which are available for instructors within all sites in the Statistics tool.

To access this tool, go to Sitestats Admin in the Tool Menu of the Administration Workspace.



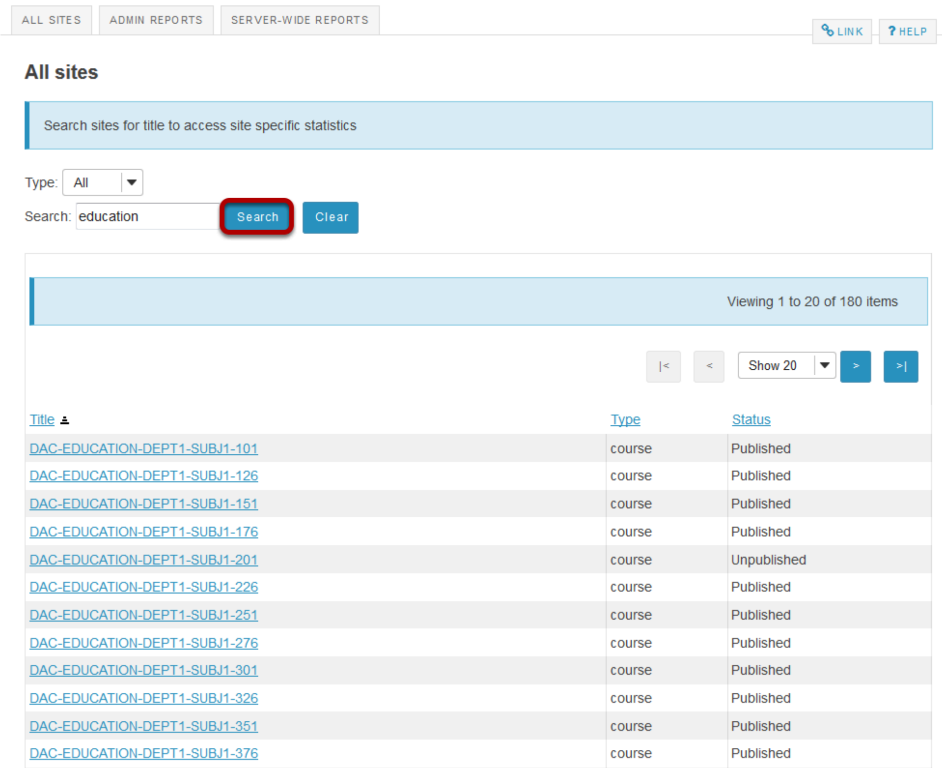
How do I view reports for a specific site?

Go to Sitestats Admin.



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

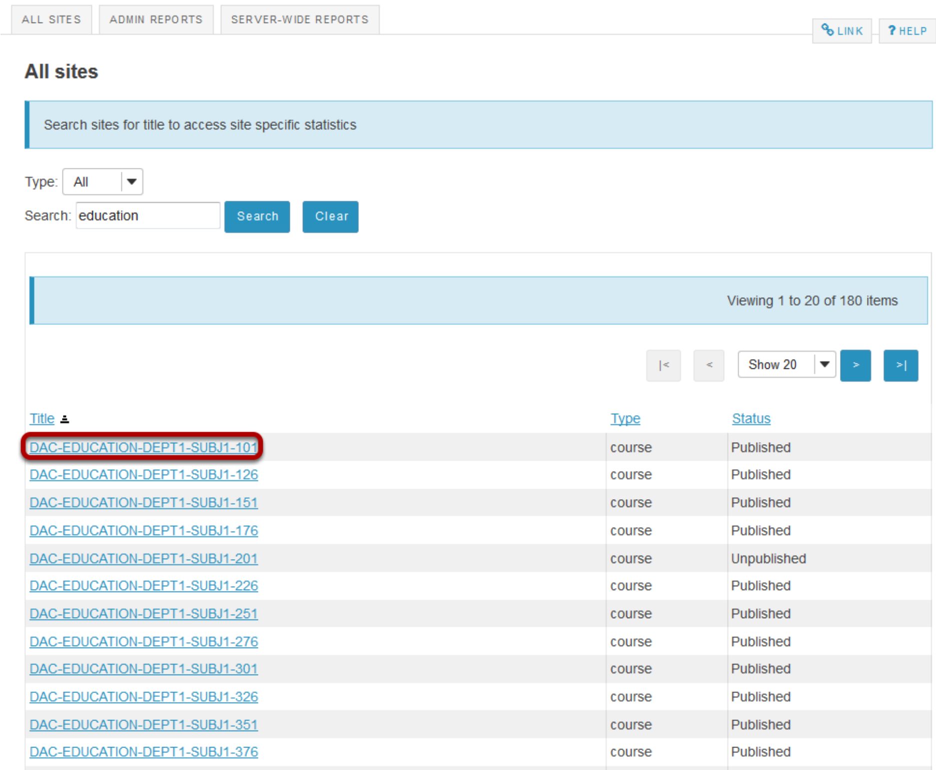
Locate the site you want to view.



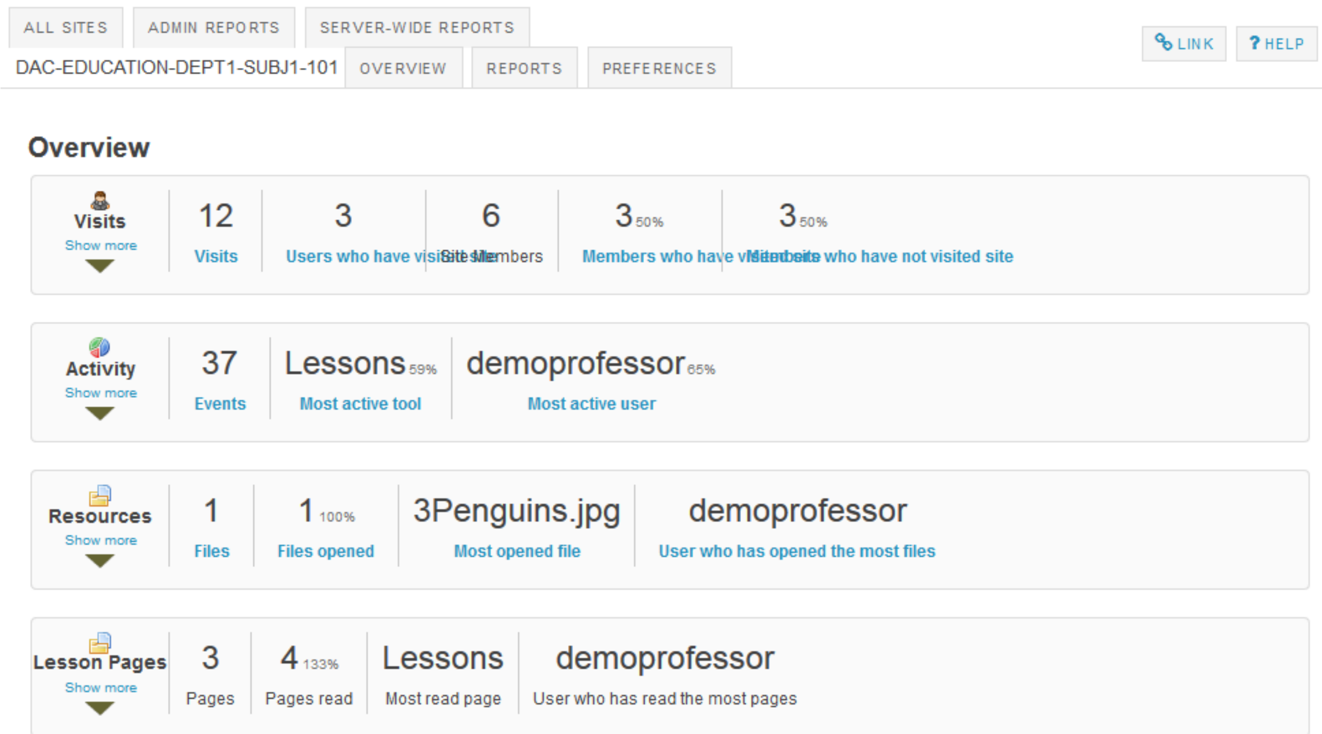
Enter a search term and click **Search** to locate the site you want to view.

All sites matching your criteria will be displayed.

Click on the title of the site.



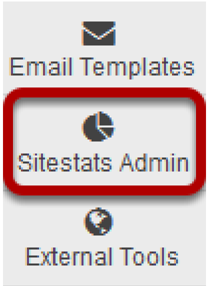
The site's Statistics will display.



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?

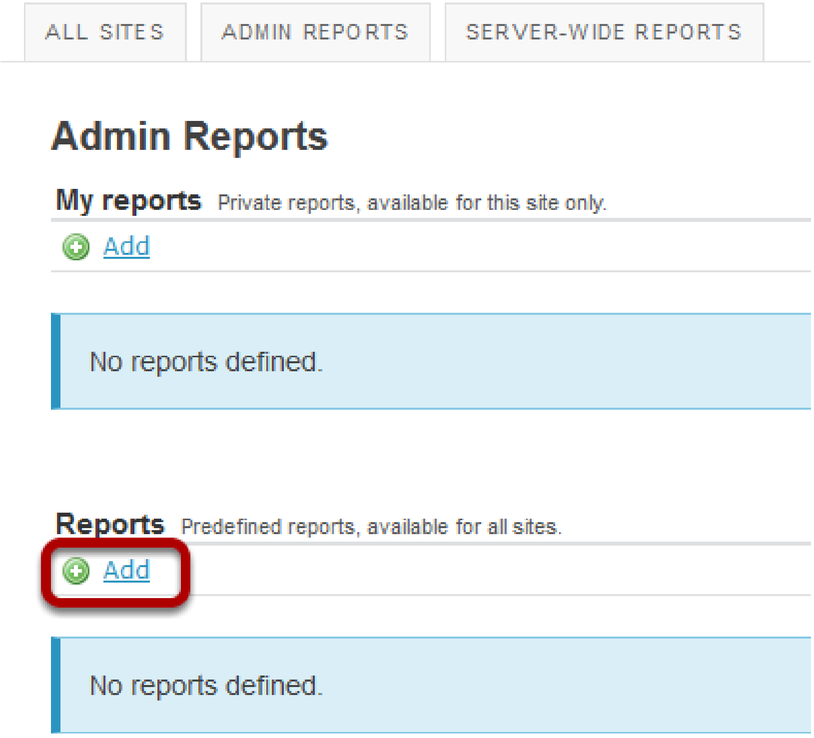
Go to Sitestats Admin.



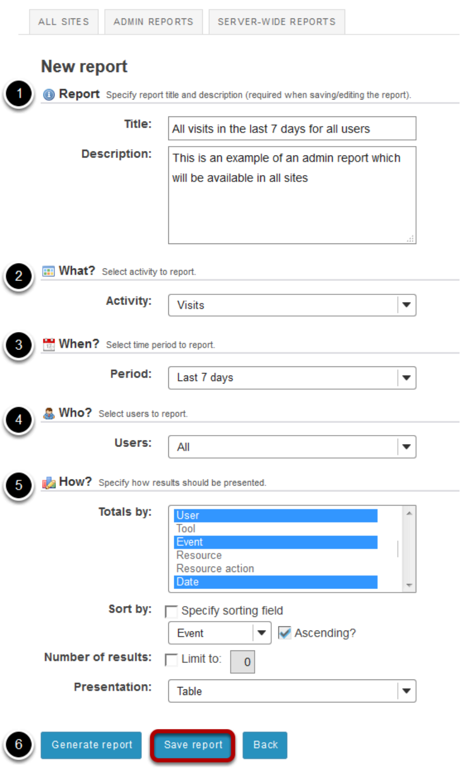
Select the **Sitestats Admin** tool from the Tool Menu in the Administration Workspace.

Click Admin Reports.

Under Reports, click Add.



Enter the report information.



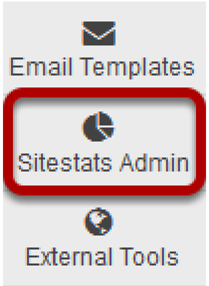
Set up your report by entering the following information:

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?

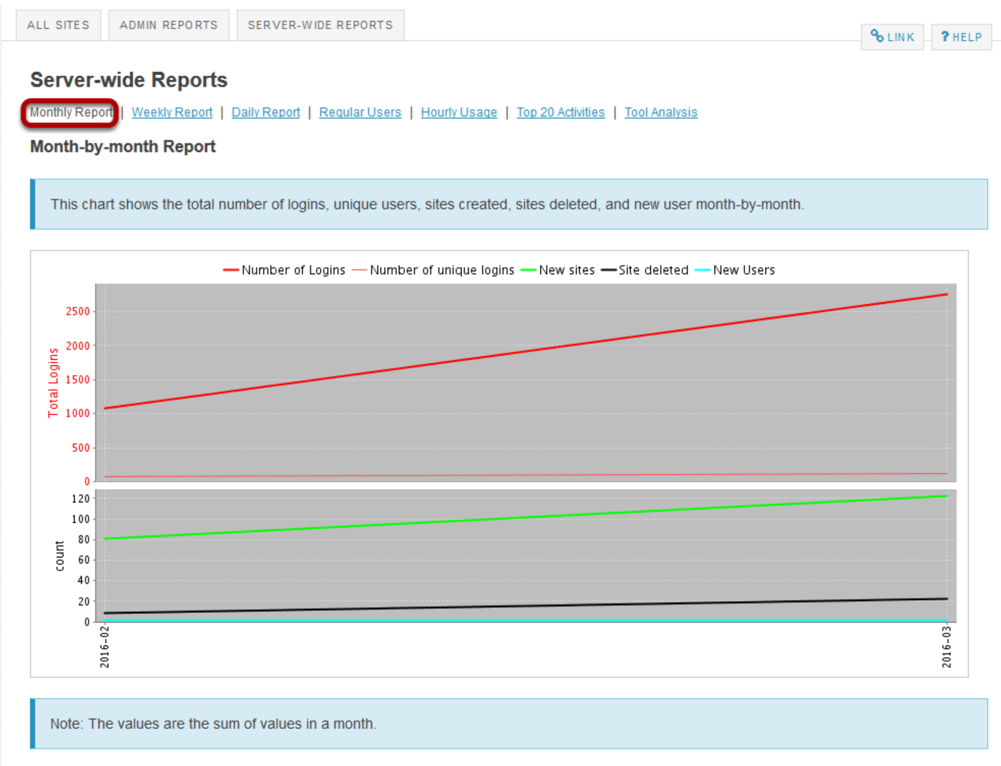
Go to Sitestats Admin.



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.

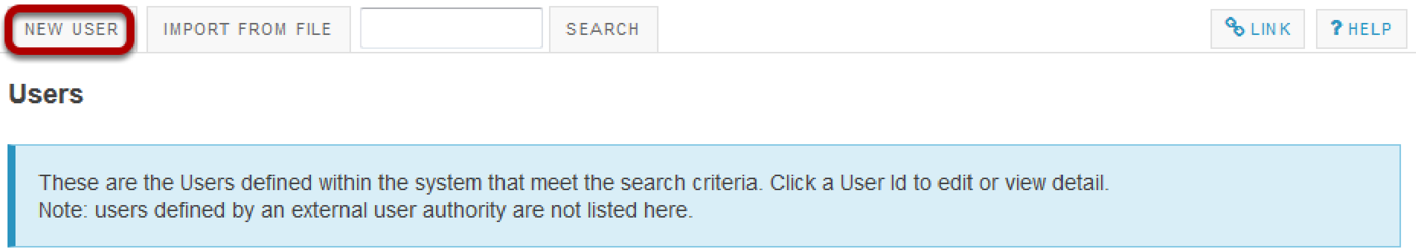
To access this tool, select Users from the Administration Workspace Tool Menu.

How do I add a new account?

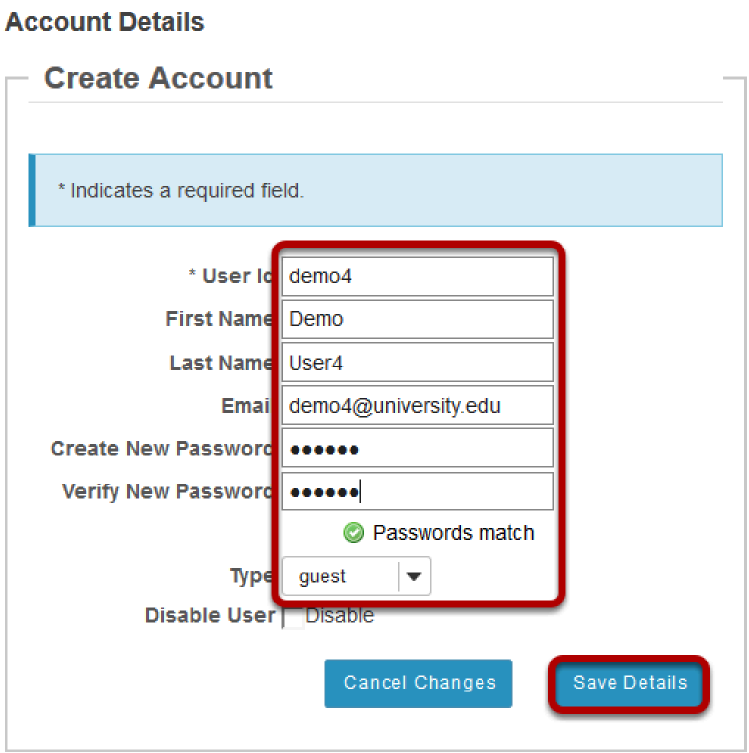
Go to Users.

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

Click New User.



Enter the user information and then save.



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.

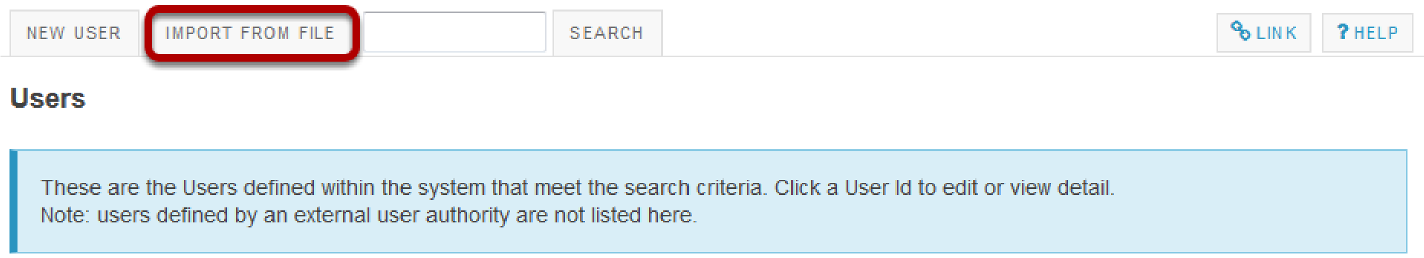
Note: User Ids must be unique. If you attempt to add a new user that has the same user id as an existing user, you will receive an error.

How do I create multiple new user accounts by importing a file?

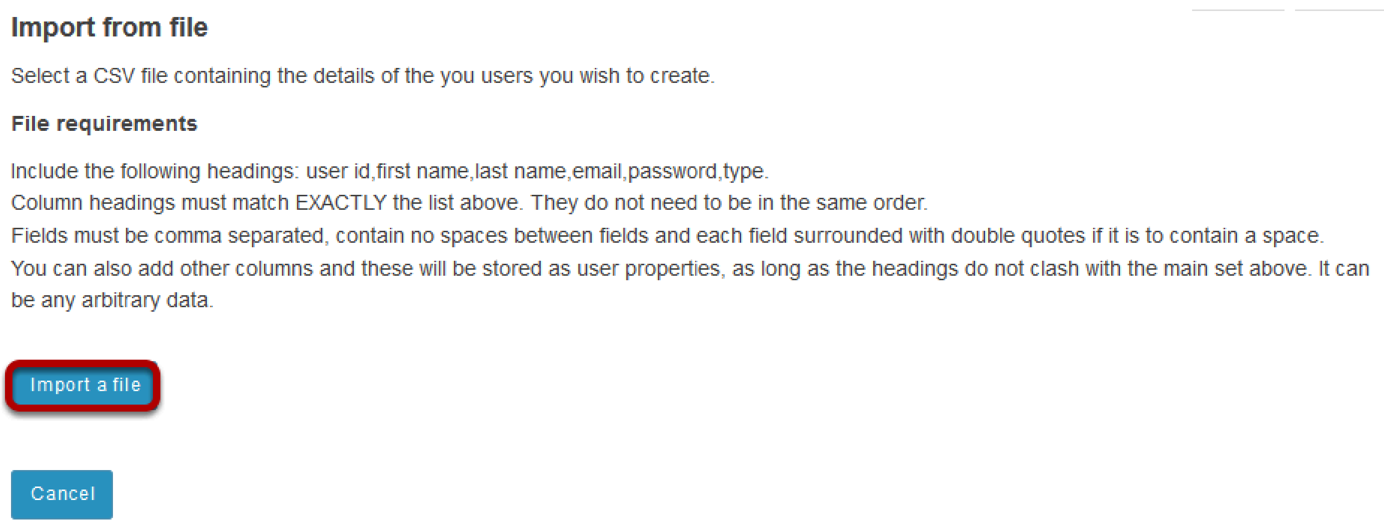
Go to Users.

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

Click Import from file.



Click Import a file.

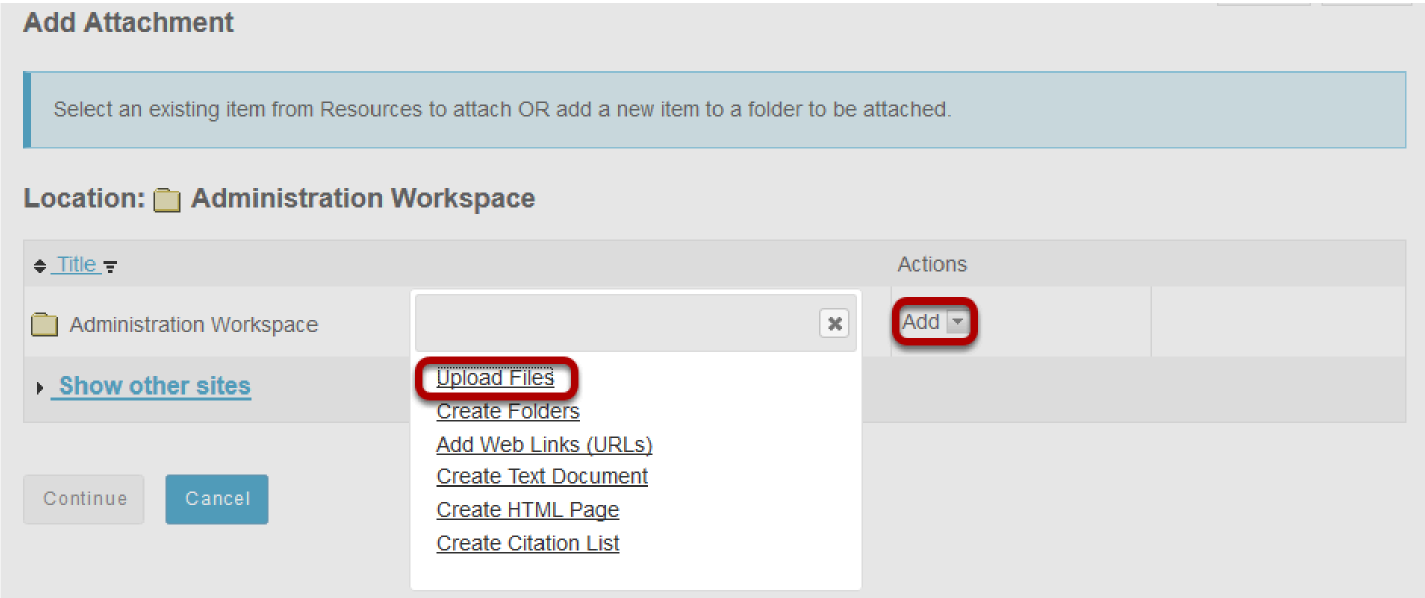


Click the **Import a file** button to browse for an select a properly formatted CSV file containing the user account information for the users you would like to create.

Please note the following file requirements when preparing your CSV file.

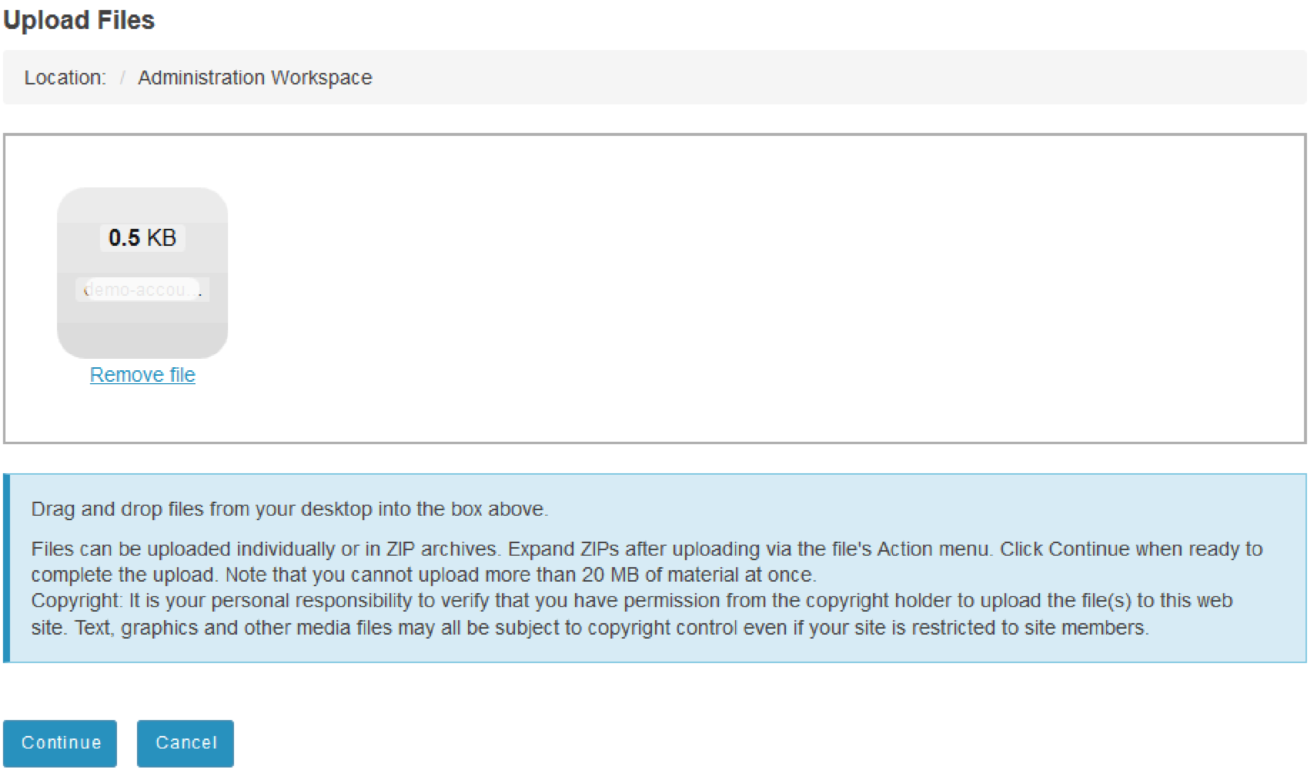
- Include the following headings: user id, first name, last name, email, password, type.
- Column headings must match EXACTLY the list above. They do not need to be in the same order.
- Fields must be comma separated, contain no spaces between fields and each field surrounded with double quotes if it 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.



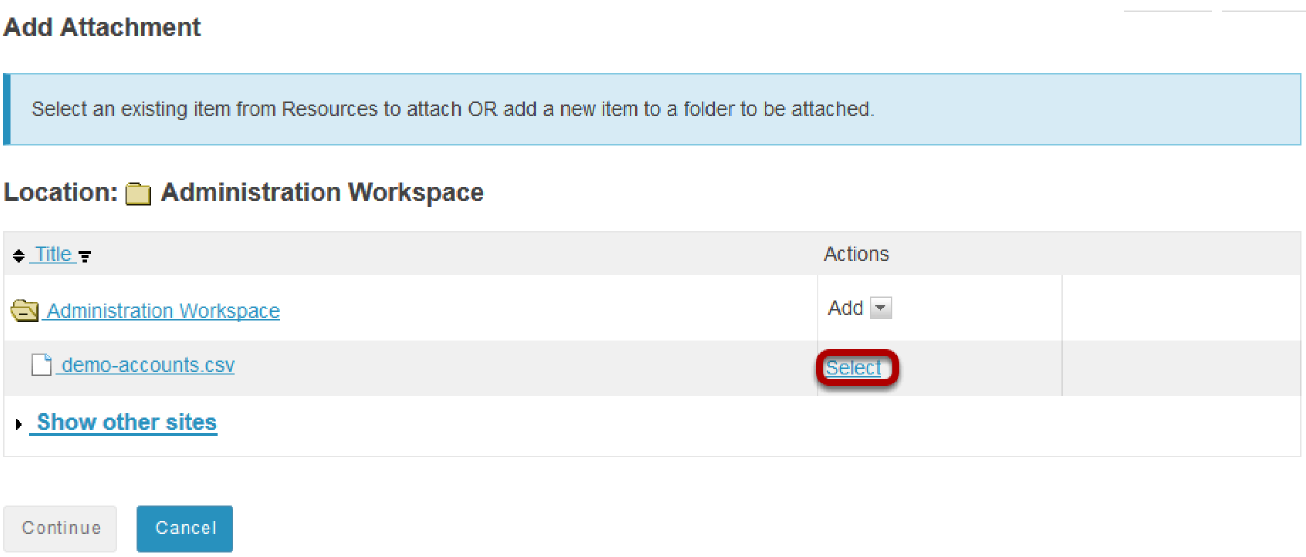
If the import file has not been previously uploaded to Resources, click **Add** and then **Upload Files** to upload a new item.

Locate the file to upload, then click Continue.



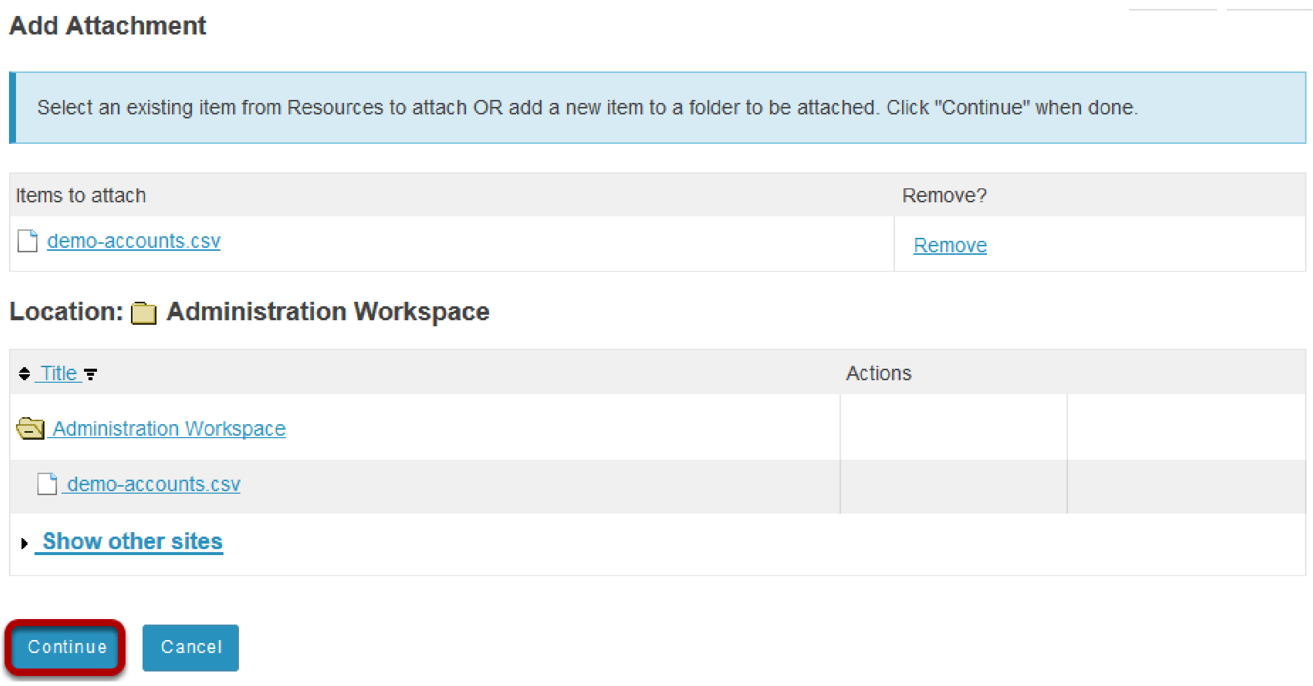
You may drag and drop your file or click in the drag and drop area to browse for the file to be uploaded. Click **Continue** to upload the file.

Select the import file.

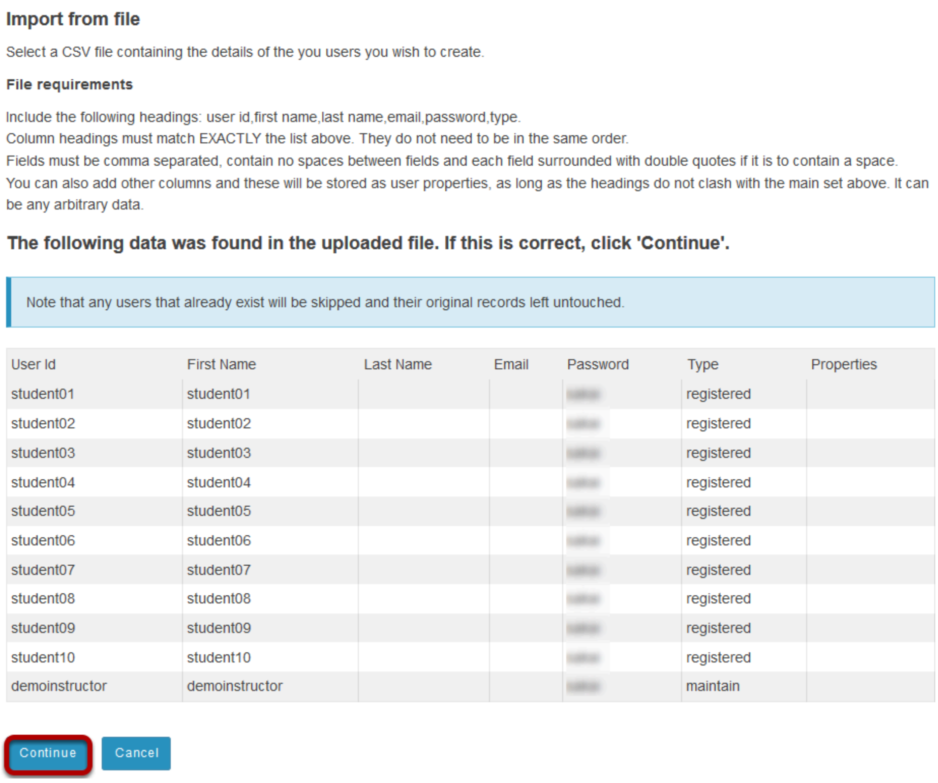


Click the **Select** link for the file containing the user information you wish to import.

Click Continue.



Preview and confirm the user information.



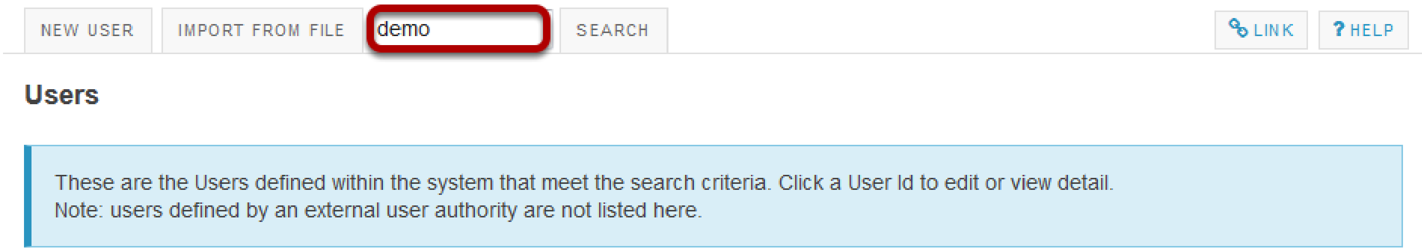
The information for each new user will be displayed. If everything looks correct, click **Continue** to proceed and add the accounts.

How do I search for a user account?

Go to Users.

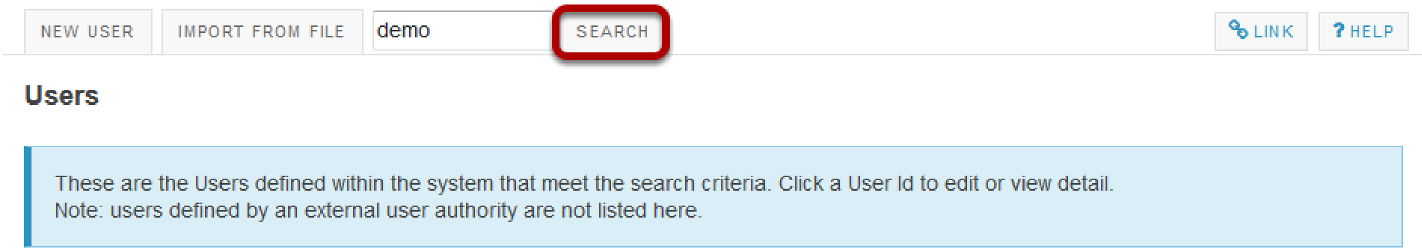
Select the **Users** tool from the Tool Menu in the Administration Workspace.

Enter a search term.

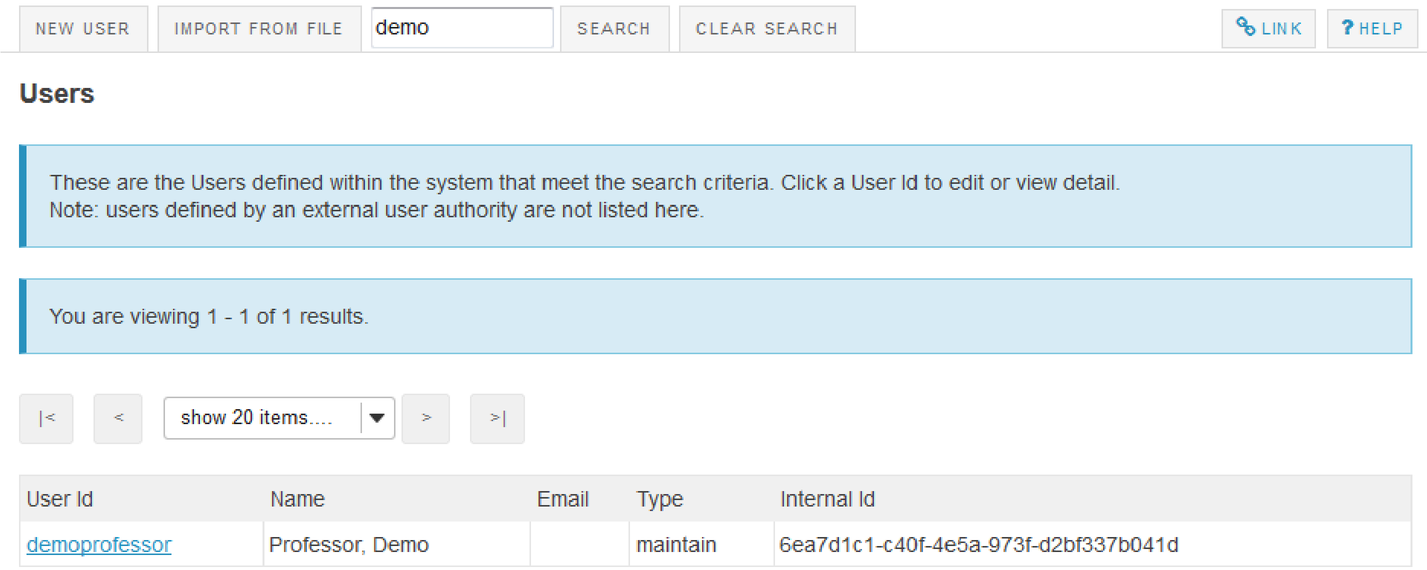


Enter a search term to locate the account you are looking for. You may search by a full or partial string of characters which appears in the user id, name, or email fields of a user's account.

Click Search.



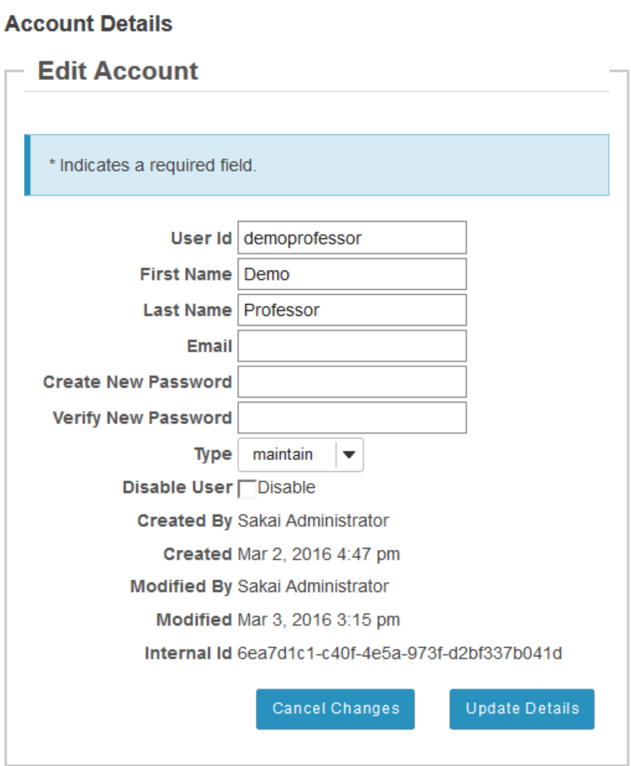
Search results will display.



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.

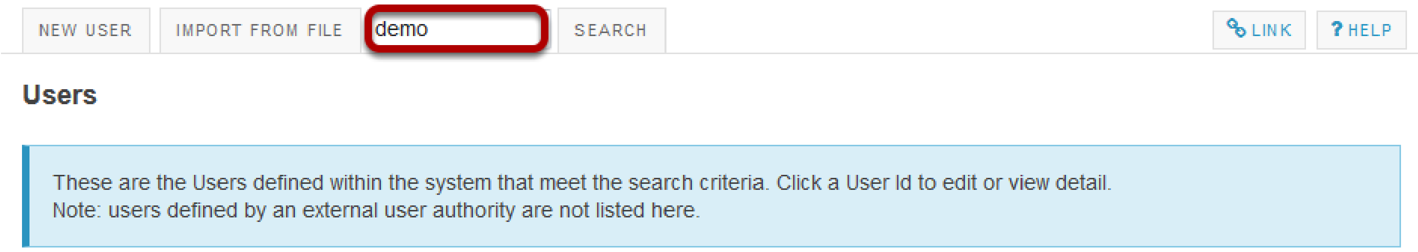


How do I edit a user account?

Go to Users.

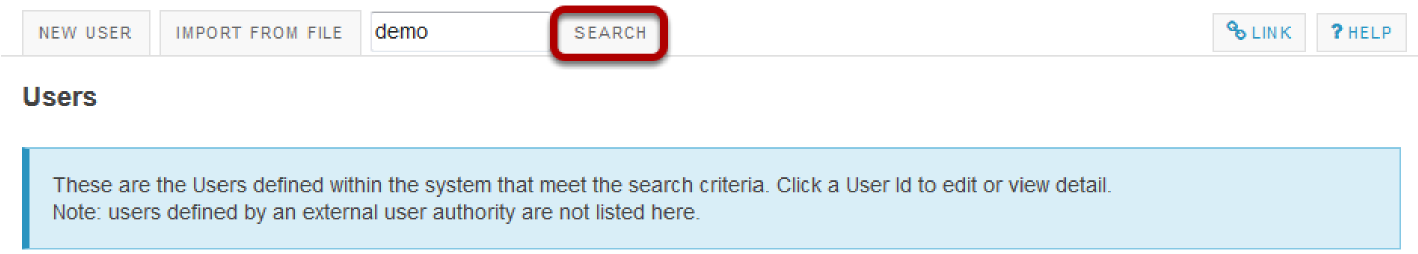
Select the **Users** tool from the Tool Menu in the Administration Workspace.

Enter a search term.

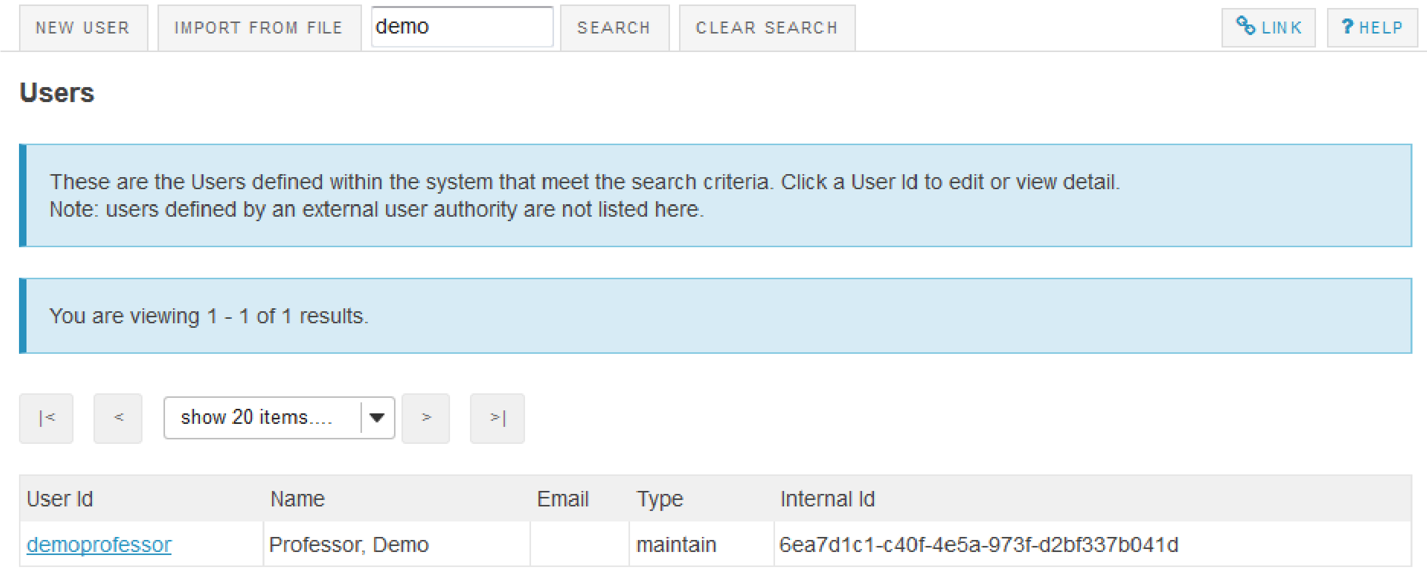


Enter a search term to locate the account you are looking for. You may search by a full or partial string of characters which appears in the user id, name, or email fields of a user's account.

Click Search.



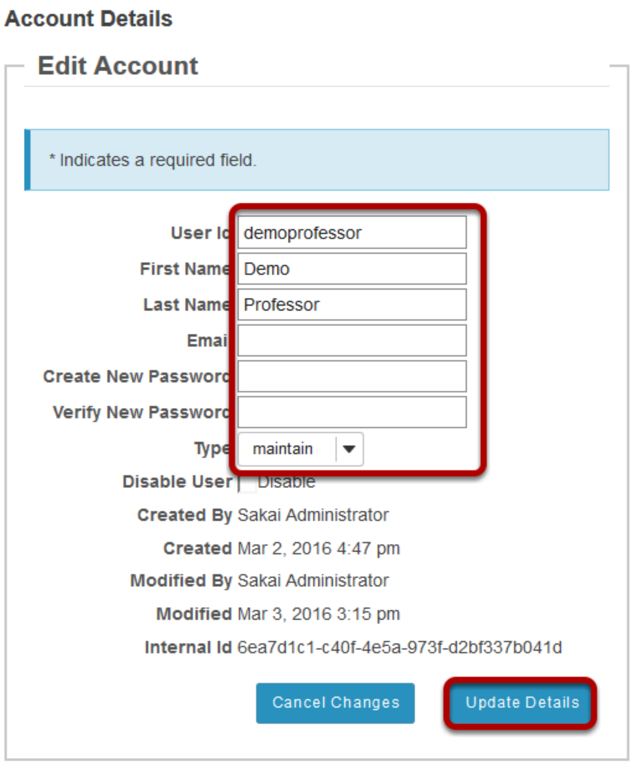
Search results will display.



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 and edit that user's details.



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?

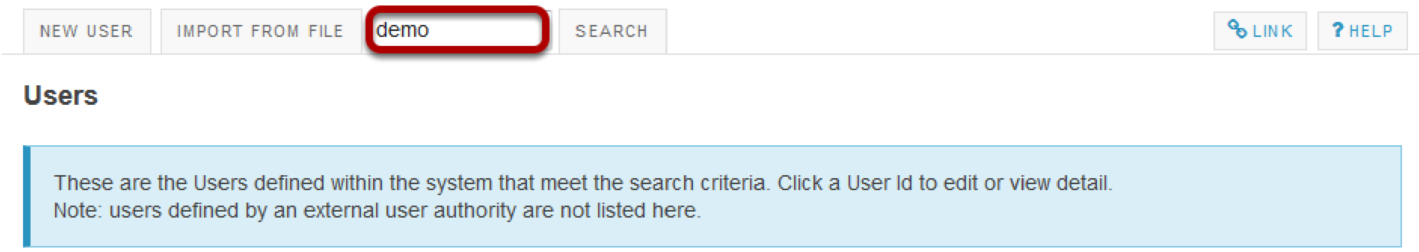
Disabling a user account blocks that user from being able to access the system. However, the user's data and activity are still retained in the system.

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.

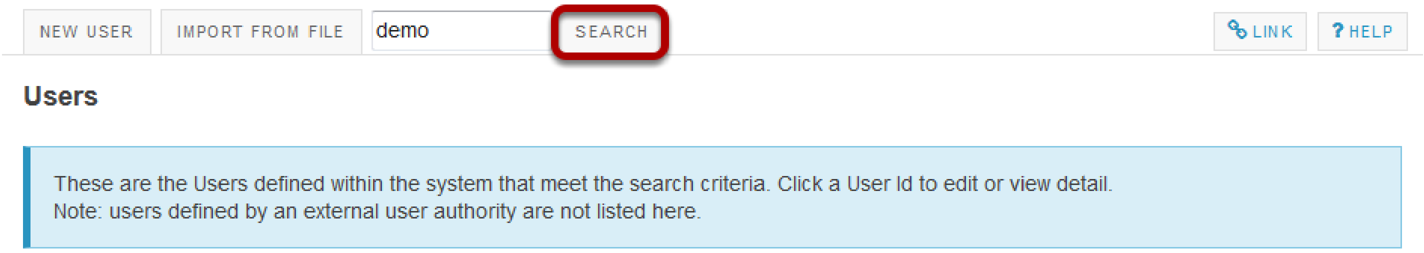
Select the **Users** tool from the Tool Menu in the Administration Workspace.

Enter a search term.

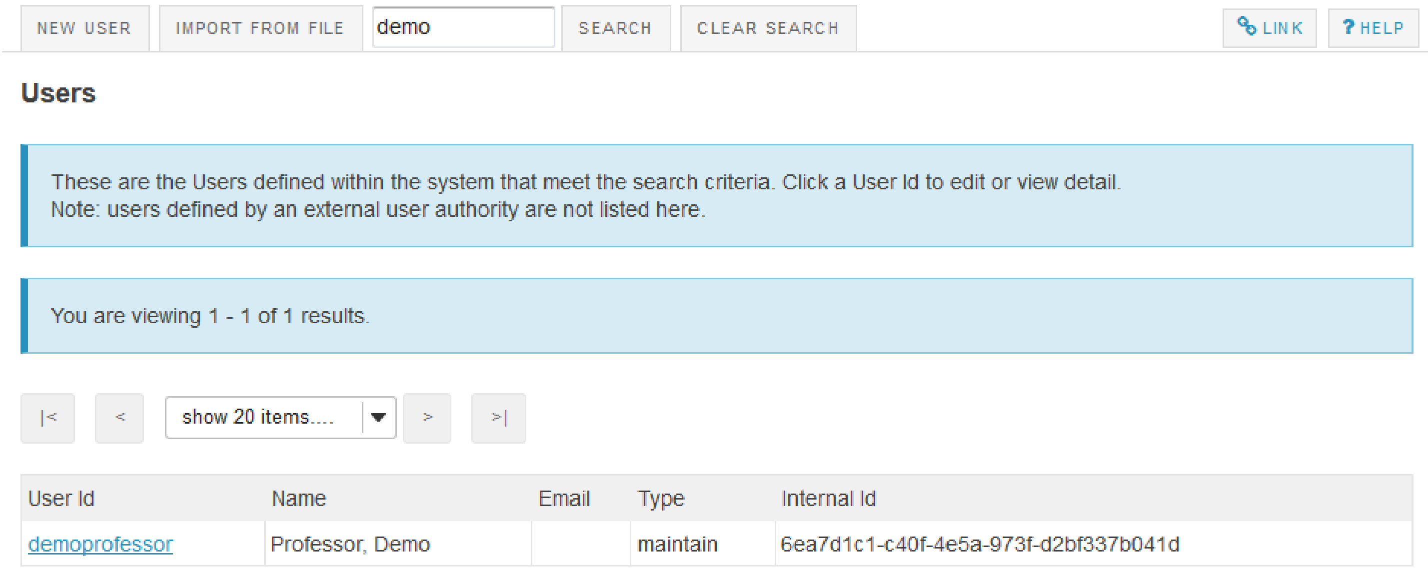


Enter a search term to locate the account you are looking for. You may search by a full or partial string of characters which appears in the user id, name, or email fields of a user's account.

Click Search.



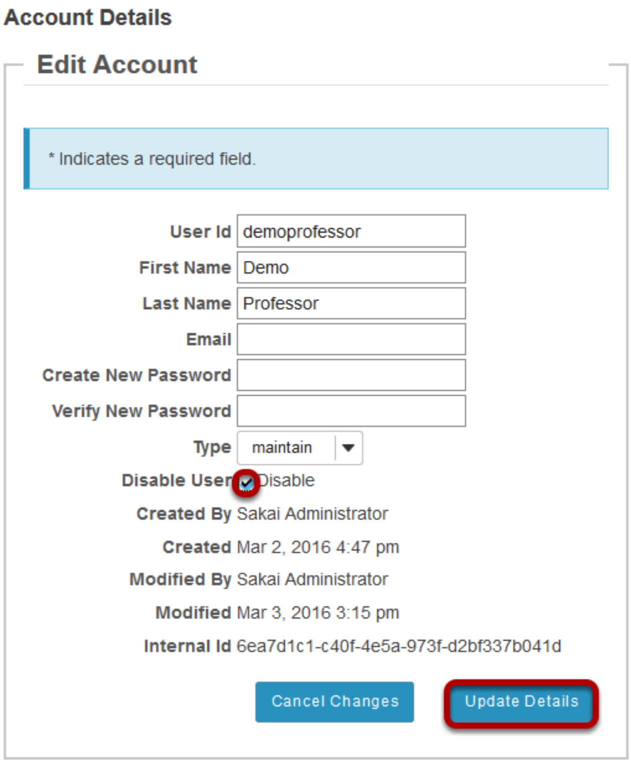
Search results will display.



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 and edit that user's details.



Check the box next to **Disable**, then click **Update Details** to save the change.

How do I remove a user account?

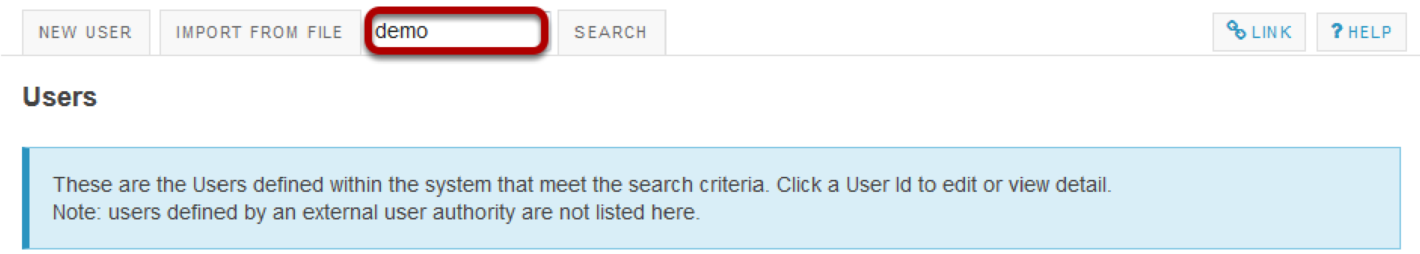
Removing an account deletes all the user data for that user, including any grades, resources, and other user-related files or activity. This option should be used with caution, as it will delete all information associated with the account!

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.

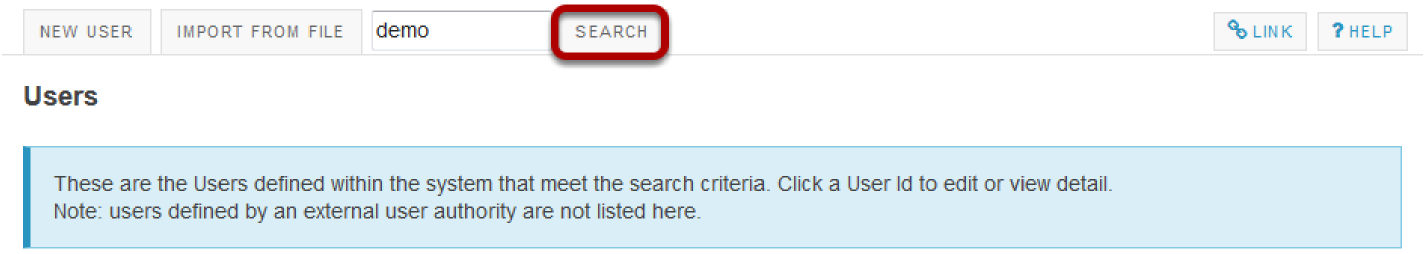
Select the **Users** tool from the Tool Menu in the Administration Workspace.

Enter a search term.

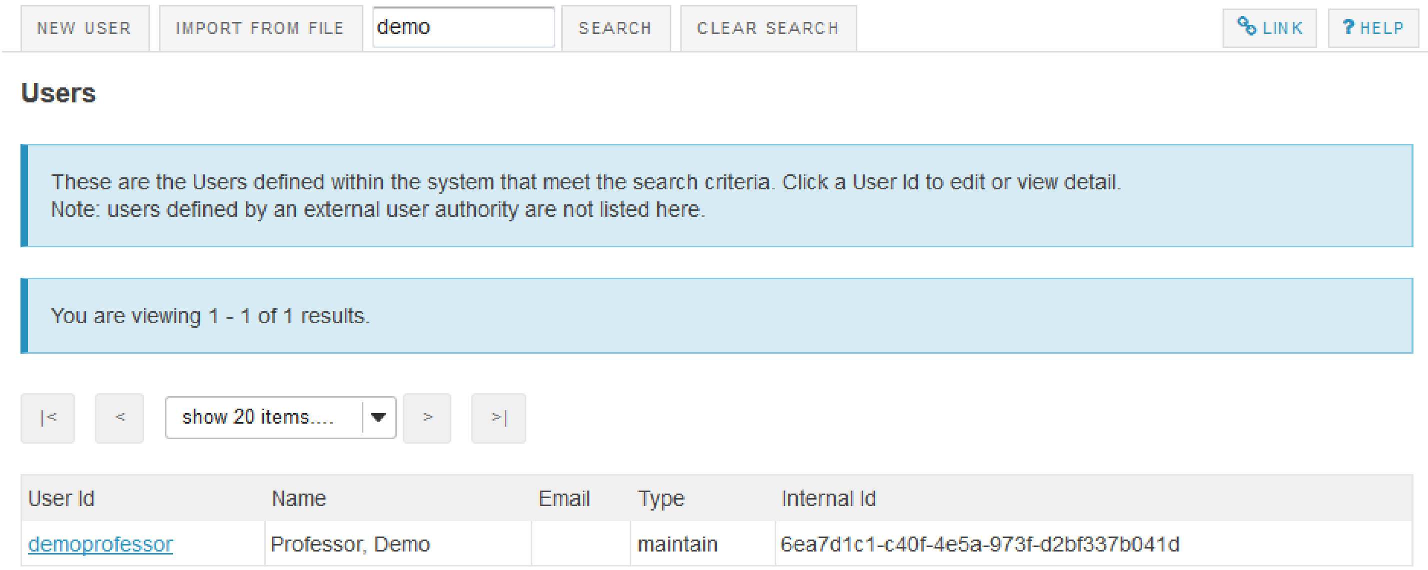


Enter a search term to locate the account you are looking for. You may search by a full or partial string of characters which appears in the user id, name, or email fields of a user's account.

Click Search.



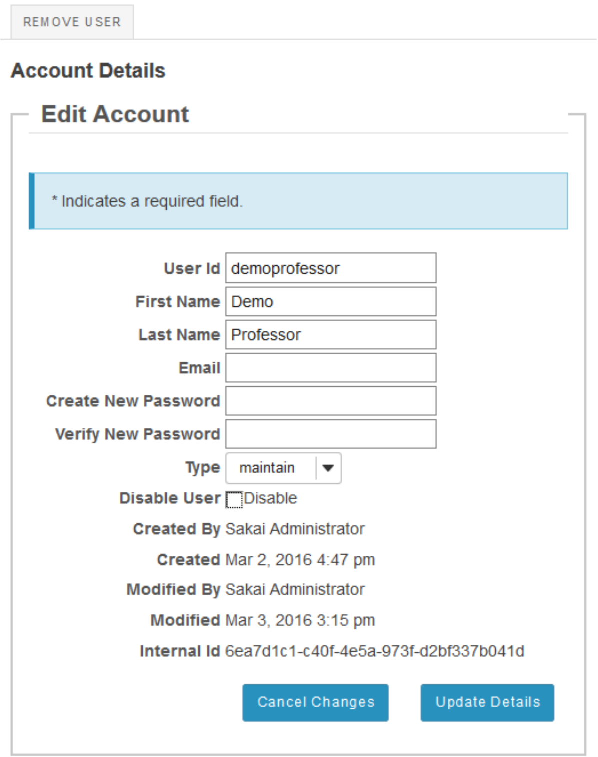
Search results will display.



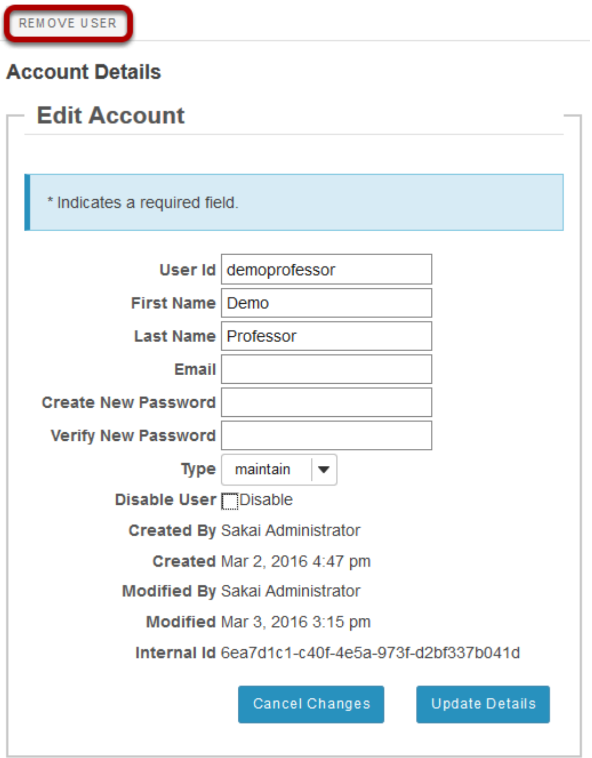
All internal accounts meeting the search criteria will be displayed.

Note: Users defined by an external user authority (e.g. LDAP, etc.) are not listed here.

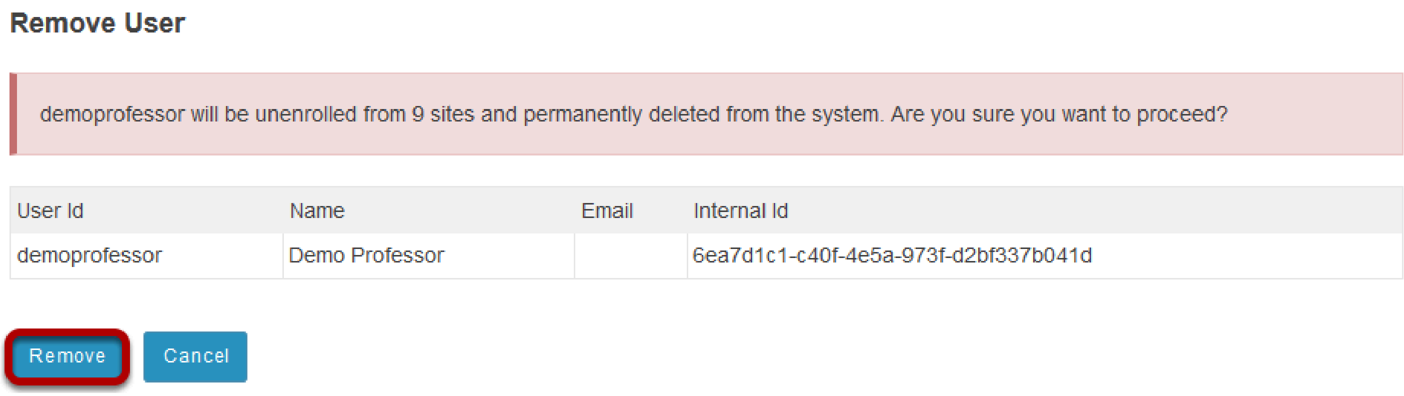
Click on an individual user id to view and edit that user's details.



Click Remove User.



Click Remove to confirm deletion.



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

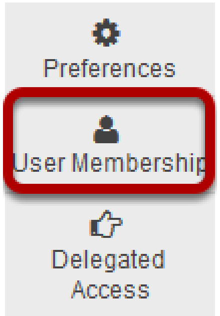
What is User Membership?

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.

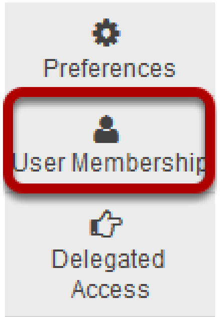
The User Membership tool is available by default in the Administration Workspace. If you would like to add it to other sites, you must do so manually using the Sites tool in the Administration Workspace.

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



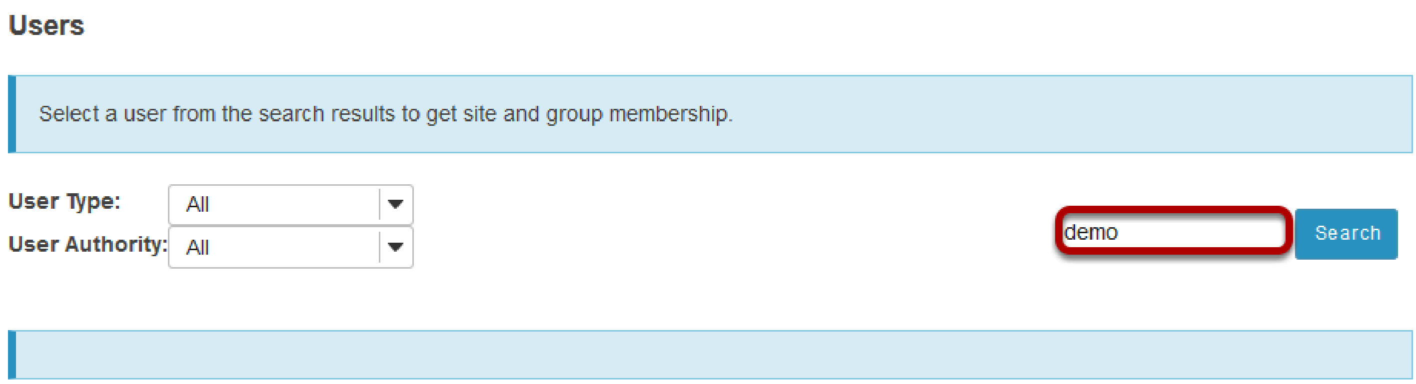
How do I search for an account in User Membership?

Go to User Membership.



Select the **User Membership** tool from the Tool Menu in the Administration Workspace.

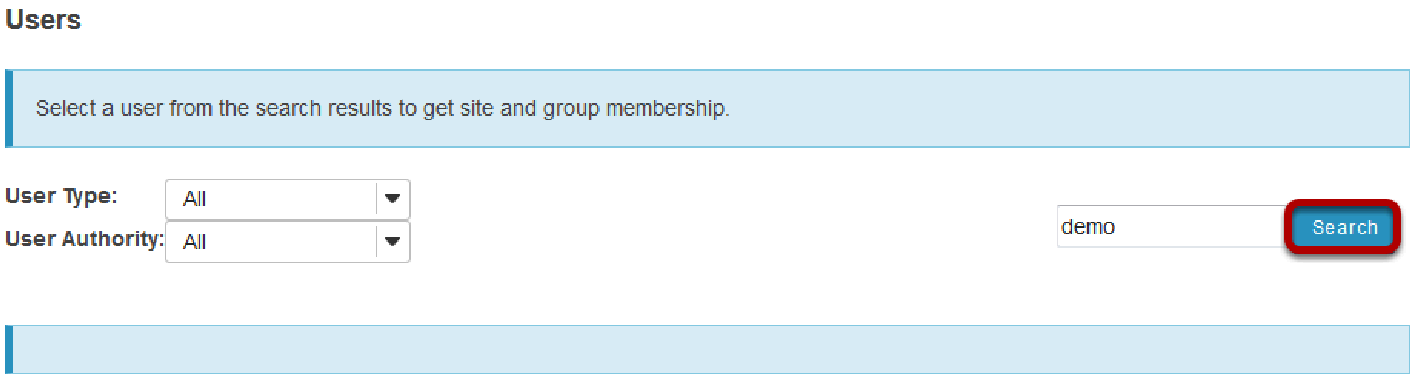
Enter a search term.



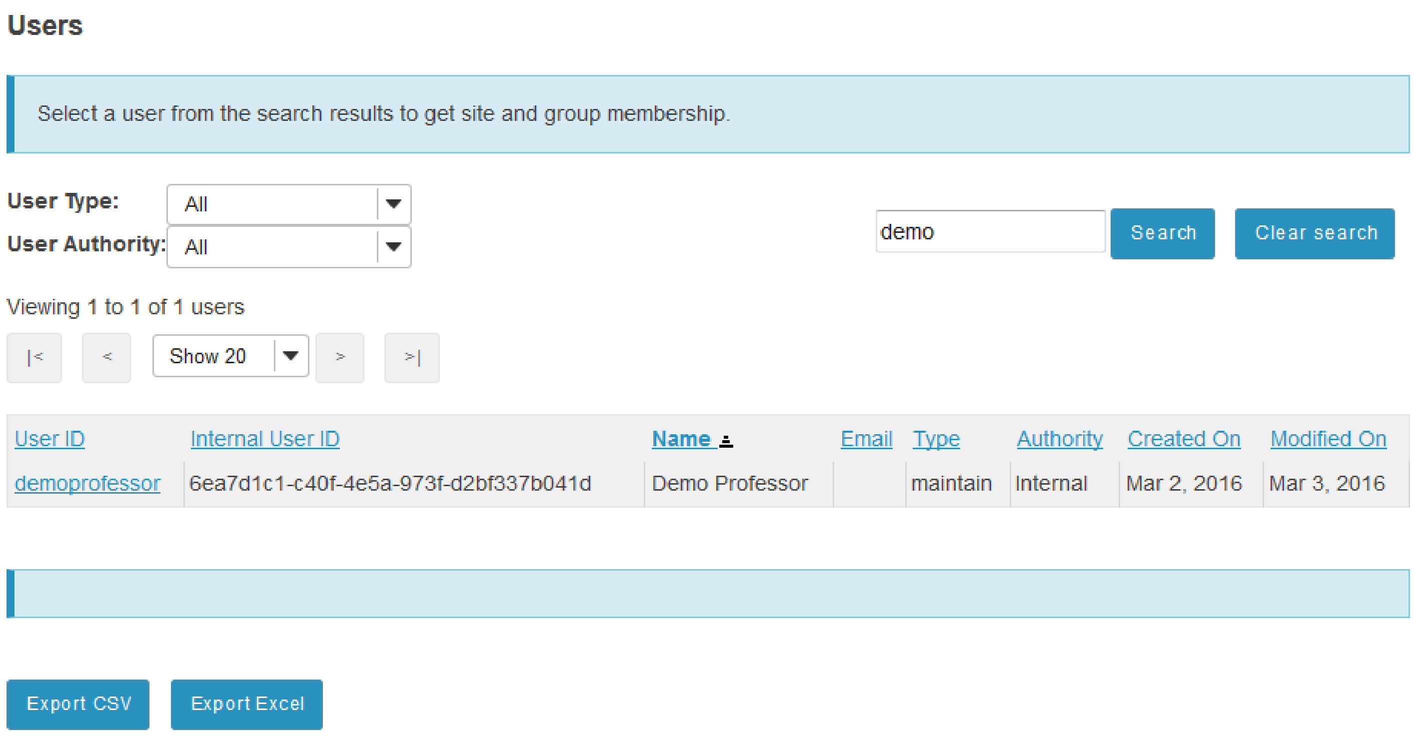
Enter a search term into the field provided. You may search for a full or partial name, user ID, or email address.

Note: If desired, you may also filter your search using the User Type or User Authority drop-down menus.

Click Search.

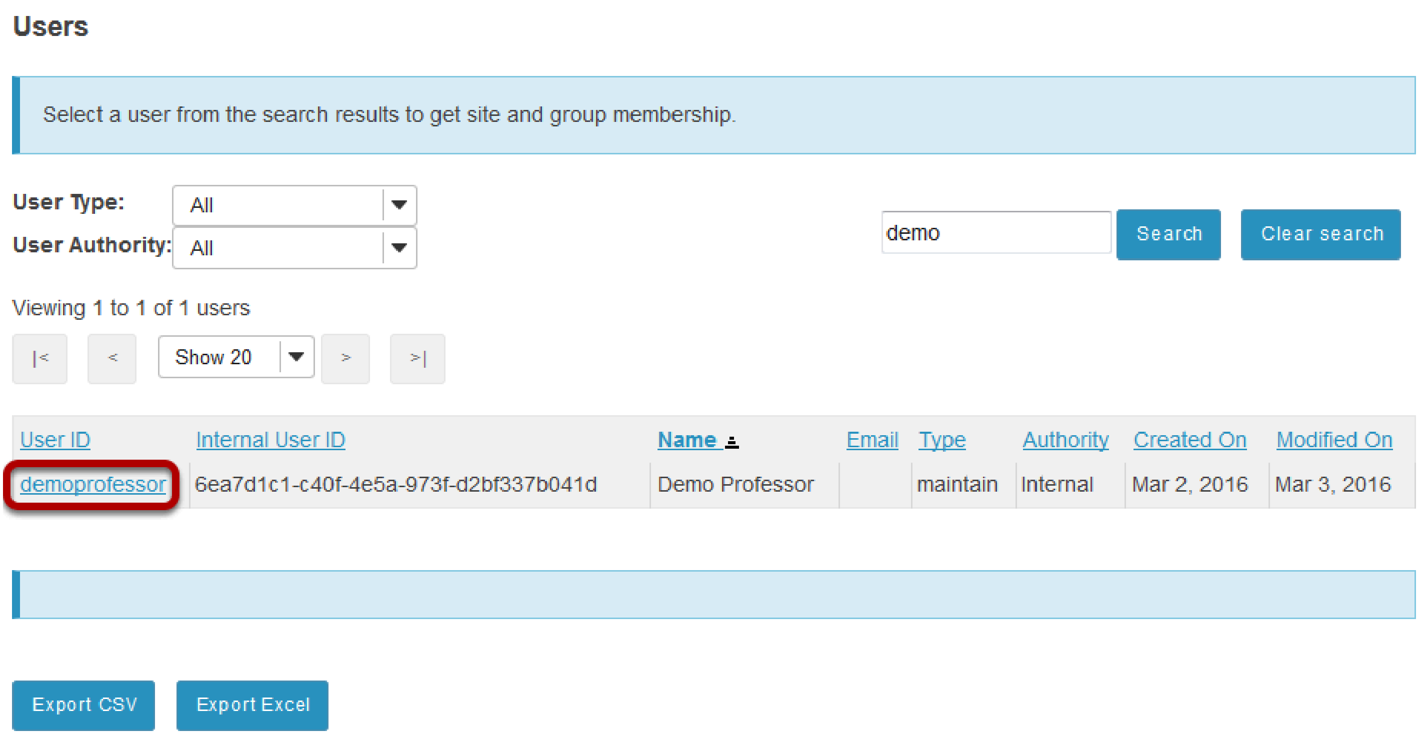


View search results.

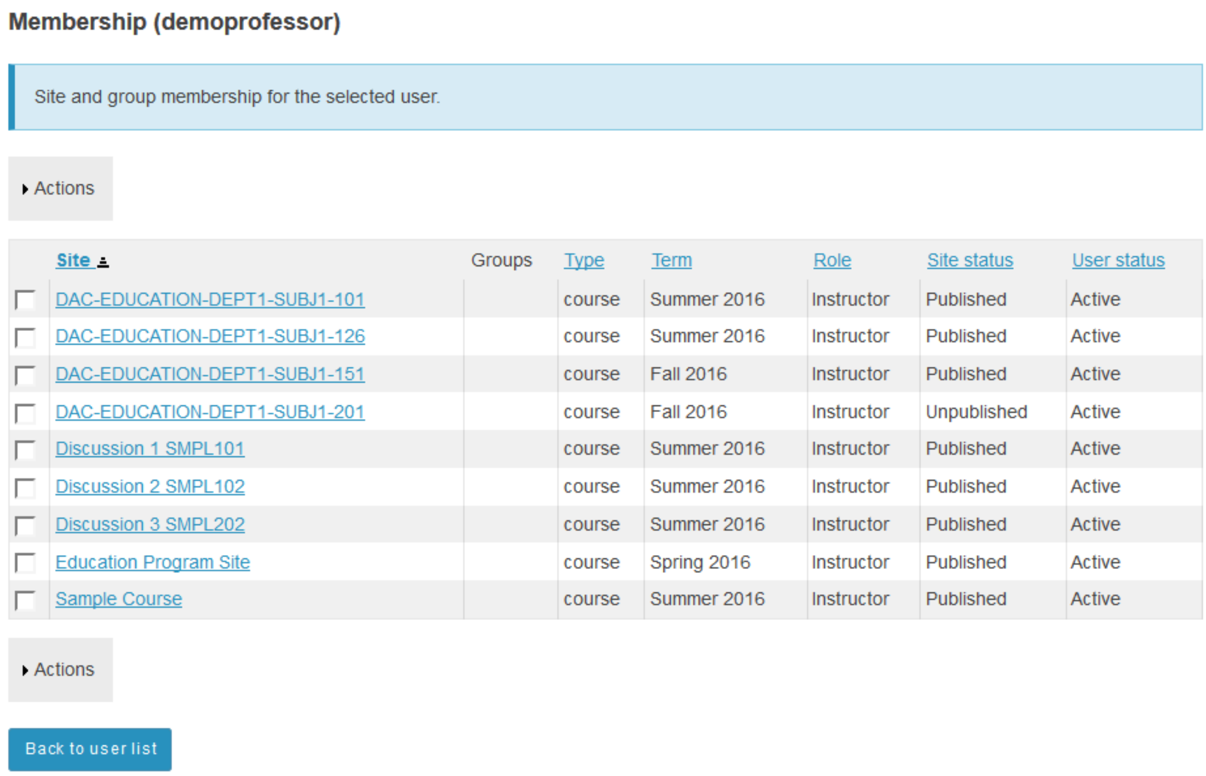


All matching users will be displayed in the search results.

Click on a User ID to see site and group membership for that user.



View the selected user's membership.

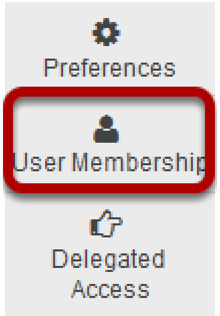


This detail view will display all of the sites in which the user is enrolled. The type, term, and published/unpublished site status are shown, as well as the user's role and status within each site.

Note: Clicking on the title of a site will take you into that site.

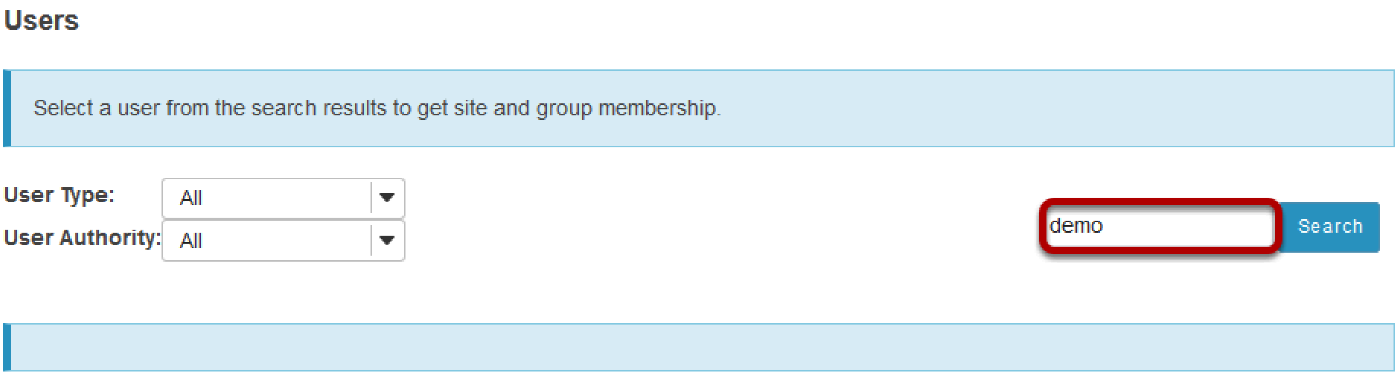
How do I filter search results in User Membership?

Go to User Membership.



Select the **User Membership** tool from the Tool Menu in the Administration Workspace.

Enter a search term.

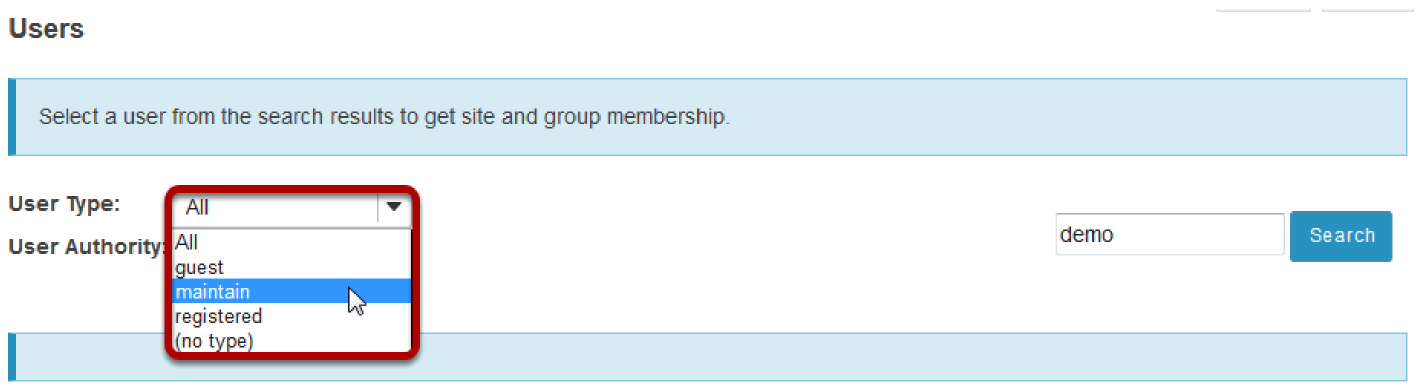


Enter a search term into the field provided. You may search for a full or partial name, user id, or email address.

Filter search by User Type.

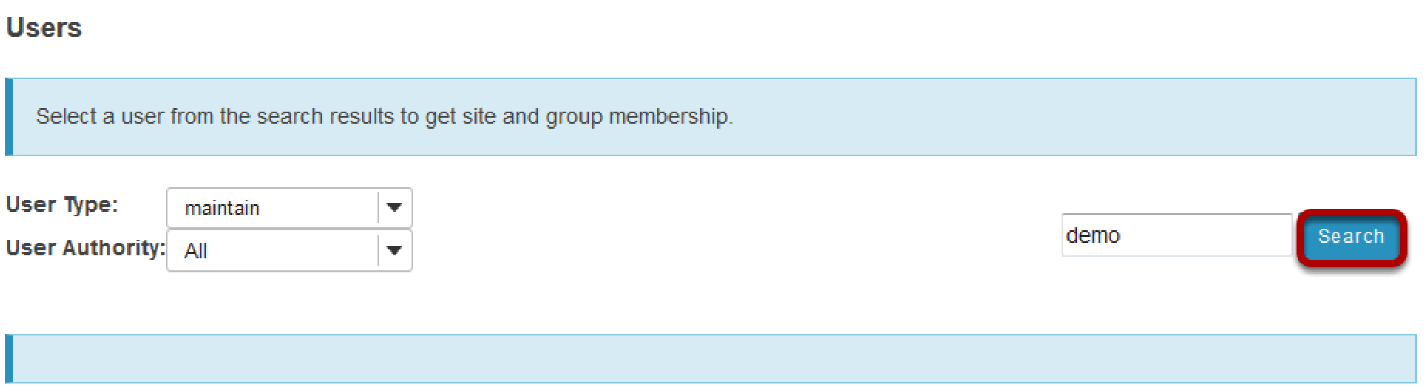
You may filter your search to show only a specified user type if desired.

Select the User Type from the drop-down menu.

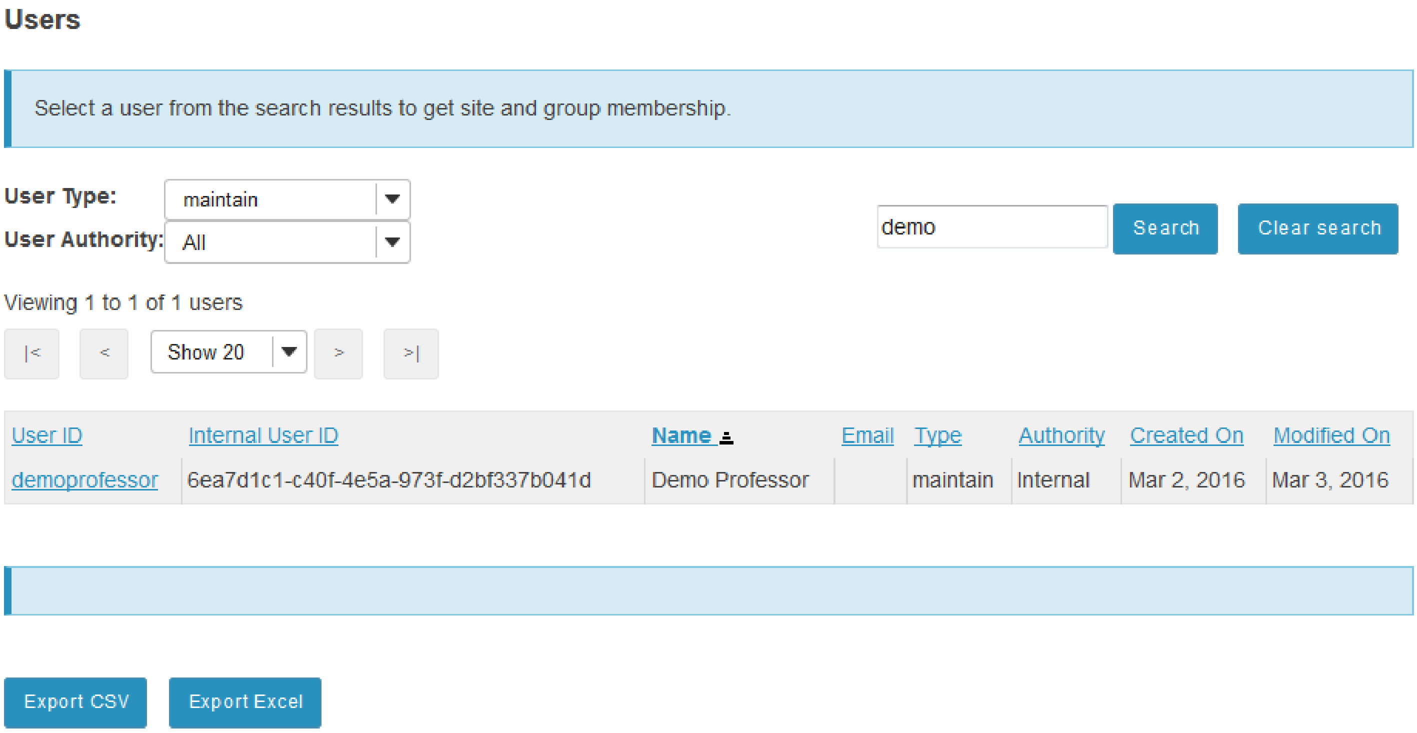


From the User Type drop-down menu, select the type of user for which you would like to limit the search results. The list displayed in the drop-down menu will include any user types that currently exist in your instance. In this example, we have selected "maintain" as the user type.

Click Search.



View search results.

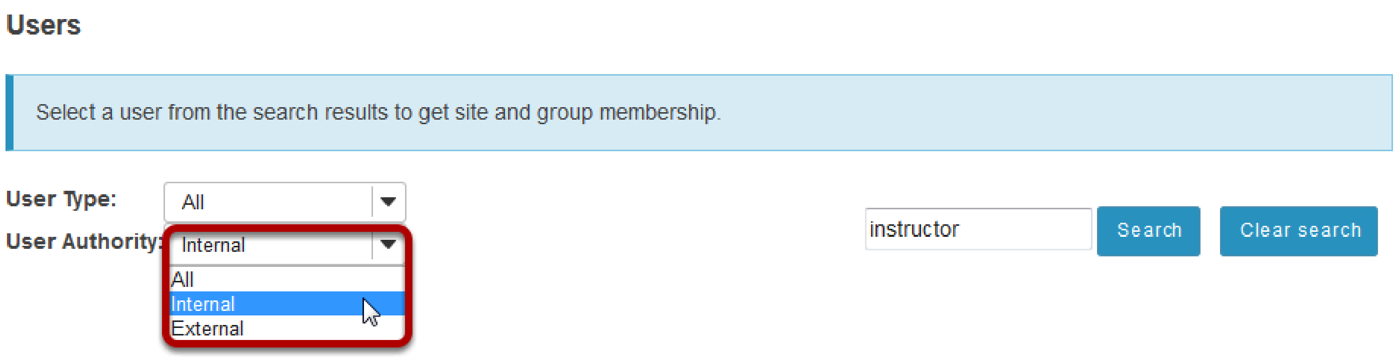


The filtered search results will display. In this example the results show all users matching the search criteria with the user type of faculty.

Filter search by User Authority.

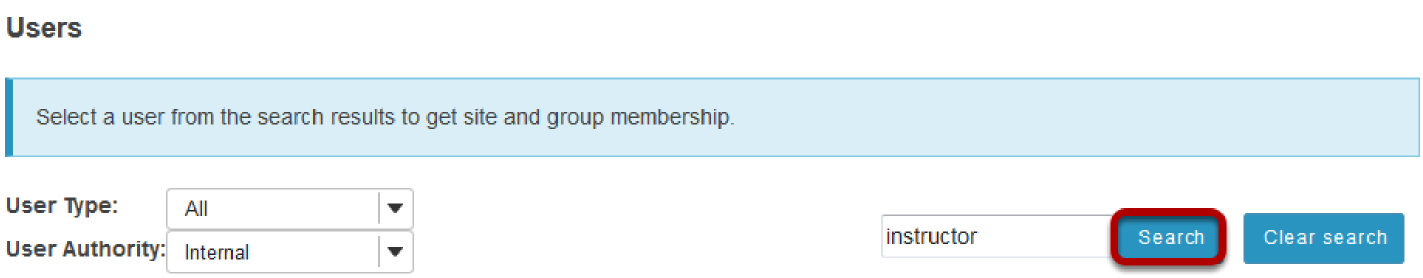
The User Authority filter allows you to filter your search to show only internal or external accounts. Internal accounts are created and authenticated directly in Sakai. External account are created and authenticated via an external system such as LDAP, Active Directory, etc.

Select the User Authority from the drop-down menu.

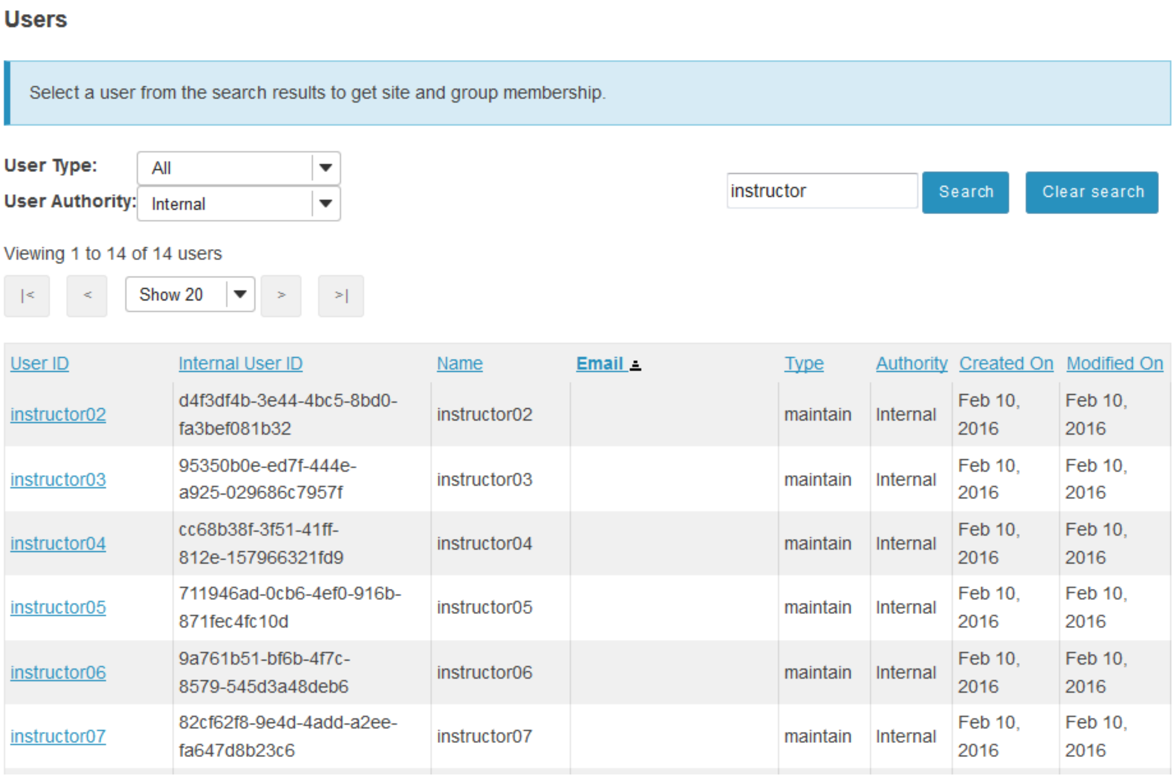


From the User Authority drop-down menu, select the type of account for which you would like to limit the search results, either Internal or External. In this example, we will select Internal.

Click Search.



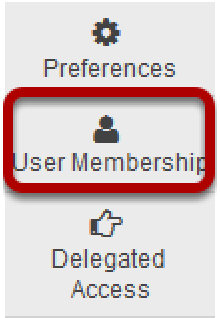
View search results.



The filtered search results will display. In this example the results show all users matching the search criteria with an internally authenticated account.

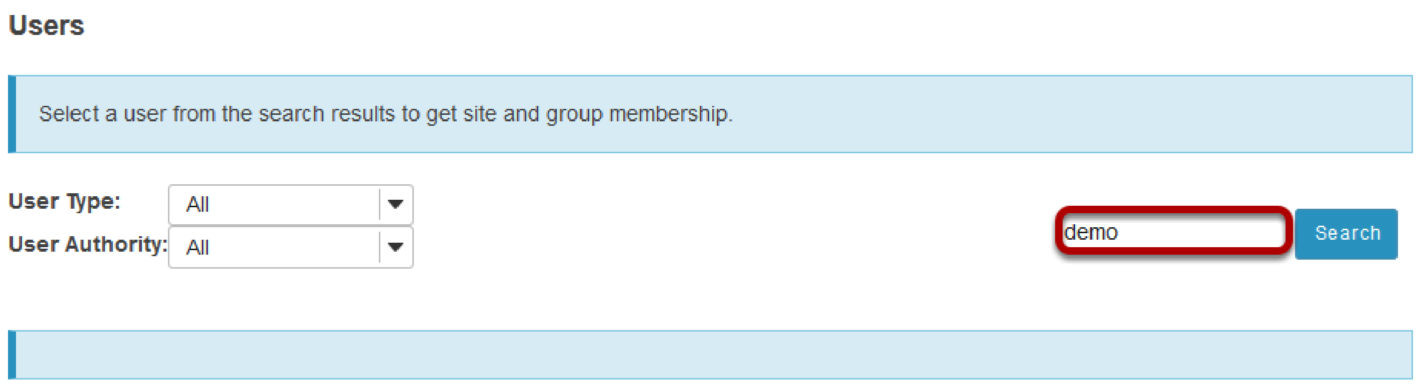
How do I make a user active in multiple sites?

Go to User Membership.



Select the **User Membership** tool from the Tool Menu in the Administration Workspace.

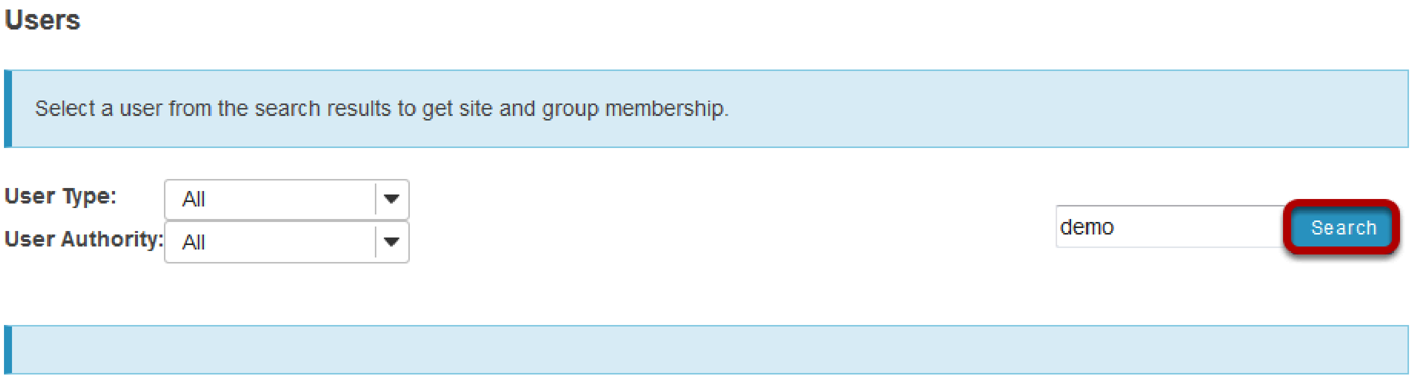
Enter a search term.



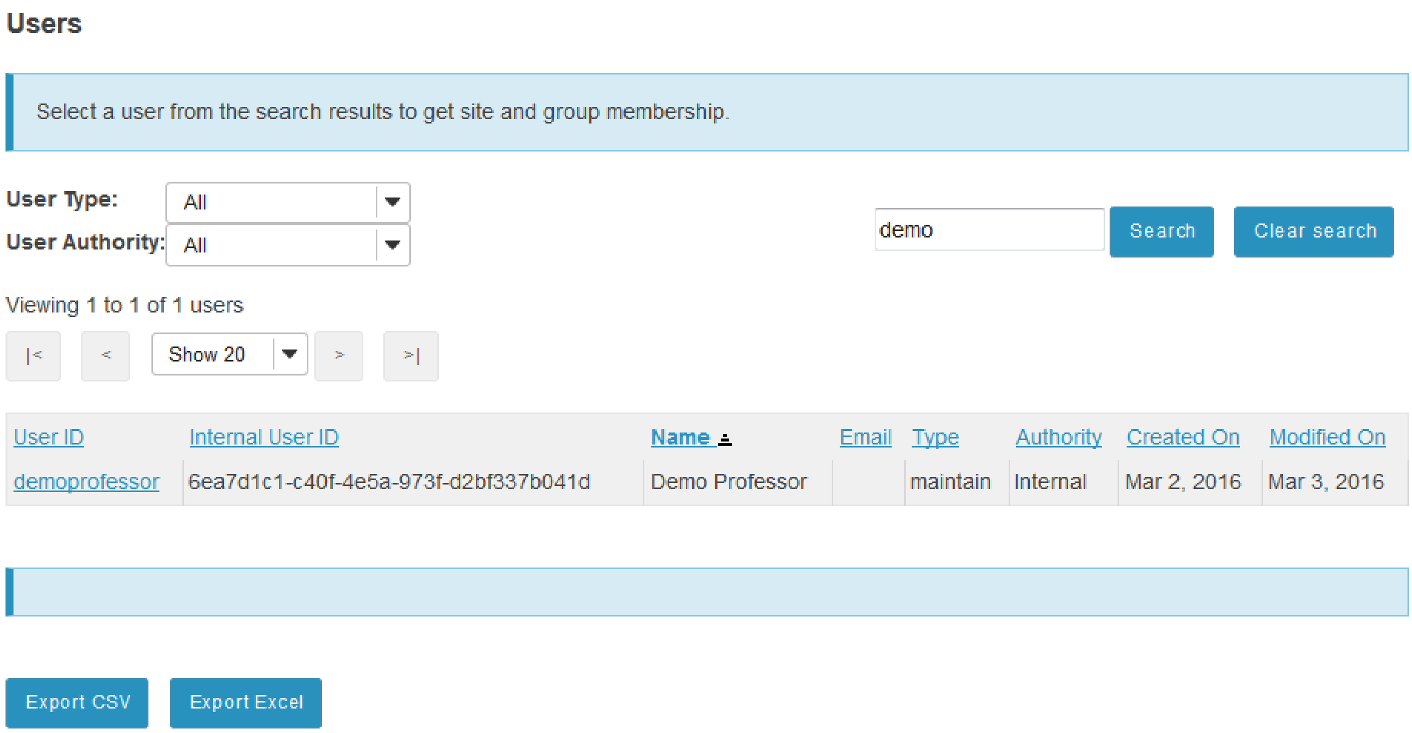
Enter a search term into the field provided. You may search for a full or partial name, user ID, or email address.

Note: If desired, you may also filter your search using the User Type or User Authority drop-down menus.

Click Search.

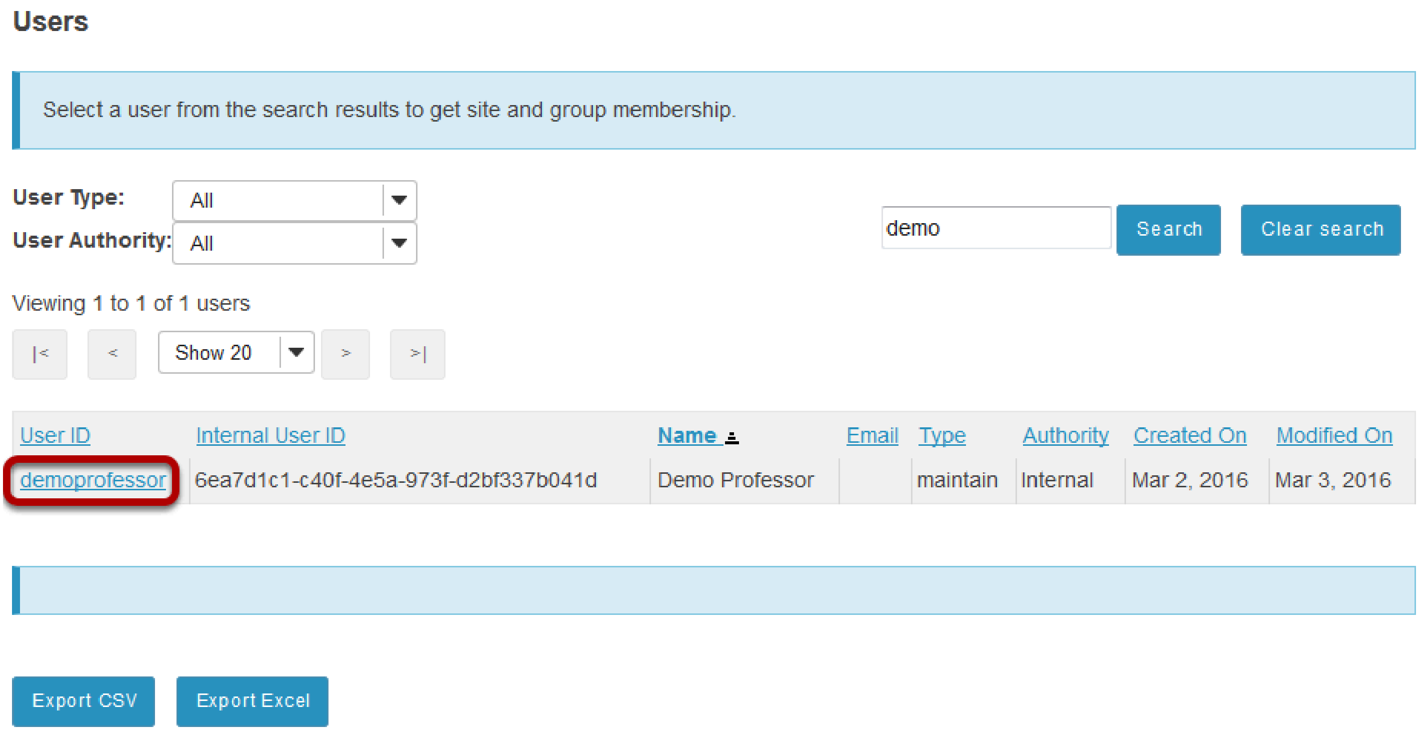


View search results.

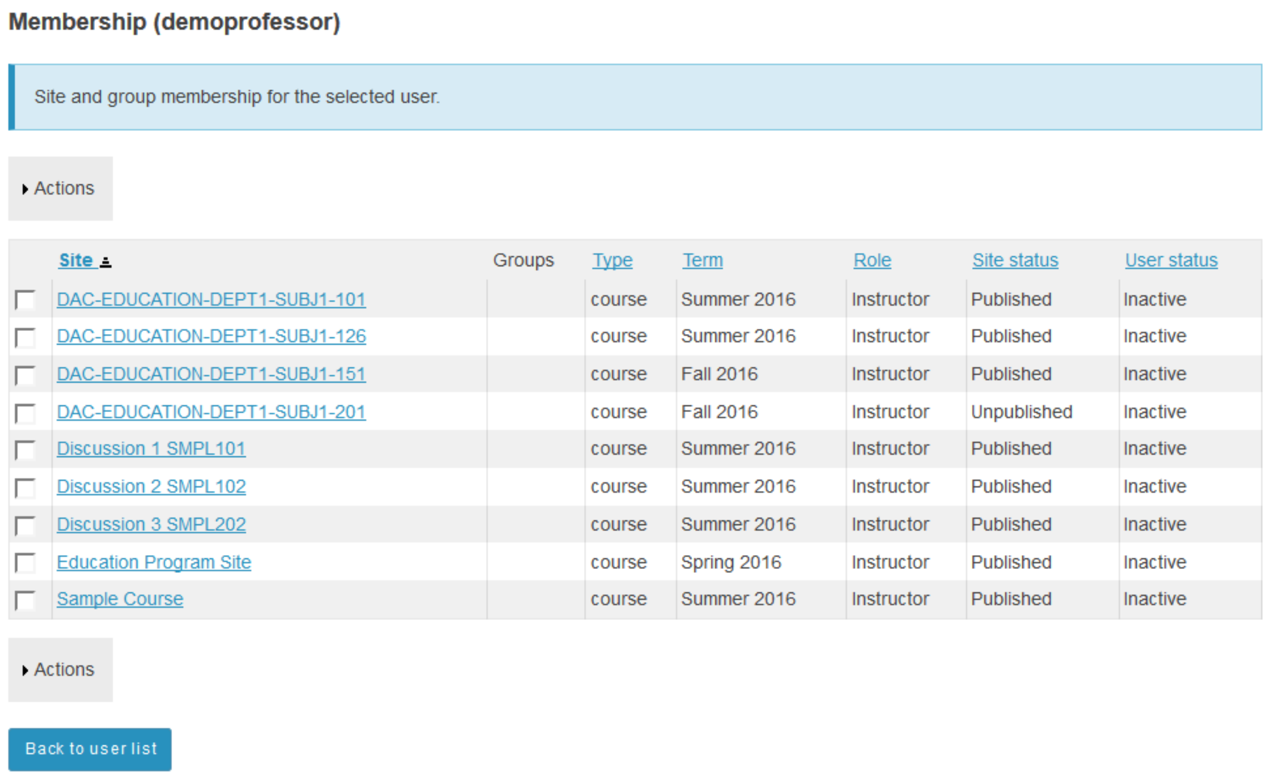


All matching users will be displayed in the search results.

Click on a User ID to see site and group membership for that user.



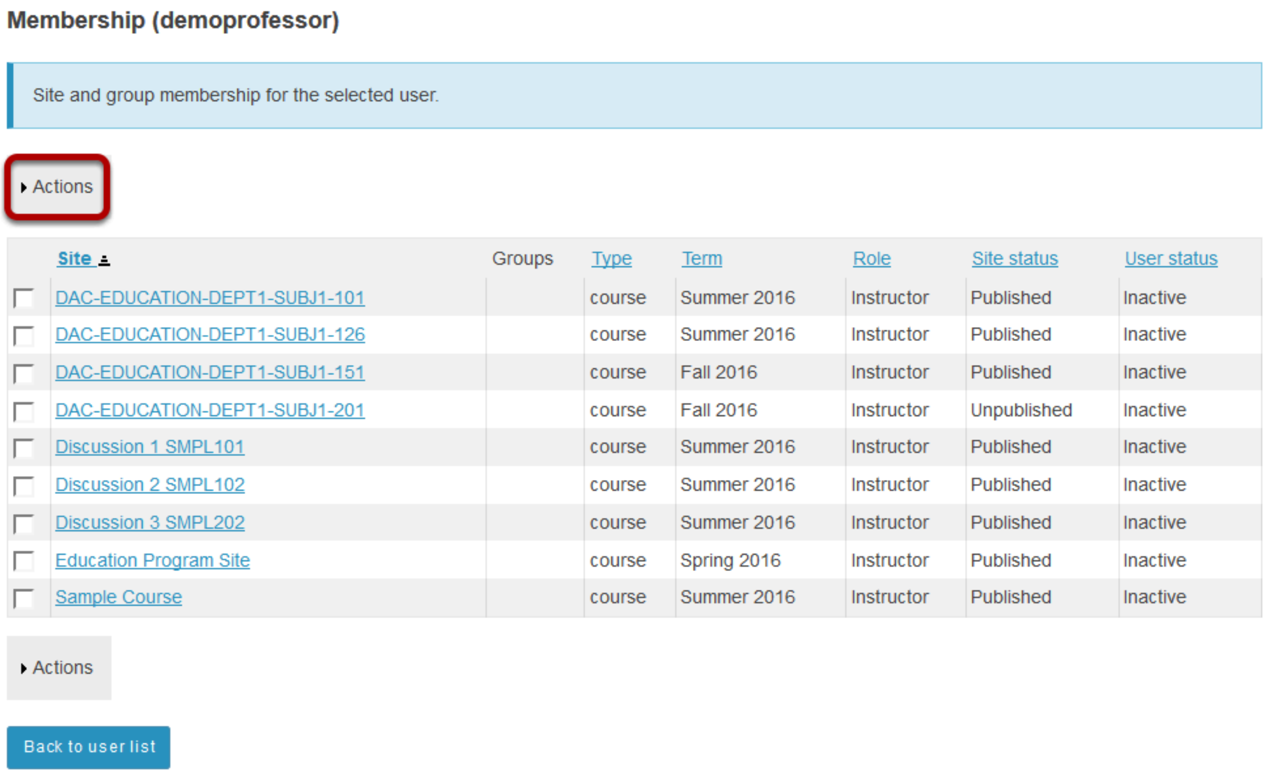
View the selected user's membership.



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.

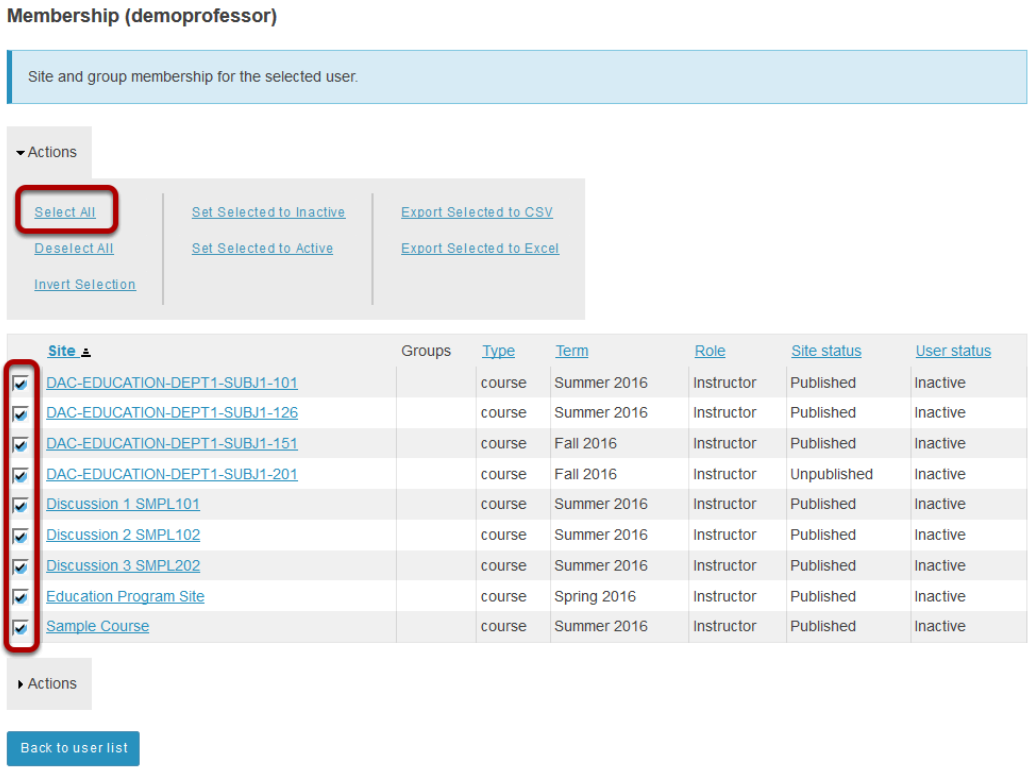
Click Actions.



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.

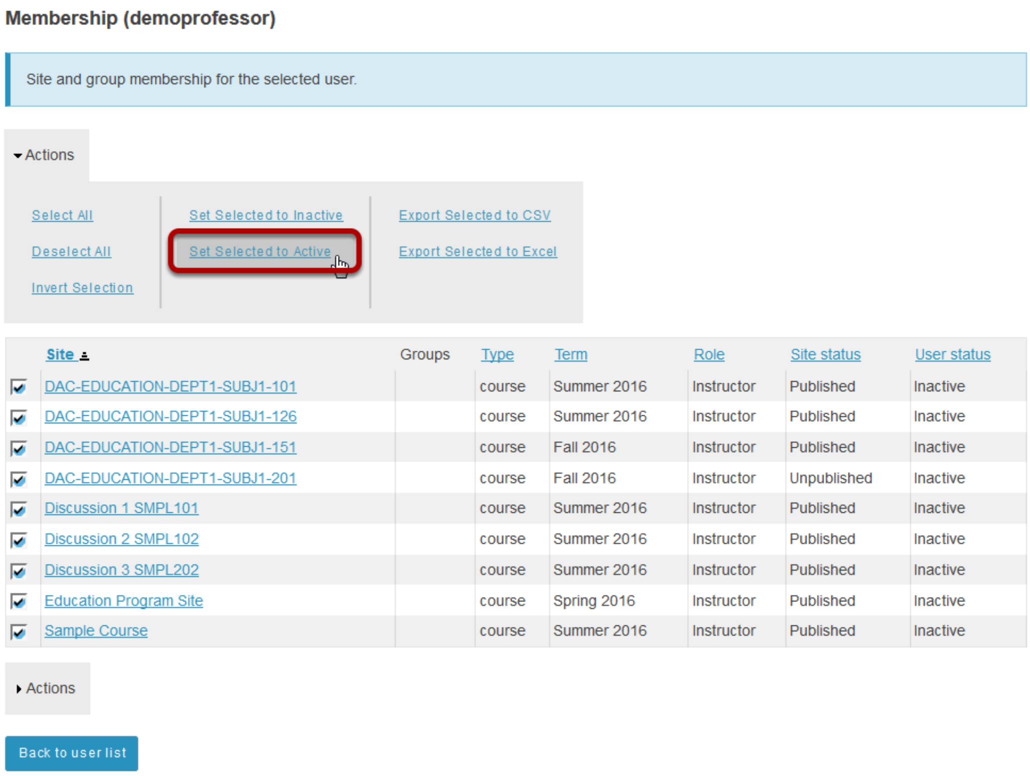
Note: Clicking on the title of a site will take you into that site.

Select some or all of the user's enrolled sites.

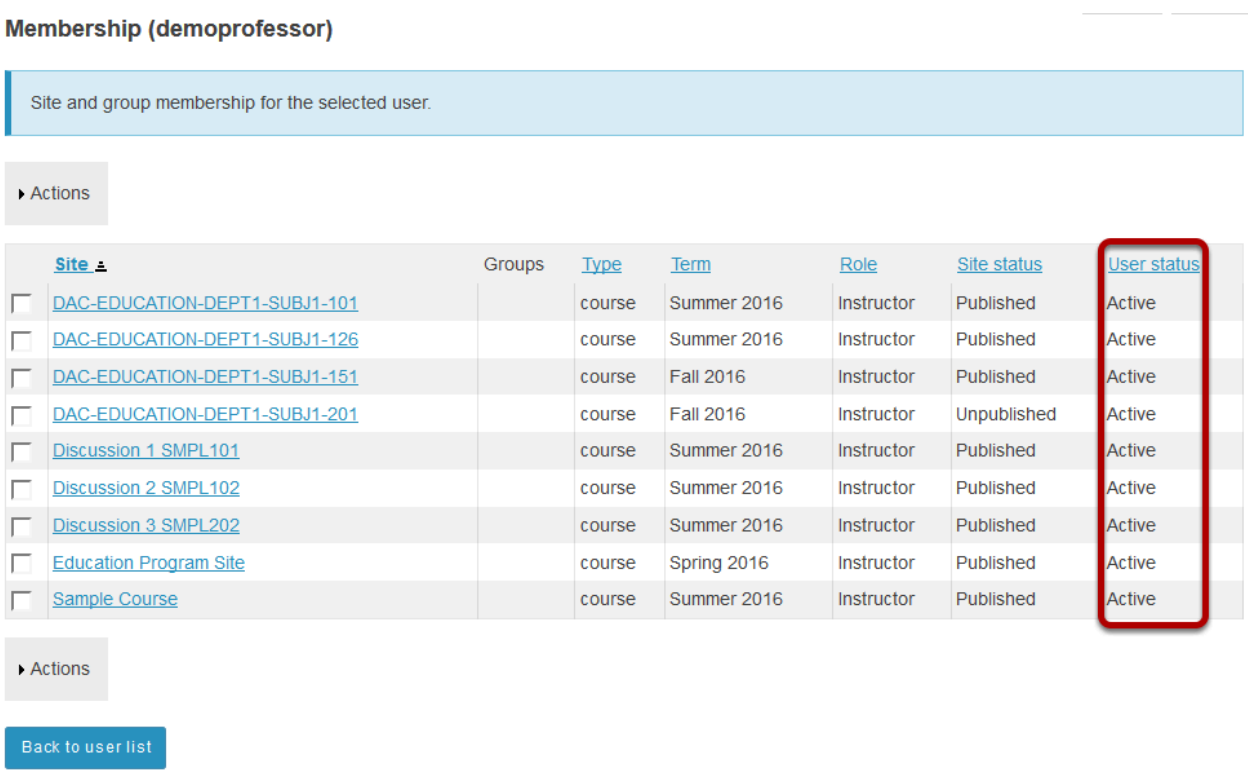


You may select all or some of the user's sites by using the **Select All** link in the Actions menu, or by checking the boxes next to the sites in which you want to make the user active.

Click Set Selected to Inactive in the Actions menu.



View user's current status.



Notice that the user's status is now "active" in the specified sites.

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.

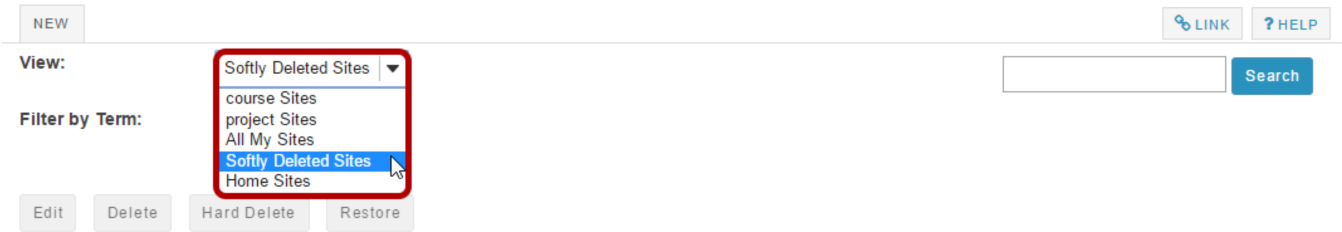
In addition, admin users have access to the Hard Delete feature via Worksite Setup.

How do I restore a softly deleted site?

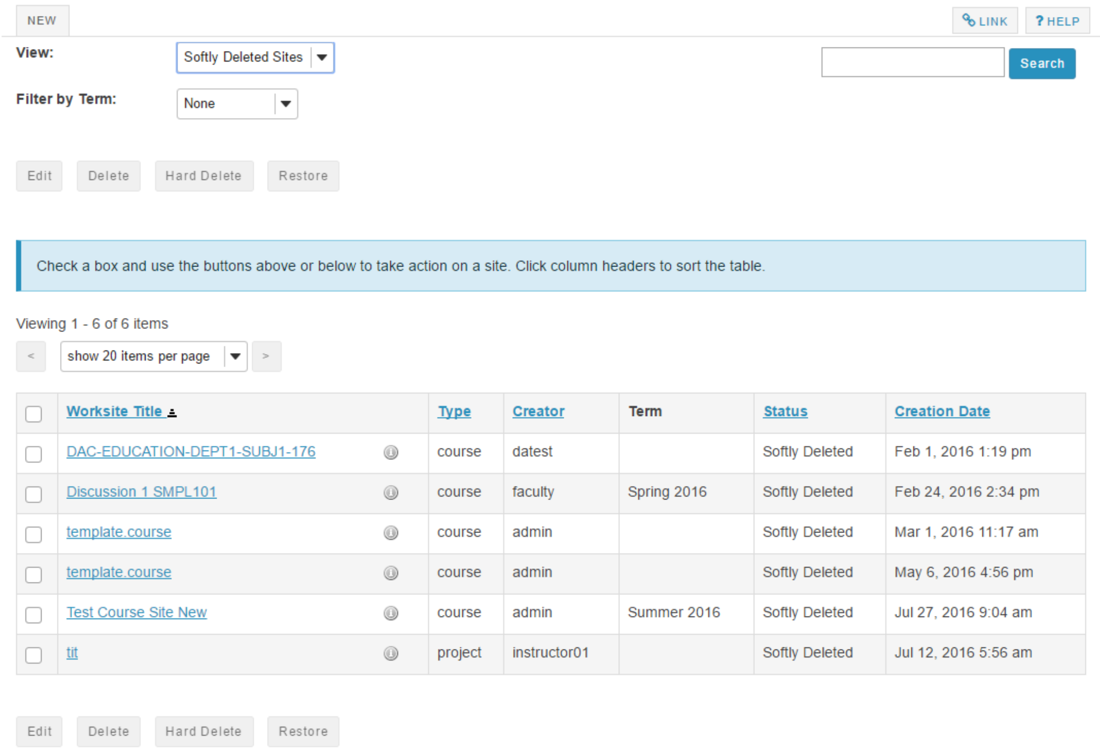
Go to Worksite Setup.

Select the **Worksite Setup** tool from the Tool Menu.

From the View drop-down menu, select Softly Deleted Sites.



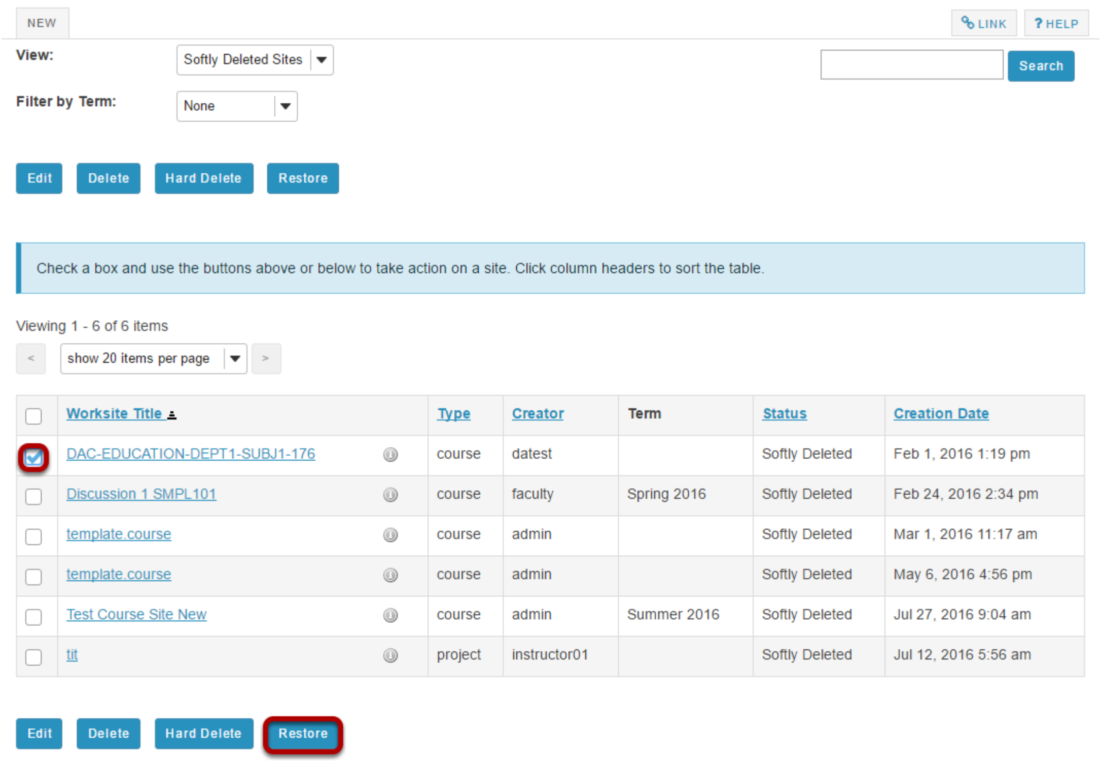
All sites marked for deletion will be displayed.



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](#).*

Select the site you want to restore, then click Restore.



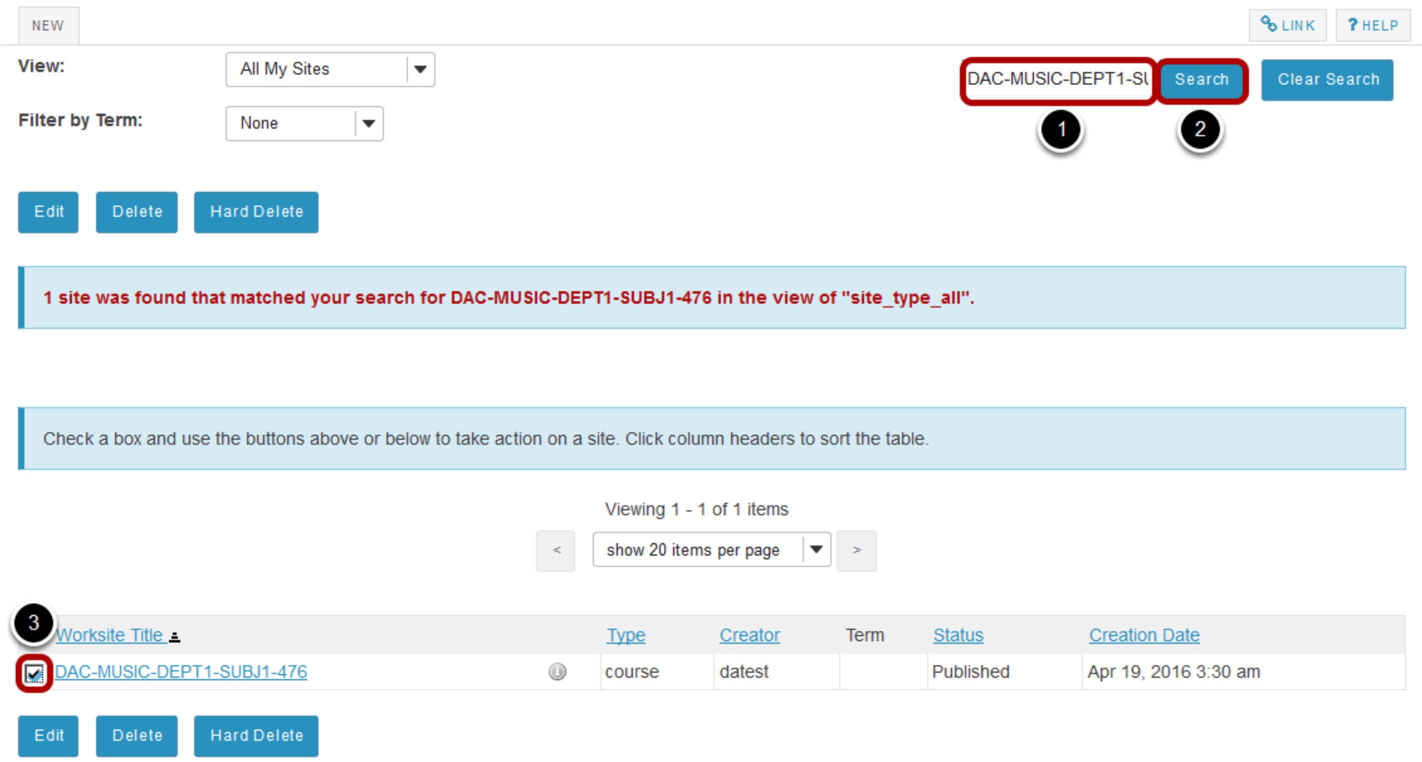
How do I Hard Delete a site?

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.

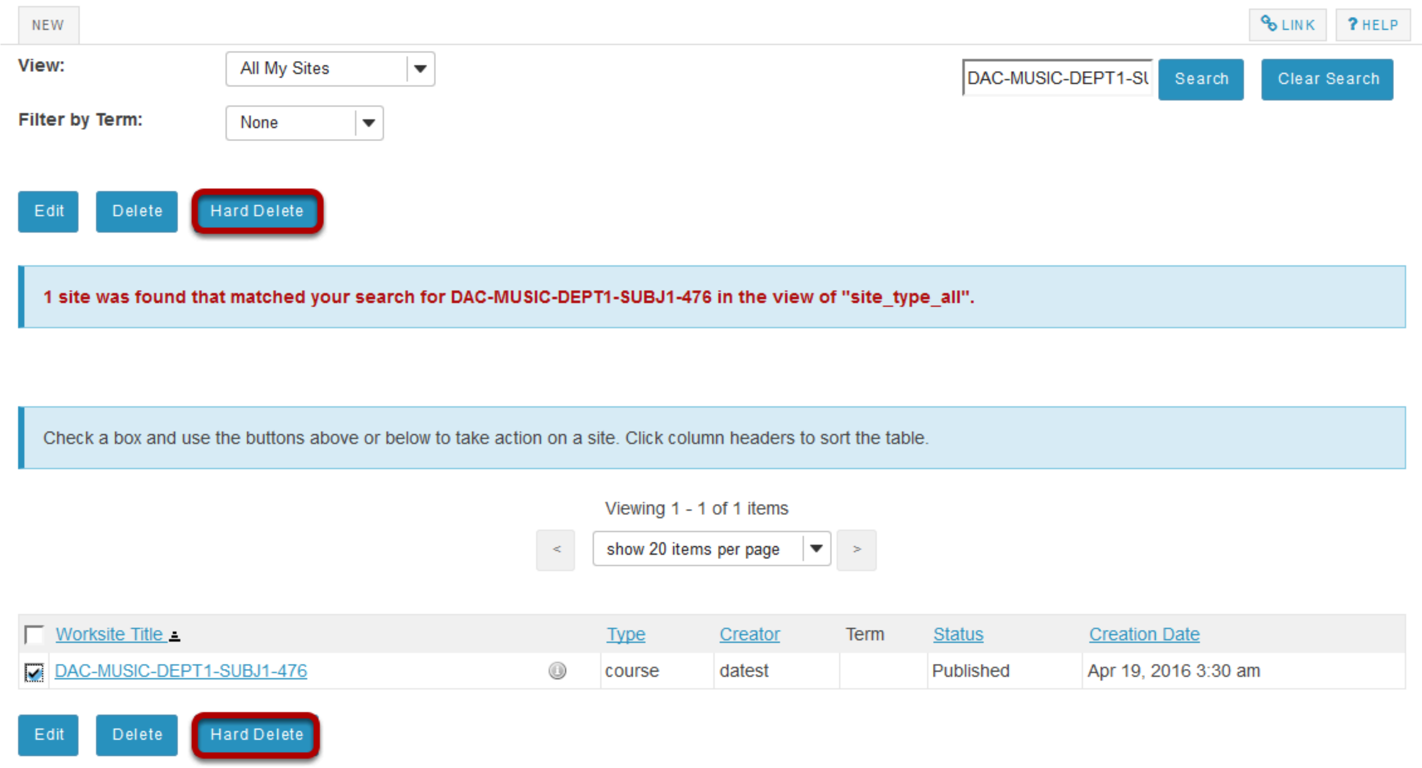
Locate and select the site or sites you want to permanently delete.



Find the site or sites you want to delete be 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.

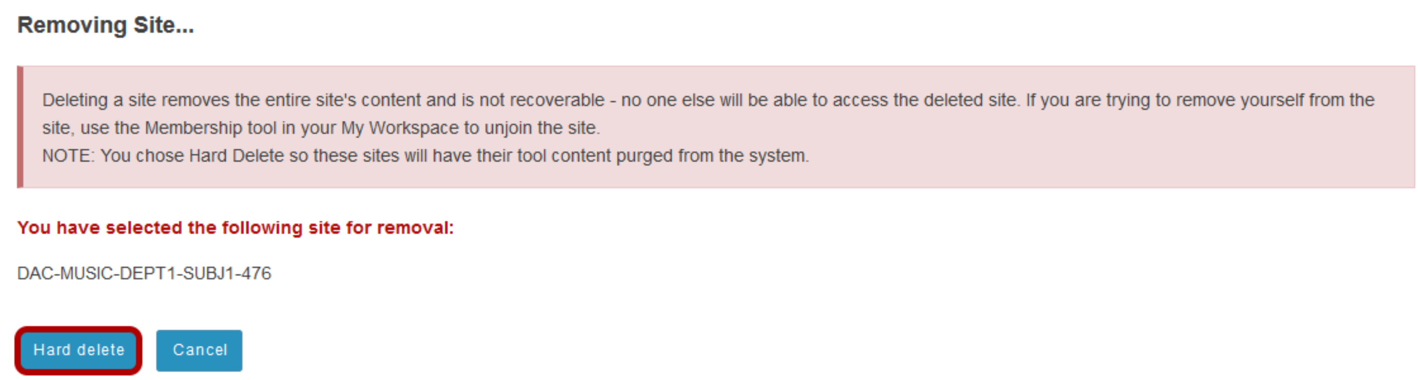
Click Hard Delete.



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.



Note: This action will purge the site and all of its data from the system. Once purged, the data is not recoverable.