ADMINISTRATOR GUIDES
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Admin Level Supporter - Accessing Courses In Your SubAccount

This article shows how users who have elevated access in their School/Department SubAccount can access courses.

💡 If you need elevated access to any sub-account, please contact canvas@yale.edu to ensure proper documentation is completed prior to being granted access.

💡 Please notes that cross-listed courses may be in other SubAccounts - if you are missing a course, please email canvas@yale.edu and include the course number so we can give you access.
Log into Canvas

Open SubAccount

1. In the left side global navigation bar, click the "Admin" button.
2. Click on the appropriate SubAccount title. (NOTE: Undergraduate and Graduate level courses will appear in a separate SubAccounts)
Your SubAccount homepage will include the following sections (you may have fewer options in each section depending on your level of access in your SubAccount):

1. **Global Navigation Bar** - Accessible from anywhere in Canvas.
2. **SubAccount Tools** - These are advanced level tools. Do not use these unless you have permission and have receive training on how to use these tools.
3. **Course/User Search Results** - This shows courses in your SubAccount that meet the criteria of your search. There is a limit on how many courses can appear on this page, so you may need to use the search tools on the right side of the screen to search for and find a specific course.
4. **Search Tools** - Use these filters and search tools to find specific courses and users in your SubAccount.

**NOTE:** When you search for users - it will only return users that are enrolled in a course in your SubAccount. Failure to find a user with the user search does not mean that they do not have an account in Canvas, it just means that they are not enrolled in a course in your SubAccount.
Open Course

If you use very specific words in the search tools, the course you are looking for will open right away.

If your keywords are not as specific, you may be provided a list of courses which match your search terms. Click the title (1) to open the course.
Add an Official Course to Canvas (Before Banner Sync)

The following instructions are to add a course before the course is officially created by Banner.

NOTE: The SubAccount hierarchicical structure in Canvas is set up as:

- School --> Department --> Subject
- All courses would then be created in the "Subject" SubAccount

So, for example, you could have:

- Yale College (School) --> Cognitive Science (Department) --> Psychology (Subject)
- All courses would then be created in the "Psychology" SubAccount

Go to the Appropriate Subject SubAccount

Before you start, it is helpful to navigate to the Subject SubAccount in which the course should be created.

Click here for instructions on how to access a SubAccount.

Add a course

Click here for instructions on how to add a course to the SubAccount.

When you add a course, you will need to include the following information:

- **Course Name** *(Required)*: Enter in the title for the course. *Example: Introduction to Psychology*
- **Reference Code** *(Required)*: Enter the course code, including section: *Example: PSYC 110 01*
- **Department**: If you are in the correct Subject SubAccount, this should already be set to the correct department. If not, you will need to select the correct one.
- **Enrollment Term**: Select the appropriate term from the options provided. *Example: Spring 2016*
Edit the course settings

Open the course

Navigate to the course you just created (click here for instructions on how to search for a course).

Go to "Settings"

In the left side navigation panel, click the "Settings" link.

Adjust course settings

In the "SIS ID:" field, enter the SIS ID for this course. The SIS ID will follow this format:

   term year and term number . subject code . course number . section number

NOTE: term numbers are 01 (Spring), 02 (Summer), 03 (Fall)

EXAMPLE:

For PSYC 110 Section 01 Introduction to Psychology taught in Spring 2016:

• the term year is 2016
• the term number is 01 (Spring)
• the subject code is PSYC
• the course number is 110
• the section number is 01

Therefore, the resulting SIS ID would be: 201601.PSYC.110.01

Update
Scroll to the bottom of the screen and click the "Update Course Details" button.

Special Instructions for Fall 2016 / Spring 2017

Once the course has been created, the course will need to be added to the Banner filter. If you have access to the Banner Filter Admin Tool, go here for instructions.

If you do not you will need to notify canvas@yale.edu and include the following:

- term
- course id
- course number
- section number

**EXAMPLE:** Fall 2016 PSYC 110 01
Create a Sandbox Site

Go to the Courses Area

Go to the Courses Area

From the Admin panel, go to "Courses".

Add Course

Add Course

On the right side of the screen, click the "Add a New Course" button.

Enter Course Information

Enter Course Information

Complete the form using the following format:

- **Course Name**: Enter the user's name plus the word "Sandbox". *Example: John Doe Sandbox*
- **Reference Code**: Enter the user's NetID plus a period and the suffix "sbx". *Example: jd123.sbx*
- **Department**: Select "RT Sandboxes" (If you know the school that the user is associated with, you could also put it in the "Sandbox" subaccount for that school - *Example SOM Sandboxes*)
- **Enrollment Term**: Default Term

When you are done, click the "Add Course" button.

Adjust SIS ID

Adjust SIS ID

After the course is created, search for and enter the course.

Once you are inside the course, click the "Settings" button (1) in the left side navigation panel.
On the "Course Details" tab (2), go to the SIS ID field and enter the same value that you have in the Course Code. That value should be the user's NetID plus a period plus the suffix "sbx" - Example: jd123.sb

Click Update

Click Update

When you are done, scroll down and click the "Update Course Details" button.
Term Dates / Course Dates / Concluding & Resetting Courses

- **Term Dates** - Dates that are set globally which help to manage users' "dashboard" and "all courses course lists" to show courses completed during a previous term under a "Past Enrollments" heading. Courses that are concluded by Term Dates are still visible to all instructors and participants, but cannot be modified after the end date (Admins can intervene to undo this). Term Dates can be overridden by Course Dates.
- **Course Dates** - Dates set at the individual course level through the course's "Settings" area. Course dates override term dates which allows instructors to give students access to participate in the course after the Term Date as past. To prevent students from being able to participate after the Course End date, instructors will need to also select the option "Users can only participate in the course between these dates". Courses that are concluded by the Course Dates are still visible to all instructors and participants.
- **Manually Concluded Courses** (clicking the "Conclude" button in a course's "Settings" area) - Manually concluded courses are still visible to all participants, but cannot be modified (this can be undone by an administrator). Student enrollments are shifted to "Prior Enrollments" and will not appear within the People tool unless you opt to view prior enrollments.
- **Reset Course** - Resetting a course deletes the course site and creates a brand new empty course shell for the course which only contains the user enrollments from the original site (this can be undone by an admin).

Please note: Course Dates do not override term dates unless you also select the checkbox for "Users can only participate in the course between these dates"

<table>
<thead>
<tr>
<th>Role</th>
<th>Permission</th>
<th>Term Date Conclude</th>
<th>Course Date Conclude</th>
<th>Manual Conclude (click button)</th>
<th>OLD COPY Reset Course</th>
<th>NEW COPY Reset Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructor</td>
<td></td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>YES</td>
</tr>
</tbody>
</table>

Can view course
<table>
<thead>
<tr>
<th>Role</th>
<th>Permission</th>
<th>Term Date Conclude</th>
<th>Course Date Conclude</th>
<th>Manual Conclude (click button)</th>
<th>OLD COPY Reset Course</th>
<th>NEW COPY Reset Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can add/edit content</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Course appears in Dashboard</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Course appears in Past Enrollments</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
</tbody>
</table>

### Student

<table>
<thead>
<tr>
<th>Role</th>
<th>Permission</th>
<th>Term Date Conclude</th>
<th>Course Date Conclude</th>
<th>Manual Conclude (click button)</th>
<th>OLD COPY Reset Course</th>
<th>NEW COPY Reset Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>Can view course</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Can add/edit content</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Course appears in Dashboard</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
</tr>
<tr>
<td>Course appears in Past Enrollments</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
</tbody>
</table>

### General

<table>
<thead>
<tr>
<th>Role</th>
<th>Permission</th>
<th>Term Date Conclude</th>
<th>Course Date Conclude</th>
<th>Manual Conclude (click button)</th>
<th>OLD COPY Reset Course</th>
<th>NEW COPY Reset Course</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enrollments moved to &quot;Prior Enrollments&quot;</td>
<td>NO</td>
<td>NO</td>
<td>YES</td>
<td>NO</td>
<td>NO</td>
<td>NO</td>
</tr>
<tr>
<td>Can import content into next term courses (or new site)</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>NO</td>
<td>YES</td>
<td>YES</td>
</tr>
<tr>
<td>Can be</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
<td>YES</td>
</tr>
</tbody>
</table>

Note: The numbers (1-7) represent different permissions or actions for each role. The **YES** and **NO** indicate whether the permission is allowed or not.
## Role Permissions

<table>
<thead>
<tr>
<th>Role</th>
<th>Permission</th>
<th>Term Date Conclude</th>
<th>Course Date Conclude</th>
<th>Manual Conclude (click button)</th>
<th>OLD COPY Reset Course</th>
<th>NEW COPY Reset Course</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>overridden/ undone</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Who can override/ undo</td>
<td>Admin</td>
<td>Instructor/ Admin</td>
<td>Admin</td>
<td>Admin</td>
<td>Admin</td>
</tr>
<tr>
<td></td>
<td>Offical Course - Banner Feed Fix?</td>
<td>NO</td>
<td>NO</td>
<td>YES?</td>
<td>YES?</td>
<td>YES?</td>
</tr>
</tbody>
</table>

1. Admin will need to temporarily move course into an active term, change course end date, return course to correct term.
2. Students can see the course as long as the instructor has not selected the option to "Restrict students from viewing course after end date".
3. Students can participate in the course as long as the instructor has not selected the option "Users can only participate in the course between these dates".
4. Instructor or Admin can change the Course End date and/or the options from 2 & 3 above.
5. Admin will need to "Un-Conclude" course and then add back all of the users (instructors, TAs, & students). Adding back the users will add back their assignment submissions.
6. Resetting a course deletes the original copy of the course and creates a brand new empty course site which keeps all enrollments. The old site can be restored by an admin using the Canvas Course ID and by re-enrolling all users.
7. If original copy of course is restored, new copy should be deleted by an Admin.

? - Banner may over-write these changes during the next feed if the course is in a current, active term.
How to Merge Course Sections

NOTE: This is not an official cross-listing process. Courses that should be cross-listed in the registration system (Banner) will need to be done through the Registrar's Office.

Merging course sections allows you to move section enrollments from individual courses and combine them into one course. This feature is helpful for instructors who teach several sections of the same course and only want to manage course data in one location. Instructors can allow students to view users in other sections or limit them to only view users in the same section. Section names do not change when they are merged; the section is just moved to another course.

NOTE: The individual section sites are not maintained. If an instructor needs to have a combined site as well as the individual section sites, they will need to request an umbrella site through our umbrella site request form.

Merging should be done while the courses are still unpublished and no course work has been submitted by students.

You can re-merge the section if necessary, but each section can only be associated with one "parent" course.

Any "parent" section can contain multiple children.

Although you can un-merge sections, you will not want to do so if students have already submitting assignments and classwork.
Before you begin this process, go to the "Settings" area of the course site you want to contain all sections and copy the "SIS ID" number.

Open Course Settings

In the course you want to merge (child section), go to the "Settings" area.

Open Sections Tab

Click on the "Sections" tab [1]. On the sections screen, click on the title of the appropriate section [2].
On the next screen, click the "Cross-List this Section" button [3].

In the pop-up that appears, paste the SIS ID of the "parent" course into the search textbox [4]. As the system searches for the course, the name of the course should automatically appear just below the search textbox - click on the course title [5].
Confirm Course

Verify that the course you have selected is correct [6]. If everything is correct, click the "Cross-List this Section" button [7].

Confirm Merged Sections

The merged section now appears in the new course. The breadcrumbs show the new course code [8].
Current Enrollments

- \textbf{Hamilton, Teri}
  - Enrolled as a student
  - fake_hamilton

- \textbf{Student, Test}
  - Test Student
  - 7767845c9a3de1c1b056d82a390153d98f0d6135
Participants
Add Non-Yale Users (Guest Users) to Canvas

Please follow these steps to request Canvas accounts for non-Yale users. These are also known as guest accounts.

- Request a large number of accounts
- Request a single account

**BULK REQUESTS**

Download the Template CSV file

1. Click the following link:  
   `Bulk_Non-Yale_Import_Template.csv`
2. You will see a preview of the template file.
3. Click the "Download" button to download a copy of the file to your computer.
4. Be sure to remove the row for "Fake Student".

**Enter User Information**

Enter the information for each user into the CSV template file. Below is a description of what information should be included. For each column, you will enter in the information as follows:

1. **full_name** - Enter the user’s first name and last name (Example: John Doe)
2. **password** - Enter a generic password up to 8 characters.
3. **email** - Email address

You will likely want to pick one generic password that you give to all of your students. When the student logs in, they will be able to change their password to something unique. For instructions on how guest users change their password, [visit this help article](#). Please note that passwords need to be eight or more characters.
Please be aware that Yale NetID users cannot change their password within Canvas. For information on how Yale NetID users change their password, visit the ITS website help article to Change Your Yale Password(s).

Send File

Email the completed CSV template file to canvas@yale.edu for processing. Please allow 3-5 business days for these requests to be completed.

You will be notified when the guest accounts have been created. Guest accounts will NOT automatically be added to any courses.

Add students

Once the accounts are created, you can add them to any course by going to the course site and using the "People" tool. You can add people using their email addresses. For instructions on how to add users to a course, visit this help article.

SINGLE ACCOUNT REQUESTS

If you have a fewer than two accounts to request, you can use our Guest Account Request Form.

You will be notified when the user account has been created.

NOTE: You can set up a password for a single account or you can skip the password and the user will be emailed asking them to complete registration and set up their own password.

Add students

Once the account is created, you can add it to any course by going to the course site and using the "People" tool. You can add people using their email addresses. For instructions on how to add users to a course, visit this help article.
Requesting Elevated Access / Adding Admins to a SubAccount

This process is used to add an Admin to your SubAccount. Admin level access includes the following roles:

• Account Admin
• SubAccount Admin
• Course Supporter
• Masquerade

Keep in mind, the structure of your SubAccount is as follows:

School --> Department --> Subject

Admins can be added at any level:

• School level admins can access everything in your school including all departments and subjects;
• Department level admins can access everything within the Department only including all subjects within that department;
• Subject level admins can access everything within the Subject only.

⚠️ Admins can only be added to Sub-Accounts by Canvas @ Yale Support Staff. Please refer to the Canvas @ Yale Terms of Use for additional information.

1. Submit Request Form

Please submit the Sub-Account Admin Access Form.

2. Confirmation from School/Department Liaison

Requests for elevated access will be verified with the user's school/department Canvas liaison.
3. Attend an Elevated Access Orientation

All new users will need to attend a brief online Elevated Access Orientation webinar where they will learn how to use the elevated access and how to get support.

4. Canvas @ Yale Terms of Use

All users requesting elevated access will need to read and acknowledge the Canvas @ Yale Terms of Use.

5. FERPA Sign off

After completion of the above criteria, the user will receive an email with a link to a FERPA sign off sheet which is required by the registrar. All users must complete the form BEFORE they receive admin level access.

6. Confirm Requirements Met

Once the user has completed the requirements listed above, the user should email canvas@yale.edu (or other person indicated in the email) to confirm that they have completed all requirements.

Access Granted

The user will be emailed a confirmation when admin level access has been granted to your SubAccount.
Course Roles

Below is a description of the roles available within a Canvas course site:

Faculty Roles

Support Roles

Student Roles

Rules to Avoid

Faculty Roles

Instructor

- **Primary Use:** Official instructor(s) of record for the course. These users will be automatically added to course sites by the registration system.
- **Permissions:** Full course permissions to add/edit/delete/copy course content and manage manually added users.
- **Limitations:** Cannot manage users that are automatically enrolled by the registration system.
- **NOTE:** Avoid manually adding users to course sites with the Instructor role. This role should be reserved for the instructor(s) of record.

Guest Instructor

- **Primary Use:** Unofficial users that need instructor level permissions but are not the official instructor of record. These users must be manually added by the course Instructor or a TA.
- **Permissions:** Full course permissions to add/edit/delete/copy course content and manage manually added users.
- **Limitations:** Cannot manage users that are automatically enrolled by the registration system.

Support Roles

TA

- **Primary Use:** Teaching fellows and teaching assistants who will be supporting the instructor(s) for a course. These users must be manually added by the course Instructor or a TA.
- **Permissions:** Full course permissions to add/edit/delete/copy course content and manage manually added users.
- **Limitations:** Cannot manage users that are automatically enrolled by the registration system. Also, TAs can be restricted so that they can only view the course section they are assigned to manage.

Grader
• **Primary Use:** TAs or other staff. These users must be manually added by the course Instructor or a TA.
• **Permissions:** Add/edit student grades and add/edit/delete assignments and quizzes.
• **Limitations:** Cannot manage users or any other course content.

**NOTE:** Graders are NOT anonymous in Canvas. If you need an anonymous grader, please contact canvas@yale.edu for more information.

**Designer**

• **Primary Use:** Departmental and administrative staff supporting the creation of course sites. These users must be manually added by the course Instructor or a TA.
• **Permissions:** Add/edit/delete course content. Can add other TAs and Guest Instructors.
• **Limitations:** Cannot manage student users and cannot update/edit student grades.

**Librarian**

• **Primary Use:** Librarian staff that are assisting faculty.
• **Permissions:** Add LibGuides links to Course Navigation.
• **Limitations:** Cannot manage users, cannot update/edit/view student grades, and cannot add/edit/delete course content.

**Student Roles**

**Student**

• **Primary Use:** Students who are officially enrolled in a course and have sealed their registration worksheet. These users will be automatically added to course sites by the registration system.
• **Permissions:** View course content and participate in course activities and assignments.
• **Limitations:** Cannot view or modify course settings or view other students' grades or assignments.
• **NOTE:** Avoid manually adding users to course sites with the Student role. This role should be reserved for officially registered students.

**Shopper**

• **Avoid manually adding users to course sites with the Shopper role. This role should be reserved for officially registered students during Yale's Shopping Period.**
• **Primary Use:** Students who are officially enrolled in a course and have NOT sealed their registration worksheet. These users will be automatically added to course sites by the registration system.
• **Permissions:** View course content and participate in course activities and assignments.
• **Limitations:** Cannot view or modify course settings or view other students' grades or assignments.

**NOTE:** Users will only have the Shopper role during Yale's official shopping period (plus a week or so grace period). As students seal their worksheets, their Shopper role will automatically do one of the following:
1. Change from Shopper to Student for courses the students plan to complete OR
2. Be completely removed from courses they drop.

Auditor

- **Primary Use:** Students who have officially registered to audit a course. These users will be automatically added to course sites by the registration system.
- **Permissions:** View course content and participate in course activities and assignments.
- **Limitations:** Cannot view or modify course settings or view other students' grades or assignments.
- **NOTE:** Avoid manually adding users to course sites with the Auditor role. This role should be reserved for officially registered students.

Guest Student

- **Primary Use:** People who are unofficially requesting to audit or participate in a course. These users must be manually added by the course Instructor or a TA.
- **Permissions:** View course content and participate in course activities and assignments.
- **Limitations:** Cannot view or modify course settings or view other students' grades or assignments.

Viewer

- **Primary Use:** For users who would like to view the course only.
- **Permissions:** View course content and post to discussions.
- **Limitations:** Cannot view or modify course settings or view other students' grades or assignments.

Roles to Avoid

Teacher

- **Primary Use:** Please do not use.
- **Permissions:** Full course permissions to add/edit/delete/copy course content and manage manually added users.
- **Limitations:** Cannot manage users that are automatically enrolled by the registration system.

Observer

- This is a default Canvas role and is not recommended for use.
- **Primary Use:** Typically used in the K-12 arena to allow parents to view and monitor their children's progress.
- **Permissions:** View course content. When linked to a student account, this user can also see the associated student's assignment submissions and grades.
- **Limitations:** Cannot add/edit/delete content or participate in any activities.
Root Level
Admin
Functions
THESE INSTRUCTIONS ARE FOR ROOT LEVEL ADMINS ONLY.
This instructions are for adding an individual Yale NetID user to Canvas.

Look Up User Information

Go to the Yale Phonebook and look up the user, you will need the highlighted information to complete the next few steps.
In Canvas, go to the Admin area and click the "Users" link in the left side navigation panel.

Click the "Add New User" button on the right side of the screen.
Enter User Information

Complete the form. For each field, you will enter in the information from the Yale Phonebook (see phonebook screen-shot above) as follows:

- Full Name - Enter the name (1) from the phonebook
- Display Name - This will auto-fill based on Full Name above
- Sortable Name - This will auto-fill based on Full Name above
- Email - Enter the name (2) from the phonebook
- Login - Enter the NetID (3) from the phonebook
- SIS ID - Enter the UPI (4) from the phonebook
- Un-check the "Email the user about this account creation checkbox.

When you are done, click the "Add User" button.
Admin Roles & Permissions

*NOTE: eReserves is a role which is granted at the root level and allows access to all SubAccounts.